

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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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.**

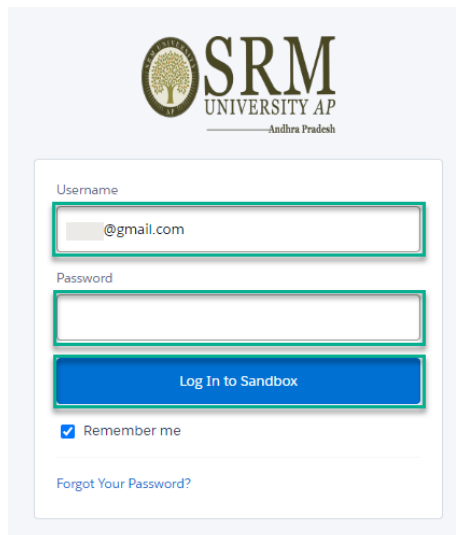
The **Quick Actions** feature covers: **Global Search, Favorite list, Global Actions, Guidance Center, Help, Setup, Notifications, and View Profile.**

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 image shows a login form for SRM University AP. At the top is the university's logo, which includes a circular emblem with a tree and the text 'SRM UNIVERSITY AP' and 'Andhra Pradesh'. Below the logo is a white rectangular box containing the login fields. It has a 'Username' label above a text input field containing '@gmail.com'. Below that is a 'Password' label above a password input field. A blue button labeled 'Log In to Sandbox' is positioned below the password field. Under the button is a checkbox labeled 'Remember me' which is checked. At the bottom of the box is a link that says 'Forgot Your Password?'.

SRM
UNIVERSITY AP
Andhra Pradesh

Username
@gmail.com

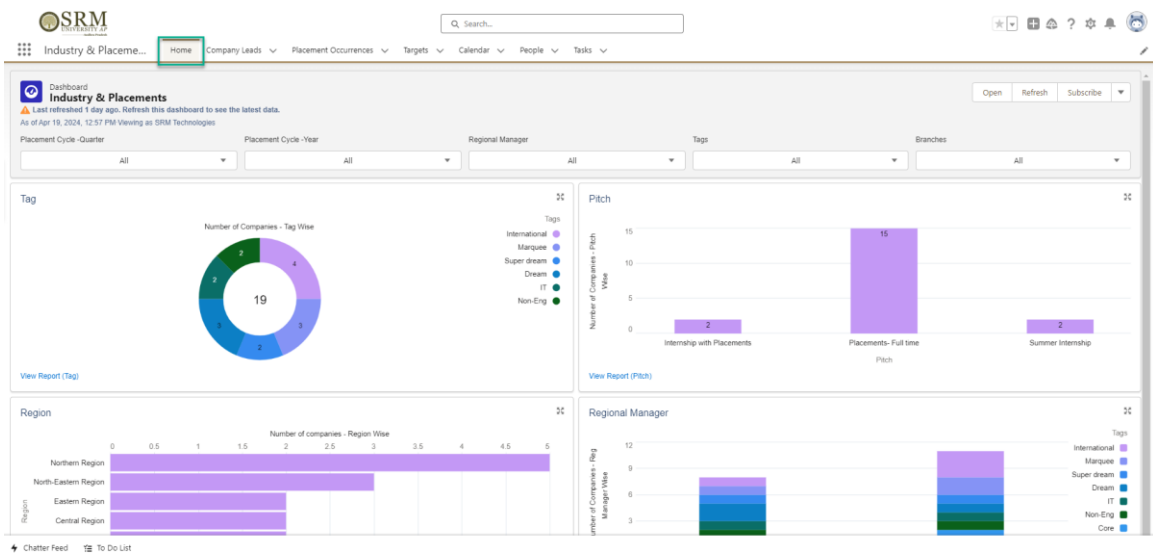
Password

Log In to Sandbox

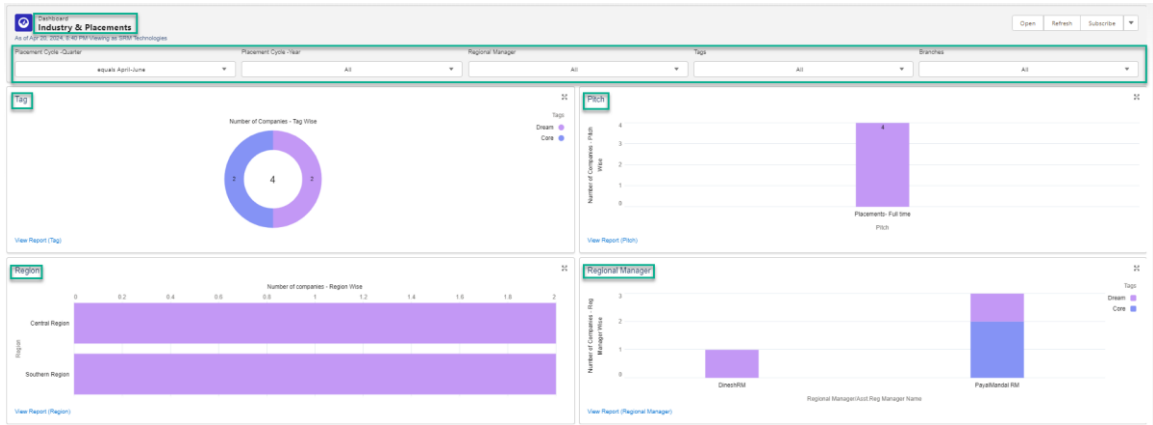
☒ Remember me

[Forgot Your Password?](#)

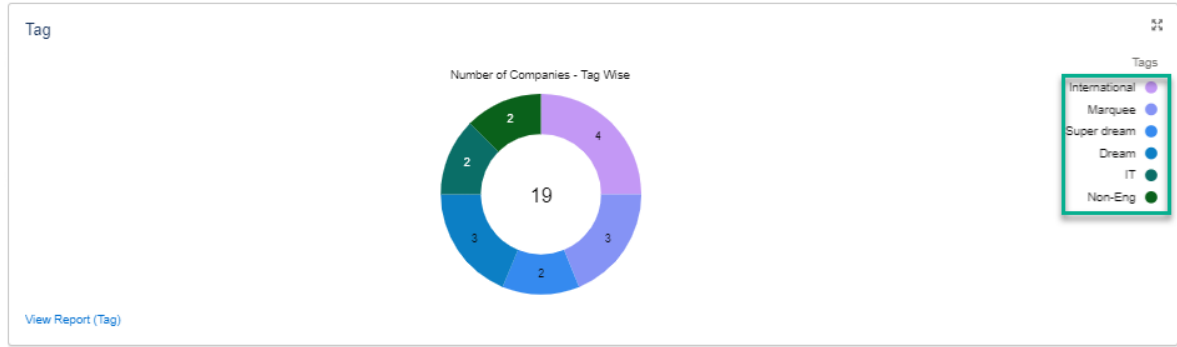
The **Home page** screen displays. On the Home page, you can see **Dashboard** and a few quick actions to **Create User** and **Create Targets.**



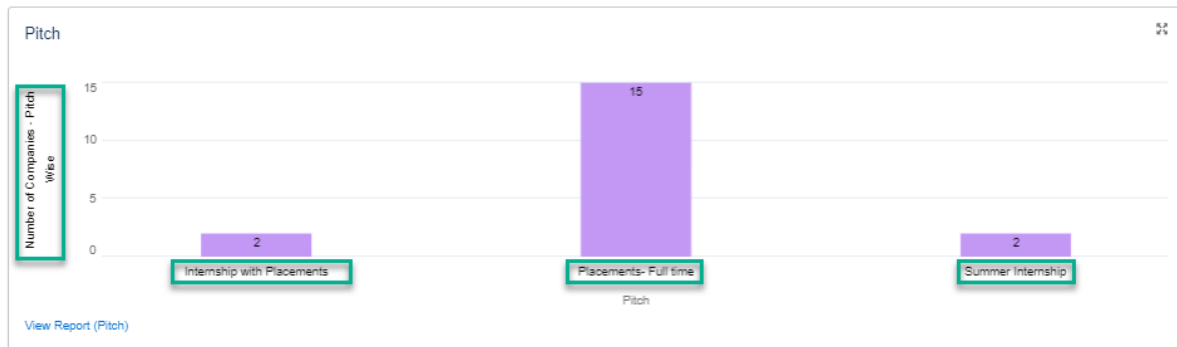
The **Dashboard** displays charts of **Tag**, **Pitch**, **Region**, and **Regional Manager** with various filters such as **Placement Cycle –Quarter**, **Placement Cycle –Year**, **Regional Manager**, **Tags**, and **Branches**.



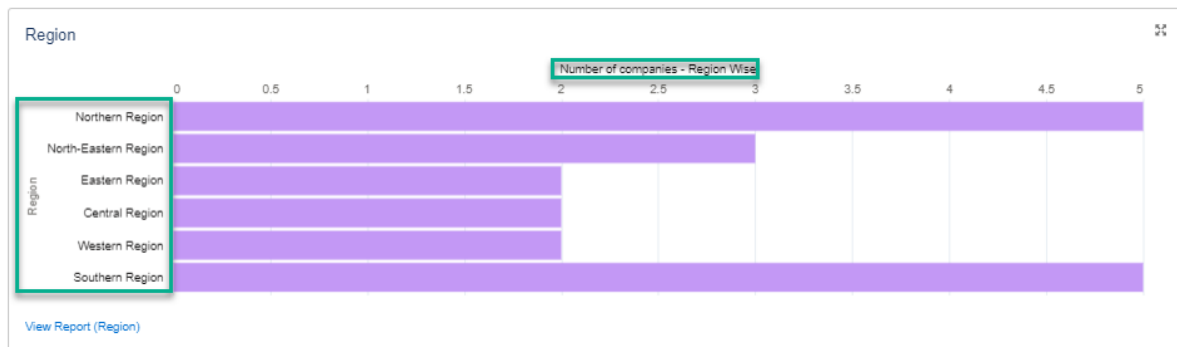
Tag - Tags are keywords or labels to facilitate categorization of **number of companies** as **International**, **Marquee**, **Super dream**, **Dream**, **IT**, or **Non-Eng**.



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.

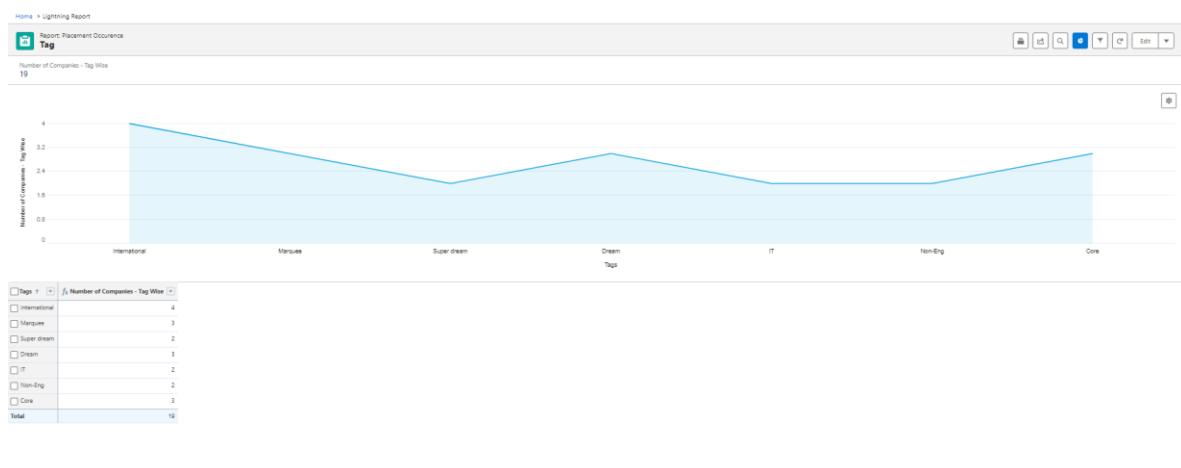


Regional Manager - The regional manager is an individual responsible for overseeing operations, activities, and personnel within a specific geographic region. They typically manage a team of employees, coordinate strategies, and ensure that organizational goals are met within their assigned region.



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)

Targets

1 item • Sorted by Target Id • Filtered by All targets • Updated a minute ago

Search this list...

Printable View

Target Id	Placement Cycle -Year	Regional Manager	Created By
1 T-0001	2024	Payal Mandal RM	Vivek IP

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

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.

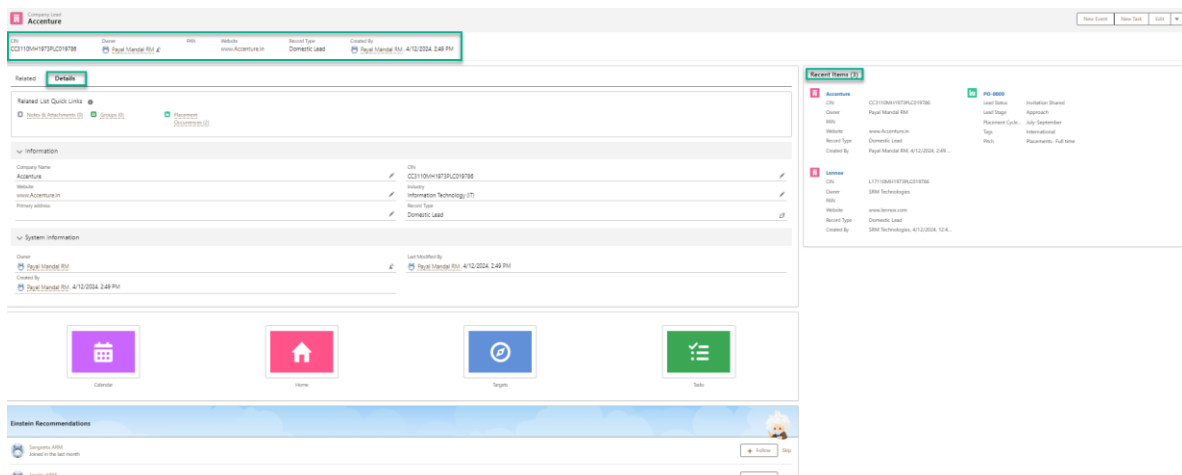
Company Leads

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**.



Company Leads		Recently Viewed		New Import	
9 items • Updated a few seconds ago		Search this list...			
Company Name					
1 Tcs					
2 Zoho					
3 Accenture					
4 Tiger Analytics					
5 Saint-Gobin					
6 Sulekha					
7 ChargeBee					
8 Omega HealthCare					
9 Cognizant					

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



Company Leads

Recently Viewed

9 items • Updated a few seconds ago

Search this list...

New Import

Company Name	
1 Tcs	
2 Zoho	
3 Accenture	
4 Tiger Analytics	
5 Saint-Gobin	
6 Sulekha	
7 ChargeBee	
8 Omega HealthCare	
9 Cognizant	

Company Leads

Details

CC110A4H5T0P2U19T8

Owner: Rajat Mandal

CIN: CC110A4H5T0P2U19T8

Website: www.accenture.in

Record Type: Domestic Lead

Created By: Rajat Mandal

4/12/2024 2:48 PM

Recent

Details

Recent List Quick Links

Info & Documents

Placement Documents

Information

Company Name: Accenture

CIN: CC110A4H5T0P2U19T8

Website: www.accenture.in

Record Type: Domestic Lead

Created By: Rajat Mandal

4/12/2024 2:48 PM

System Information

Owner: Rajat Mandal

Created By: Rajat Mandal

4/12/2024 2:48 PM

Recent Items

Recent Items List

Item 1

Item 2

Item 3

Item 4

Item 5

Item 6

Item 7

Item 8

Item 9

Item 10

Item 11

Item 12

Item 13

Item 14

Item 15

Item 16

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Item 996

Item 997

Item 998

Item 999

Item 1000

Calendar

Home

Target

Tools

Einstein Recommendations

Company A

Company B

Company C

Company D

Company E

Company F

Company G

Company H

Company I

Company J

Company K

Company L

Company M

Company N

Company O

Company P

Company Q

Company R

Company S

Company T

Company U

Company V

Company W

Company X

Company Y

Company Z

Company AA

Company AB

Company AC

Company AD

Company AE

Company AF

Company AG

Company AH

Company AI

Company AJ

Company AK

Company AL

Company AM

Company AN

Company AO

Company AP

Company AQ

Company AR

Company AS

Company AT

Company AU

Company AV

Company AW

Company AX

Company AY

Company AZ

Company BA

Company BB

Company BC

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Company BW

Company BX

Company BY

Company BZ

Company CA

Company CB

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Company CI

Company CJ

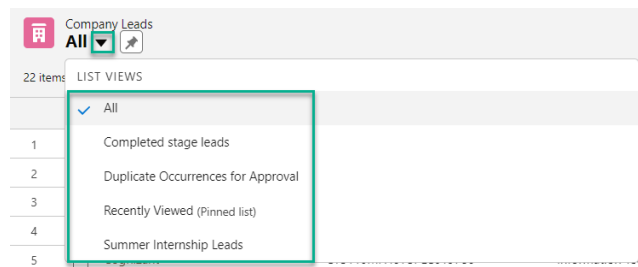
Company CK

Company CL

Company CM

Company CN</

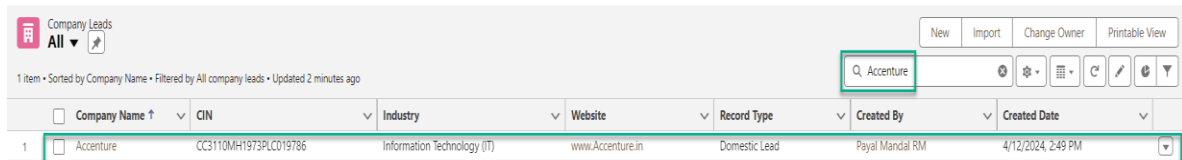
You can change the **View** from **View dropdown**



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

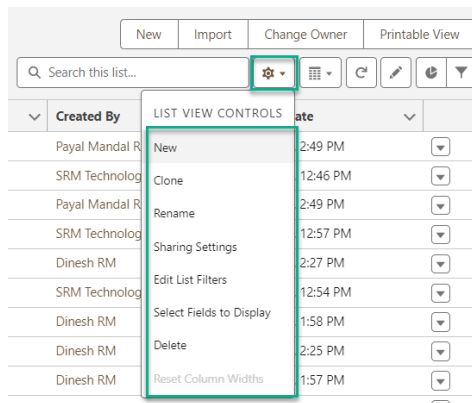

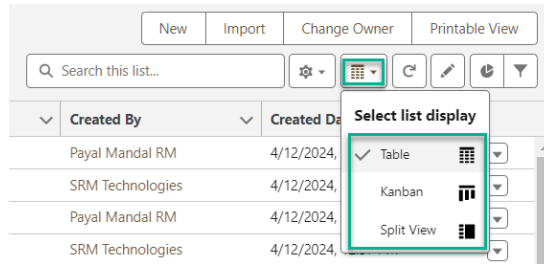



Table View


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

New Company Lead

Select a record type

☒ Domestic Lead
☐ International Lead

Cancel
Next

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.

New Company Lead

Select a record type

☒ Domestic Lead

☐ International Lead

Cancel

Next

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.

New Company Lead: Domestic Lead

* = Required Information

Information

* Company Name

Complete this field.

* CIN

* Website

Industry
--None--

Primary address

Search Address

Primary address (Country/Territory)
--None--

Primary address (Street)

Primary address (City)

Primary address (State/Province)
--None--

Primary address (ZIP/Postal Code)

Record Type
Domestic Lead

- 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:

- Click on **Import** button

The Setup screen displays

Setup
Home
Object Manager

Let's do this

Choose data
Edit mapping
Start import

Import your Data into Salesforce
You can import up to 50,000 records at a time.

What kind of data are you importing?

Standard objects
Custom objects

Company Leads

What do you want to do?

Where is your data located?

Cancel
Previous
Next

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.

Placement Occurrence ID	
1	PO-0018
2	PO-0005
3	PO-0017
4	PO-0010
5	PO-0015
6	PO-0007
7	PO-0014
8	PO-0013
9	PO-0012
10	PO-0011
11	PO-0009
12	PO-0008

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

Placement Occurrence PO-0000

Lead Status: Invitation Shared | Lead Stage: Approach | Placement Cycle - Quarter: July-September | Type: International | Pitch: Placements- Full time

Related: Details

Company Lead: KPMG | Address: | Lead Status: | Invitation Shared: | Lead Stage: | Approach: | Primary Source of lead: | Phone call: | Others (Primary Source of lead): | Created User Email: rithuabhishek@comtech.com | Approval Status: | Placement Occurrence ID: PO-0000 | Type: International | Placement Cycle - Quarter: July-September | Placement Cycle - Year: 2024 | Pitch: Placements- Full time | Region: Northern Region | CTC Offered: ₹30,00,000 | No of Openings: | Eligible Branches: | Regional Manager/Host Reg Manager ID: dimesh@gmail.com | Regional Manager/Host Reg Manager Email: dimesh@gmail.com | Regional Manager/Host Reg Manager Name: DimeshRaj

Activity

Filters: All time • All activities • All types

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

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

Placement Occurrences

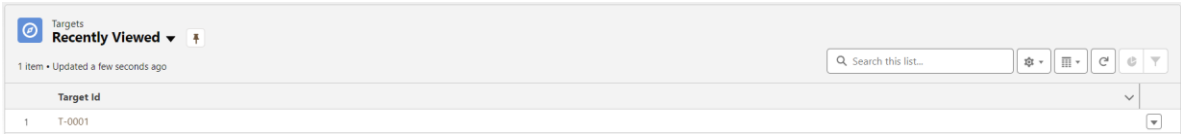
19 items

LIST VIEWS

- ✓ All
- Completed stage leads
- Duplicate Occurrences for Approval
- Recently Viewed (Pinned list)
- Summer Internship Leads
- Todays Occurrences

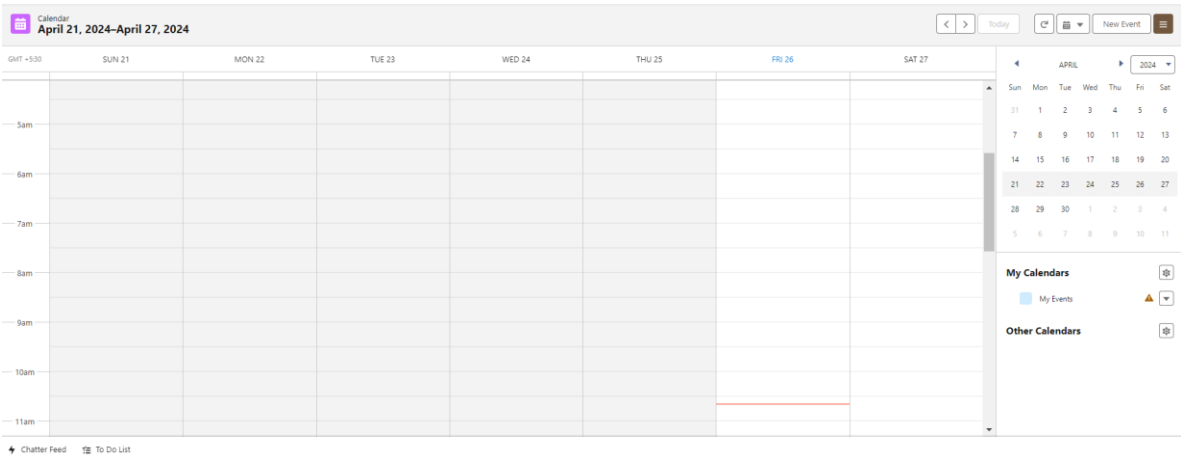
Targets

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.

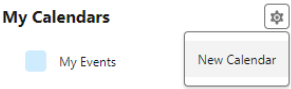


Calendar

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.



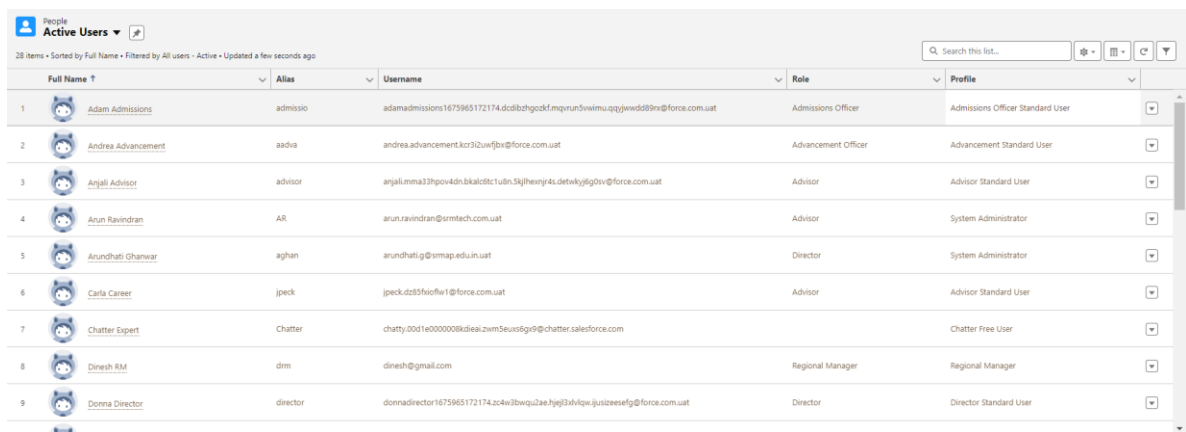
New Calendar: This feature allows users to create personalized calendars or schedule views tailored to their specific needs and preferences. Users can configure calendar settings, such as color-coding, time zones, and display options, to optimize their viewing experience.

Other Calendars

Add Calendars

People

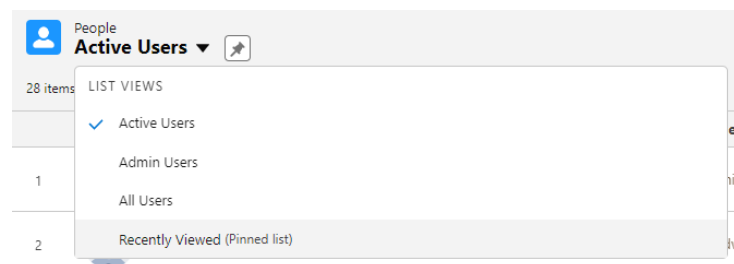
The People module serves as a comprehensive database of individuals associated with the organization, including employees, clients, candidates, and contacts. It stores essential information such as contact details, roles, qualifications, employment history, and communication preferences. Users can search, 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.



The screenshot displays the 'People' module interface. At the top, there's a header with 'People' and 'Active Users' (with a dropdown arrow). Below this, a sub-header indicates '28 items • Sorted by Full Name • Filtered by All users • Active • Updated a few seconds ago'. A search bar labeled 'Search this list...' is on the right. The main content is a table with columns: Full Name, Alias, Username, Role, and Profile. The table lists 9 users, each with a profile picture icon, a name, an alias, a username, a role, and a profile type. A dropdown arrow is visible at the end of each row.

	Full Name	Alias	Username	Role	Profile
1	Adam Admissions	admisio	adamadmissions1675965172174.dcbzghgcof.mqrunbwmu.qgyjwdd89n@force.com.uat	Admissions Officer	Admissions Officer Standard User
2	Andrea Advancement	aadvia	andrea.advancement.kcr3i2uafjv@force.com.uat	Advancement Officer	Advancement Standard User
3	Anjali Advisor	advisor	anjali.mma33hpov4dn.bkalddtctubn.5kjthevj4s.detwkyjg0v@force.com.uat	Advisor	Advisor Standard User
4	Arun Ravindran	AR	arun.ravindran@srmaptech.com.uat	Advisor	System Administrator
5	Arundhati Ghanwar	aghan	arundhati.g@smmap.edu.in.uat	Director	System Administrator
6	Carla Career	jpeck	jpeck.dz85fioffw1@force.com.uat	Advisor	Advisor Standard User
7	Chatter Expert	Chatter	chatty.00e1e0000008kldeai.zvm5eoursgr@chatter.salesforce.com		Chatter Free User
8	Dinesh RM	dirm	dinesh@gmail.com	Regional Manager	Regional Manager
9	Donna Director	director	donnadirector1675965172174.zc4w3bwqu2ae.hjej34vlqw.juizeesefg@force.com.uat	Director	Director Standard User

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



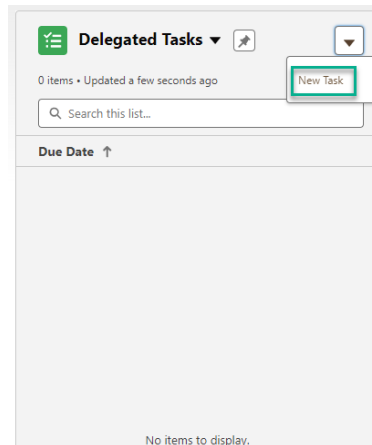
Tasks

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

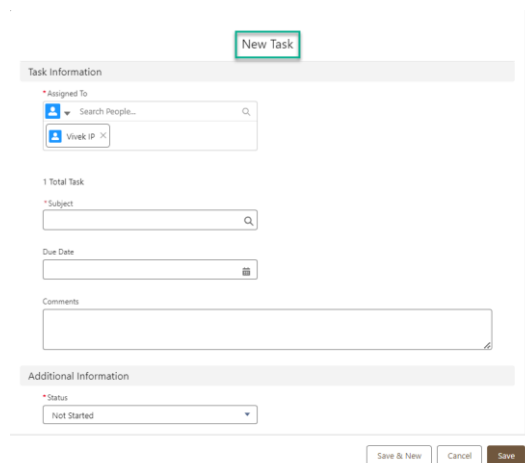
Creating New Task

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

1. Click on **New Task**

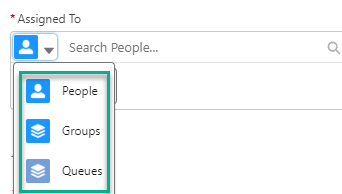


The **New Task** dialog box displays

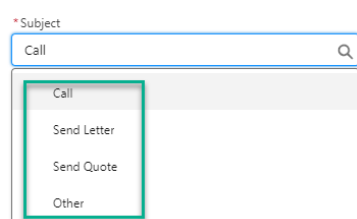
A screenshot of the 'New Task' dialog box. It has a title bar with a 'New Task' button. The dialog is divided into sections: 'Task Information' and 'Additional Information'. Under 'Task Information', there's an 'Assigned To' field with a dropdown arrow and a search bar, showing 'Vivek (P)' selected. Below that is a '1 Total Task' section with a 'Subject' field and a 'Due Date' field. There's also a 'Comments' text area. Under 'Additional Information', there's a 'Status' dropdown menu showing 'Not Started'. At the bottom right, there are three buttons: 'Save & New', 'Cancel', and 'Save'.

2. Fill in the following fields:

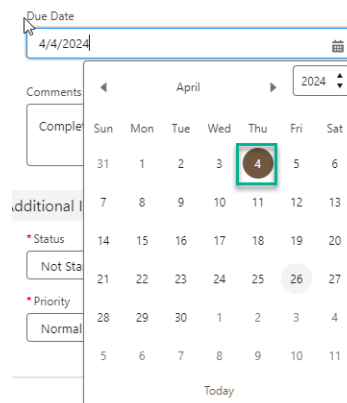
Assigned To: Select the desired **People/Groups/Queues** from the list



Subject: Select the desired from the list



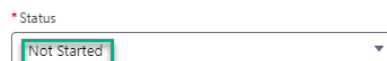
Due Date: Select the desired date




Comments: Enter the comment



Status: Select the desired status from the list



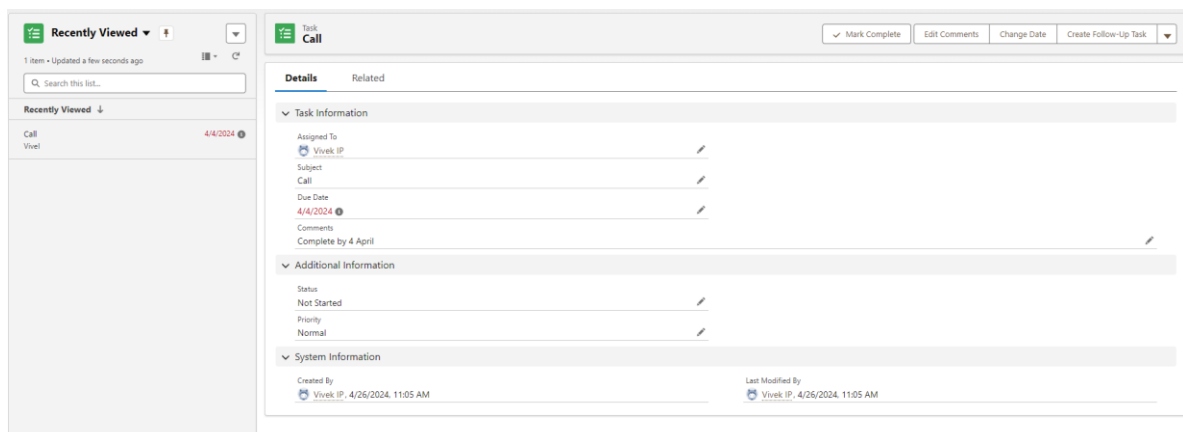
Priority: Select the desired Priority from the list



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.
