Opportunity Registration System User Guide for SI

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About This Guide

This guide provides operations for a SI to use the opportunity registration system.

In This Guide

Topics provided in this guide include:

- Chapter 1 Basic Operation
- Chapter 2 Project Management

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Basic Operation

This chapter provides basic operating instructions for opportunity registration system.

Topic includes:

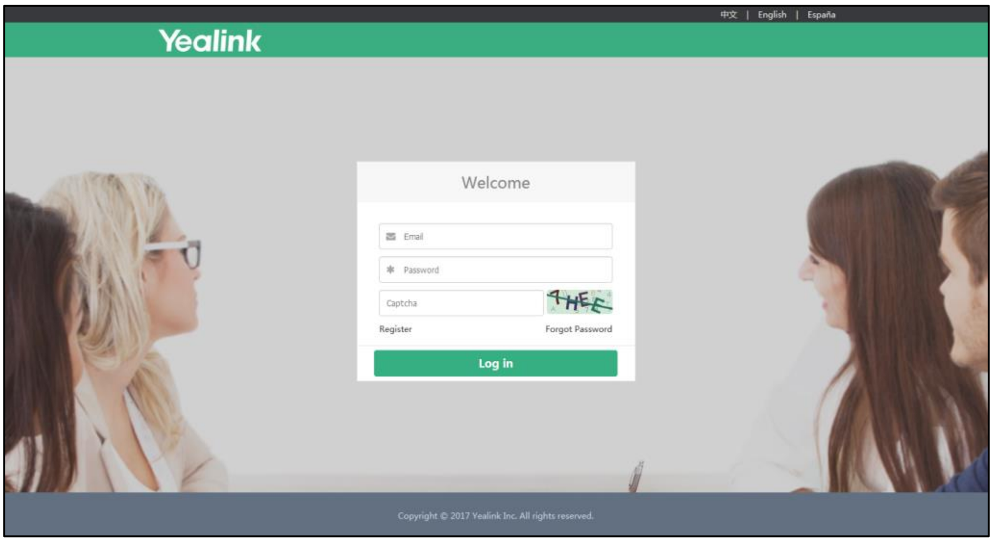
- Visiting Opportunity Registration System
- Changing the Display Language
- Registering a SI Account
- Login
- Forgetting Password

Visiting Opportunity Registration System

To visit opportunity registration system:

1. Open a web browser.
2. Enter **ors.yealink.com** in the address bar, and then press the **Enter** key.

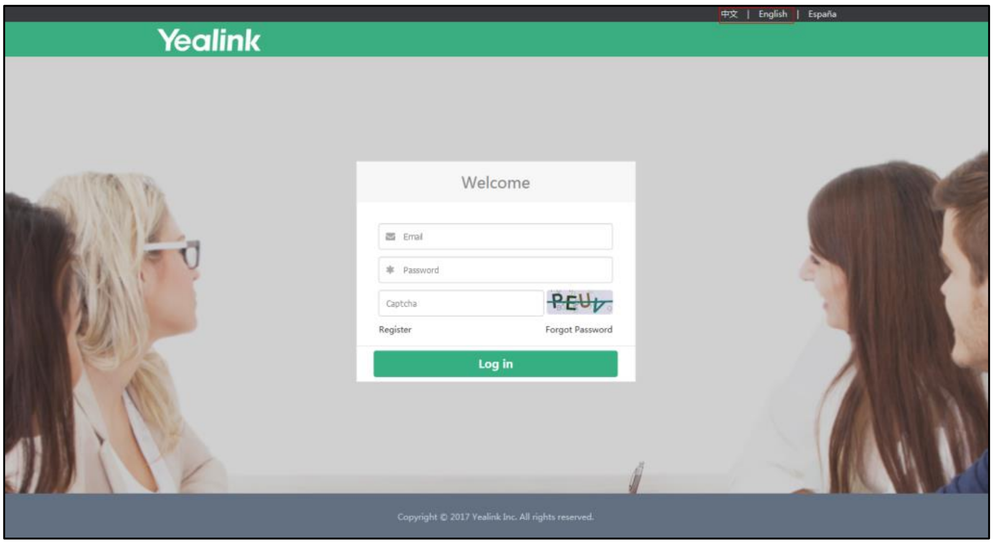
   The opportunity registration system is displayed as below:



Changing the Display Language

To change the display language:

1. Click 中文 or **English** on the top right of the page, the page will be displayed in Chinese or English.

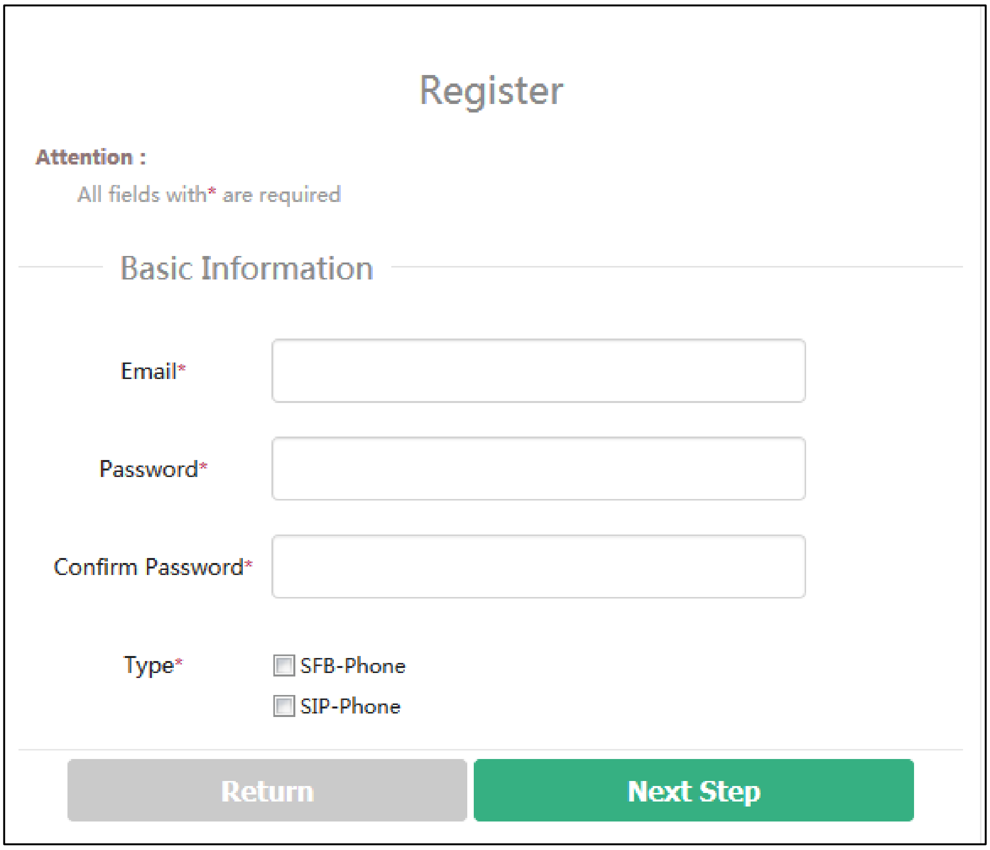


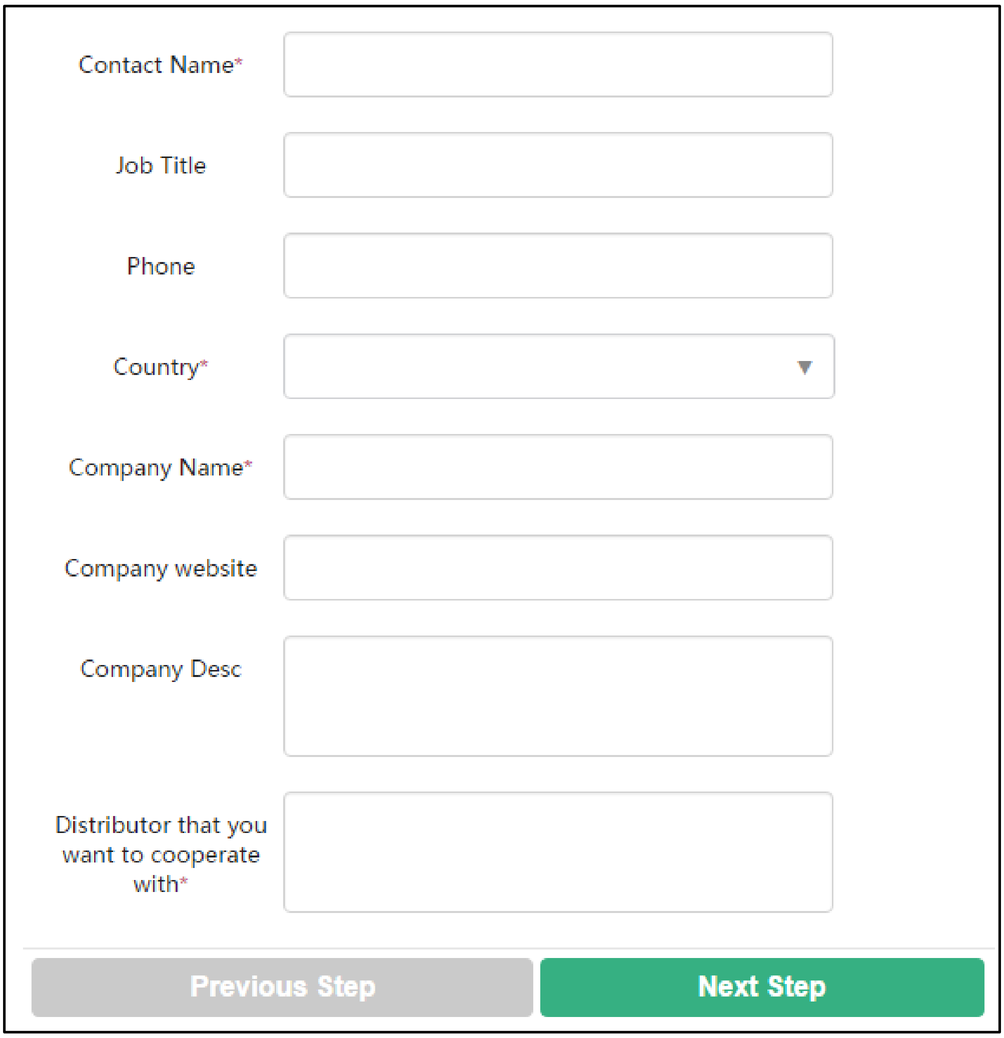
Registering a SI Account

To register a SI account:

1. Click **Register**.

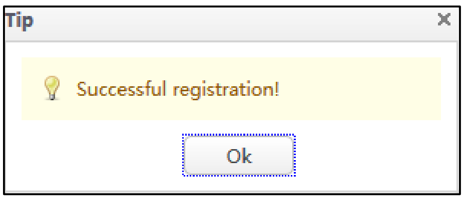
2. Configure the basic information.





3. Click **Next Step** to continue or **Return** to back to the previous page.
4. If you want to register SFB-Phone opportunity, please check the **SFB-Phone** checkbox in the **Type** field; if you want to register SIP-Phone opportunity, please check the **SIP-Phone** checkbox in the **Type** field. You can also check both of them. Yealink regional manager can change the type of your account.
5. Note that the **Country** refers to the country where the SI has business, you can select multiple countries from pull-down list of **Country**, and after you register the account successfully, only regional managers or administrators can edit the country.
6. Click **Next Step** to continue or **Previous Step** to back to the previous page.
7. Confirm your registration information.
8. Click **Finish** to complete the registration.

   The page will prompt “Successful registration!”

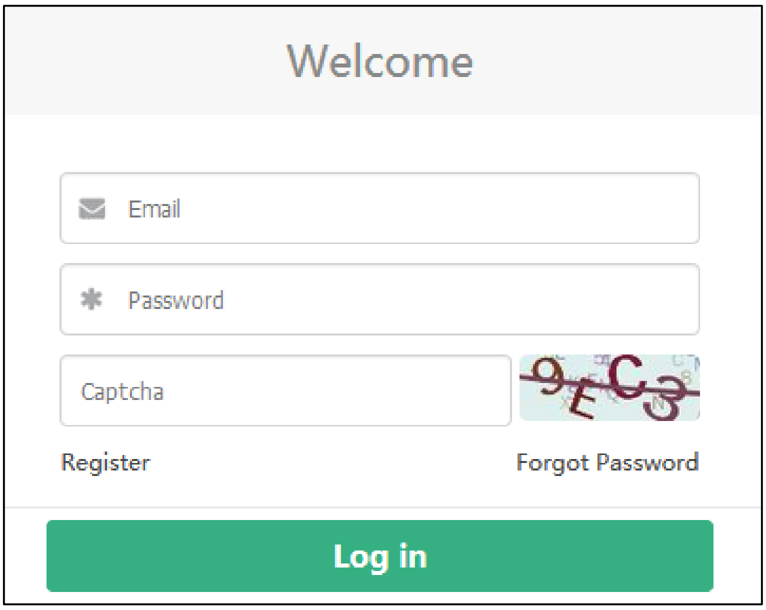


9. Click **Ok**.

Login

To log into opportunity registration system:

1. Enter the email and password you set in registration, captcha in the corresponding field.



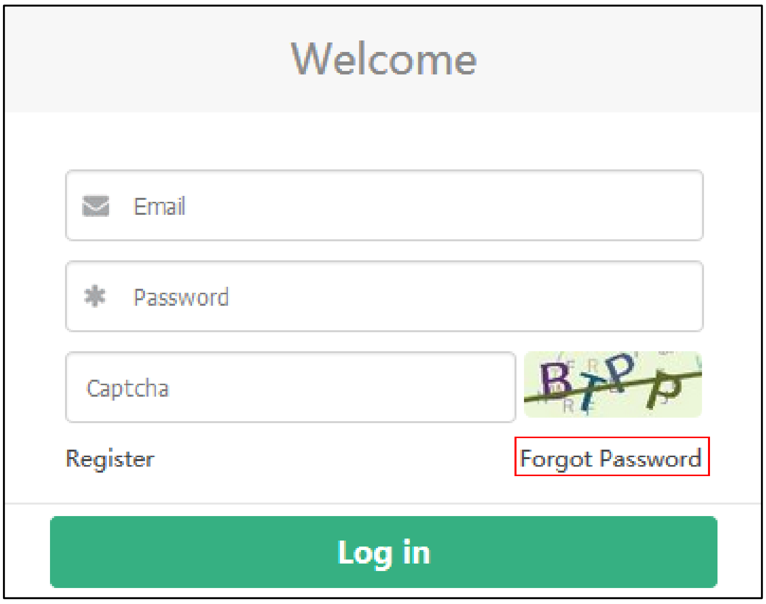
2. Click **Log in**.

Forgetting Password

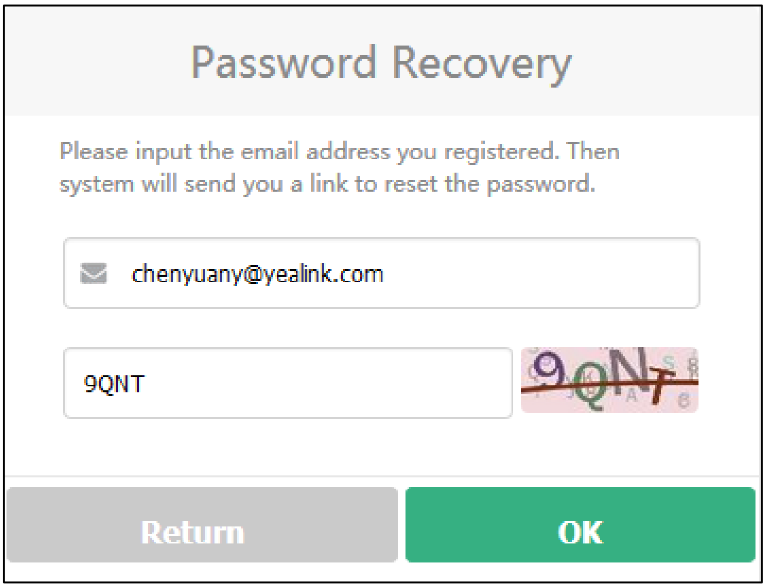
If you forget password, you have to click **Forgot password** to reset password.

To reset password:

1. Click **Forgot password**.

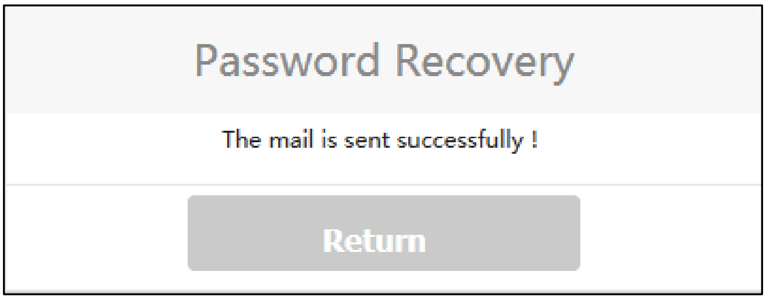


2. Enter your registered email and captcha in the corresponding field.

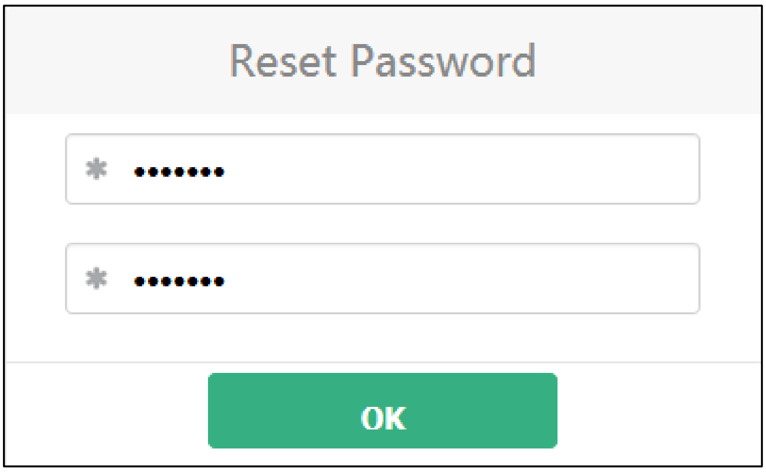


3. Click **OK**.

The page prompts “The mail is sent successfully!”.

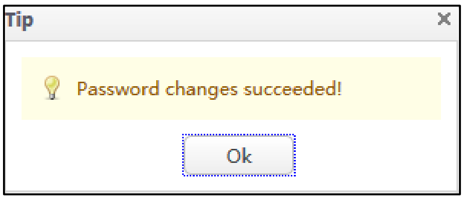


4. Log into your registered email and click the link to set a new password.
5. Enter the new password and re-enter the password to confirm.



6. Click **OK** to accept the change.

   The page prompts “password changes succeeded!”



7. Click **OK** to back to the home page.

Project Management

The SI can add, edit, extend and delete projects via opportunity registration system.

This chapter provides the account management, Topics include:

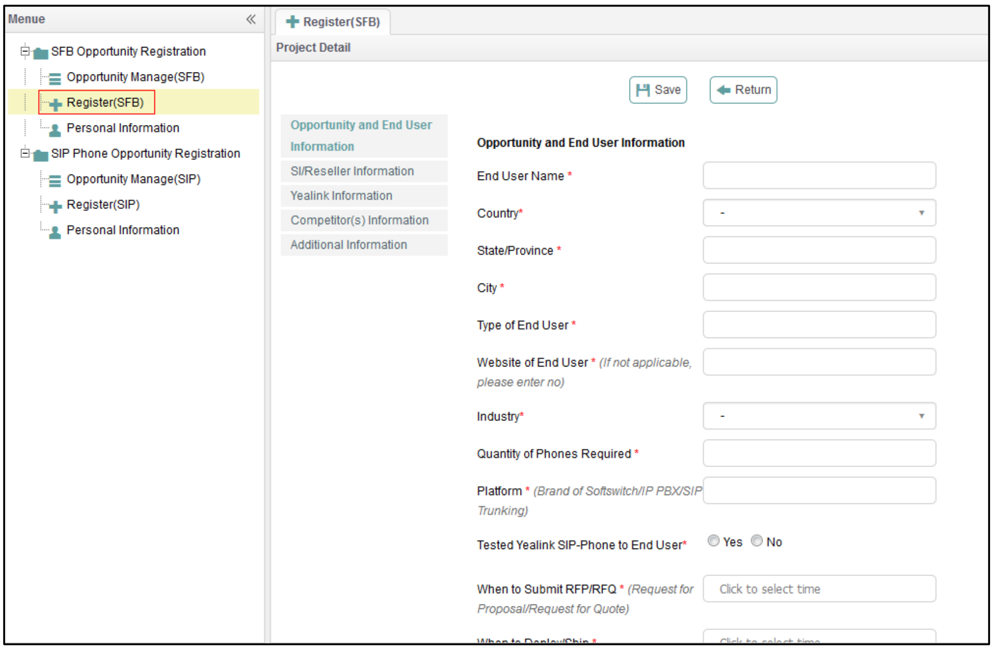
- Adding Projects
- Editing, Extending or Deleting Projects from the Project Detail Page

Adding Projects

Adding SFB Phone Projects

To add SFB phone projects:

1. Click **SFB Opportunity Registration**->**Register(SFB)** in the menu bar.

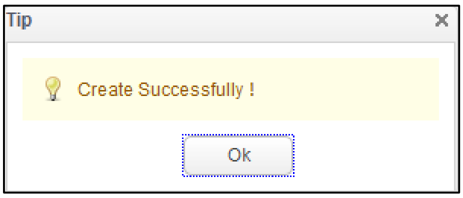


2. Configure the SFB phone information

   Note that the options from the pull-down list of **Country** are consistent with the countries which are selected when you register a SI account.

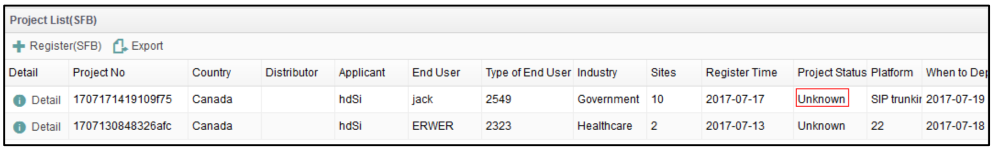
3. Click  to accept the change.

The page prompts “Create successfully!”



4. Click **Ok**.

The project will be displayed in the project list, and the project status is unknown, it means you need wait for regional manager to verify it.

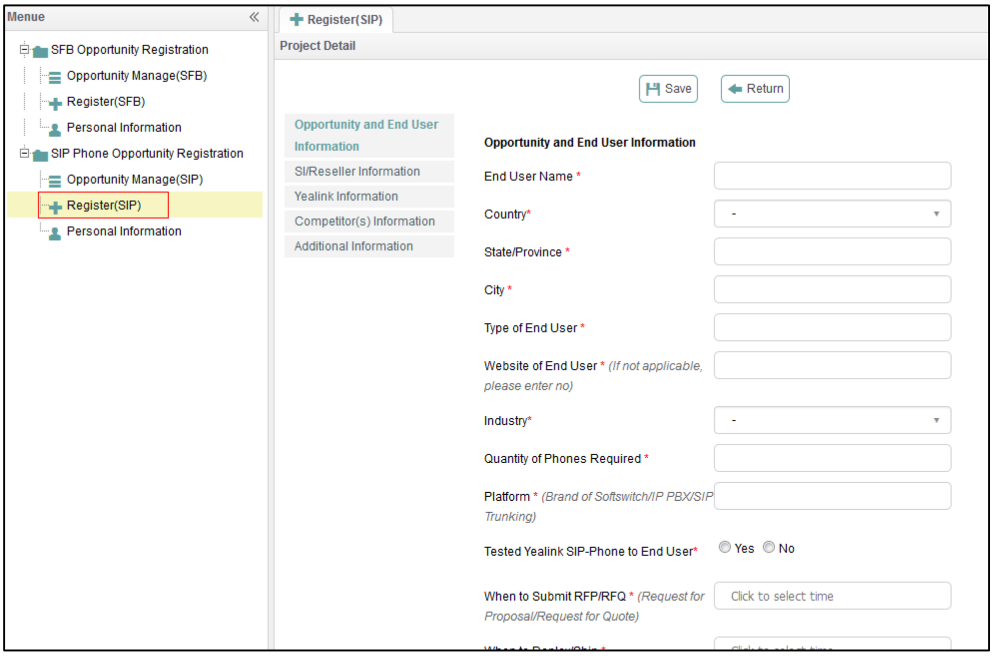

Project List(SFB)
Register(SFB) Export

Detail	Project No	Country	Distributor	Applicant	End User	Type of End User	Industry	Sites	Register Time	Project Status	Platform	When to De
Detail	1707171419109f75	Canada		hdSi	jack	2549	Government	10	2017-07-17	Unknown	SIP trunkir	2017-07-19
Detail	1707130848326afc	Canada		hdSi	ERWER	2323	Healthcare	2	2017-07-13	Unknown	22	2017-07-18

Adding SIP Phone Projects

To add SIP phone projects:

1. Click **SIP Phone Opportunity Registration**->**Register(SIP)** in the menu bar.

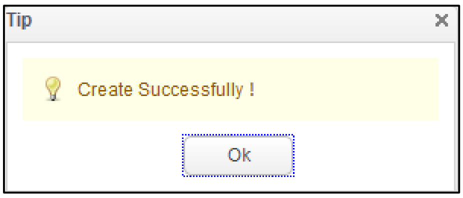


2. Configure the SIP phone information.

Note that the options from the pull-down list of **Country** are consistent with the countries which are selected when you register a SI account.

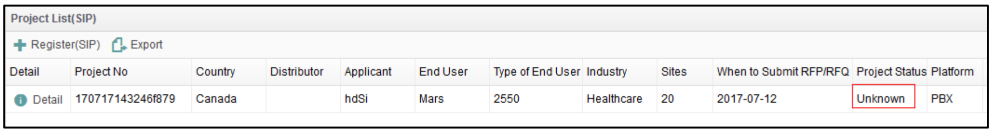
3. Click  to accept the change.

The page prompts "Create successfully!"



4. Click **Ok**.

   The project will be displayed in the project list, and the project status is unknown, it means you need wait for regional manager to verify it.



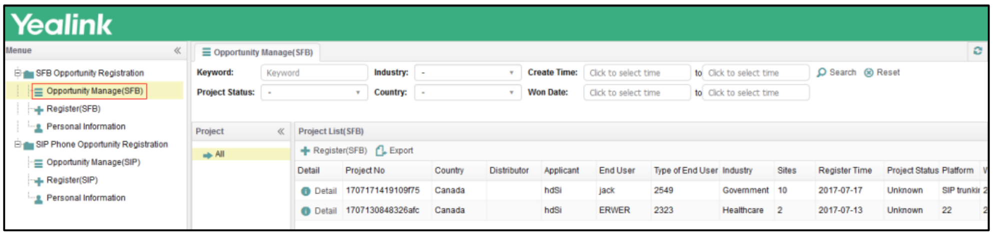
Editing, Extending or Deleting Projects from the Project Detail Page

You can edit, extend and delete the project information from the Project Detail page. Extending a project means, for a past project, end-user needs to extend it as a new one.

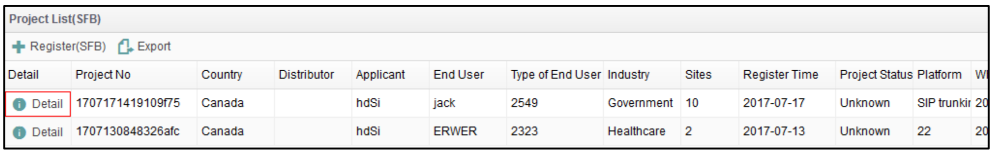
Editing, Extending or Deleting SFB Phone Projects

To edit, extend or delete SFB phone projects:

1. Click **SFB Opportunity Registration**-> **Opportunity Manage(SFB)** in the menu bar.



2. Click **Detail** to view the desired SFB phone project.



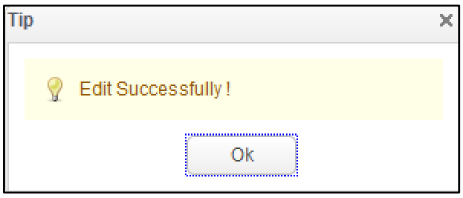
3. From the Project Detail page, you can:

   - Click Edit .

Edit the SFB phone project information.

Click  to accept the change.

The page prompts "Edit Successfully!"



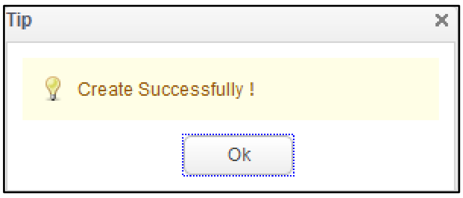
Click **Ok**.

– Click  .

Configure the SFB phone project information.

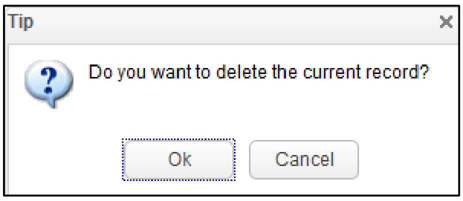
Click  to accept the change.

The page prompts "Create successfully!"



Click **Ok**, the project will be displayed in the project list, and the project status is unknown.

– Click .

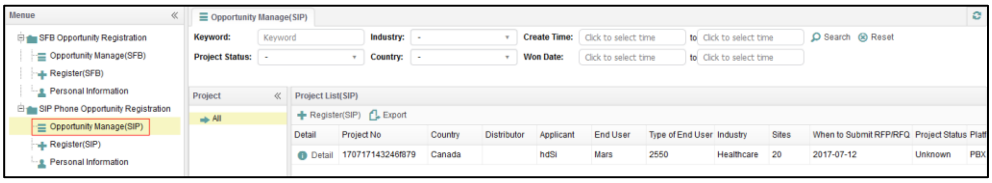


Click **Ok** to confirm to delete the project.

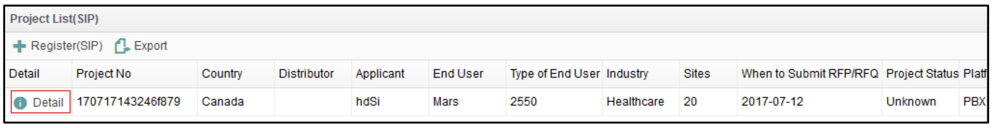
Editing, Extending or Deleting SIP Phone Projects

To edit, extend or delete SIP phone projects:

1. Click **SIP Phone Opportunity Registration**->**Opportunity Manage(SIP)** in the menu bar.



2. Click **Detail** to view the desired SIP phone project.



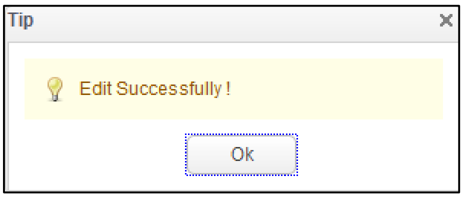
3. From the Project Detail page, you can:

   – Click  .

     Edit the SIP phone project information.

     Click  to accept the change.

     The page prompts "Edit Successfully!"



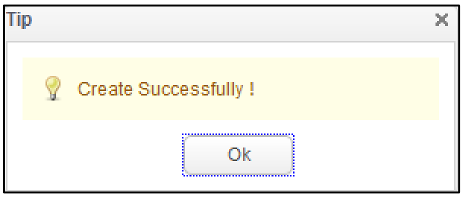
     Click **Ok**.

   – Click  .

     Configure the SIP phone project information.

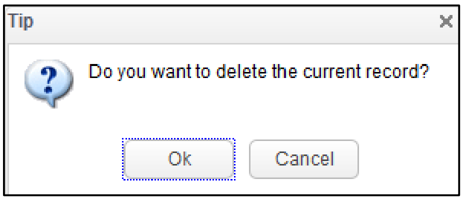
     Click  to accept the change.

     The page prompts "Create successfully!"



     Click **Ok**, the project will be displayed in the project list, and the project status is unknown.

- Click 
Delete
.


Tip
Do you want to delete the current record?
Ok
Cancel