

# **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:

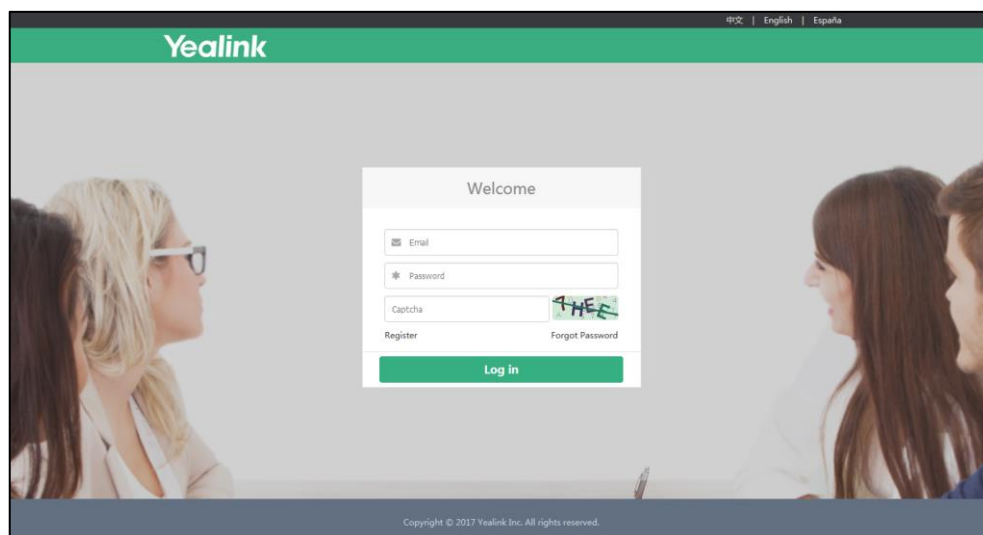
- [Visiting Opportunity Registration System](#)
- [Changing the Language](#)
- [Registering a SI Account](#)
- [Login](#)
- [Forgetting Password](#)

## 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.

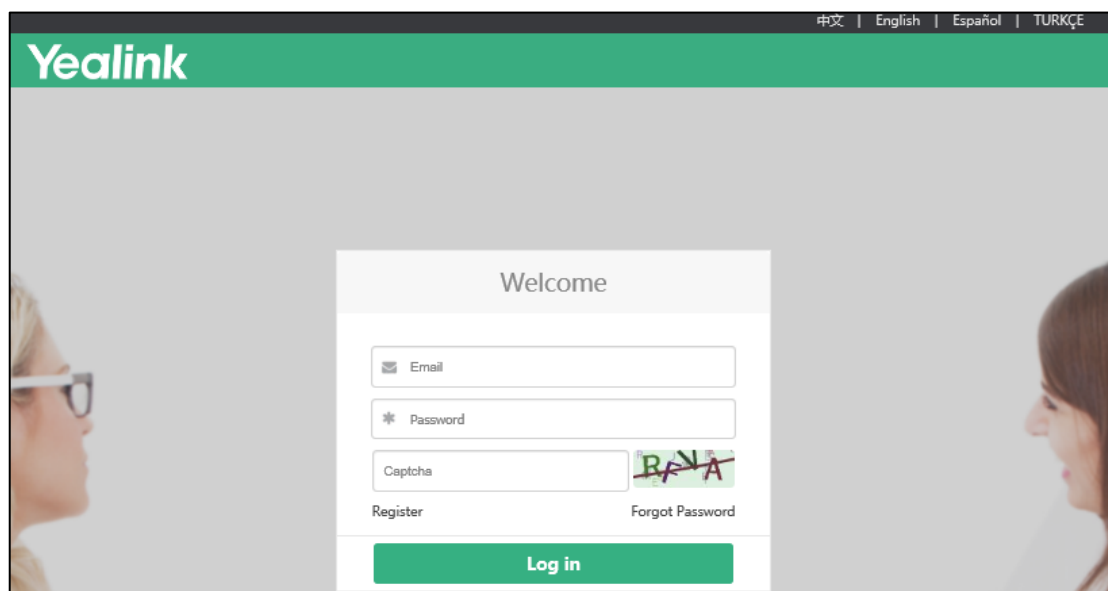
The opportunity registration system is displayed as below:



## Changing the Language

**To change the language:**

1. Click **中文**, **English**, **Español** or **TÜRKÇE** on the top right of the page, the page will be displayed in the selected language.



## Registering a SI Account

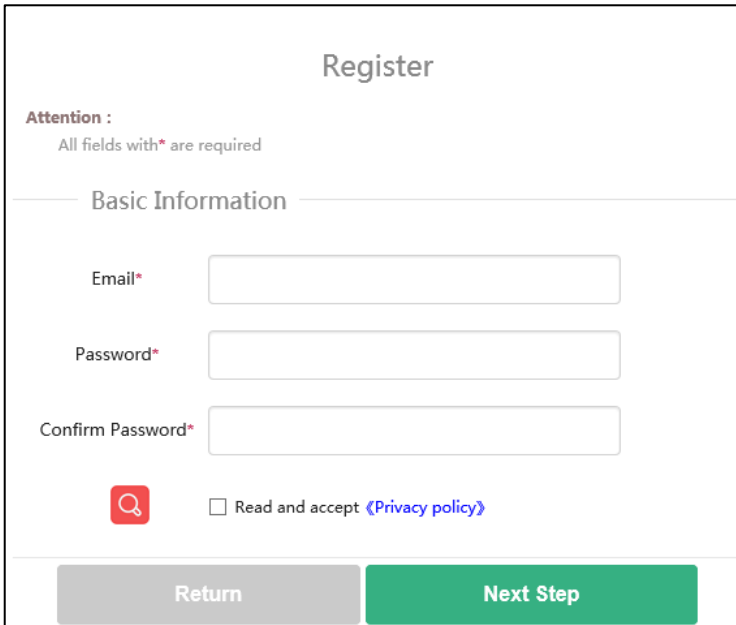
After you register a SI account, the product lines including Video, SIP and Microsoft certified Devices are opened by default.

**To register a SI account:**

1. Click **Register**.

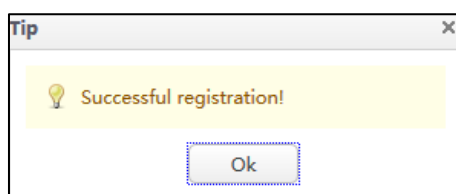


2. Configure the basic information.



The screenshot shows a registration form titled "Register". At the top, there is an "Attention" note: "All fields with\* are required". Below this is a section titled "Basic Information" containing three input fields: "Email\*", "Password\*", and "Confirm Password\*". Below the fields is a checkbox labeled "Read and accept" followed by a link to the "Privacy policy". At the bottom of the form are two buttons: "Return" (grey) and "Next Step" (green).

3. Click **Next Step** to continue or **Return** to back to the previous page.
4. 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 account managers/area managers or administrators can edit the country.
5. Click **Next Step** to continue or **Previous Step** to back to the previous page.
6. Confirm your registration information.
7. Click **Finish** to complete the registration.  
The page will prompt "Successful registration!"

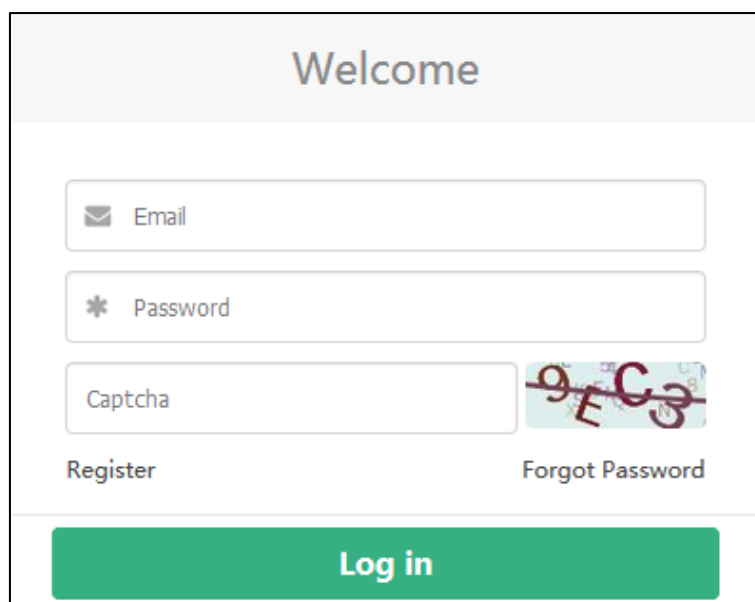


8. Click **Ok**.

## 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 form with the following elements:

- Header: "Welcome"
- Input fields: "Email" (with an envelope icon), "Password" (with an asterisk icon), and "Captcha" (with a captcha image showing "9FC3").
- Links: "Register" and "Forgot Password".
- Button: A large green "Log in" button at the bottom.

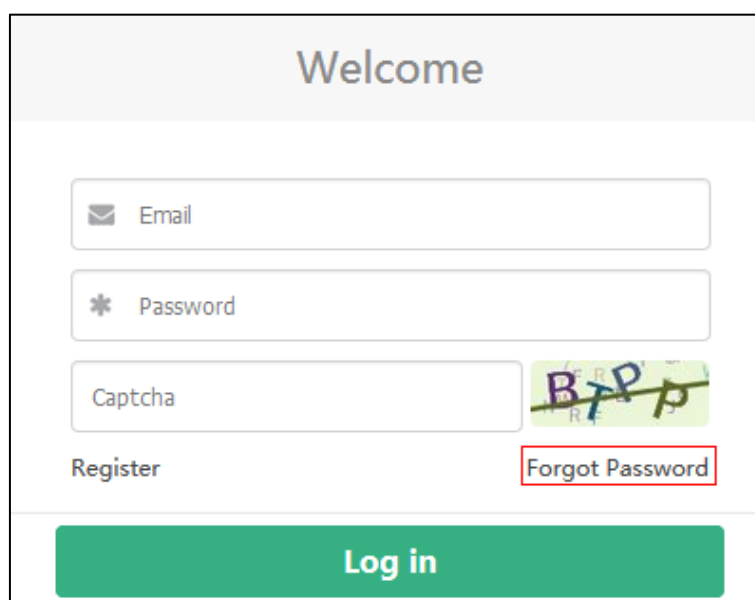
2. Click **Log in**.

## Forgetting Password

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

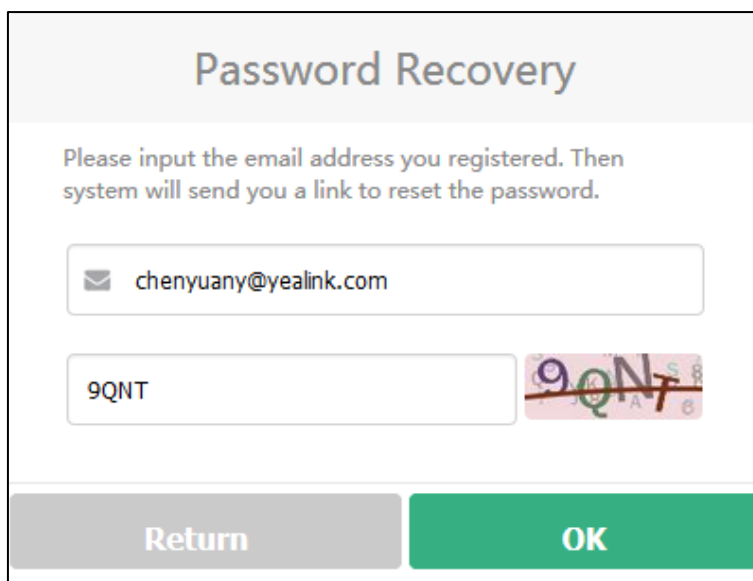
**To reset password:**

1. Click **Forgot password**.



The screenshot shows the same login form as above, but with the "Forgot Password" link highlighted with a red rectangular box.

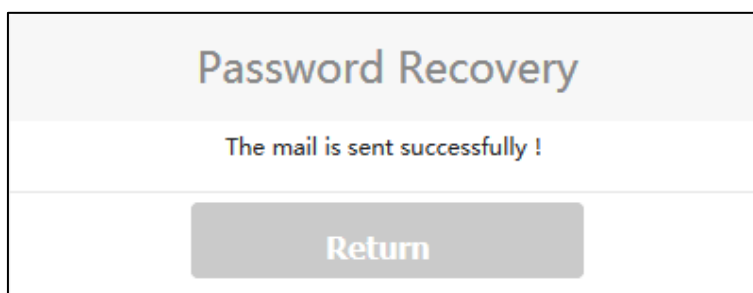
2. Enter your registered email and captcha in the corresponding field.



The screenshot shows a web form titled "Password Recovery". Below the title, there is a text instruction: "Please input the email address you registered. Then system will send you a link to reset the password." The form contains two input fields: the first is for an email address, with "chenyuany@yealink.com" entered; the second is for a CAPTCHA, with "9QNT" entered. To the right of the CAPTCHA input is a small image of a CAPTCHA with the characters "9QNT" overlaid on a background of letters and numbers. At the bottom of the form are two buttons: a grey "Return" button and a green "OK" button.

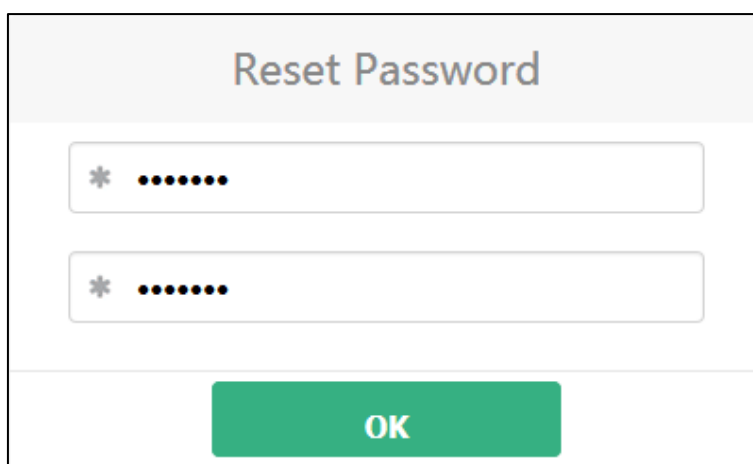
3. Click **OK**.

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



The screenshot shows a confirmation screen titled "Password Recovery". The main text in the center reads "The mail is sent successfully!". Below this text is a single grey "Return" button.

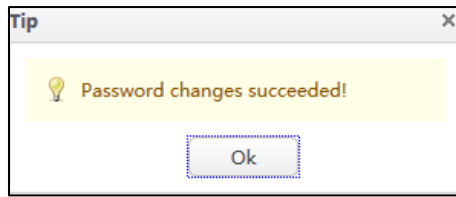
4. Log into your registered email and click the link to set a new password.
5. Enter the new password and re-enter the password to confirm.



The screenshot shows a web form titled "Reset Password". It contains two input fields for passwords, each with a small asterisk icon on the left and a series of dots representing masked characters. Below the input fields is a green "OK" button.

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, delete project or export project files via opportunity registration system.

Topics include:

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

## Adding Projects

**To add projects:**

1. Click **Register** in the menu bar.

The screenshot shows the 'Register' form in the Yealink system. The form is divided into several sections:

- Product Line:** A dropdown menu for selecting the product line.
- End User Information:** Fields for 'Enduser company name', 'VAT No', 'Country/Regions', 'State/Province', 'City', and 'Industry'.
- SI/Reseller Information:** A field for 'Distributor that you want to cooperate with'.
- Opportunity Information:** Radio buttons for 'New Project' and 'Existing opportunity Expansion'.

Buttons for 'Save' and 'Return' are located at the top right of the form.

2. Select the desired value from the pull-down list of **Product Line**.

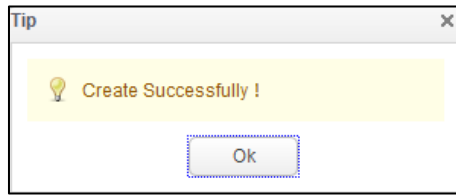
Note that the product line cannot be changed after you add a project. If you want to change it, contact your account manager/area manager.

3. Configure other 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.

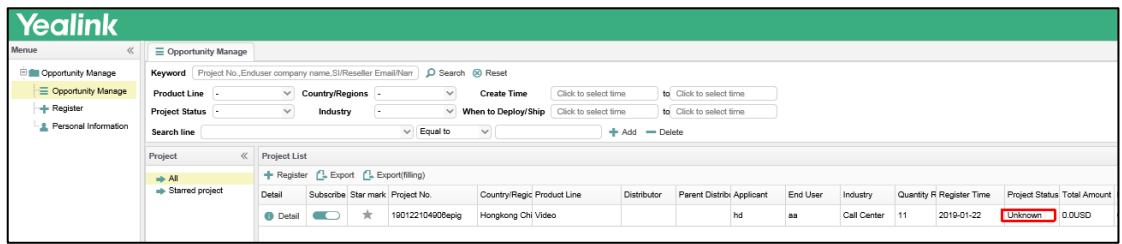
4. Click  to accept the change.

The page prompts "Create successfully!"



5. Click **Ok**.

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

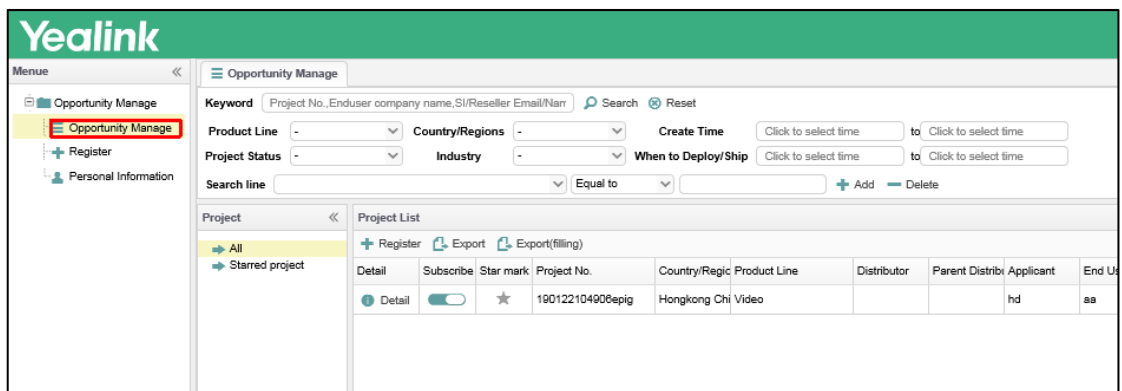


## Editing, Extending, Deleting Projects or Export Project Files from the Project Detail Page

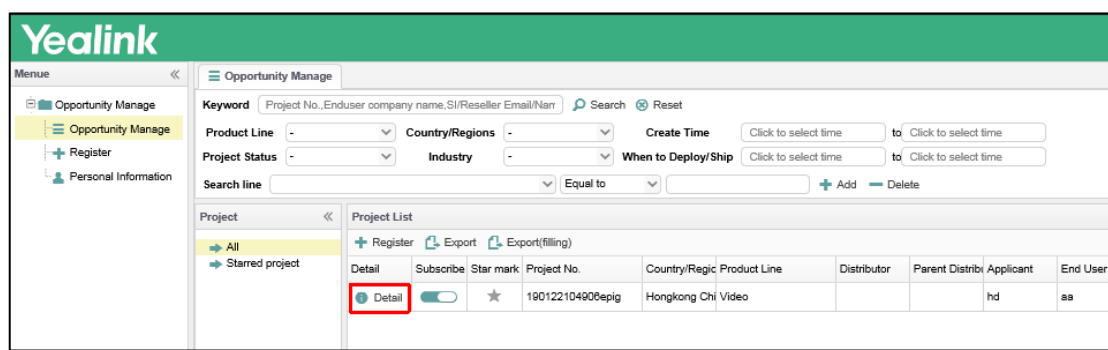
You can edit, extend and delete the project information from the Project Detail page. Extending a project means, for a past project, end-user needs to extend it as a new one.

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



1. Click **Opportunity Manage** in the menu bar.

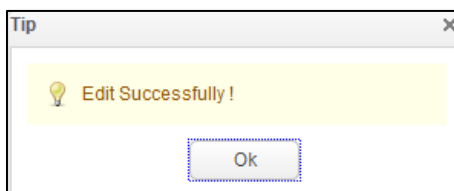


2. Click **Detail** to view the desired project.





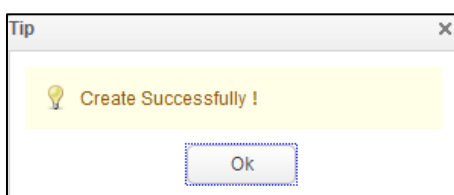
3. From the Project Detail page, you can:

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



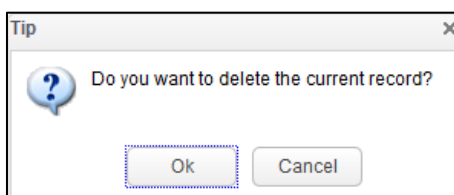
Click **Ok**.

- Click  **Extend** .  
Configure the 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** .



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

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

- Click  **Export** .

Click **Save** to save the project file.