

# Opportunity Registration System User Guide June 2021

## About This Guide

This guide introduces how to use the Opportunity Registration System (ORS).

## In This Guide

Topics include:

- Chapter 1 Basic Operation
- Chapter 2 Project Management

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### **Basic Operation**

This chapter provides basic instructions for using ORS· Topics include:

- Visiting Opportunity Registration System
- Changing the Language
- Registering a SI Account
- Logging into ORS
- Forgetting Password
- Modifying Personal Information
- Modifying the Permission of Product Line

### Visiting Opportunity Registration System

#### Procedure:

- 1. Open a web browser and visit: <u>https://ors.yealink.com</u>
- 2. Enter the domain name of ORS in the address bar and then press the **Enter** key:

Yealink		Link US English v
	Welcome	
	Imail	
	Register now Forgot Password	
	Login	

### Changing the Language

#### Procedure:

1. Select language from the top-right corner, then the page will be displayed in the selected language.



### Registering a SI Account

**Special note**: The distributor account can only be created by the Yealink sales or administrators. Therefore, if you are a Yealink distributor, you need to contact the Yealink sales or administrators to create a distributor account and get the account information. After that, you can log into the system directly, and do corresponding operations.

#### Procedure:

1. Click Register now

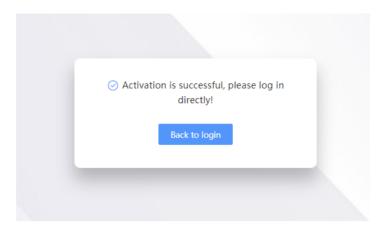
W	/elcome
Email	
Password	
Register now	Forgot Password
	Login

2. Configure the basic information and click **Submit**.

	Register		
Attention			
Distributor, please contact sa	not for Yealink Distributors or end-users. Iles representative to obtain an account. If ntact local SI or Reseller to register new op	you are an end-user, y	/ou
Personal Info			
* Contact Name			
* Phone			
Job Title			
* Email			
* Password		Ć	)
* Confirm Password			
Company Info			
* Company Name			
* Country			
Website			
Company Profile			
* Captcha	Captcha	6XMA	
	Read and accept 《Privacy policy》		
	Back Submit		

3. After submitting the information, the system will send an activation email. Please click the link in the email to activate your account. Otherwise, you cannot use the account to log in.

	Register	
Attention		
This Registration Distributor, please c are highly encourag	Tips	a Yealink an end-user, you es.
Personal Info	Registration success. The activation email has been	
* Contact Nar	sent to your mailbox, please click the activation link in the email to activate your account before logging in.	
* Phone		
Job Title	ОК	



## Logging into ORS

#### Procedure:

1. Enter the email, the password, and the captcha in the corresponding fields.

Welcome	
Email.	
Register now Forgot Password	
	Parsented

### Forgetting Password

If you forget password, you can reset it.

#### Procedure:

1. Click Forgot Password.

Email	V	Velcome	
Password	Email		
	Password		
Register now Forgot Password	Register now	Forgot Pas	sword

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

P	asswor	d Red	covery	1
Email				
Captcha			<b>N</b> HT	SR
	ut the email ad send you a lin		-	
	Back	Su	bmit	

- 3. Click the link in the email you receive:
- 4. Enter the new password and re-enter the password to confirm.

	Reset Password
Passwor	d
Confirm	Password
	sword length to 7-20 digits, including at least three mbers, uppercase and lowercase letters, and acters.
	Back Submit

5. Click **Submit** to accept the change.

### Modifying Personal Information

#### Procedure:

1. Click the account avatar in the top-right corner and select Personal Info-

Project Type Estimated Time of Final Confirmation		End Time	Industry Quantity Required	+Registe	<ul> <li>A Personal Ir</li> <li>⊕ Language</li> <li>➡ Guide</li> <li>☑ Contact Us</li> </ul>	English >
Distributo	r SI	lı		Quantity Required	E Logout	Estimated of Order

🗧 Project Manage	Personal Info	
	User Info	
	* User Name	ORS TEST contact
	Phone	123456789
	Email	yl@yealink.com
	Cc-mail	Please use ";" to separate e-mail addresses
	Job Title	

2. In the Personal Info field, edit the information and click Save.

### Modifying the Permission of Product Line

#### Procedure:

1. Click the account avatar in the top-right corner and select Personal Info-

Project Type       ✓       Industry       I	Distributo	or SI		ndustry	Quantity	Platform	Estimated
Project Type Industry E Guide		Start Time -	End Time	Quantity Required	Min		;
				) 1			
					+Registe	r 🔰 💄 ORS TH	EST contact

2. In the **Product Line** field, modify the permission and click **Save**.

Yealink Opportunity Registration System	三 Personal Info		
	Product Line Info		
	Product Line	<ul> <li>Yealink Meeting &amp; VC Endpoints</li> <li>Microsoft-certified Teams Devices</li> </ul>	SIP Phones
	SIP Phones Role	SI	
	Yealink Meeting & VC Endpoints Role	SI	
			Cancel

Note: you can see the newly updated permissions after re-logging into ORS.

## Project Management

You can add, edit, extend, delete or export project files via ORS· Topics include:

- Adding Projects
- Editing, Extending, Deleting Projects
- Accessibility Description

### Adding Projects

#### Procedure:

1. Click **Report** in the top-right corner.

tunity Registration System	Project No./Company	y/Email/Name etc. C	Filter(See Less)						1		
oject Manage	Product Line		Project Phase		Project Status		Project Type		Industry		~
	Country		Register Time	🛗 Start Time + End Time	Estimated Time of Order	🛗 Start Time + End Time	Estimated Time of Final Confirmation	Start Time - End Time	Quantity Required	Min • Max	
		Reset									
	Processed (0/0)	Pending (0/0)									
	# Subscribe ~	Mark V Project I	No. End L	Iser Name Product Line	Project Status	Project Phase Country	Distributor	SI	Industry Qu Re	antity quired Platform	Est

2. Select the desired product line.

Note that the product line cannot be changed after you add a project.

Yealink	
Opportunity Registration System	
	Register
Project Manage	
	Pruduct Line Tips
	SIP Phones :
	Include T2/T3/T4/T5 series SIP phones, CP series conference phones and DECT phones. Yealink Netering AV CE Andpoints :
	vaamink weeting of vic_Endpoints : Include VMS platform, Vealink Meeting cloud service, VC series room system (VC200/500/800/VC880), MeetingEye series room system (M400/M600).
	Microsoft-certified Teams Devices :
	Include MVC series Teams Room System, VC210 and MeetingBar series Collaboration Bar, T4/T5/MP series Teams or SFB Edition desk and conference phones, UVC series USB Cameras, USB Headsets and speakerphones.
	ZOOM-settified Devices: 2V Include ZOOM phones XV tariet Zoom Rooms System.
	mender boom private a to prior boom nounie system
	Project Info
	Product Line     SIP Phones     Yealink Meeting & VC Endpoints     Microsoft-certified Teams Devices     ZOOM-certified Devices
	Project Type New Project
	End User Info

 $3\cdot$  Configure other information.

Please ensure that the information you fill in is complete and credible.

4. Click Submit.

You can see the project in the project list, with the status as Pending. You need to wait for the account manager or the area manager to verify the project.

ealink														
ct Manage	roject No./Company/		Q Filter(Se	ie Less)										Export
	Product Line		<ul> <li>Project</li> </ul>	t Phase		Project Status			Project Type		~ In	dustry		
	Country		<ul> <li>Regist</li> </ul>	ter Time 📋	Start Time - End Time	Estimated Time of Order	🛗 Start Time + I	End Time	Estimated Time of inal Confirmation	🛗 Start Time + End Time	Quantity Re	quired Min		
Pr	Yocessed (0/0)	ery Reset			_									
		nding (1/1)	oject No.	End User I	Name Prosact Line	Project Status	Project Phase	Country	Distributo	r SI	Industry	Quantity Required	Platform	Estima of Ord

## Viewing Projects

#### Procedure:

1. Click the blue font of the desired project to view the project details.

Prod	duct Line			Project Phase			Project Statu			Project Type	
	Country			Register Time	🛗 Start T	ime - End Time	Estimated Time o Orde	f 🔠 Start Time -	End Time	Estimated Time of Final Confirmation	🛗 Start Time - End Time
	Q	uery Re	eset								
Process	sed (0/0) P	ending (1/1	)								
									<i>.</i> .		<i>c</i> :
# 9	Subscribe $\vee$	Mark 🗸	Project No.	End U	ser Name	Product Line	Project Status	Project Phase	Country	Distributo	or SI
1		☆	20201020201	8e00f TEST		SIP Phones , Y	Pending	P0-Opportunity	United Sta	tes ——	888VoIP
		-	/								
		/									

The project lists are divided into pending or processed. The approved projects are in the Processed list while the unapproved or rejected projects are in the Processed list.

	Project No./Cor			c. Q F	ilter(See Le	ess)									
,	Product Line				Project Ph	1450		Project Stat	15		Project Type		<ul> <li>✓ Indust</li> </ul>	7	
	Countr								of 🗄 Start Time -	End Time		Start Time - End Time			- Max
		Query	Reset					010							
		2) Pend	ing (1/1)												
	Processed (2/)	-	ing (1/1)	roject No.	Er	nd User Name	Product Line	Project Status	Project Phase	Country	Distributor	SI	Industry	Quantity	Platform
		ibe 🗸 🕴	Mark	roject No.			Product Line	-	Project Phase P0-Opportunity	,		SI 888VoIP	Industry Government	Quantity Required	<b>Platform</b> Freeswitch

### Editing Projects

#### Procedure:

- 1. Under the tab of **Project Info**, click **Edit** to edit the project information.
- 2. Click Submit to accept the change.

Project Info	Project Info			
End User Info	Product Line	SIP Phone , Video , Microsoft Certified De	vises Zoom Davises	
SI/Reseller Info	Product Line	SIP Phone, video, Microsoft Certified De	vices , 200m Devices	
Processment Info	Project No.	20200812102003e1		
Yealink Product I	Project Type	New Project		
Competitor Info				
Other Info Assignment	End User Info			
Project Status Info	5.00		VAT No	
Operation Log	End User Company	End User Company	VALNO	
Back To TOP	Country	United States	State/Province	State of California
	City	City of Los Angeles	Industry	Education
	Contact Name		Phone	
	Email		User Address	美国
	How many branches in the company	0		
	SI/Reseller Info			
	Desired Distributor	No		
	Processment Info			
	Project Phase	P0-Opportunity Identification	Currency	USD
	Project Budget	USD 10,000.00	Total Project Requirements	100
		Edit Expansion	Previous Next	

Operations of any user on the peroject information will be recorded in the **Operation Log** module.

Operation Log		
Operating Time	Operator	Content
2020-08-12 10:41:51	ORS TEST contact	Change Project Description from test to test1
2020-08-12 10:41:51	ORS TEST contact	Change Key Points of Yealink to Win from test to test3
2020-08-12 10:41:51	ORS TEST contact	Change User Scenario from test to test2
2020-08-12 10:41:51	ORS TEST contact	Change Comments from test to test4
2020-08-12 10:20:02	ORS TEST contact	Create the project

### Expanding Projects

You can expand an old project to a new project. Note that you can only expand the project whose status is approved.

#### Procedure:

- 1. Click **Expansion** to expand the project.
- 2. Click Submit to accept the change.

	Product Line	SIP Phone , Video , Microsoft Certified Devic	es , Zoom Devices	
Project Info	Project No.	20200812102003e1		
End User Info	D 1 1 T			
SI/Reseller Info	Project Type	New Project		
Processment Info				
Yealink Product I	End User Info			
Competitor Info	End User Company	End User Company	VAT No	
Other Info				
Assignment	Country	United States	State/Province	State of California
Project Status Info	City	City of Los Angeles	Industry	Education
Operation Log	Contact Name		Phone	
Back To TOP	Contact Name		FIIONE	
	Email		User Address	美国
	How many branches in the company	0		
	SI/Reseller Info			
	Desired Distributor	No		
	Processment Info			
	Project Phase	P0-Opportunity Identification	Currency	USD
	Project Budget	USD 10,000.00	Total Project Requirements	100
	Original Platform	test	Platform	Broadsoft
	Order Method	One-off purchase order	Estimated Order Time	2020-08-26
		Edit Expansion	Previous Next	

### Deleting Projects

#### Procedure:

- 1. Click **Delete** to delete the project.
- 2. Click **Submit** to accept the change.

Note that you can only delete the project whose status is pending.

	End oser-Company	End Oser Company	VALINO	
Project Info	Country	United States	State/Province	State of California
End User Info	City	City of Los Angeles	Industry	Medical Treatment
SI/Reseller Info Processment Info	Contact Name	End User contact	Phone	12345678932
Yealink Product I	Email	xx@yealink.com	User Address	XXXX
Competitor Info Other Info	How many branches in the company	0		
Assignment	SI/Reseller Info			
Project Status Info Operation Log Back To TOP	Desired Distributor	No		
	Processment Info			
	Project Phase	P0-Opportunity Identification	Currency	USD
	Project Budget	USD 10,000.00	Total Project Requirements	100
	Original Platform	test	Platform	Broadsoft
	Order Method	One-off purchase order	Estimated Order Time	2020-08-26
	When to Submit RFP/RFQ	2020-08-18		
	Open bid or not	Yes	招标时间	
	Project Description	test1		
	User Scenario	test2		
	Key Points of Yealink	test3		

### Accessibility Description

#### Combination Screening

You can click **Open Filter** and set the corresponding filters to view the desired projects.

roject No./Co		ail/Nan Q												Close F
Pre	duct Line			Project Phase			Project Status			Project Ty	ipe	~	-	
	Country			Industry			Register Time			Estimated Order Ti	me 🛅 Start Time -	End Time		
lanning Deci	sion Time	🖨 Start Time - End	Time	Quantity Required	Min -									
		Query Reset												
										Quantity Require				
v	Mark $\vee$	Project No.	End User Name	Product Line	Project Statu s	Country	Distributor	SI Inc	dustry	d	Platform	Applicant	Register Time	Unupdated o
ubscribe	Mark ∨			Product Line	4 <sup>1</sup>	Country United States	Distributor		dustry ducation	d 100	Platform Broadsoft	Applicant ORS TEST contact	Register Time	-

#### Following Projects

In the project list, if you are concerned about a project, you can light up the star button  $\checkmark$  of the project  $\cdot$ After that, you can select **Marked** from the drop-down menu of **Mark**, then you can quickly view the projects with start icons.

Pro	oduct Line			oject Phase		Project Statu			Project Type		Indust	у		
	Country		<ul> <li>Reg</li> </ul>	gister Time 🔄 💷		Estimated Time o Orde	Start Time -	End Time Fi	stimated Time of nal Confirmation	🖾 Start Time - End Time	Quantity Require	d Min	- Mair	
	Q	uery Re	iset											
Proce	ssed (2/2) P	ending (1/1	)											
	Subscribe ~	Mark 🗠	Project No.	End User Name	e Product Line	Project Status	Project Phase	Country	Distributor	SI	Industry	Quantity Required	Platform	Estima of Ord
-1			202010202021219	Se test	SIP Phones , Y	Approval	P0-Opportunity	United States	s ——	888VolP	Government	20	Freeswitch	2020-1
2		\$	20011501175712c	t test	SIP Phones	Approval	P0-Opportunity	United State	s Teledynami	cs 888VoIP	Others	3000	Others	2020-0

Subscribing to Email Reminders

You can subscribe to the email reminders of projects. When the project has new progress, you can receive an email.

Project Manage Projec	Yealink	÷													+Regist	er 💄 ORS	TEST conta
County       Register Time () that Time 4 Ind Time 4 Out Ti			oject No./Com		Email/Name	etc. Q F	Iter(See Less)										Export
General         Reset           Processed (2/2)         Pending (1/1)           #         Subscribe v         Mark v         Project No.         End User Name         Project Status         Project Phase         Country         Distributor         Sl         Industry         Country         Required         Partform         Estimation           1         Image: Country         Distributor         V         2020102020212156         test         SIP Prones, Y., Approval         P0-Opportunity-, United States          888Vo/P         Government         2.0         Freeswitch         2020-			Product Line				Project Phase							Indust	ry 📃		
#       Subscribe       Mark       Project No.       End User Name       Project Status       Project Phase       Country       Distributor       Sl       Industry       Quantity       Platform       Estimation         1       1       1       1       1       1       2020102020212155       test       SIP Phones, Y_a Approval       PO-OpportunityUnited States        888/o/P       Government       20       Freewitch       2020-			Country				Register Time	🛗 Start Time 🔹 End Time	Estimated Time o Orde	🛗 Start Time •	End Time Est Fina	imated Time of Confirmation	Start Time • End Time	Quantity Require	ed Min		
#     Subscribe     Mark ~     Project No.     End User Name     Product Line     Project Status     Project Phase     Country     Distributor     SI     Industry     Quantity Required     Platform     Estim       1<				Qu	ery Res	iet											
*       Subscribe *       Mark *       Project No.       End User Name       Product Line       Project Status       Proje		Pr	ocessed (2/2)	Per	nding (1/1)												
		-	# Subscrit	be ~	$Mark{\scriptstyle \checkmark}$	Project No.	End U	Iser Name Product Line	Project Status	Project Phase	Country	Distributor	SI	Industry		Platform	Estima of Ord
2 💽 🟠 20011501175712ct test SIP Phones Approval P0-Opportunity United States Teledynamics 888VoIP Others 3000 Others 2020-		1		)	合	202010202021	215e test	SIP Phones , Y	Approval	P0-Opportunity	United States		888VoIP	Government	20	Freeswitch	2020-1
		-	2 🔍			200115011757	12ct test	SIP Phones	Approval	P0-Opportunity	United States	Teledynamics	888VoIP	Others	3000	Others	2020-0

#### Export project

you can filter projects needed according to relevant conditions, and click"export"to create the Form Off-line.

Yealink ortunity Registration System	E											+Regist		TEST conta
Project Manage	Project No./Cor		me etc. Q	Filter(See Less)										Export
i oje et i na loge	Product Line			Project Phase	P0-Oppor	<ul> <li>Project Statu</li> </ul>			Project Type		~ Indus	itry		*
	Country			Register Time	🛅 Start Time = End Time	Estimated Time o Orde	📋 Start Time -	End Time Esti	imated Time of al Confirmation	📅 Start Time 🔹 End Time	Quantity Requi	red Min		
		Query	Reset											
	Processed (2/2	Pending (1	/1)								-			
	# Subscri	be 🗸 🛛 Mark	<ul> <li>Project No.</li> </ul>	End Us	er Name Product Line	Project Status	Project Phase	Country	Distributor	SI	Industry	Quantity Required	Platform	Estima of Ord
	1 🗨	) ☆	2020102020	18e00f TEST	SIP Phones , Y	Pending	P0-Opportunity	United States		888VoIP	Government	20	Freeswitch	2020-1

#### Project Communication

If you would like to communicate the process of project with others, you can realize such communication in the "Project Communication"  $\cdot$ 

Project Operatio					
Yealink Product I	Other Info				
Competitor Info					
Other Info	Project Communication	Creator	Create Time	Content	
Assignment	communication	ORS TEST contact	2020-10-21 09:07:38	I have something to communicate with you	
Project Status					
Operation Log	Files				
Back to the Top					
	Assignment				
		000 7507			

#### Split Screen view

In the project list, you can click "Split Screen View" to enter the split screen interface, this function helps you quickly switch projects

rr(See Less)									+ Reg Split Scree		ORS test
roduct Type Country lline for Next	🗄 Start Time -		Project Phase Register Time	🗮 Start Time - End	∽ Time	Project Status Estimated Time of Order	V	Project Type Estimated Time of Final Confirmation	Start Time - Er	∼ nd Time	
Update	start lime -										
or Next En	d User Name	Product Line	Product Type	Project Status	Project	Phase Count	ry Distributor	SI	Industry	Quantity Required	Selec