

# **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:

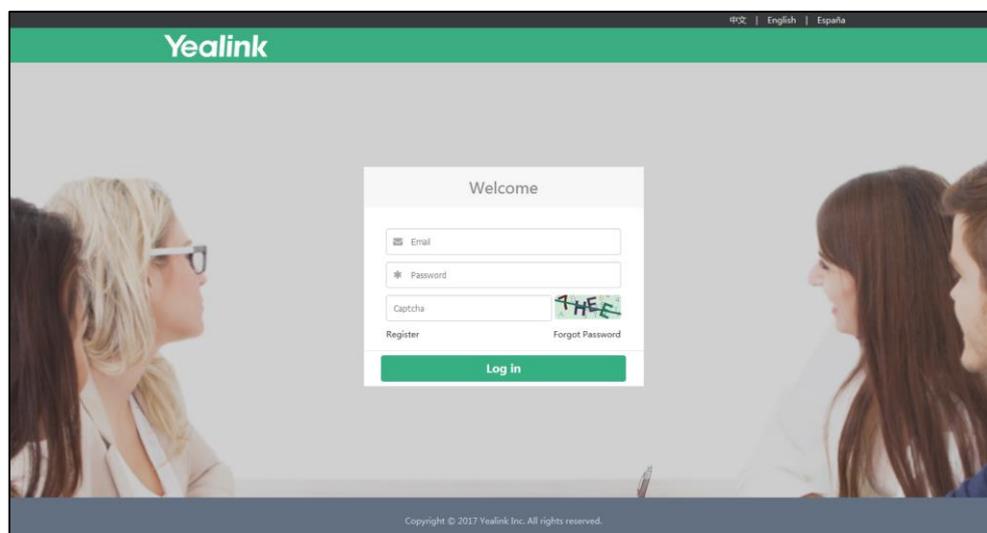
- [Visiting Opportunity Registration System](#)
- [Changing the Display Language](#)
- [Registering a SI Account](#)
- [Login](#)
- [Forgetting Password](#)

## Visiting Opportunity Registration System

**To visit opportunity registration system:**

1. Open a web browser.
2. Enter the domain name of opportunity registration system in the address bar, and then press the **Enter** key.

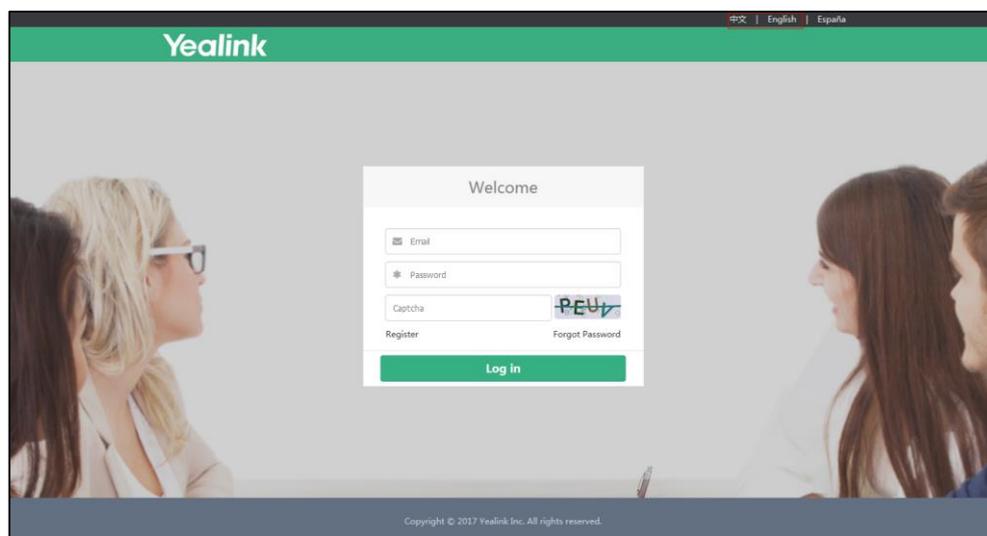
The opportunity registration system is displayed as below:



## Changing the Display Language

**To change the display language:**

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



## Registering a SI Account

**To register a SI account:**

1. Click **Register**.

## 2. Configure the basic information.

## Register

**Attention:**  
All fields with\* are required

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### Basic Information

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Email\*

Password\*

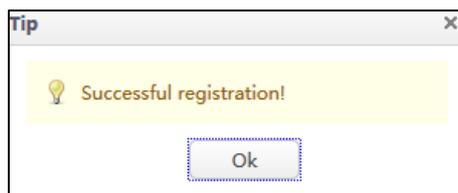
Confirm Password\*

Type\*  VCS[Video Conferencing Opportunity Registration System]  
 Skype for business-Phone  
 SIP-Phone

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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"/>
<input type="button" value="Previous Step"/>	
<input type="button" value="Next Step"/>	

3. Click **Next Step** to continue or **Return** to back to the previous page.
4. If you want to register Video Conferencing System opportunity, please check the **VCS[Video Conferencing System]** checkbox in the **Type** field; 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.

A login form interface. At the top, the word "Welcome" is displayed in a large, grey font. Below it are three input fields: "Email" with an envelope icon, "Password" with an asterisk icon, and "Captcha" with a small image of a captcha (the characters "9FC3" crossed out with a red line). To the right of the "Captcha" field is a "Forgot Password" link. Below the input fields are two links: "Register" on the left and "Forgot Password" on the right. At the bottom of the form is a large green button with the text "Log in" in white.

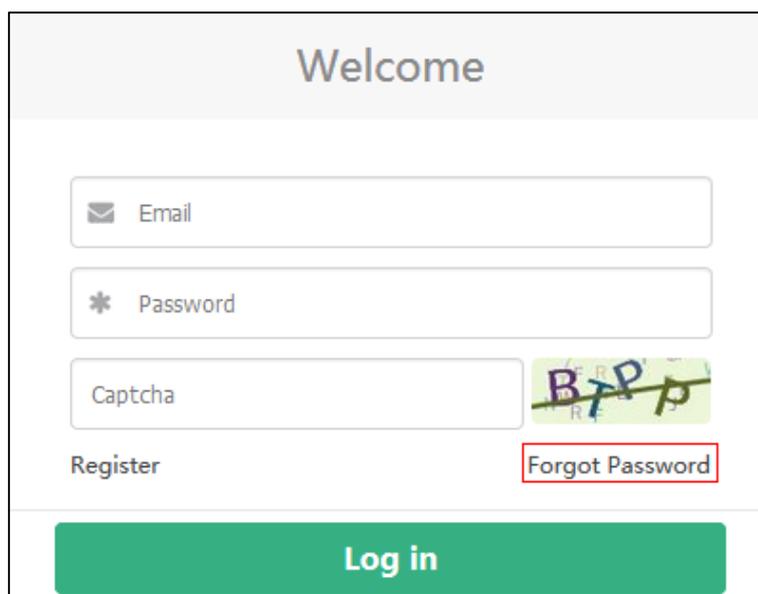
2. Click **Log in**.

## Forgetting Password

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

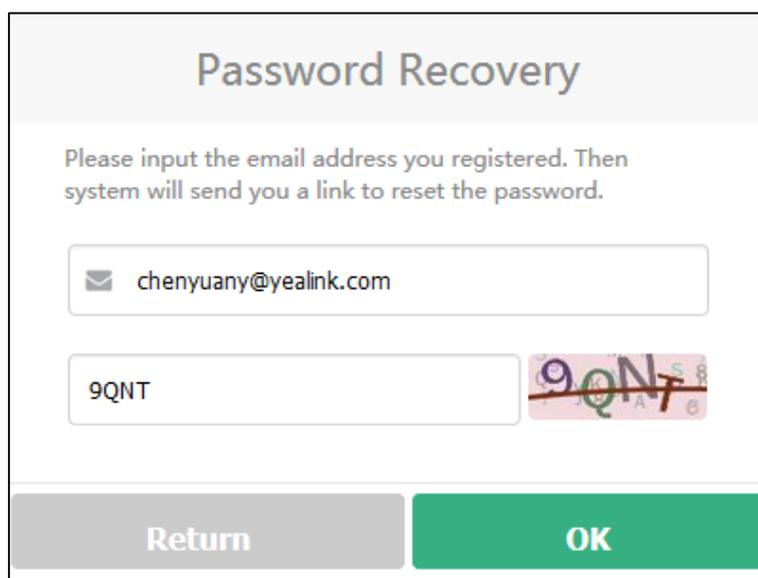
**To reset password:**

1. Click **Forgot password**.



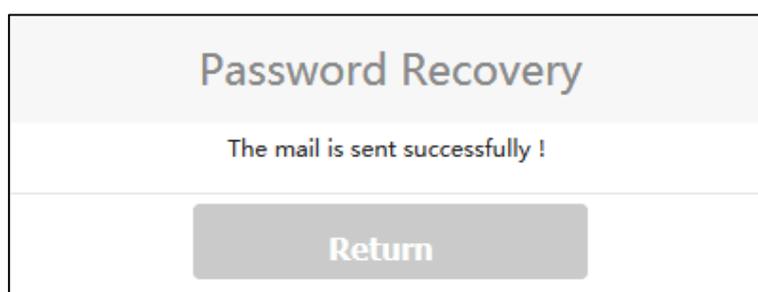
The screenshot shows a 'Welcome' page with a light gray header. Below the header are three input fields: 'Email' with an envelope icon, 'Password' with an asterisk icon, and 'Captcha' with a green captcha image showing the letters 'BTP' in a stylized font. Below the input fields are two links: 'Register' and 'Forgot Password' (the latter is highlighted with a red border). At the bottom is a large green button labeled 'Log in'.

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



The screenshot shows a 'Password Recovery' page with a light gray header. Below the header is a text prompt: 'Please input the email address you registered. Then system will send you a link to reset the password.' Below the prompt are two input fields: the first contains the email 'chenyuany@yealink.com' and the second contains the captcha '9QNT' next to a pink captcha image showing the letters '9QNT' in a stylized font. At the bottom are two buttons: a gray 'Return' button and a green 'OK' button.

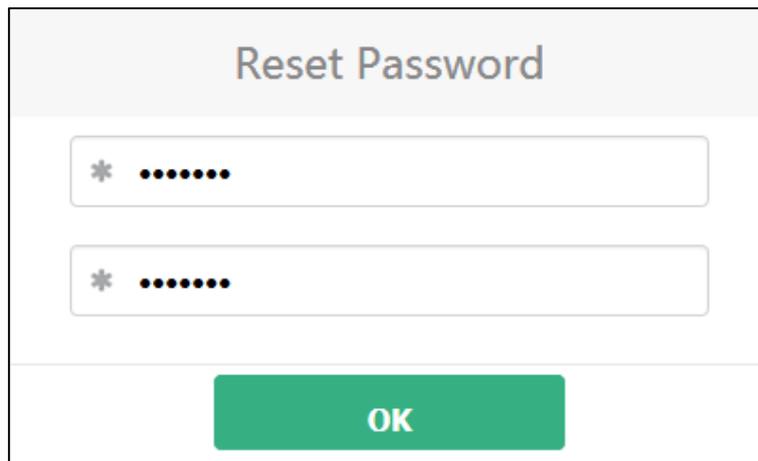
3. Click **OK**.  
The page prompts "The mail is sent successfully!".



The screenshot shows the 'Password Recovery' page after a successful email send. The header is the same, but the text prompt is replaced by 'The mail is sent successfully !'. Below this is a single gray 'Return' button.

4. Log into your registered email and click the link to set a new password.

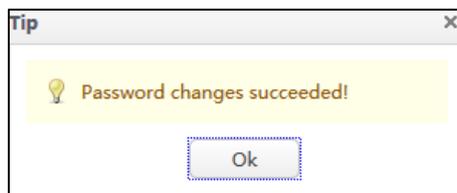
5. Enter the new password and re-enter the password to confirm.



The image shows a 'Reset Password' form. It has a title bar at the top with the text 'Reset Password'. Below the title bar are two input fields for passwords, each with a small asterisk icon on the left and a series of dots representing masked text. At the bottom of the form is a large green button with the text 'OK' in white.

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:

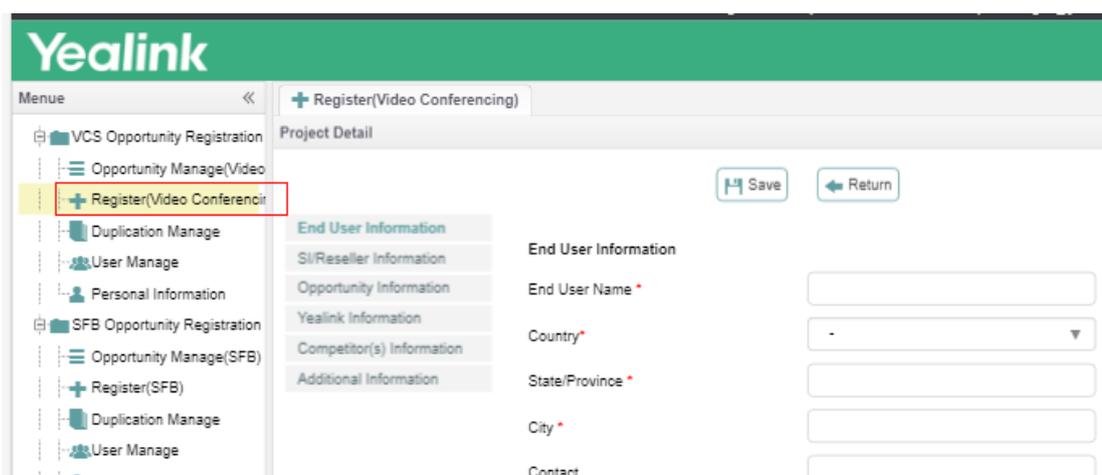
- [Adding Projects](#)
- [Editing, Extending or Deleting Projects from the Project Detail Page](#)

## Adding Projects

### Adding Video Conferencing System Projects

To add Video Conferencing System projects:

1. Click **VCS Opportunity Registration->Register(Video Conferencing)** in the menu bar.



The screenshot displays the Yealink web interface. On the left, a menu tree is visible with 'VCS Opportunity Registration' expanded, and 'Register(Video Conferencing)' highlighted with a red box. The main content area shows the 'Project Detail' form for 'Register(Video Conferencing)'. The form includes sections for 'End User Information', 'SI/Reseller Information', 'Opportunity Information', 'Yealink Information', 'Competitor(s) Information', and 'Additional Information'. The 'End User Information' section contains fields for 'End User Name', 'Country' (a pull-down menu), 'State/Province', 'City', and 'Contact'. There are 'Save' and 'Return' buttons at the top right of the form area.

2. Configure the Video Conferencing 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.

Detail	Subscribe	Project No.	Country	Distributor	SI	Applicant	End User	Industry	Sites	Register Time	Project Status	When to Deploy/Ship	Order Qty	Is YMS	Top Deal
<input type="checkbox"/> Detail	<input type="checkbox"/>	17102419312296ae	Brazil	qvcAgent	vcs	qvcAgent	fwee	Top 500 Enter	5	2017-10-24	Cancel	2017-10-18	0		B (Important & Not Urgent)
<input checked="" type="checkbox"/> Detail	<input checked="" type="checkbox"/>	1710241731224e44	America		testv	qvcManager	testv	Public Instituti	3	2017-10-24	Cancel	2017-10-03	0		A (Important & Urgent)
<input checked="" type="checkbox"/> Detail	<input checked="" type="checkbox"/>	171024164842eba8	America		testv	qvcManager	testv	Public Instituti	2	2017-10-24	Reject	2017-10-10	0		B (Important & Not Urgent)

## Adding SFB Phone Projects

To add SFB phone projects:

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

The screenshot shows the 'Register(SFB)' form with the following fields and options:

- Opportunity and End User Information:**
  - End User Name \*
  - Country\* (dropdown menu)
  - State/Province \*
  - City \*
  - Type of End User \*
  - Website of End User \* (If not applicable, please enter no)
  - Industry\* (dropdown menu)
  - 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)
  - When to Deploy/Ship \*

6. 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.

7. Click  to accept the change.

The page prompts "Create successfully!"



8. 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 Det
Detail	1707171419109f75	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:

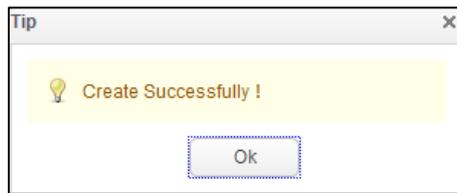
1. Click **SIP Phone Opportunity Registration -> Register(SIP)** in the menu bar.

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 **Save** 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

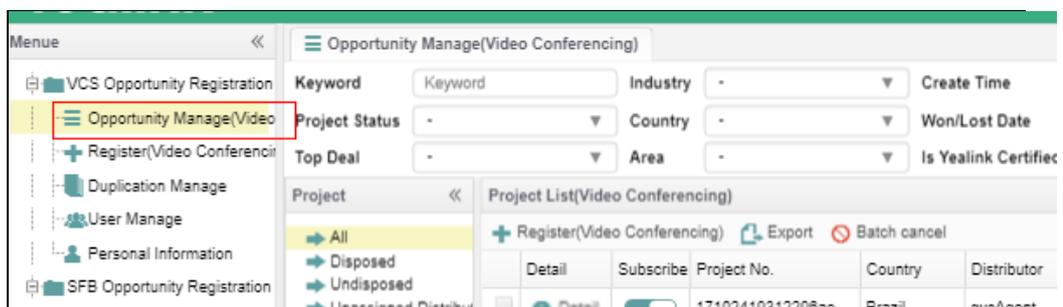
## Editing, Extending or Deleting Projects from the Project Detail Page

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 Video Conferencing Projects

**To edit, extend or delete Video Conferencing System projects:**

1. Click **VCS Opportunity Registration-> Opportunity Manage(Video Conferencing)** in the menu bar.



2. Click **Detail** to view the desired Video Conferencing 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

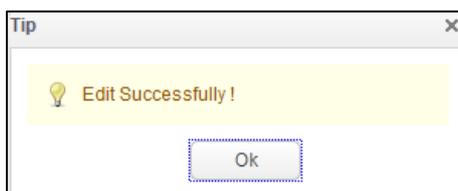
3. From the Project Detail page, you can:

- Click 

Edit the Video Conferencing project information.

Click  to accept the change.

The page prompts "Edit Successfully!"



Click **Ok**.

- Click 

Configure the Video Conferencing project information.

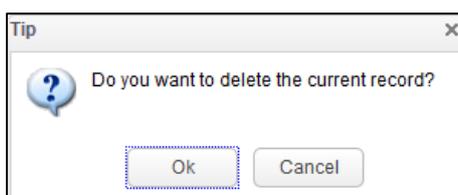
Click  to accept the change.

The page prompts "Create successfully!"



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

- Click 

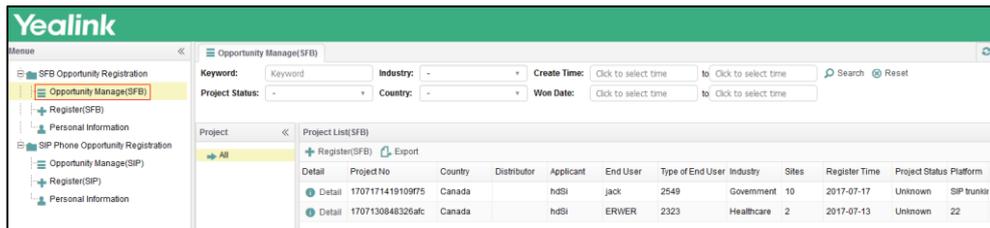


Click **Ok** to confirm to delete the project.

## Editing, Extending or Deleting SFB Phone Projects

**To edit, extend or delete SFB phone projects:**

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

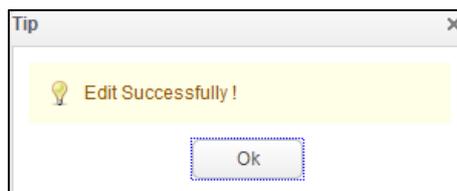


5. Click **Detail** to view the desired SFB phone project.

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
<a href="#">Detail</a>	1707171419109f75	Canada		hdSi	jack	2549	Government	10	2017-07-17	Unknown	SIP trunkir 20
<a href="#">Detail</a>	1707130848326afc	Canada		hdSi	ERWER	2323	Healthcare	2	2017-07-13	Unknown	22 20

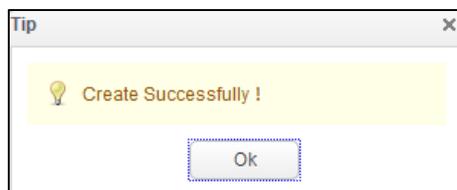
6. From the Project Detail page, you can:

- Click  **Edit**  
Edit the SFB phone project information.
- Click  **Save** to accept the change.  
The page prompts "Edit Successfully!"



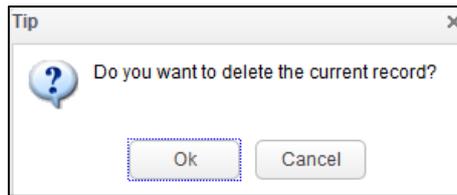
Click **Ok**.

- 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**

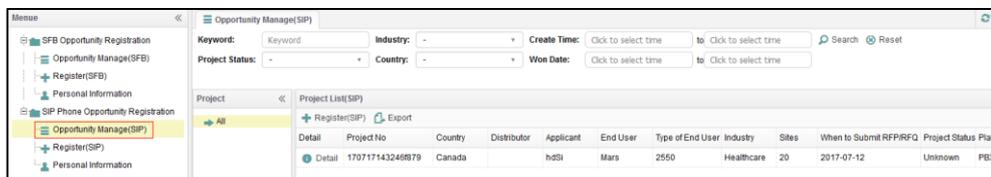


Click **Ok** to confirm to delete the project.

## 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.

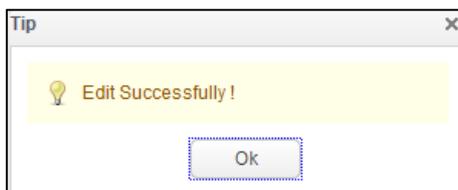


2. Click **Detail** to view the desired SIP phone project.

Project List(SIP)											
+ Register(SIP) Export											
Detail	Project No	Country	Distributor	Applicant	End User	Type of End User	Industry	Sites	When to Submit RFP/RFO	Project Status	Platf
<b>Detail</b>	170717143246/879	Canada		hdSi	Mars	2550	Healthcare	20	2017-07-12	Unknown	PBX

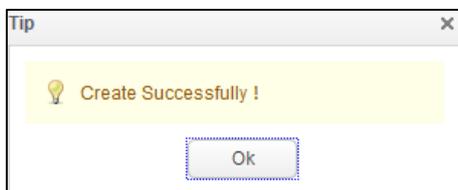
3. From the Project Detail page, you can:

- Click  Edit  
Edit the SIP phone project information.
- Click  Save to accept the change.  
The page prompts "Edit Successfully!"



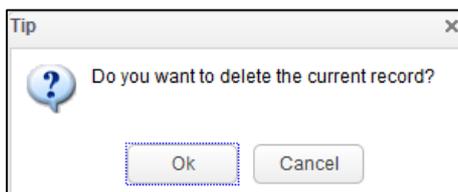
Click **Ok**.

- 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



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

