



Opportunity Registration System User Guide

August 2020

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.

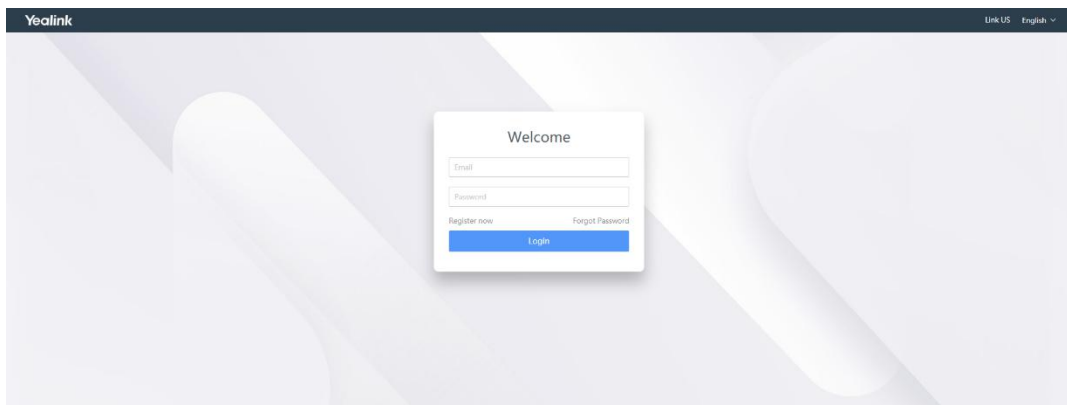
Topics include:

- [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:

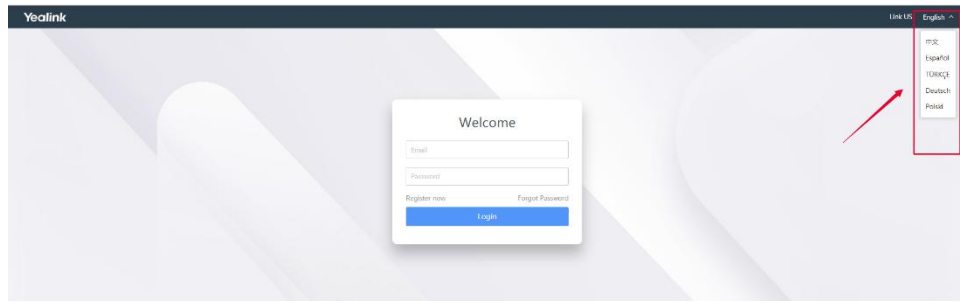
1. Open a web browser and visit: <https://ors.yealink.com>
2. Enter the domain name of ORS in the address bar and then press the **Enter** key:



Changing the Language

Procedure:

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

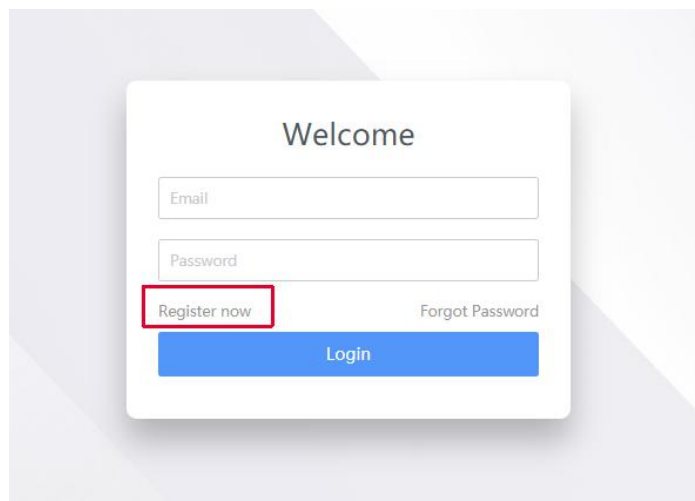


Registering a SI Account

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**.



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

Register

Attention

This Registration page is not for Yealink Distributors or end-users. If you are a Yealink Distributor, please contact sales representative to obtain an account. If you are an end-user, you are highly encouraged to contact local SI or Reseller to register new opportunities.

Personal Info

* Contact Name

* Phone

Job Title

* Email

* Password ⓘ

* Confirm Password

Company Info

* Company Name

* Country

Website

Company Profile

* Captcha

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- 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 page is not for Yealink Distributors or end-users. If you are a Yealink Distributor, please contact sales representative to obtain an account. If you are an end-user, you are highly encouraged to contact local SI or Reseller to register new opportunities.

Personal Info

* Contact Name

* Phone

Job Title

* Email

* Password ⓘ

* Confirm Password

Company Info

* Company Name

* Country

Website

Company Profile

* Captcha

☐ Read and accept [Privacy policy](#)

Tips

Registration success. The activation email has been sent to your mailbox, please click the activation link in the email to activate your account before logging in.

Register

Attention

This Registration page is not for Yealink Distributors or end-users. If you are a Yealink Distributor, please contact sales representative to obtain an account. If you are an end-user, you are highly encouraged to contact local SI or Reseller to register new opportunities.

Personal Info

* Contact Name

* Phone

Job Title

* Email

* Password ⓘ

* Confirm Password

Company Info

* Company Name

* Country

Website

Company Profile

* Captcha

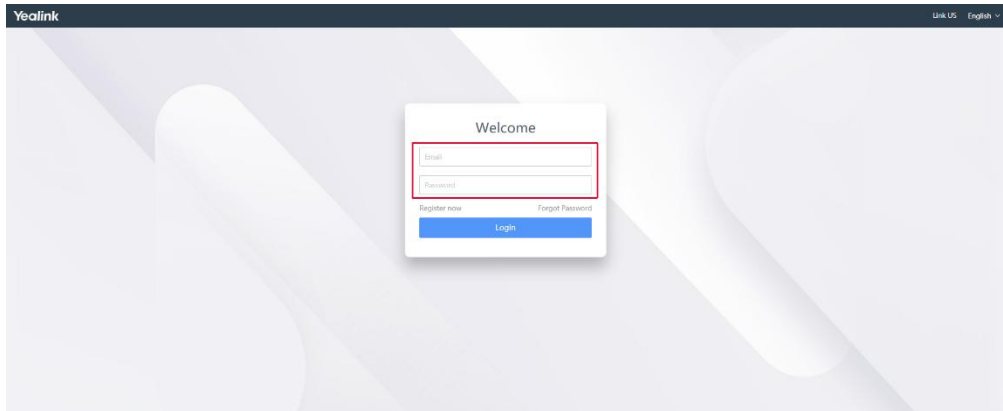
☐ Read and accept [Privacy policy](#)

✓ Activation is successful, please log in directly!

Logging into ORS

Procedure:

1. Enter the email, the password, and the captcha in the corresponding fields.
2. Click **Login**.

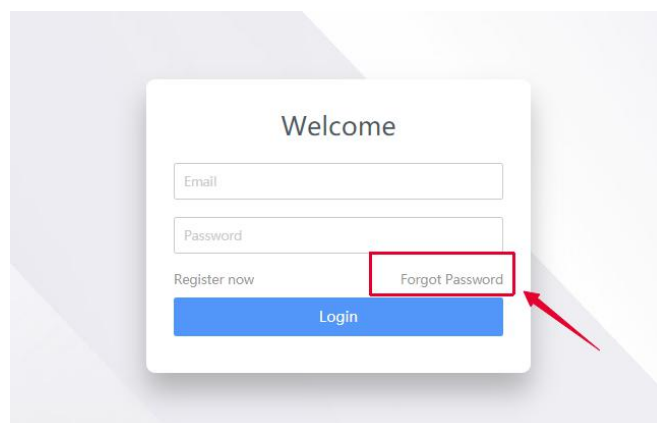


Forgetting Password

If you forget password, you can reset it.

Procedure:

1. Click **Forgot Password**.



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

Password Recovery

Email

Captcha

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

Back Submit

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

Reset Password

Password

Confirm Password

Set the password length to 7-20 digits, including at least three types of numbers, uppercase and lowercase letters, and special characters.

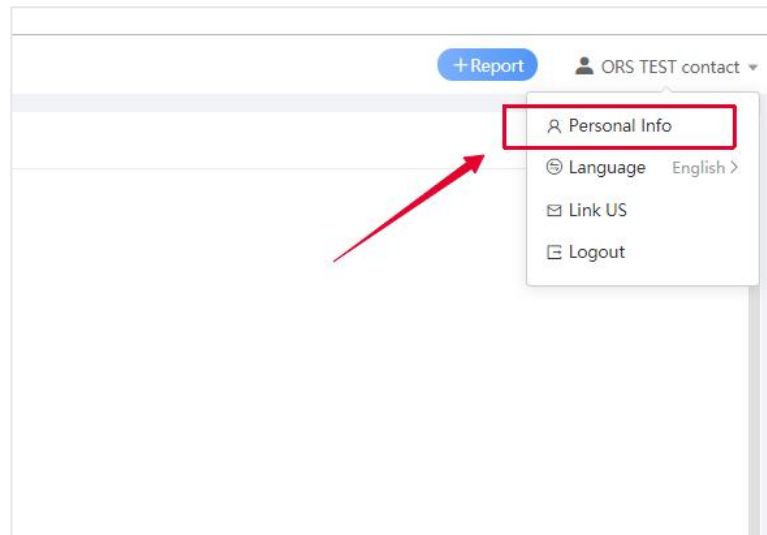
Back Submit

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**.

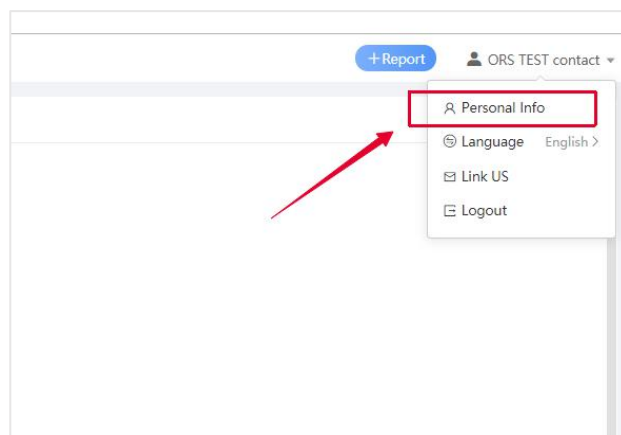


2. In the **Personal Info** field, edit the information and click **Save**.

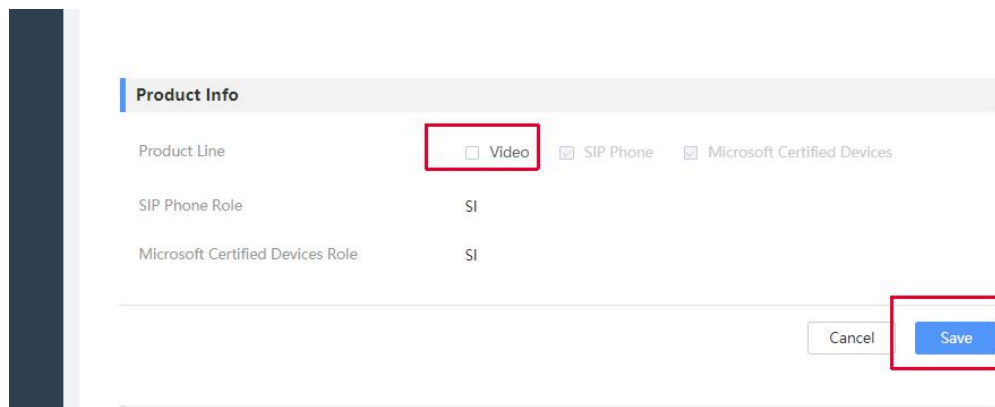
Modifying the Permission of Product Line

Procedure:

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



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



Product Info

Product Line ☐ Video ☒ SIP Phone ☒ Microsoft Certified Devices

SIP Phone Role SI

Microsoft Certified Devices Role SI

Cancel Save

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 OSP.

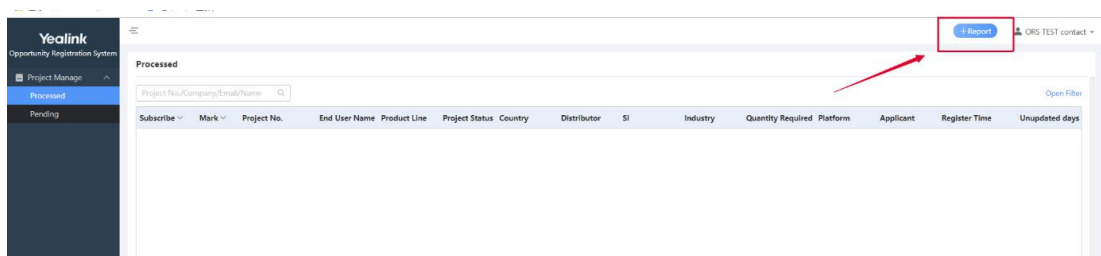
Topics include:

- [Adding Projects](#)
- [Editing, Extending, Deleting Projects](#)
- [Accessibility Description](#)

Adding Projects

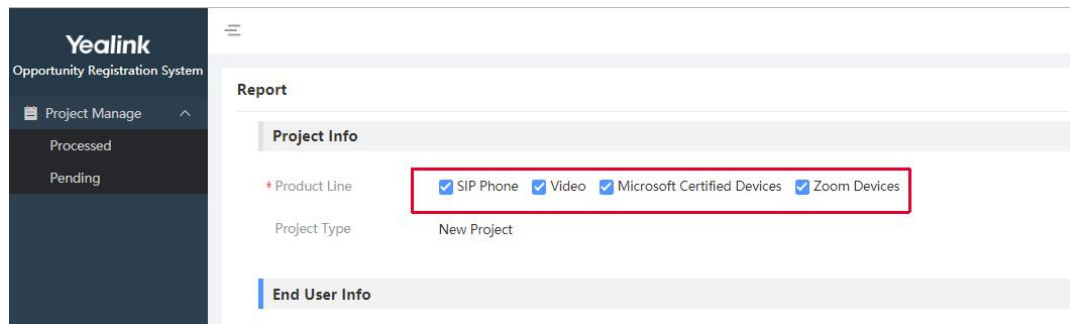
Procedure:

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



2. Select the desired product line.

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



Yealink
Opportunity Registration System

Project Manage
Processed
Pending

Report

Project Info

* Product Line: ☒ SIP Phone ☒ Video ☒ Microsoft Certified Devices ☒ Zoom Devices

Project Type: New Project

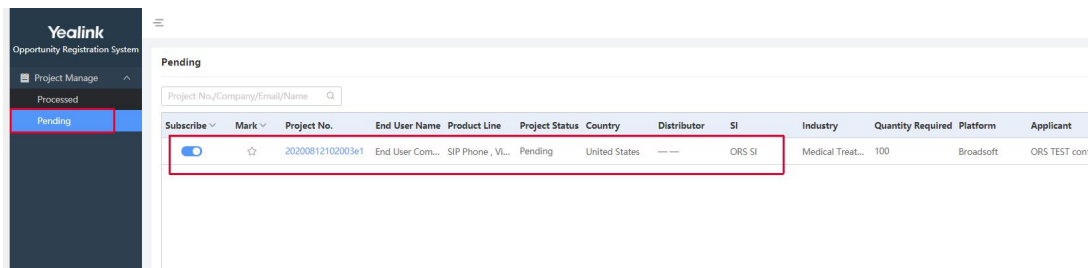
End User Info

3. 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.

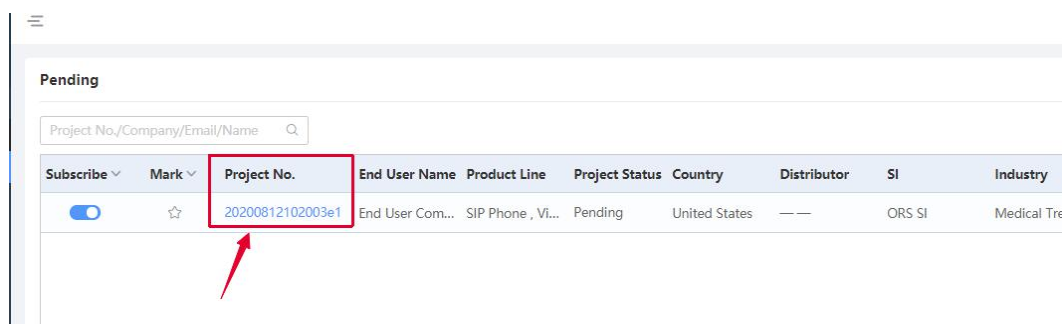


Subscribe	Mark	Project No.	End User Name	Product Line	Project Status	Country	Distributor	SI	Industry	Quantity Required	Platform	Applicant
<input checked="" type="checkbox"/>	☆	20200812102003e1	End User Com...	SIP Phone , VL...	Pending	United States	---	ORS SI	Medical Treat...	100	Broadsoft	ORS TEST cor

Viewing Projects

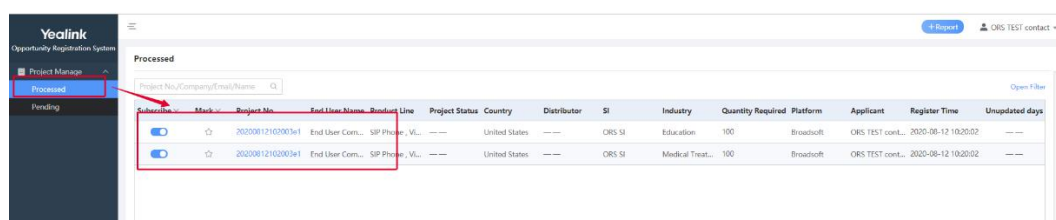
Procedure:

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



Subscribe	Mark	Project No.	End User Name	Product Line	Project Status	Country	Distributor	SI	Industry
<input checked="" type="checkbox"/>	☆	20200812102003e1	End User Com...	SIP Phone , VL...	Pending	United States	---	ORS SI	Medical Tre

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.



Subscribe	Mark	Project No.	End User Name	Product Line	Project Status	Country	Distributor	SI	Industry	Quantity Required	Platform	Applicant	Register Time	Unupdated days
<input checked="" type="checkbox"/>	☆	20200812102003e1	End User Com...	SIP Phone , VL...	---	United States	---	ORS SI	Education	100	Broadsoft	ORS TEST cont...	2020-08-12 10:20:02	---
<input checked="" type="checkbox"/>	☆	20200812102003e1	End User Com...	SIP Phone , VL...	---	United States	---	ORS SI	Medical Treat...	100	Broadsoft	ORS TEST cont...	2020-08-12 10:20:02	---

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

Product Line: SIP Phone , Video , Microsoft Certified Devices , Zoom Devices

Project No.: 20200812102003e1

Project Type: New Project

End User Info

End User Company: End User Company

VAT No: — —

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 project 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.

Project Info	Product Line	SIP Phone , Video , Microsoft Certified Devices , Zoom Devices		
End User Info	Project No.	20200812102003e1		
SI/Reseller Info	Project Type	New Project		
Processment Info	End User Info			
Yealink Product I...	End User Company	End User Company	VAT No	---
Competitor Info	Country	United States	State/Province	State of California
Other Info	City	City of Los Angeles	Industry	Education
Assignment	Contact Name		Phone	
Project Status Info	Email	---	User Address	美国
Operation Log	How many branches in the company	0		
Back To TOP	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.

Project Info	End User Company	End User Company	VAT No	---
End User Info	Country	United States	State/Province	State of California
SI/Reseller Info	City	City of Los Angeles	Industry	Medical Treatment
Processment Info	Contact Name	End User contact	Phone	12345678932
Yealink Product I...	Email	xx@yealink.com	User Address	xxx
Competitor Info	How many branches in the company	0		
Other Info	SI/Reseller Info			
Assignment	Desired Distributor	No		
Project Status Info	Processment Info			
Operation Log	Project Phase	P0-Opportunity Identification	Currency	USD
Back To TOP	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 to Win	test3		
	Edit Delete			


Accessibility Description

Combination Screening

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

The screenshot shows the 'Processed' filter section with various dropdown menus and input fields for filtering projects. A red box highlights the filter area, and a red arrow points to the 'Close Filter' button.

Following Projects

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

The screenshot shows the 'Processed' project list. A red box highlights the 'Mark' dropdown menu, which is set to 'Marked'. The table displays project details for two projects, both from the United States.

Subscribe	Mark	Project No.	End User Name	Product Line	Project Status	Country
<input checked="" type="checkbox"/>		20200812102003e1	End User Company	SIP Phone , Video ...	---	United States
<input checked="" type="checkbox"/>		20200812102003e1	End User Company	SIP Phone , Video ...	---	United States

Subscribing to Email Reminders

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

The screenshot shows the 'Processed' project list. A red box highlights the 'Subscribe' dropdown menu, which is set to 'On'. The table displays project details for two projects, both from the United States.

Subscribe	Mark	Project No.	End User Name	Product Line	Project Status	Country	Distributor	SI	Industry	Q
<input checked="" type="checkbox"/>		20200812102003e1	End User Com...	SIP Phone , Vi...	---	United States	---	ORS SI	Education	11
<input checked="" type="checkbox"/>		20200812102003e1	End User Com...	SIP Phone , Vi...	---	United States	---	ORS SI	Medical Treat...	11