SRM – ADMIN USER GUIDE

Revision History

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

Contents

Purpose

The purpose of this guide is to let Admin user 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**.

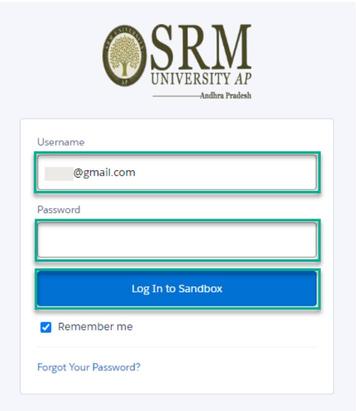
The **Quick Actions** feature covers: **Global Search**, **Favorite list**, **Global Actions**, **Guidance Center**, **Help**, **Setup**, **Notifications**, and **View Profile**.

Home Page

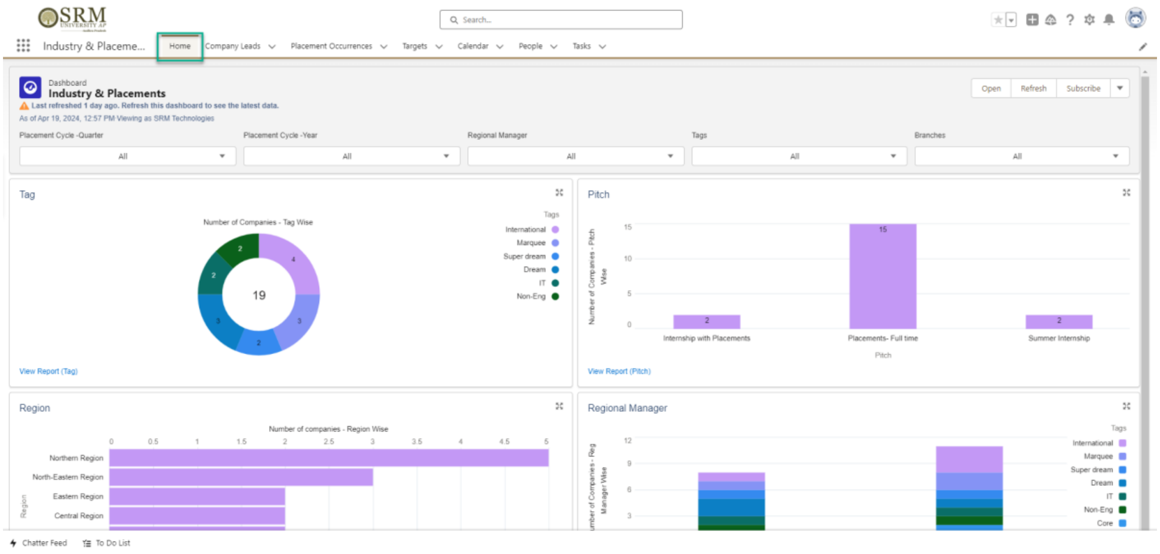
The **Home page** covers the **Dashboard**, **Targets**, **Create User**, and **Create Targets**.

Logging in to SRM University AP Portal

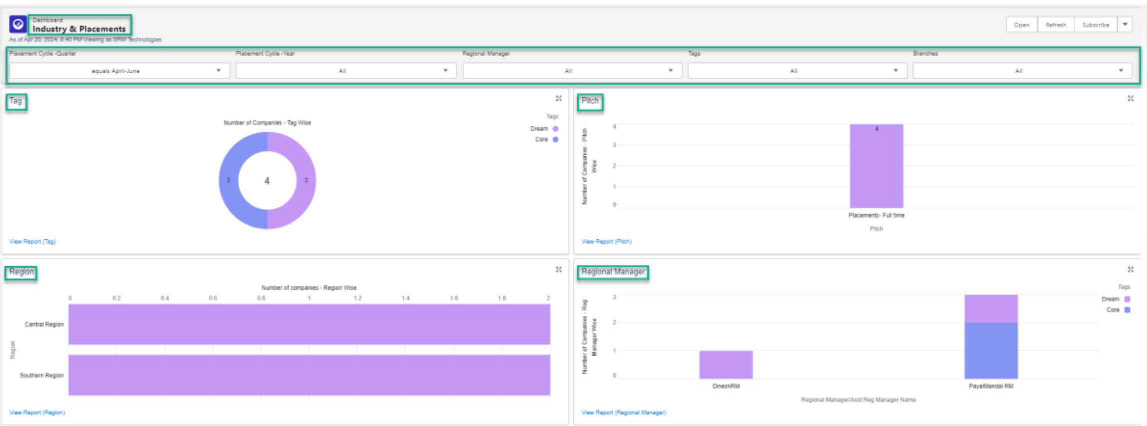
1. Navigate to **SRM University AP**
2. Enter the credentials **Username** and **Password** and click on Log In to Sandbox



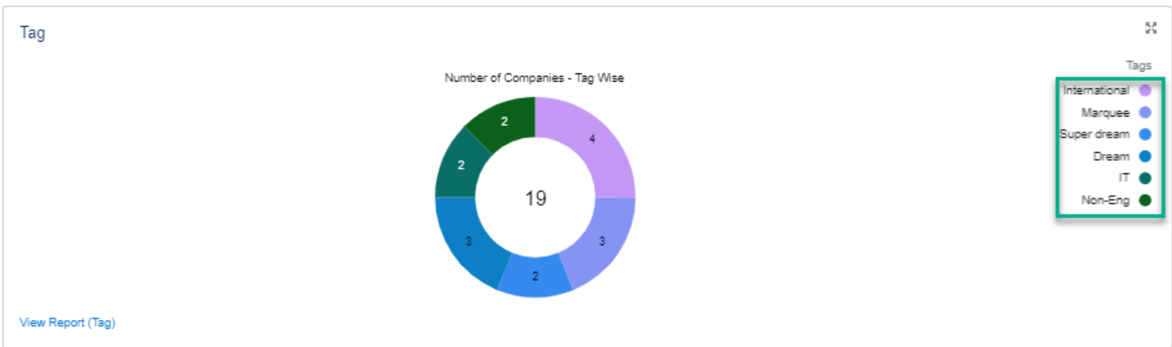
The **Home page** screen displays. On the Home page, you can see **Dashboard** and a few quick actions to **Create User** and **Create Targets**.



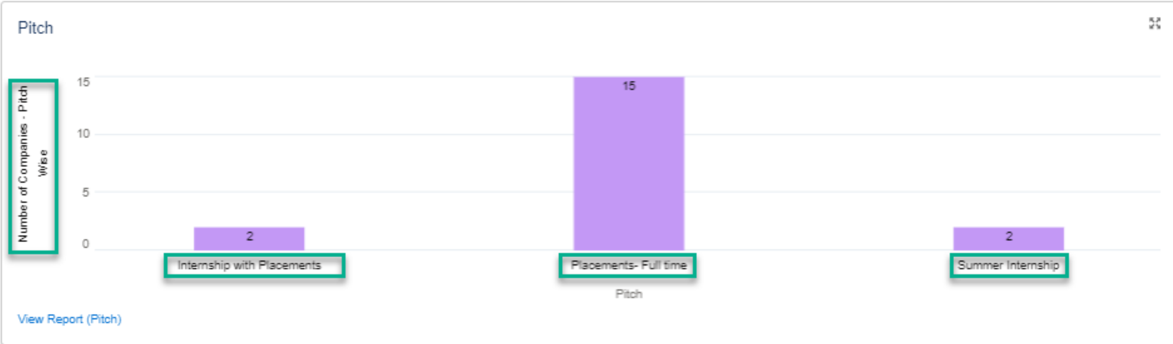
The **Dashboard** displays charts of **Tag**, **Pitch**, **Region**, and **Regional Manager** with various filters such as **Placement Cycle –Quarter**, **Placement Cycle –Year**, **Regional Manager**, **Tags**, and **Branches**.



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

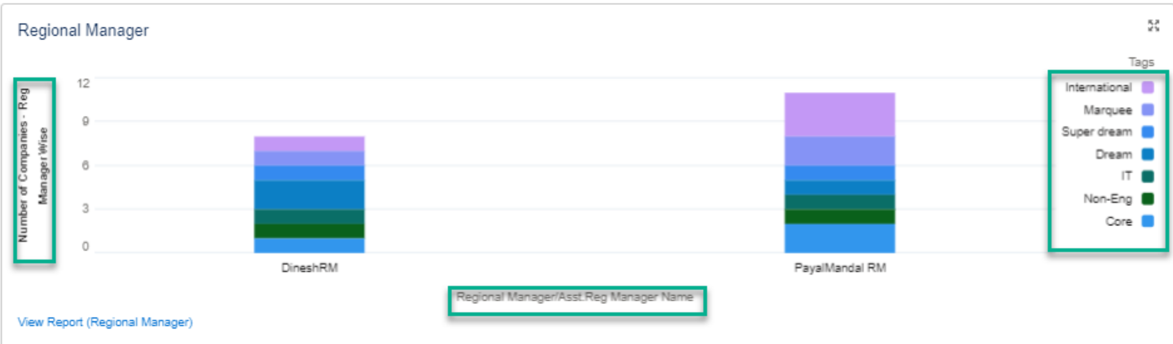


Pitch – Pitch is used to figure out the number of companies that offer **Internship with Placements, Placements – Full time, or Summer Internship**.



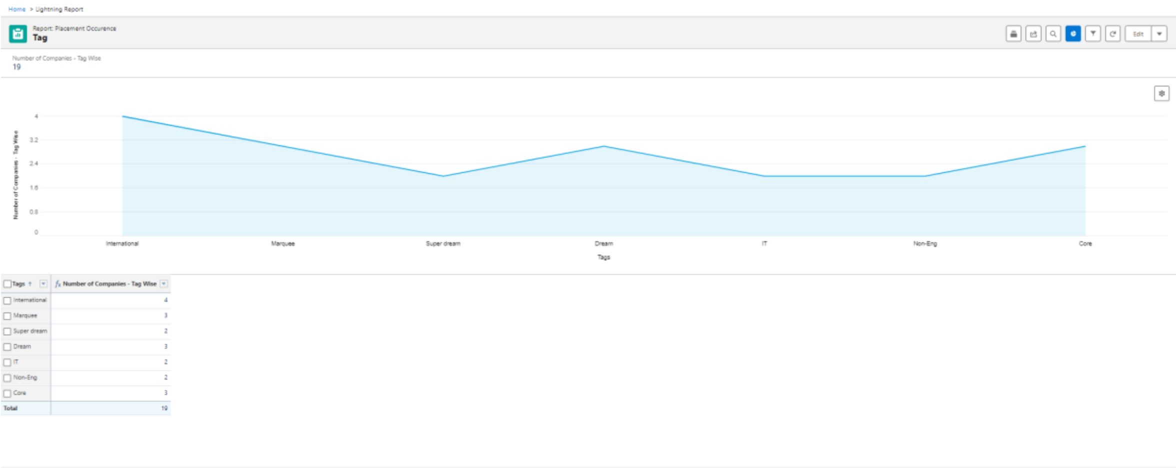
Region - The region denotes a geographical area (**Northern, North-Eastern, Eastern, Central, Western, or Southern regions**) within which certain activities or operations are conducted.

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.



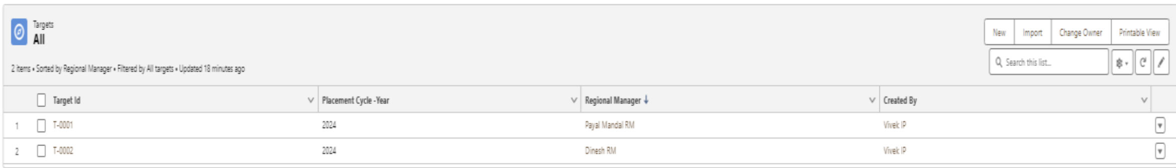
Viewing the Reports:

- 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 **New** button to create a new Target
- Click on **Change Owner** to change the Owner
- 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
- You can click on icon to refresh the data
- You can click on icon to edit any information

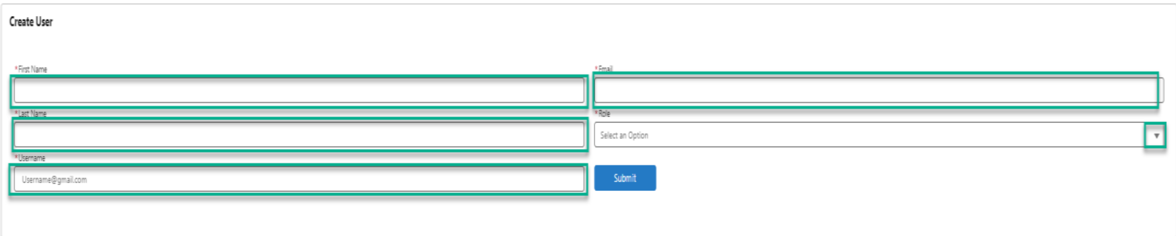
Creating a User

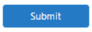
To create a User, follow the steps below:

1. Fill in all the below mandatory details:

Field	**Description**
First Name	This field captures the user's first name, typically the name they are commonly addressed by in personal or professional. Example: **John.**
Last Name	This field captures the user's last name.

	Example: **Smith**.
Username	The username serves as a unique identifier for the user within the system. It's often used for logging in and may also be visible to other users depending on system settings. Example: **jsmith123**.
Email	The email address is used for communication and system notifications. It must be unique to each user and typically follows the format: [username]@[domain].[extension]. Example: **jsmith@example.com**.
Role	The role defines the user's permissions and access levels within the system. It dictates what actions the user can perform and what data they can view or modify. Example: **Asst. Regional Manager**, **Director – Industry and Placements**, **Junior Regional Manager**, and **Regional Manager**.



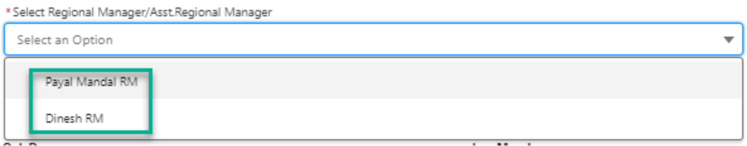
2. Click on 

button

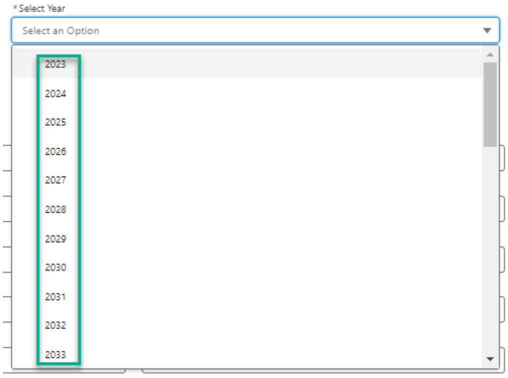
Creating Targets

To create targets, follow the steps below:

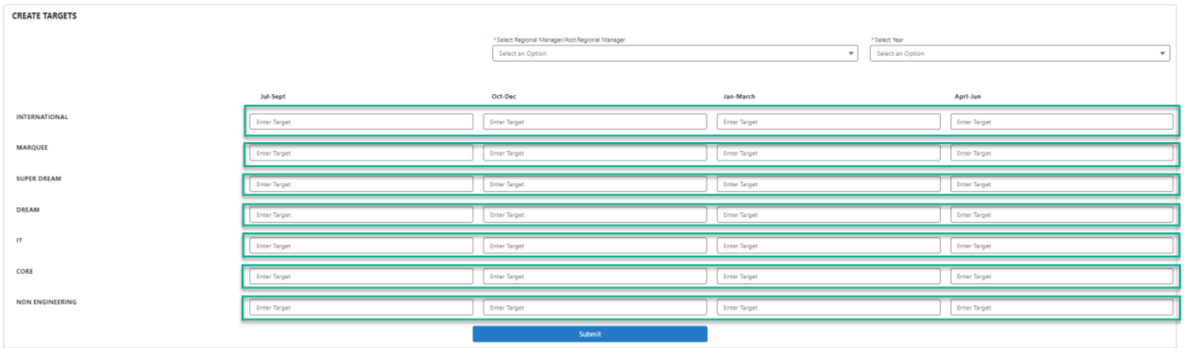
1. Select the desired **Regional Manager/Asst. Regional Manager** from the dropdown list

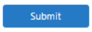


2. Select the desired **Year** from the dropdown list



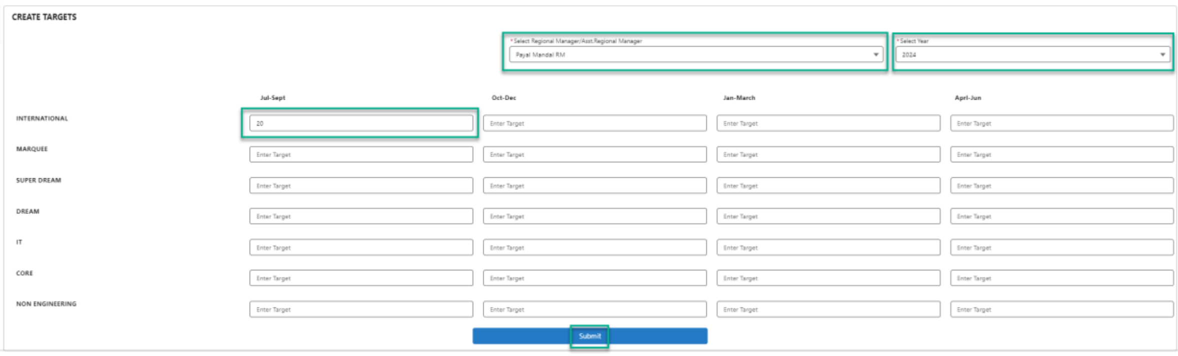
3. Enter **Target** with respective to the **month** and its corresponding Tag (**INTERNATIONAL, MARQUEE, SUPER DREAM, DREAM, IT, CORE, OR NON ENGINEERING**)



4. Click on 

button

For example: If you want create a **Target** for **Payal Mandal RM** and during **2024 Year and Jul-Sept Month** corresponding to **INTERNATIONAL** TAG, select **Payal Mandal RM** from **Select Regional Manager/Asst. Regional Manager** dropdown list > select **2024** from **Year**, and Enter **20** under **Jul-Sept** with corresponding to **INTERNATIONAL** Tag > and then click on **Submit** button



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.

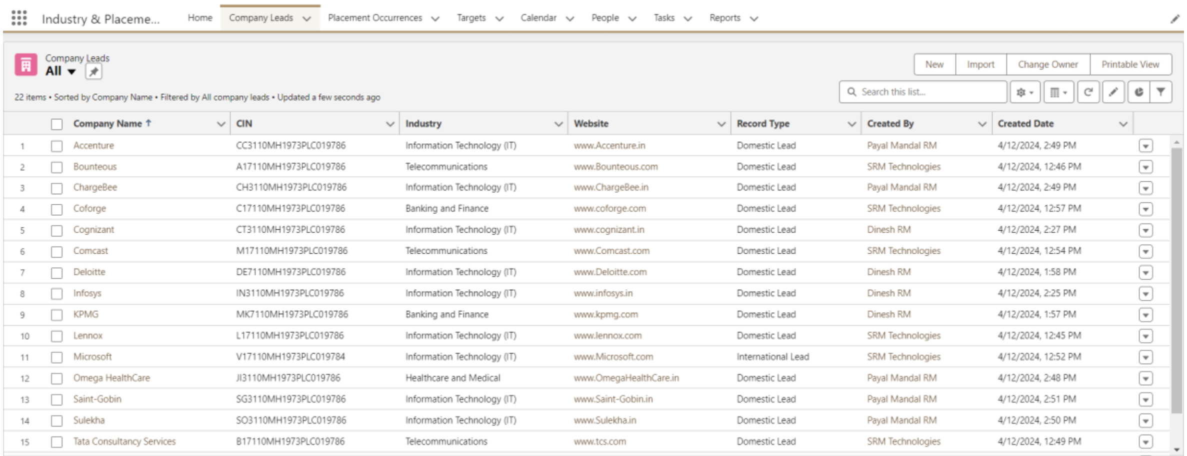
Setup: This feature provides users with administrative access to configure and customize various aspects of the system according to their organizational needs. It typically includes options to manage user permissions, customize fields and layouts, configure workflows, and integrate external applications or services.

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.

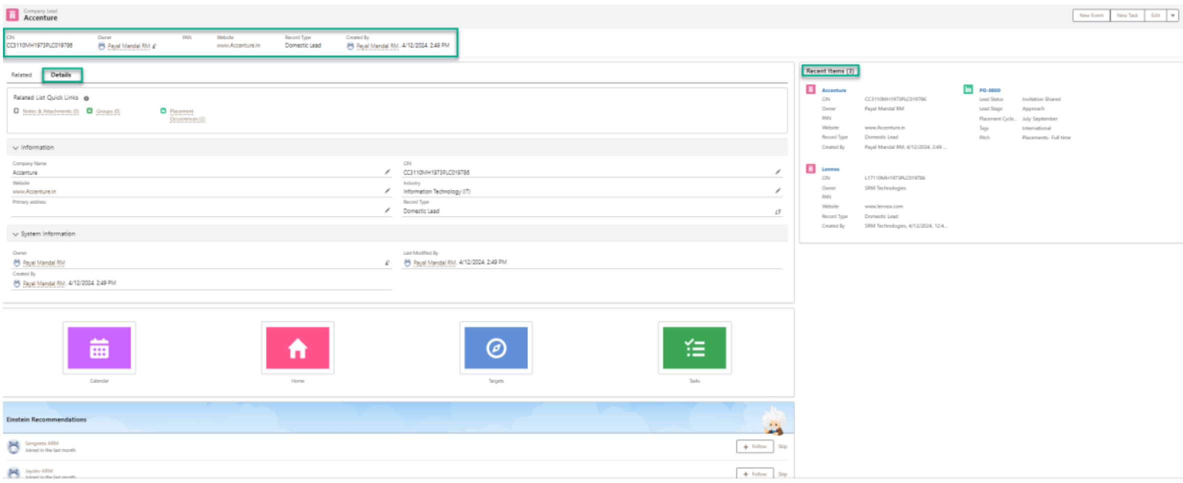
View Profile: This feature allows users to access and manage their personal profile information within the system. Users can view and edit details such as their name, contact information, preferences, and profile picture.

Company Leads

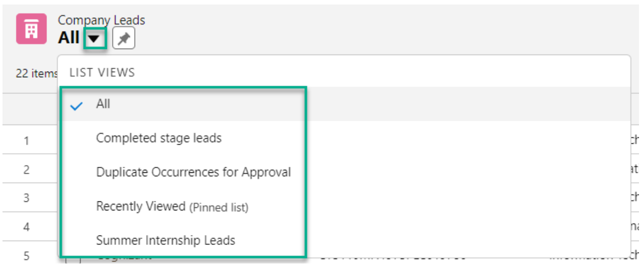
The **Company Leads** module is a comprehensive database that centralizes information of potential clients or partners. It allows users to record and manage details such as **CIN**, **Owner**, **PAN**, **Website**, **Record Type**, **Created By**, **Details**, and **Recent Items.**



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



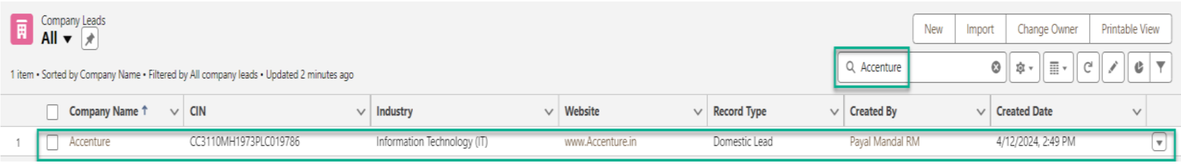
You can change the **View** from **View dropdown**



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

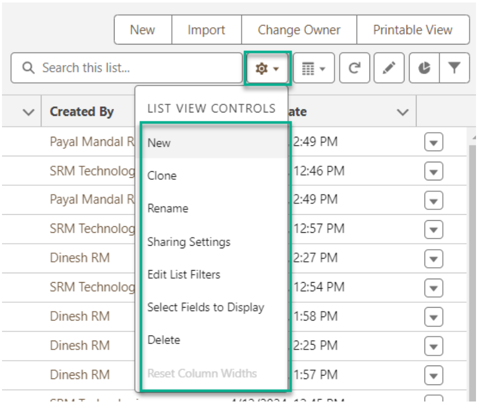
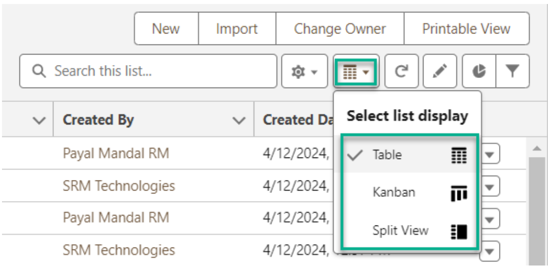


Table View

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

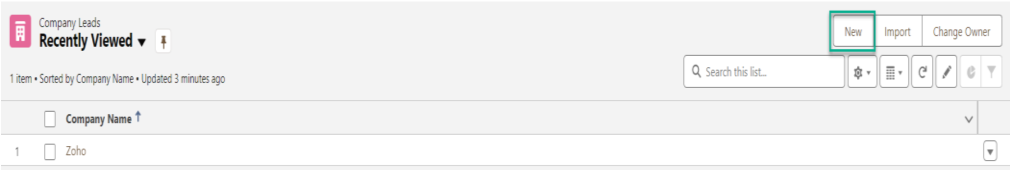
Filter

Click icon to filter the table

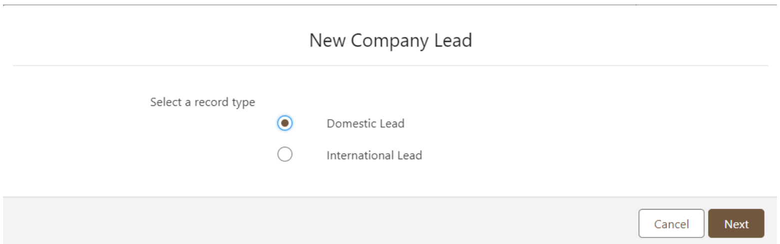
Creating a New Company Lead

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

1. Click on **New** button



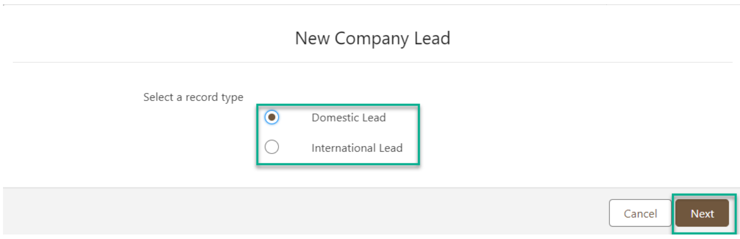
The **New Company Lead** dialog box displays



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.

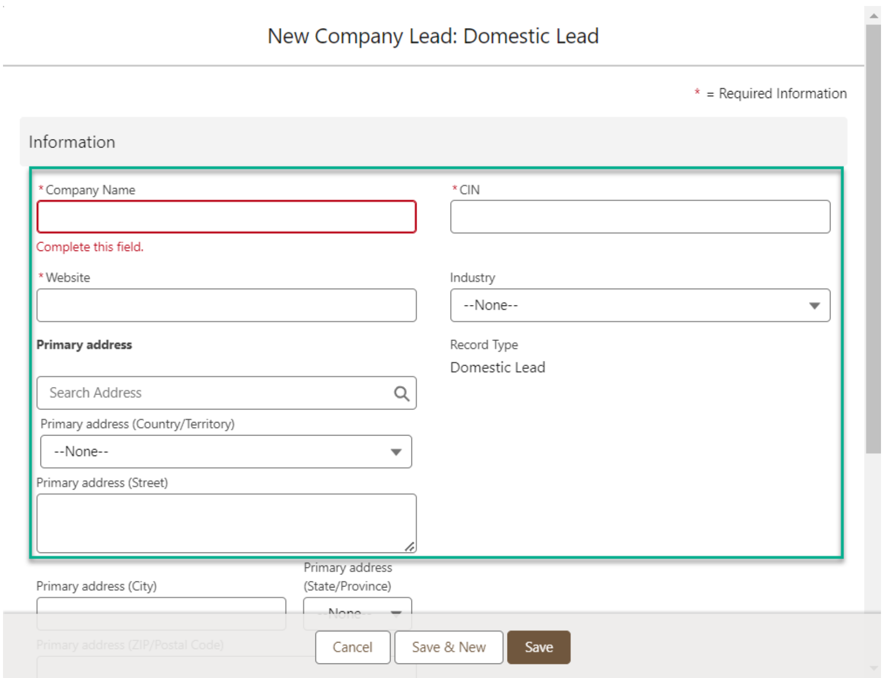


The **New Company Lead: Domestic Lead** dialog box displays

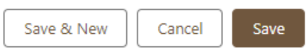
3. Fill in the following fields:

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.



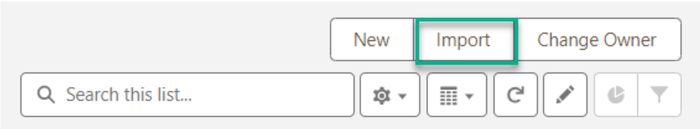
4. Click on **Save** button to save the lead, click on **Save & New** button to the current lead and start a new lead creation, or click on **Cancel** button to cancel the lead



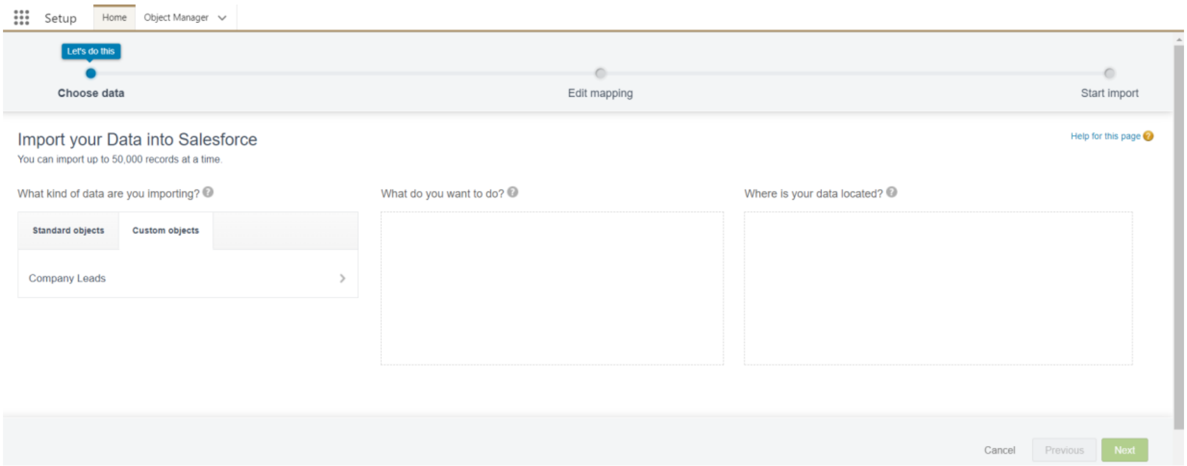
Importing data

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

1. Click on **Import** button



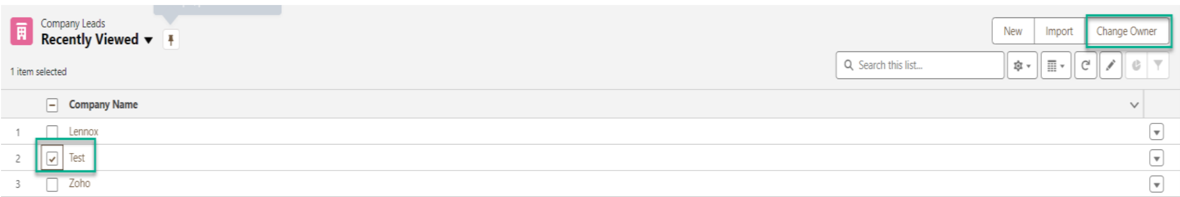
The Setup screen displays



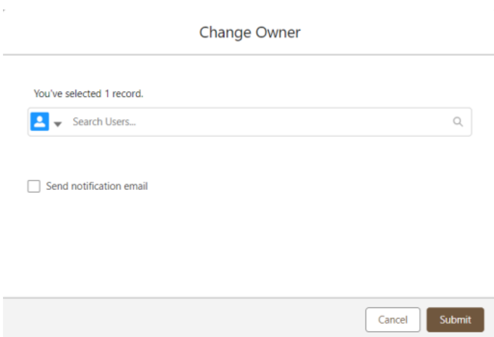
Changing Owner Name

To **Change Owner**, follow the steps below:

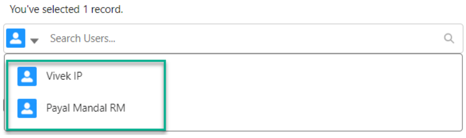
1. Select the desired **Company name** > **Change Owner**



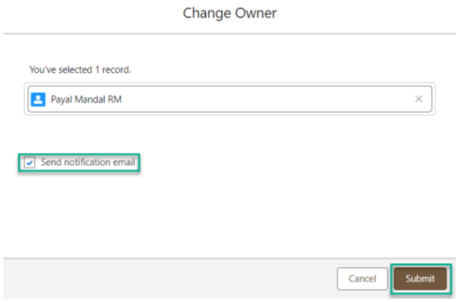
The **Change Owner** dialog box displays



2. Select the desired **Owner** from the list



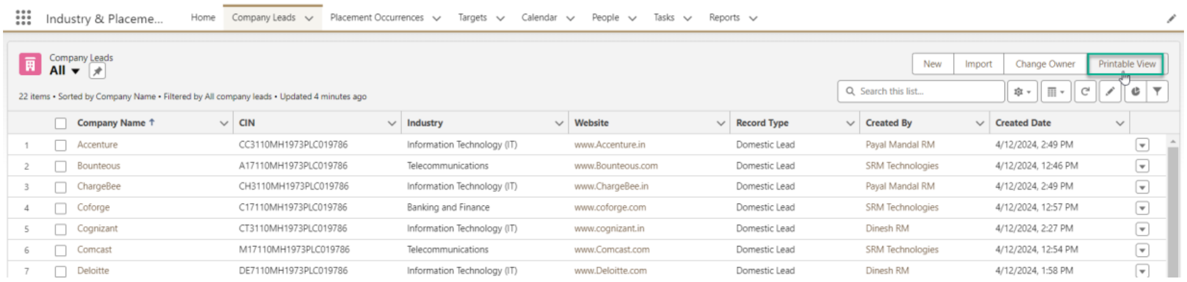
3. Select the **Send notification email** checkbox if you want to notify the owner or else ignore > Click on **Submit** button



Printable View

To open the **Printable View**, follow the below steps:

1. Click on **Printable View**



The **Printable View** opens in a separate window where you can use Print this Page option to print the page or can use **Close Window** option to close the window

- Close Window
- Print This Page

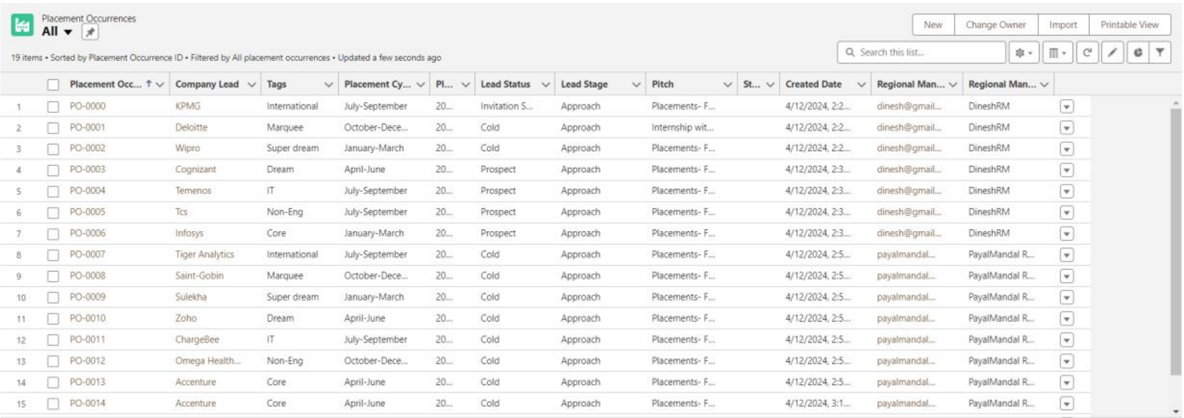
All
Displaying records 1 - 22

Number of records 22

Company Name ↑	CIN	Industry	Website	Record Type	Created By	Created Date
Accenture	CC3110MH1973PLC019786	Information Technology (IT)	http://www.Accenture.in	Domestic Lead	Payal Mandal RM, 4/12/2024, 2:49 PM	4/12/2024
Bounteous	A17110MH1973PLC019786	Telecommunications	http://www.Bounteous.com	Domestic Lead	SRM Technologies, 4/12/2024, 12:46 PM	4/12/2024
ChargeBee	CH3110MH1973PLC019786	Information Technology (IT)	http://www.ChargeBee.in	Domestic Lead	Payal Mandal RM, 4/12/2024, 2:49 PM	4/12/2024
Coforge	C17110MH1973PLC019786	Banking and Finance	http://www.coforge.com	Domestic Lead	SRM Technologies, 4/12/2024, 12:57 PM	4/12/2024
Cognizant	CT3110MH1973PLC019786	Information Technology (IT)	http://www.cognizant.in	Domestic Lead	Dinesh RM, 4/12/2024, 2:27 PM	4/12/2024
Comcast	M17110MH1973PLC019786	Telecommunications	http://www.Comcast.com	Domestic Lead	SRM Technologies, 4/12/2024, 12:54 PM	4/12/2024
Deloitte	DE7110MH1973PLC019786	Information Technology (IT)	http://www.Deloitte.com	Domestic Lead	Dinesh RM, 4/12/2024, 1:58 PM	4/12/2024
Infosys	IN3110MH1973PLC019786	Information Technology (IT)	http://www.infosys.in	Domestic Lead	Dinesh RM, 4/12/2024, 2:25 PM	4/12/2024
KPMG	MK7110MH1973PLC019786	Banking and Finance	http://www.kpmg.com	Domestic Lead	Dinesh RM, 4/12/2024, 1:57 PM	4/12/2024
Lennox	L17110MH1973PLC019786	Information Technology (IT)	http://www.lennox.com	Domestic Lead	SRM Technologies, 4/12/2024, 12:45 PM	4/12/2024
Microsoft	V17110MH1973PLC019784	Information Technology (IT)	http://www.Microsoft.com	International Lead	SRM Technologies, 4/12/2024, 12:52 PM	4/12/2024
Omega HealthCare	JI3110MH1973PLC019786	Healthcare and Medical	http://www.OmegaHealthCare.in	Domestic Lead	Payal Mandal RM, 4/12/2024, 2:48 PM	4/12/2024
Saint-Gobin	SG3110MH1973PLC019786	Information Technology (IT)	http://www.Saint-Gobin.in	Domestic Lead	Payal Mandal RM, 4/12/2024, 2:51 PM	4/12/2024
Sulekha	SO3110MH1973PLC019786	Information Technology (IT)	http://www.Sulekha.in	Domestic Lead	Payal Mandal RM, 4/12/2024, 2:50 PM	4/12/2024
Tata Consultancy Services	B17110MH1973PLC019786	Telecommunications	http://www.tcs.com	Domestic Lead	SRM Technologies, 4/12/2024, 12:49 PM	4/12/2024
Tcs	TC3110MH1973PLC019786	Information Technology (IT)	http://www.tcs.com	Domestic Lead	Dinesh RM, 4/12/2024, 2:24 PM	4/12/2024
Temenos	TT3110MH1973PLC019786	Information Technology (IT)	http://www.temenos.in	Domestic Lead	Dinesh RM, 4/12/2024, 2:29 PM	4/12/2024
Test	L17110MH1973PLC019788	Information Technology (IT)	http://Test@test.com	Domestic Lead	Vivek IP, 4/26/2024, 7:49 AM	4/26/2024
Tiger Analytics	TA3110MH1973PLC019786	Information Technology (IT)	http://www.Tiger Analytics.com	Domestic Lead	Payal Mandal RM, 4/12/2024, 2:52 PM	4/12/2024
Walmart	k17110MH1973PLC019786	Information Technology (IT)	http://www.walmart.com	Domestic Lead	SRM Technologies, 4/12/2024, 12:50 PM	4/12/2024
Wipro	WI7110MH1973PLC019786	Information Technology (IT)	http://www.Wipro.com	Domestic Lead	Dinesh RM, 4/12/2024, 1:59 PM	4/12/2024
Zoho	ZO3110MH1973PLC019786	Information Technology (IT)	http://www.Zoho.in	Domestic Lead	Payal Mandal RM, 4/12/2024, 2:50 PM	4/12/2024

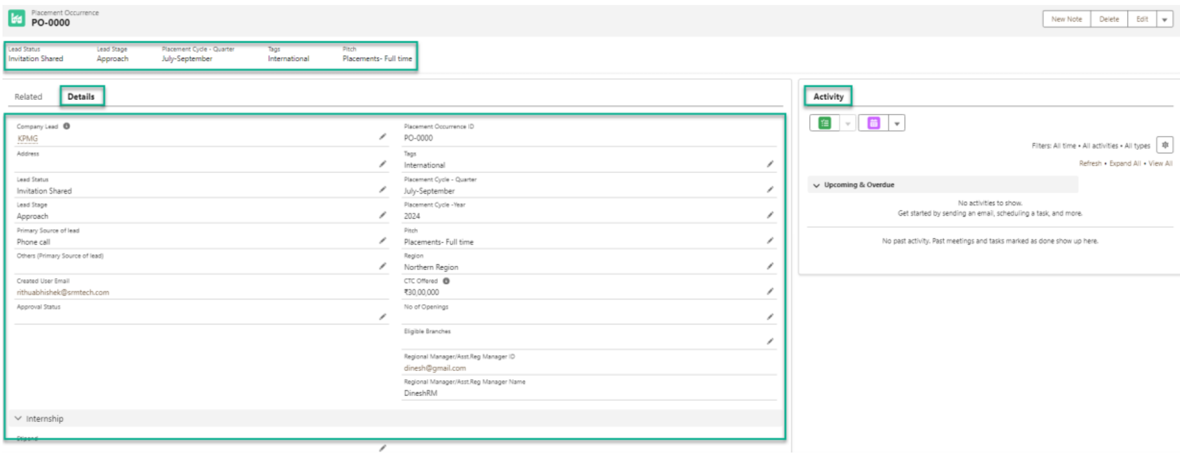
Placement Occurrences

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.

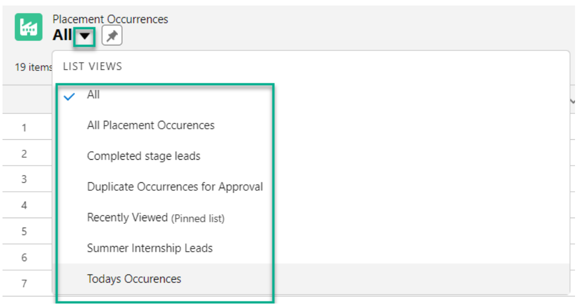


	Placement Occ...	Company Lead	Tags	Placement Cy...	Pl...	Lead Status	Lead Stage	Pitch	St...	Created Date	Regional Man...	Regional Man...
1	PO-0000	KPMG	International	July-September	20...	Invitation S...	Approach	Placements- F...		4/12/2024, 2:2...	dinesh@gmail...	DineshRM
2	PO-0001	Deloitte	Marquee	October-Dece...	20...	Cold	Approach	Internship wit...		4/12/2024, 2:2...	dinesh@gmail...	DineshRM
3	PO-0002	Wipro	Super dream	January-March	20...	Cold	Approach	Placements- F...		4/12/2024, 2:2...	dinesh@gmail...	DineshRM
4	PO-0003	Cognizant	Dream	April-June	20...	Prospect	Approach	Placements- F...		4/12/2024, 2:3...	dinesh@gmail...	DineshRM
5	PO-0004	Temenos	IT	July-September	20...	Prospect	Approach	Placements- F...		4/12/2024, 2:3...	dinesh@gmail...	DineshRM
6	PO-0005	Tcs	Non-Eng	July-September	20...	Prospect	Approach	Placements- F...		4/12/2024, 2:3...	dinesh@gmail...	DineshRM
7	PO-0006	Infosys	Core	January-March	20...	Prospect	Approach	Placements- F...		4/12/2024, 2:3...	dinesh@gmail...	DineshRM
8	PO-0007	Tiger Analytics	International	July-September	20...	Cold	Approach	Placements- F...		4/12/2024, 2:5...	payalmandal...	PayalMandal R...
9	PO-0008	Saint-Gobin	Marquee	October-Dece...	20...	Cold	Approach	Placements- F...		4/12/2024, 2:5...	payalmandal...	PayalMandal R...
10	PO-0009	Sulekha	Super dream	January-March	20...	Cold	Approach	Placements- F...		4/12/2024, 2:5...	payalmandal...	PayalMandal R...
11	PO-0010	Zoho	Dream	April-June	20...	Cold	Approach	Placements- F...		4/12/2024, 2:5...	payalmandal...	PayalMandal R...
12	PO-0011	ChargeBee	IT	July-September	20...	Cold	Approach	Placements- F...		4/12/2024, 2:5...	payalmandal...	PayalMandal R...
13	PO-0012	Omega Health...	Non-Eng	October-Dece...	20...	Cold	Approach	Placements- F...		4/12/2024, 2:5...	payalmandal...	PayalMandal R...
14	PO-0013	Accenture	Core	April-June	20...	Cold	Approach	Placements- F...		4/12/2024, 2:5...	payalmandal...	PayalMandal R...
15	PO-0014	Accenture	Core	April-June	20...	Cold	Approach	Placements- F...		4/12/2024, 3:1...	payalmandal...	PayalMandal R...

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



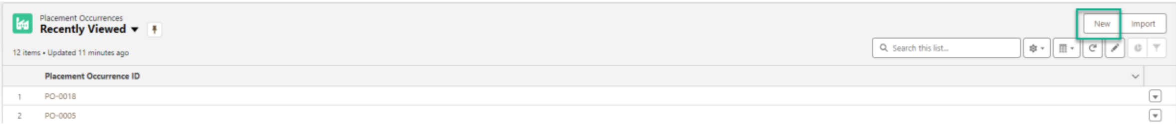
You can change the **View** from **View dropdown**



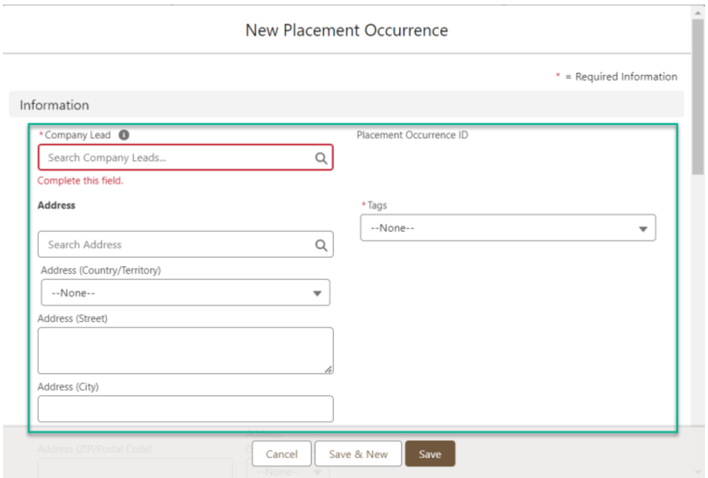
Creating a New Placement

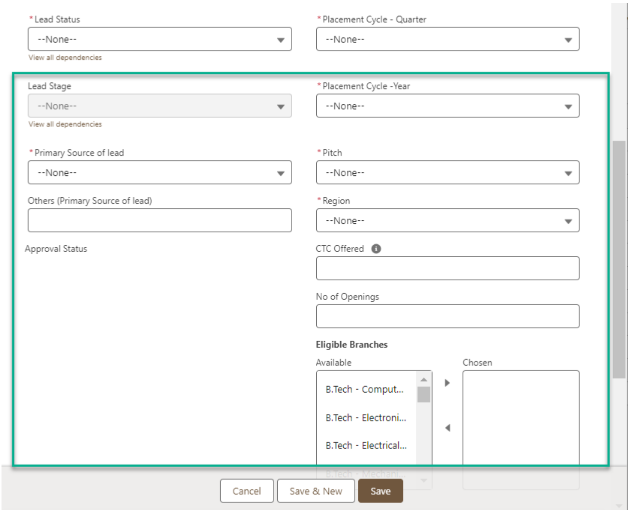
To create a new placement, follow the steps below:

1. Click on **New** button



The New Placement Occurrence dialog box displays



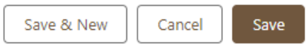


2. Fill in the following fields:

Field	Description
Company Lead (*)	This field serves as the primary identifier for the company. It is a mandatory field where users enter the official name of the company or business entity.
Tags (*)	This field allows users to add descriptive labels or keywords to categorize and organize records within the system.
Primary Address	This field captures the main physical location or mailing address of the company. It includes details such as

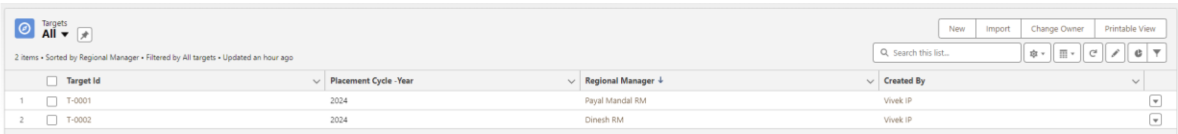
	street address, city, state/province, postal code, and country/territory.
Primary Address (Country/Territory)	This field specifically records the country or territory where the primary address of the company is located.
Primary address (Street)	This field contains the street name and number of the primary 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.
Lead Stage	This field indicates the current status.
Placement Cycle-Year (*)	This field denotes the specific cycle or period within which a placement or recruitment process occurs, typically identified by the calendar year (July – September, October – December, January – March, April – June).
Primary Source of Lead (*)	This field indicates the main channel or origin through which a lead was generated or acquired (Linkedin, mail, Phone call, etc.).
Pitch (*)	This field refers to the unique value proposition or selling points presented to potential clients or stakeholders during a sales or marketing presentation (Centers of Excellence, Competition, Faculty Development Programs, Internships, etc.).
Region (*)	This field denotes the geographical area or territory associated with a lead, opportunity, or activity within the system.
CTC Offered	This field specifies the total compensation package or salary offered to candidates for a particular job or placement opportunity.
No of Openings	The No of Openings field indicates the number of vacant positions or job openings available for recruitment within a particular role, department, or project.
Eligible Branches	This field specifies the academic disciplines or branches of study from which candidates are eligible to apply for a particular job or program.
Internship	This field indicates whether a particular job or placement opportunity is designated as an internship position, typically intended for students or recent graduates seeking practical work experience in their field of study.

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



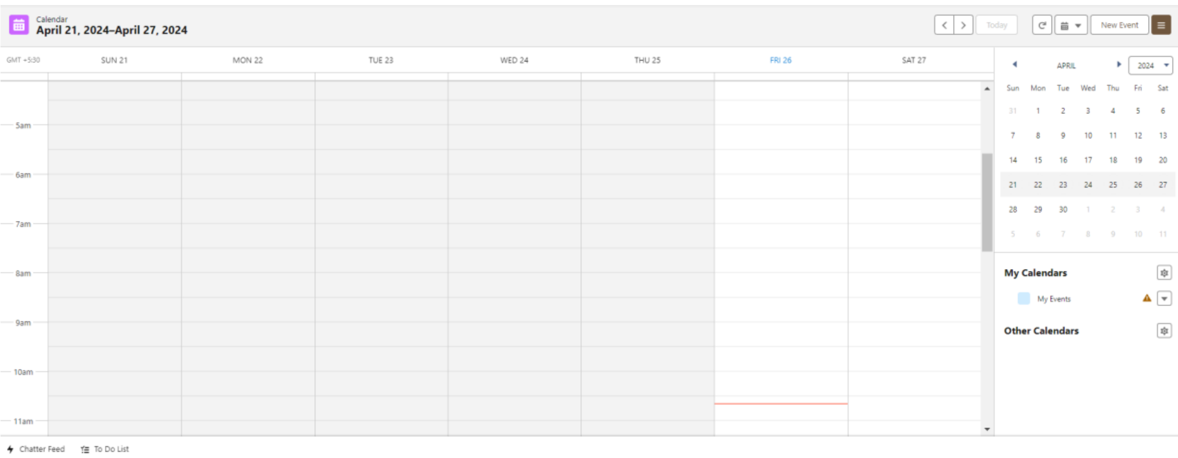
Targets

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.

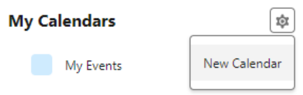


Calendar

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.



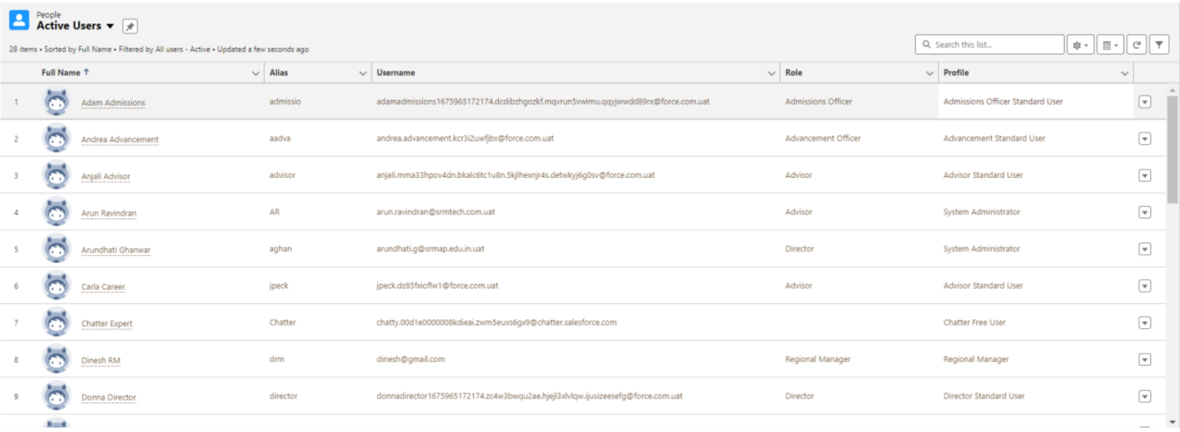
New Event: This feature empowers users to create and schedule new events, meetings, or appointments within the calendar system. Users can input essential details such as event title, date, time, location, description, and participant list.



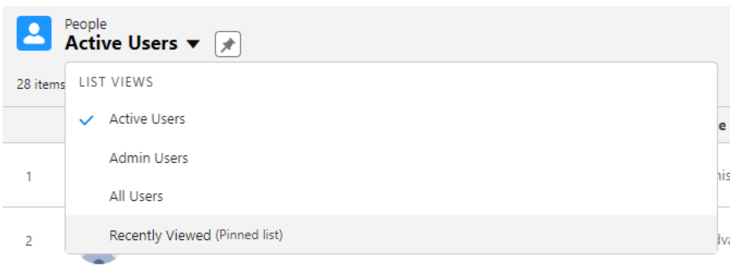
New Calendar: This feature allows users to create personalized calendars or schedule views tailored to their specific needs and preferences. Users can configure calendar settings, such as color-coding, time zones, and display options, to optimize their viewing experience.

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**



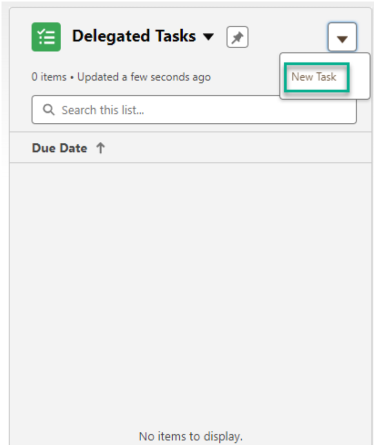
Tasks

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

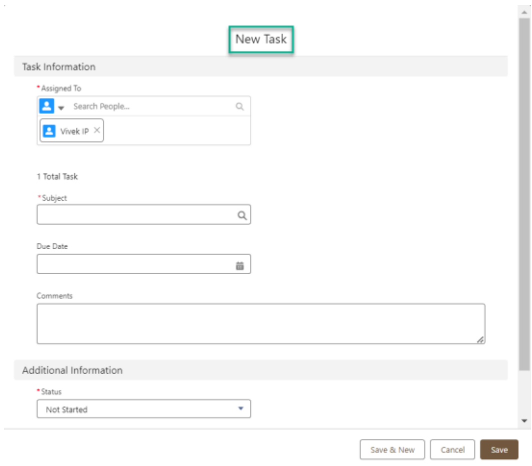
Creating New Task

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

1. Click on **New Task**

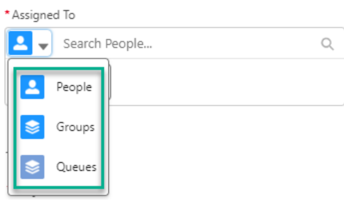


The **New Task** dialog box displays

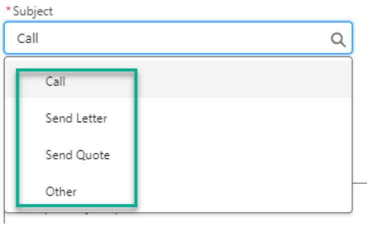


2. Fill in the following fields:

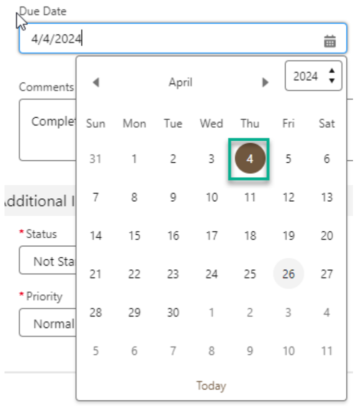
Assigned To: Select the desired **People/Groups/Queues** from the list



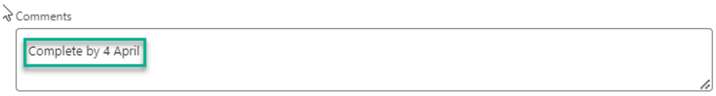
Subject: Select the desired from the list



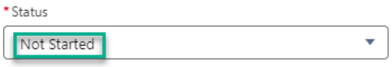
Due Date: Select the desired date



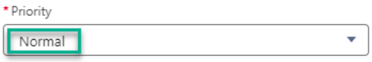
Comments: Enter the comment



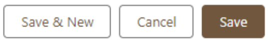
Status: Select the desired status from the list



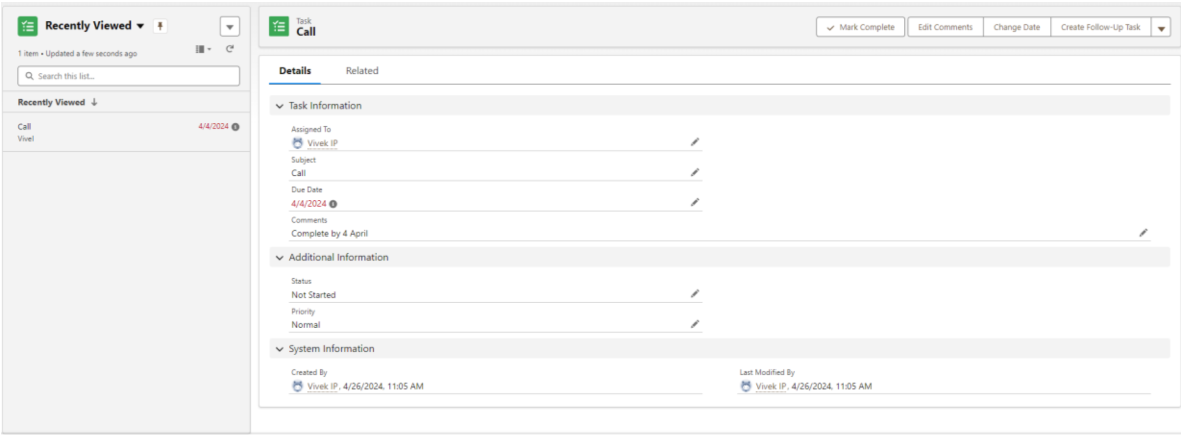
Priority: Select the desired Priority from the list



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.

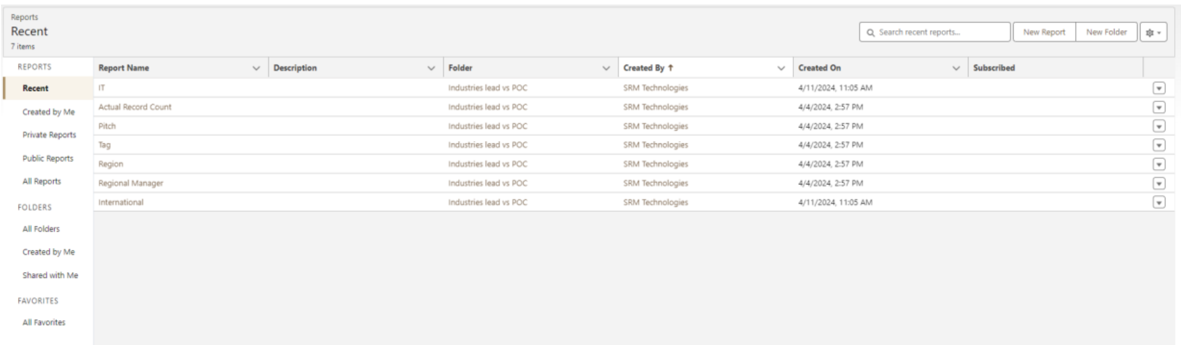
Edit Comments: This feature enables users to modify or update previously entered comments, notes, or annotations within the system.

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.

Reports

The **Reports** module provides users with insightful analytics and visualizations derived from data stored within the system. It offers pre-configured report templates as well as customizable options to generate reports tailored to specific requirements. Users can analyze various aspects of business performance, such as sales metrics, recruitment statistics, or project progress. The Reports module facilitates data-driven decision-making, performance evaluation, and strategic planning by presenting key information in a clear and digestible format.



Search Reports: This function empowers users to swiftly locate specific reports within the system by entering relevant keywords, filters, or criteria.

New Report: This feature allows users to create fresh, custom reports tailored to their specific requirements and objectives. Users can define report parameters, select data sources, choose visualization formats, and configure filters or criteria to generate insightful analytics.

New Folder: This feature enables users to organize and categorize their reports systematically by creating new folders within the report management system.