

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:

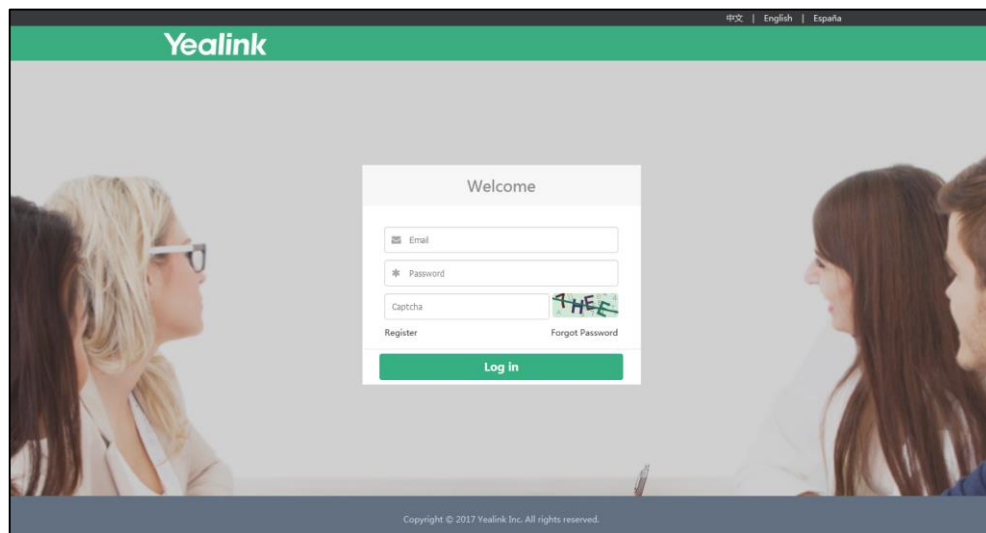
- [Visiting Opportunity Registration System](#)
- [Changing the Display Language](#)
- [Registering a SI Account](#)
- [Login](#)
- [Forgetting Password](#)

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.

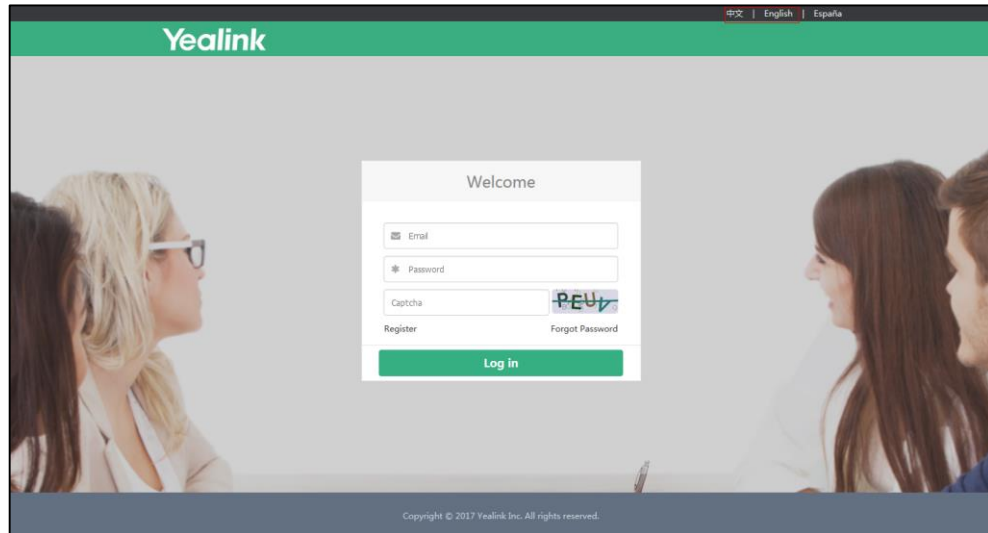
The opportunity registration system is displayed as below:



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.

Register

Attention :
All fields with* are required

Basic Information

Email*

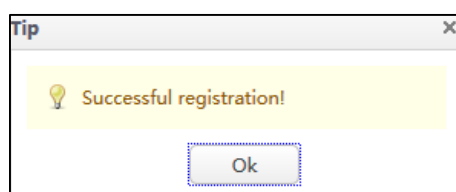
Password*

Confirm Password*

Type* SFB-Phone
 SIP-Phone

Contact Name*	<input type="text"/>
Job Title	<input type="text"/>
Phone	<input type="text"/>
Country*	<input type="text" value="▼"/>
Company Name*	<input type="text"/>
Company website	<input type="text"/>
Company Desc	<input type="text"/>
Distributor that you want to cooperate with*	<input type="text"/>

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!"

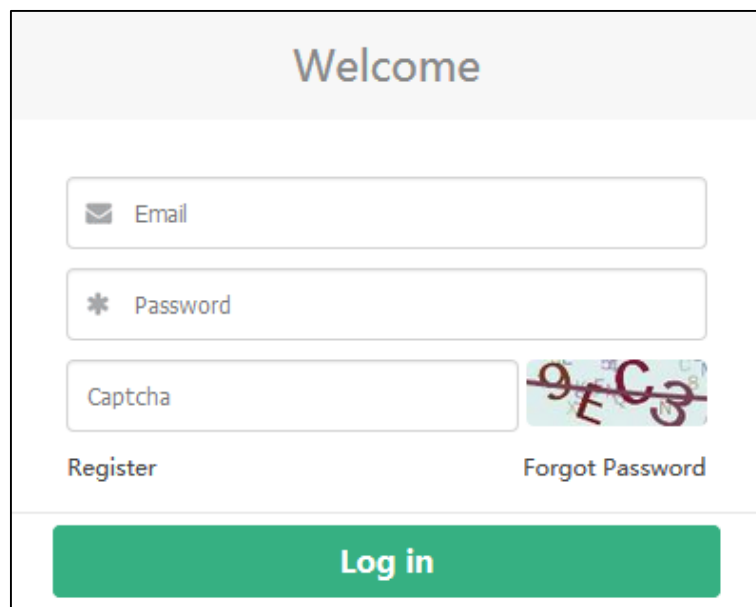


9. Click **Ok**.

Login

To log into opportunity registration system:

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



The screenshot shows a login interface with a light gray header containing the word "Welcome". Below the header are three input fields: "Email" (with an envelope icon), "Password" (with an asterisk icon), and "Captcha" (with a captcha image showing the characters "9FC3" crossed out with a red line). Below the input fields are two links: "Register" and "Forgot Password". At the bottom of the form is a large green button labeled "Log in".

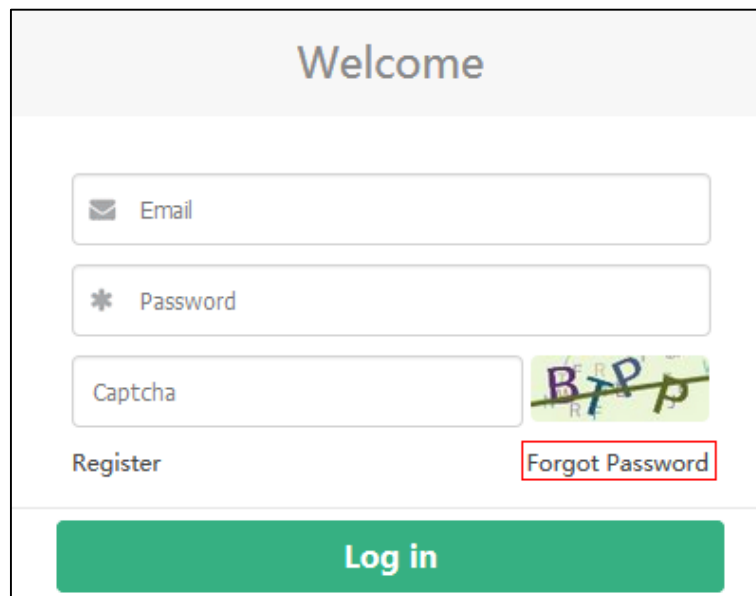
2. Click **Log in**.

Forgetting Password

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

To reset password:

1. Click **Forgot password**.



Welcome

Email

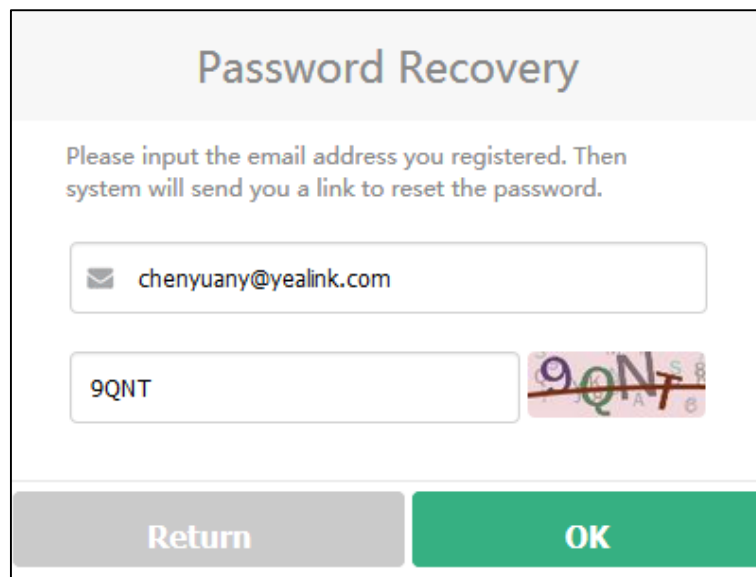
Password

Captcha

Register [Forgot Password](#)

Log in

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



Password Recovery

Please input the email address you registered. Then system will send you a link to reset the password.

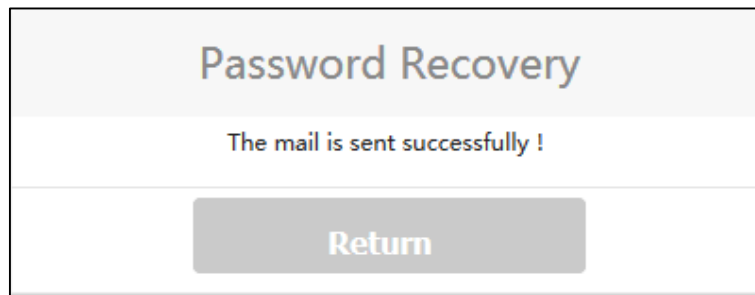
chenyuany@yealink.com

9QNT

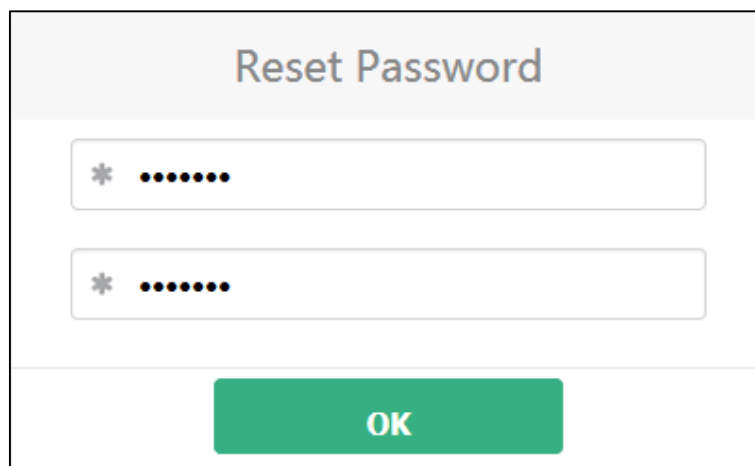
Return OK

3. Click **OK**.

The page prompts "The mail is sent successfully!".

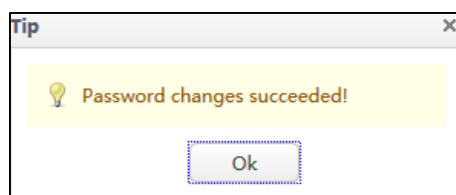


4. Log into your registered email and click the link to set a new password.
5. Enter the new password and re-enter the password to confirm.



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.

The screenshot displays the 'Register(SFB)' menu item highlighted in the left-hand navigation pane. The main content area shows the 'Project Detail' form for SFB phone projects. The form includes the following fields and options:

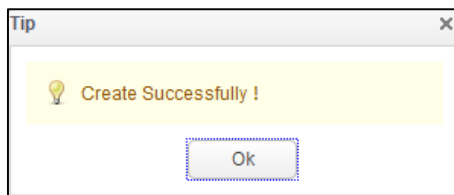
- Opportunity and End User Information**
 - SI/Reseller Information
 - Yealink Information
 - Competitor(s) Information
 - Additional Information
- End User Name *** (Text input)
- Country *** (Pull-down menu)
- State/Province *** (Text input)
- City *** (Text input)
- Type of End User *** (Text input)
- Website of End User * (If not applicable, please enter no)** (Text input)
- Industry *** (Pull-down menu)
- Quantity of Phones Required *** (Text input)
- Platform * (Brand of Softswitch/IP PBX/SIP Trunking)** (Text input)
- Tested Yealink SIP-Phone to End User *** (Radio buttons: Yes, No)
- When to Submit RFP/RFQ * (Request for Proposal/Request for Quote)** (Text input with 'Click to select time' button)
- When to Deploy/Ship *** (Text input with 'Click to select time' button)

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 Dep
Detail	170717141910975	Canada		hdSi	jack	2549	Government	10	2017-07-17	Unknown	SIP trunkin	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.

Project Detail

Save Return

Opportunity and End User Information

SI/Reseller Information

Yealink Information

Competitor(s) Information

Additional Information

End User Name *

Country *

State/Province *

City *

Type of End User *

Website of End User * (If not applicable, please enter no)

Industry *

Quantity of Phones Required *

Platform * (Brand of Softswitch/IP PBX/SIP Trunking)

Tested Yealink SIP-Phone to End User* Yes No

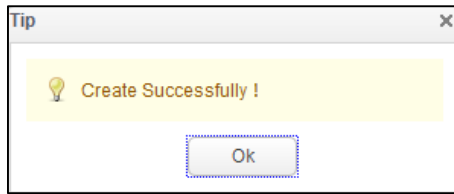
When to Submit RFP/RFQ * (Request for Proposal/Request for Quote) Click to select time

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.

Project List(SIP)											
+ Register(SIP) Export											
Detail	Project No	Country	Distributor	Applicant	End User	Type of End User	Industry	Sites	When to Submit RFP/RFQ	Project Status	Platform
Detail	170717143246879	Canada		hdSi	Mars	2550	Healthcare	20	2017-07-12	Unknown	PBX

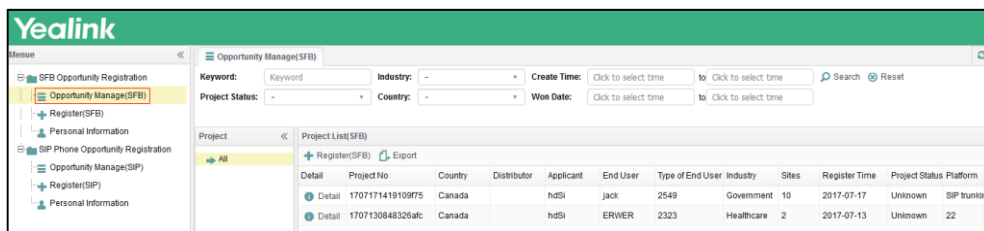
Editing, Extending or Deleting Projects from the Project Detail Page

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.

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
Detail	170717141910975	Canada		hdSi	jack	2549	Government	10	2017-07-17	Unknown	SIP trunkir 20
Detail	1707130848326afc	Canada		hdSi	ERWER	2323	Healthcare	2	2017-07-13	Unknown	22 20

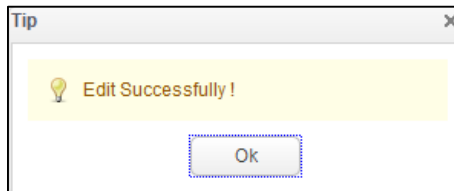
3. From the Project Detail page, you can:

- Click  **Edit** .

Edit the SFB phone project information.

Click  Save to accept the change.


The page prompts "Edit Successfully!"



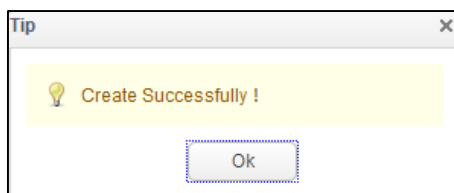
Click **Ok**.

- Click  Extend .

Configure the SFB phone project information.

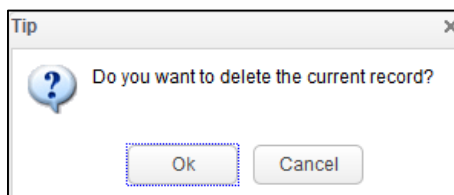
Click  Save to accept the change.

The page prompts "Create successfully!"



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

- Click  Delete .

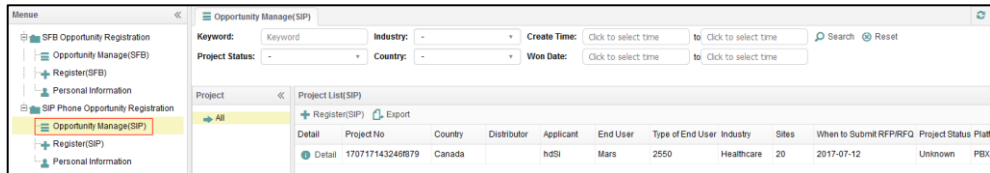


Click **Ok** to confirm to delete the project.

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.

Detail	Project No	Country	Distributor	Applicant	End User	Type of End User	Industry	Sites	When to Submit RFP/RFQ	Project Status	Platf
Detail	170717143246879	Canada		hdSi	Mars	2550	Healthcare	20	2017-07-12	Unknown	PBX

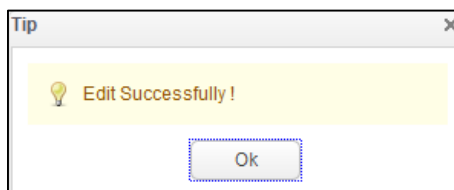
3. From the Project Detail page, you can:

- Click  **Edit** .

Edit the SIP phone project information.

Click  **Save** to accept the change.


The page prompts "Edit Successfully!"



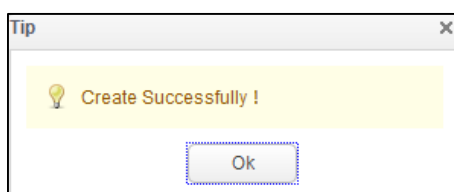
Click **Ok**.

- Click  **Extend** .

Configure the SIP phone project information.

Click  **Save** 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 .

