# SRM – REGIONAL MANAGER USER GUIDE

# Revision History

| Sl.No | Version | Last Revised Date | Rationale | Reviewed by |
|---|---|---|---|---|
| 1 | 1.0 | 27/04/2024 | Initial Release | |
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# Contents



# Purpose

The purpose of this guide is to let Regional Manager know how to navigate various features available on SRM portal and use them to perform their daily activities.

# Prerequisites

Admin access to SRM portal

# SRM Portal Interface

The SRM portal constitutes of **6** modules and a **Home** page: **Company Leads, Placement Occurrences, Targets, Calendar, People, Tasks, and Reports**.

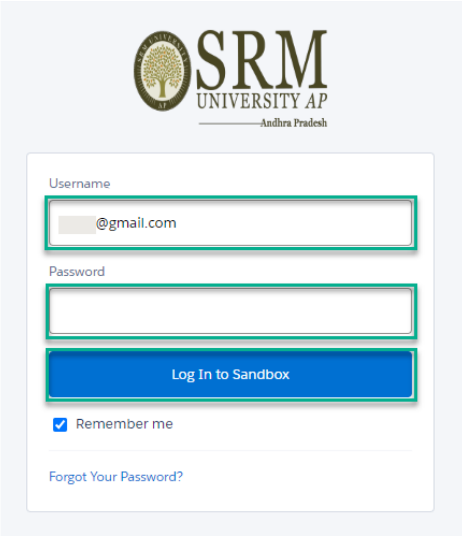
The **Quick Actions** feature covers: **Global Search**, **Favorite list**, **Global Actions**, **Guidance Center**, **Help**, **Setup**, **Notifications**, and **View Profile**.

# Home Page

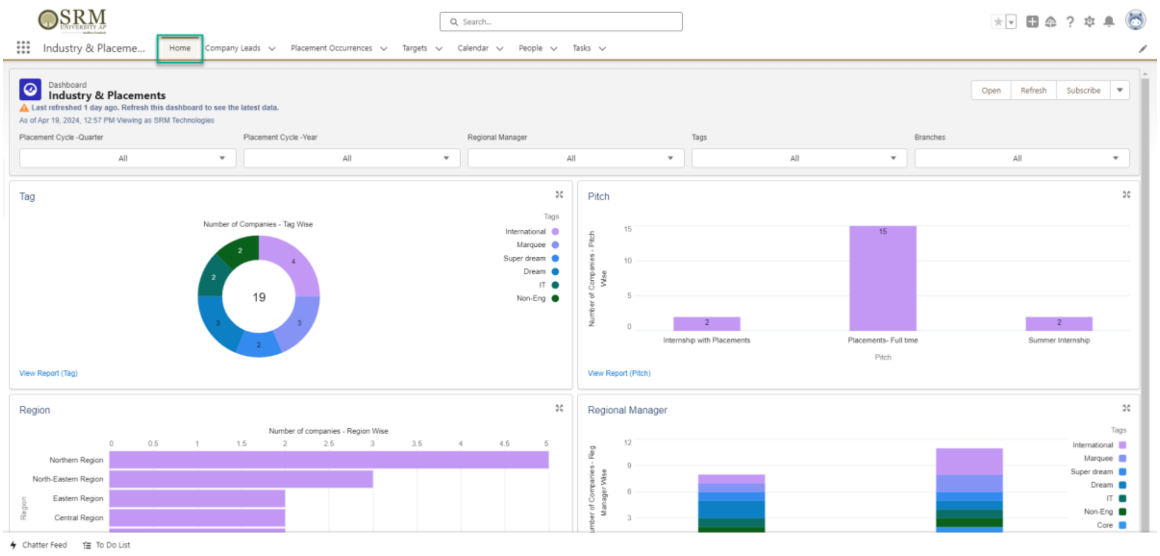
The **Home page** covers the **Dashboard** and **Targets**.

## Logging in to SRM University AP Portal

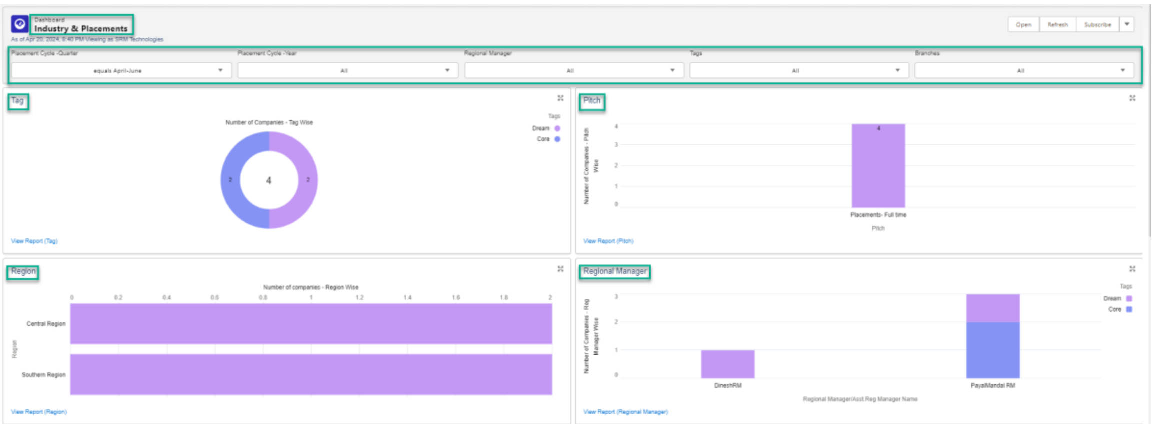
1. Navigate to **SRM University AP**
2. Enter the credentials **Username** and **Password** and click on Log In to Sandbox



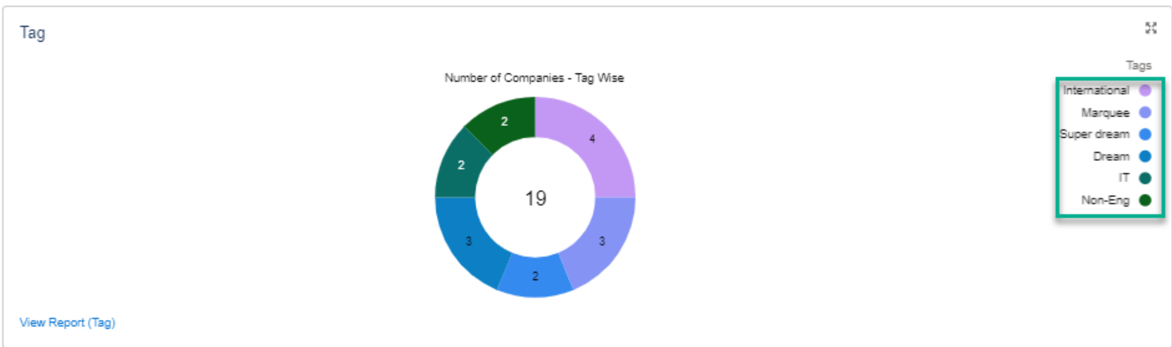

The **Home page** screen displays. On the Home page, you can see **Dashboard** and a few quick actions to **Create User** and **Create Targets**.




The **Dashboard** displays charts of **Tag**, **Pitch**, **Region**, and **Regional Manager** with various filters such as **Placement Cycle –Quarter**, **Placement Cycle –Year**, **Regional Manager**, **Tags**, and **Branches**.



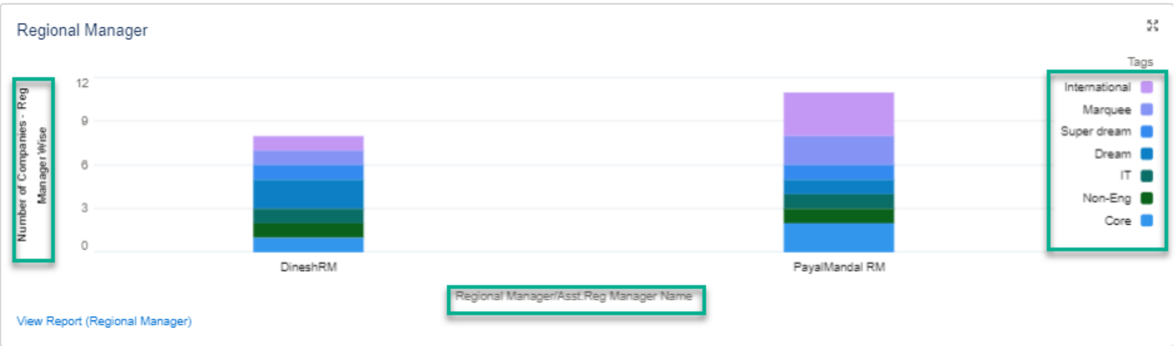
**Tag** - Tags are keywords or labels to facilitate categorization of **number of companies** as **International**, **Marquee**, **Super dream**, **Dream**, **IT**, or **Non-Eng**.



**Pitch** – Pitch is used to figure out the number of companies that offer **Internship with Placements, Placements – Full time, or Summer Internship**.

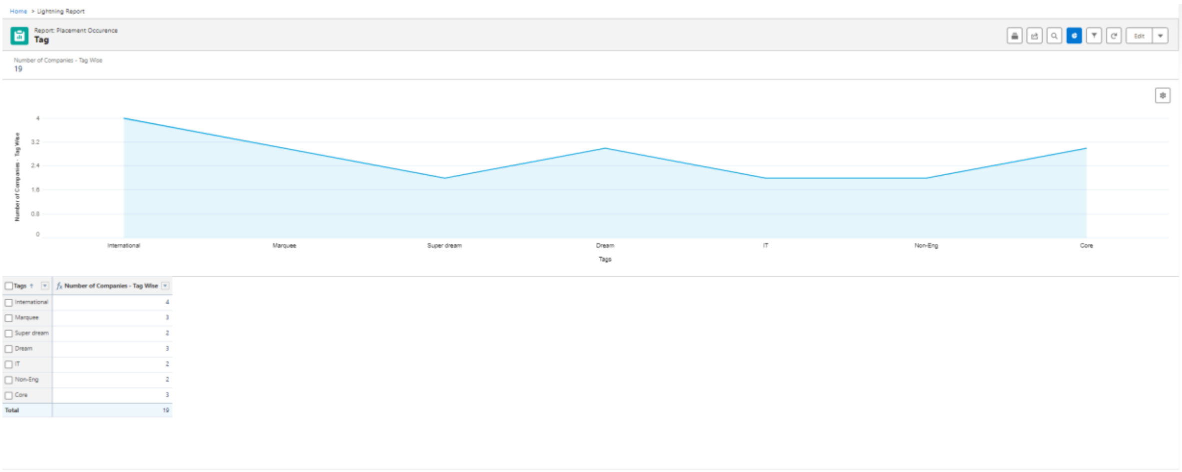

**Region** - The region denotes a geographical area (**Northern, North-Eastern, Eastern, Central, Western, or Southern regions**) within which certain activities or operations are conducted.


**Regional Manager** - The regional manager is an individual responsible for overseeing operations, activities, and personnel within a specific geographic region. They typically manage a team of employees, coordinate strategies, and ensure that organizational goals are met within their assigned region.



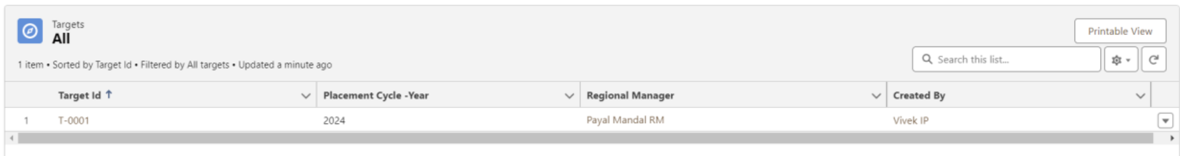

### Viewing the Reports:

- To view any report, click on View Report hyperlink. For example: To view **Tag Report**, click on View Report (Tag) hyperlink. **The Number of Companies – Tag Wise** report window displays.




- To view any **Chart** in Full screen, click on icon

**Targets** – This section displays Targets that have been created for different RM (s) or Asst. RM (s)




You can perform the following actions in this section:

- Click on **Target Id**, **Placement Cycle – Year**, **Regional Manager**, or **Created By** columns to sort by Ascending or Descending
- Click on **Printable View** to change the current view to Printable view where you can print the page
- Using **search bar**, search for any specific Target in the list
- You can click on icon to change any settings
- You click on icon to refresh the data

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## Quick Actions

**Global Search:** This field allows users to quickly find relevant information across the entire system by entering keywords or phrases. It provides a centralized search functionality that scans through all available data, including records, documents, discussions, and more.

**Favorite List:** This List feature enables users to bookmark and save frequently accessed items or records for quick reference. Users can add specific items, such as reports, records, dashboards, or pages, to their Favorite List with a single click.

**Global Actions:** These Actions are accessible commands or functionalities that are available from any screen or module within the system. These actions typically include commonly used operations such as creating new records, sending messages, initiating workflows, or performing system-wide updates.

**Guidance Center:** This Center serves as a centralized hub for accessing help resources, tutorials, documentation, and best practices within the system. It provides users with guidance and support to navigate the system effectively, troubleshoot issues, and maximize productivity.

**Help:** This feature provides users with access to comprehensive Salesforce documentation, tutorials, and support resources to assist them in using the system effectively.

**Notifications:** This feature alerts users about important events, updates, or actions within the system in real-time. Users receive notifications for activities such as new messages, task assignments, upcoming events, or changes to records they are following.

**View Profile:** This feature allows users to access and manage their personal profile information within the system. Users can view and edit details such as their name, contact information, preferences, and profile picture.

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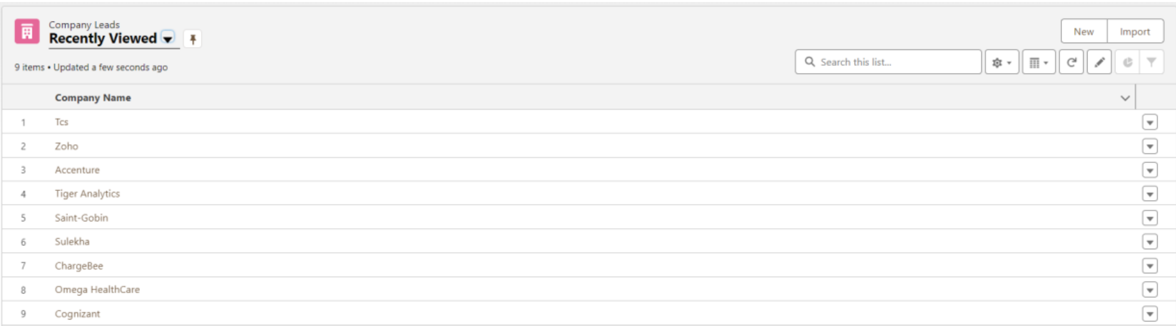
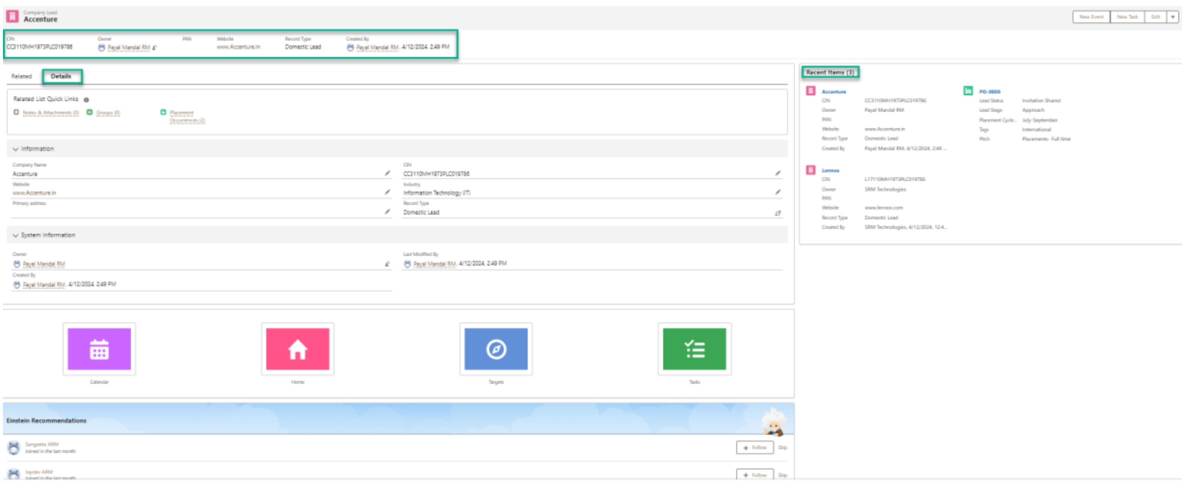
## Company Leads

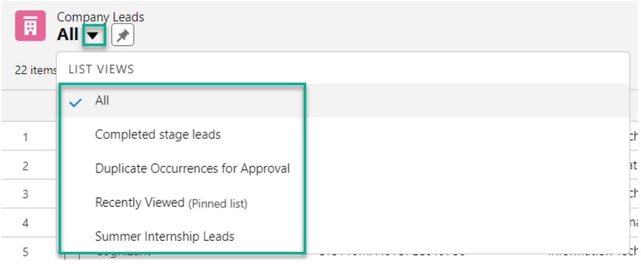
The **Company Leads** module is a comprehensive database that centralizes information of potential clients or partners. It allows users to record and manage details such as **CIN**, **Owner**, **PAN**, **Website**, **Record Type**, **Created By**, **Details**, and **Recent Items.**




You can open each company to view its **CIN**, **Owner**, **PAN**, **Website**, **Record Type**, **Created By**, **Details**, and **Recent Items**



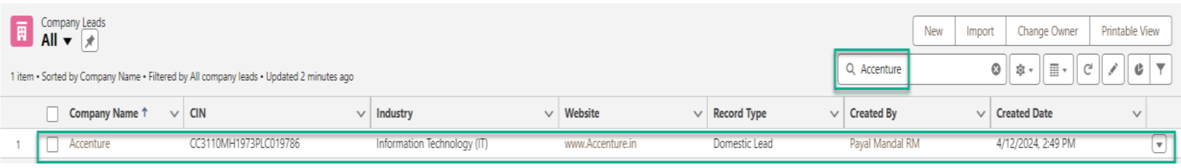
You can change the **View** from **View dropdown**




You can modify the Tabulated information as per your requirements using these features: **Search**, **Settings**, **List View**, **Refresh**, **Edit**, **Show Charts**, and **Filter**.

### Search

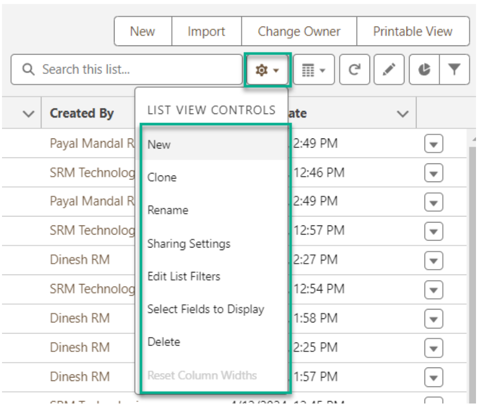
This feature is used to search for any existing information within the Table. In the search field, enter the desired **name** and hit **Enter** key. The result displays.




**Note**: You cannot search information related to these fields: **Website**, **Created Date**, **Created By**, and **Record Type** but you can sort and filter them.

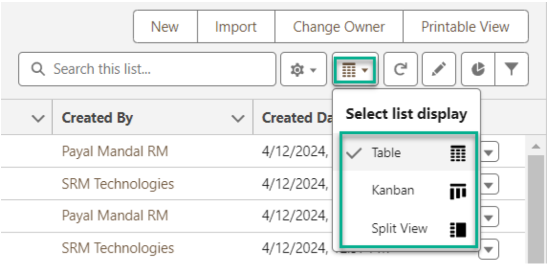
### Settings

Click icon to modify the **list settings** > select the desired option from the list to modify the settings




### Table View

Click icon to modify the **Table View** > select the desired option from the list to modify the **Table View**




**Refresh**

Click icon to refresh the table

**Edit**

Click icon to edit the table

**Show Charts**

Click icon to display the chart

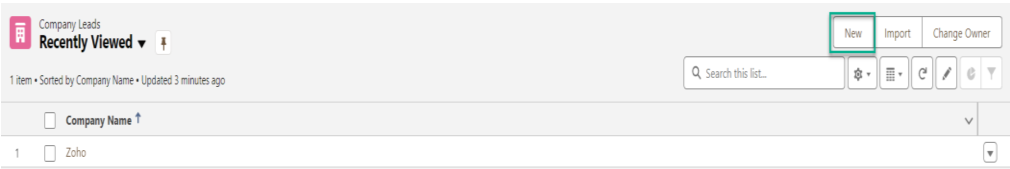
**Filter**

Click icon to filter the table

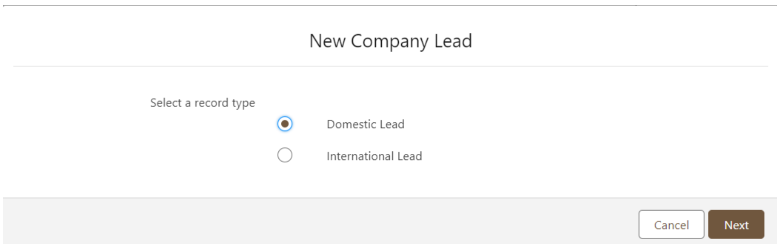
## Creating a New Company Lead

To create a **new company lead**, follow the steps below:

1. Click on **New** button



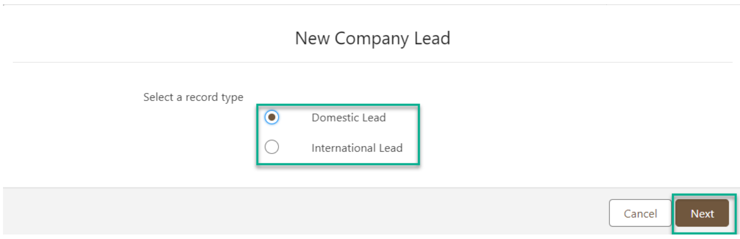

The **New Company Lead** dialog box displays




2. Select the desired **record type** and click **Next** button

   **Domestic Lead**: The Domestic Lead focuses specifically on potential clients or partners within the same country or geographic region.

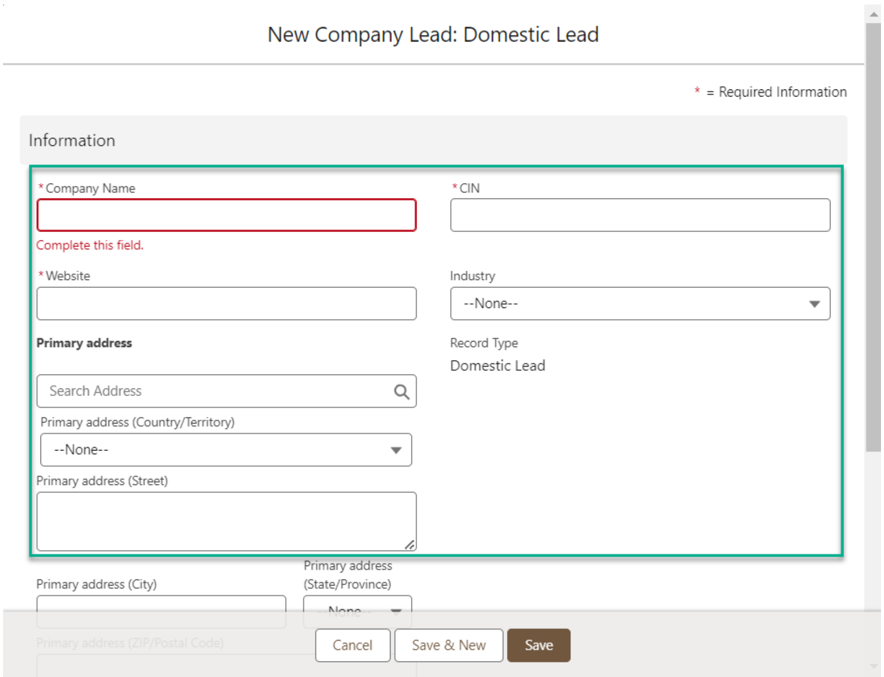
   **International Lead**: The International Lead focuses specifically on potential clients or partners from foreign countries or global markets.



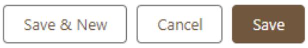

The **New Company Lead: Domestic Lead** dialog box displays

3. Fill in the following fields:

| Field | Description |
|---|---|
| **Company Name (*)** | This field serves as the primary identifier for the organization or entity. It is a mandatory field where users enter the official name of the company or business entity. |
| **CIN (*)** | This field is a unique identifier assigned to registered companies in certain jurisdictions. It is a mandatory field where users input the alphanumeric code or registration number issued by the relevant regulatory authority. |
| **Website (*)** | This field allows users to enter the official website address of the company. It is a mandatory field where users provide the URL (Uniform Resource Locator) linking to the company's online presence. |
| **Industry** | This field specifies the sector or category to which the company belongs. Users select or input the primary industry or industries in which the company operates, helping to categorize and classify its business activities. |
| **Primary Address** | This field captures the main physical location or mailing address of the company. It includes details such as street address, city, state/province, postal code, and country/territory. |
| **Primary Address (Country/Territory)** | This field specifically records the country or territory where the primary address of the company is located. |
| **Primary address (Street)** | This field contains the street name and number of the primary physical location of the company. Users input the street address where the company is situated. |
| **Primary address (City)** | This field records the name of the city or locality associated with the primary address of the company. Users enter the city where the company's main office or location is situated. |
| **Primary address (State/Province)** | This field specifies the state or province corresponding to the primary address of the company. Users select or input the state or province where the company's main office or location is situated. |
| **Primary address (ZIP/Postal Code)** | This field captures the postal code or ZIP code of the primary address of the company. Users enter the code associated with the area or region where the company is located, facilitating accurate mail delivery and geographic identification. |



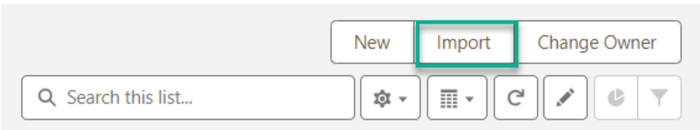

4. Click on **Save** button to save the lead, click on **Save & New** button to the current lead and start a new lead creation, or click on **Cancel** button to cancel the lead



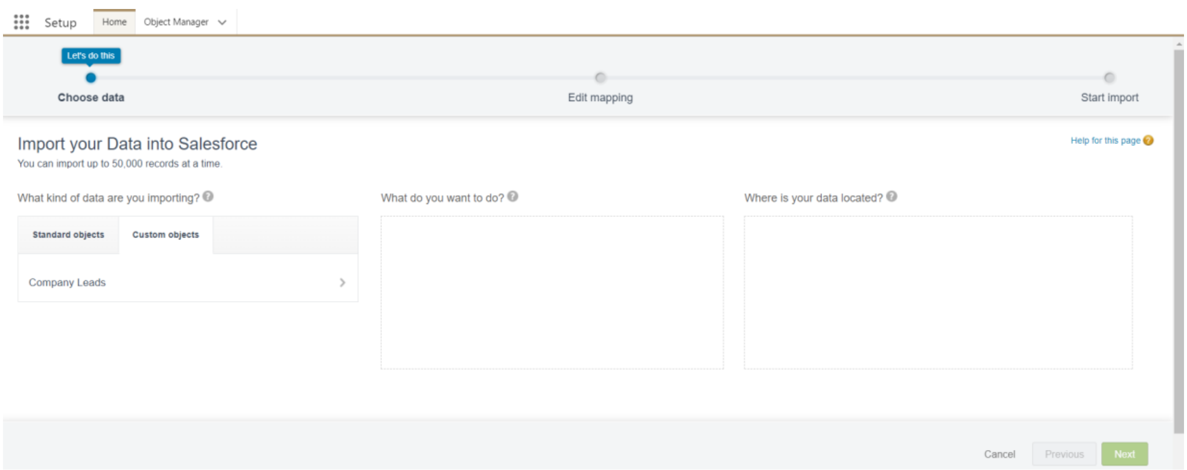

## Importing data

To **import data**, follow the steps below:

1. Click on **Import** button

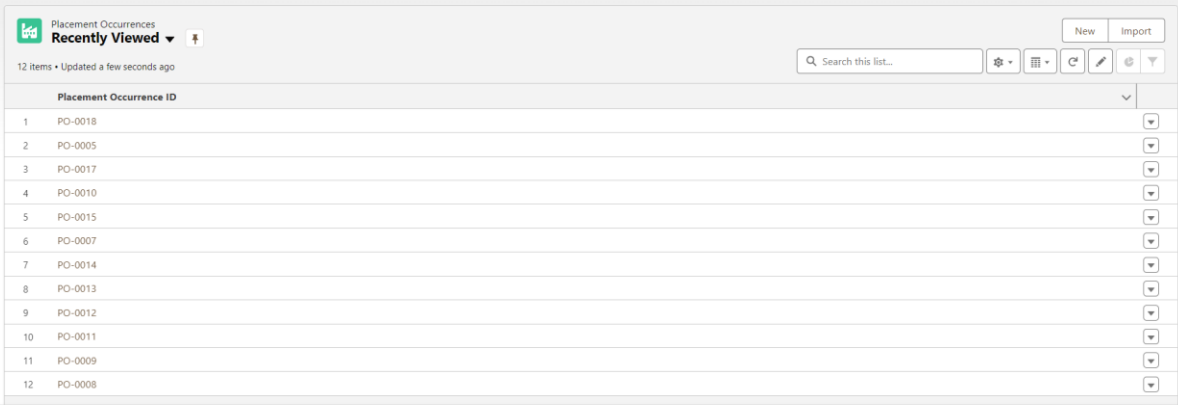



The Setup screen displays

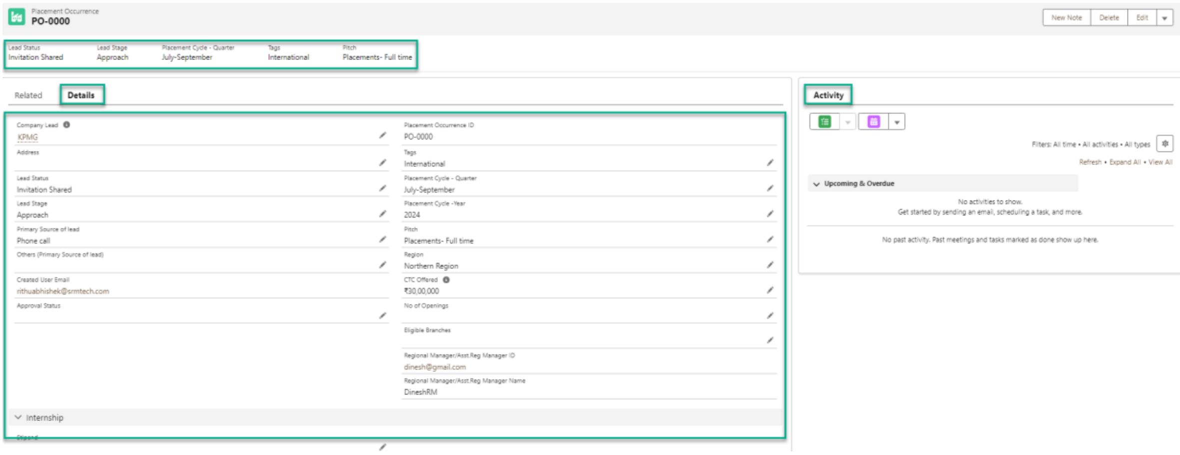


# Placement Occurrences

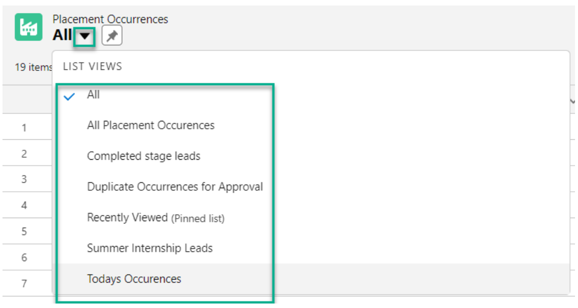
The Placement Occurrences module is designed to track instances where individuals are matched with opportunities, such as job placements, project assignments, or academic internships. It enables users to record details regarding the individual, the opportunity, start and end dates, status updates, and any relevant information.




You can open each Placement to view its **Lead Status**, **Lead Stage**, **Placement Cycle – Quarter**, **Tags**, **Pitch**, **Details**, and **Activity**

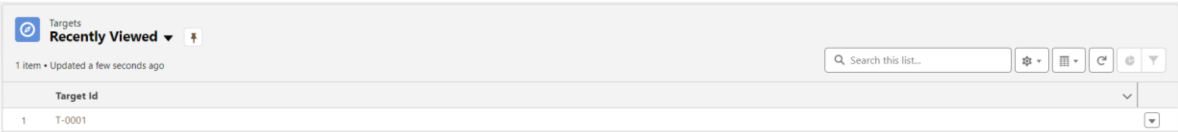



You can change the **View** from **View dropdown**



# Targets

The Targets module enables users to set and monitor specific goals, objectives, or key performance indicators (KPIs) for individuals, teams, or projects within the organization. Users can define target metrics, assign responsibilities, set deadlines, and track progress over time. By facilitating goal setting and tracking, this module supports performance management efforts, encourages accountability, and aligns efforts with organizational objectives.

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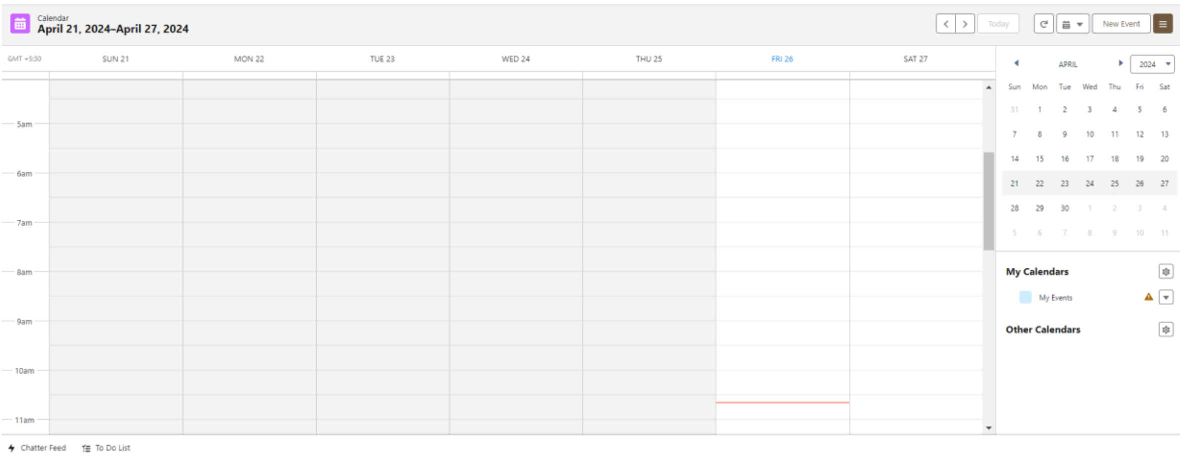
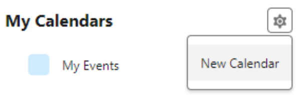
# Calendar

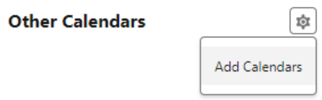
The Calendar module offers a visual representation of scheduled events, appointments, and deadlines. It allows users to view, create, edit, and manage their schedules efficiently. With features such as customizable views, reminders, and integration with other modules, the Calendar module helps users stay organized, prioritize tasks, and coordinate activities effectively. It serves as a central hub for managing time-sensitive activities and promoting productivity across the organization.




**New Event:** This feature empowers users to create and schedule new events, meetings, or appointments within the calendar system. Users can input essential details such as event title, date, time, location, description, and participant list.

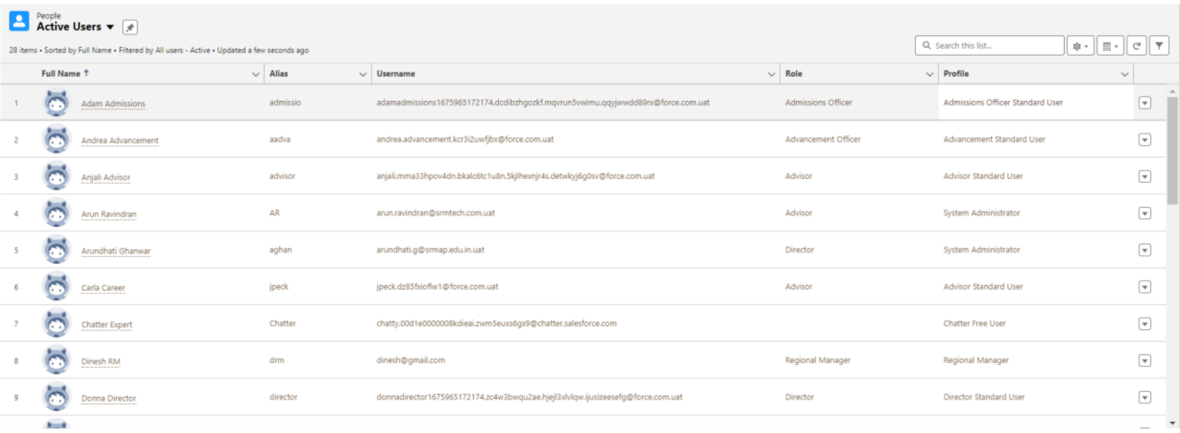



**New Calendar:** This feature allows users to create personalized calendars or schedule views tailored to their specific needs and preferences. Users can configure calendar settings, such as color-coding, time zones, and display options, to optimize their viewing experience.

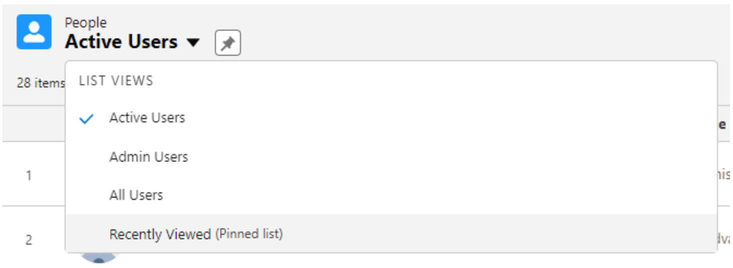



# People

The People module serves as a comprehensive database of individuals associated with the organization, including employees, clients, candidates, and contacts. It stores essential information such as contact details, roles, qualifications, employment history, and communication preferences. Users can search, filter, and update records easily, facilitating seamless communication, relationship management, and collaboration. The People module enhances efficiency in managing human resources and fostering meaningful connections with stakeholders.




You can change to desired **View** from **View dropdown**



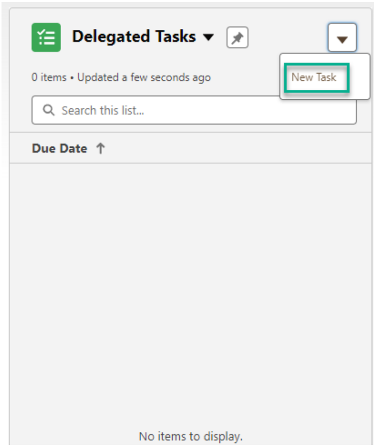

# Tasks

The Tasks module enables users to create, assign, prioritize, and track tasks and action items efficiently.

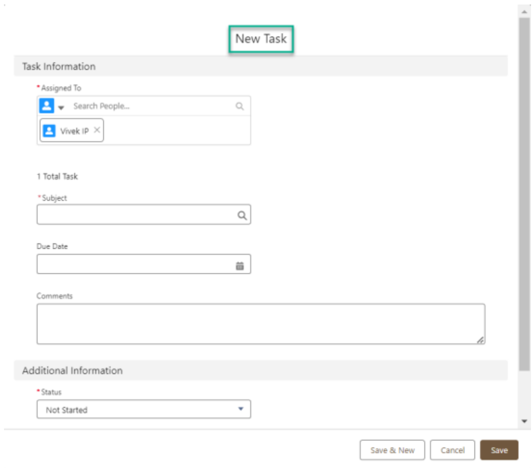
## Creating New Task

To **create a new task**, follow the steps below:

1. Click on **New Task**

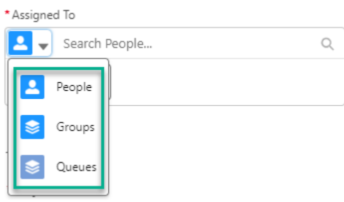



The **New Task** dialog box displays

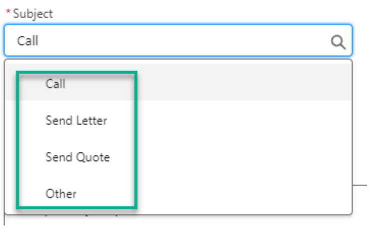



2. Fill in the following fields:

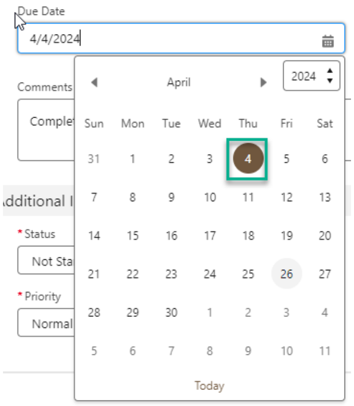
**Assigned To:** Select the desired **People/Groups/Queues** from the list



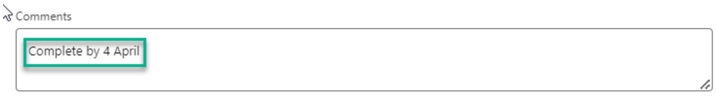

**Subject:** Select the desired from the list



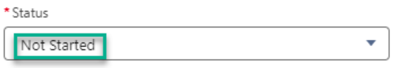
**Due Date:** Select the desired date




**Comments:** Enter the comment

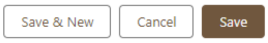



**Status:** Select the desired status from the list

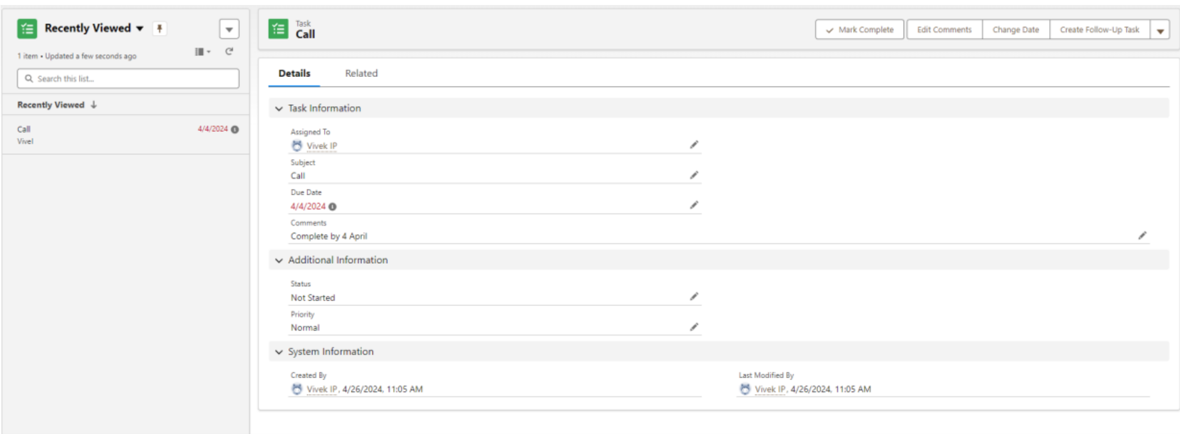



**Priority:** Select the desired Priority from the list


3. Click on **Save** button to save the lead, click on **Save & New** button to the current lead and start a new lead creation, or click on **Cancel** button to cancel the lead




You can view **Details** of the each **Task**




**Mark Complete:** This feature allows users to indicate the fulfilment or closure of a task, activity, or item within the system.

**Edit Comments:** This feature enables users to modify or update previously entered comments, notes, or annotations within the system.

**Change Date:** This feature allows users to modify the date or timestamp associated with a particular event, task, or record within the system.

**Create Follow-Up Task:** This feature enables users to generate new tasks or action items based on existing records, discussions, or activities within the system.