Moleculli

User Manual

Moleculli CRM

A complete guide for every role

Connecting everyone, in one place.

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1. Welcome to Moleculli

1.1 What is Moleculli?

Moleculli is a role-based CRM platform that connects every person in your business, from the head office to the newest team member, in one place. Leads, contacts, accounts, deals, sales, inventory, reports, tasks, broadcasts and field activity all live in a single workspace. Every user sees a dashboard built for their own role and territory.

This manual walks you through Moleculli step by step. It follows the same journey as the Moleculli demo video: sign in, understand the role hierarchy, explore the Organization Admin workspace in depth, then see what each of the other roles works with.

1.2 Why the name “Moleculli”?

In chemistry, a molecule forms when atoms join together. Businesses work the same way. When leads sit in one tool, chats in another, reports in a spreadsheet and branches work alone, nothing is connected. Moleculli joins them: **one CRM, one workspace, one hierarchy**, where people, data and decisions stay connected. The logo shows this idea: dots (people, branches, data) linked together into one structure.

1.3 Who is this manual for?

If you are a...	Start with...
Organization Admin	Chapters 2, 3 and 4. You have the widest view and set up branches and people.
Country, State, Zone, District or Area Admin	Chapters 2, 3 and section 5.1 to 5.5 for your own dashboard. Chapter 4 explains modules you will also see.
Branch Admin, Manager or Employee	Chapters 2, 3 and sections 5.6 to 5.8.
Customer	Section 5.9.

1.4 Key benefits

- **Everyone connected.** One platform from the Organization Admin down to the Employee, plus a portal for Customers.
- **The right view for every role.** Each level sees only what belongs to its own territory.
- **Real-time visibility.** Live dashboards for leads, opportunities, pipeline value, revenue and tasks.
- **Everything in one place.** Workspace, Sales, Inventory, Reports, Operations, Field Force and Organization management.
- **Built for many countries and branches.** Filter the whole organization by country in one click.

2. Getting Started

2.1 Signing in

Every role signs in from the Moleculli website, www.moleculli.com. Each role has its own portal, so you always land on the right dashboard.

1. Open **www.moleculli.com** in your browser.
2. Click **Login** in the top menu (item 1 in Figure 1).
3. Choose your portal: **Administrative Portal** for Organization, Country, State, Zone, District and Area Admins; **Branch Portal** for branch-level roles; **Customer Portal** for customers. (**Super Admin** is a separate platform-level entry.)
4. Pick your role from the list. The sign-in form shows “Login As” followed by your role.
5. Enter your **username** and **password**, then click **Login**.

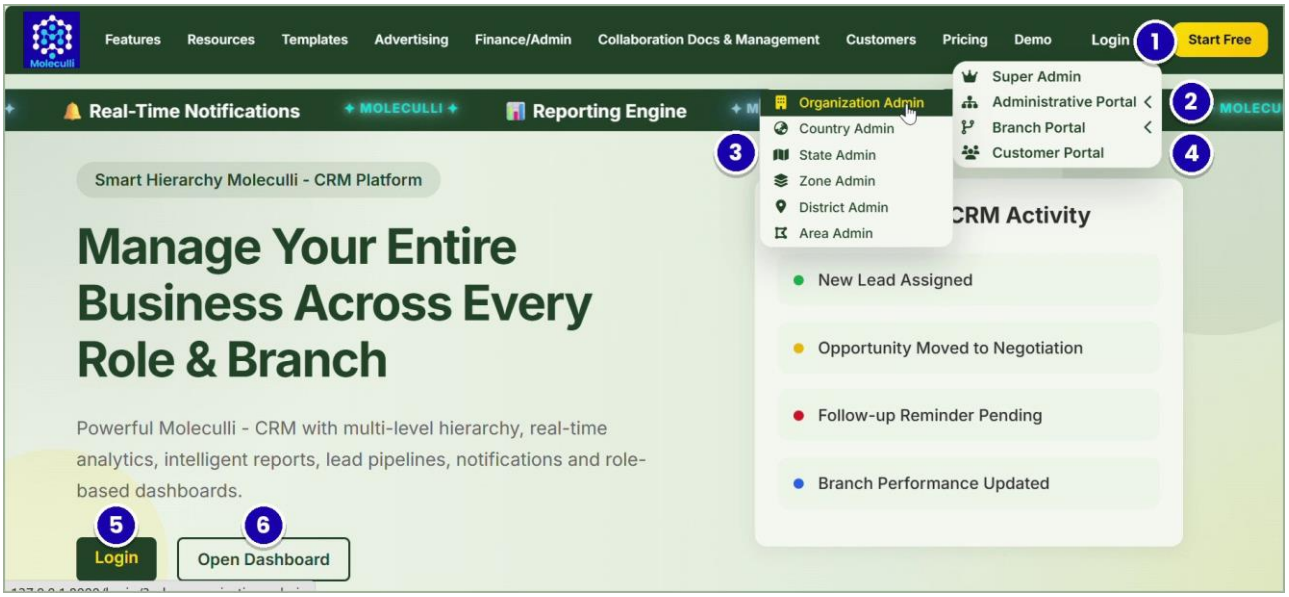


Figure 1. *The Login menu on the website. 1 Login, 2 Administrative Portal, 3 role list, 4 Customer Portal, 5 and 6 quick Login and Open Dashboard buttons.*

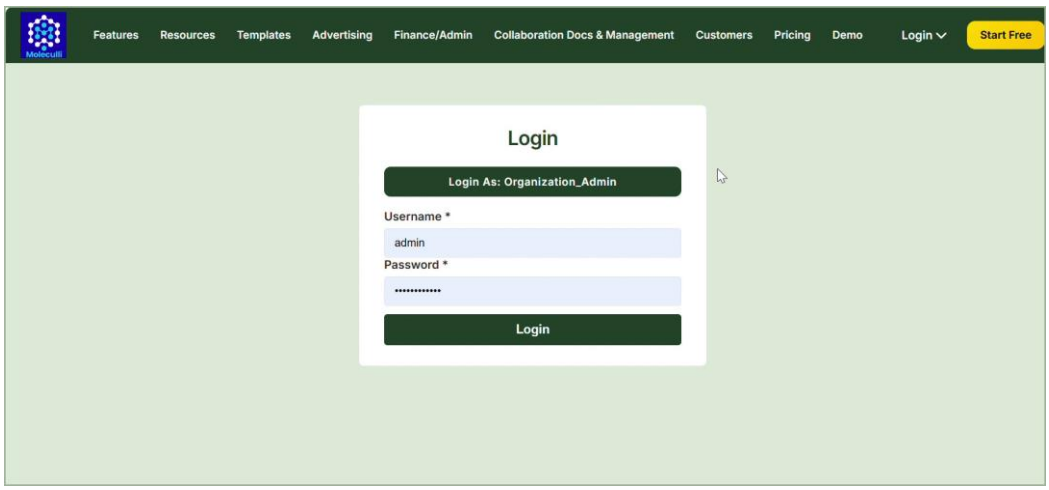


Figure 2. *The sign-in form. The heading shows which role you are logging in as.*

2.2 Understanding the screen

After signing in you will see the same basic layout in every role. Only the menu items and dashboard content change.



Figure 3. *The Organization Admin dashboard, numbered for reference.*

No.	Area	What it does
1	Sidebar menu	Your main navigation: Home, Workspace, Sales, Inventory, Reports, Operations, Field Force, Organization, Profile and Logout. Click a heading to open its sub-menu. The menu shows only what your role can use.
2	Search CRM	Search the CRM from any page.
3	Top-right icons	Notifications bell, quick-add (+), calendar, settings and your profile menu.
4	Filters	Dashboard filters, such as the Countries selector for the Organization Admin.
5	Summary cards	Colour-coded cards with live totals. Click a card to open the related list.
6	Quick-access bar	Shortcuts at the bottom of the screen, including the internal chat.

2.3 Your profile and signing out

Open **Profile** in the sidebar to see your name, username, email, company, role and location. The profile menu at the top right also offers **Create User** for roles that are allowed to add people. Use **Logout** at the bottom of the sidebar when you are finished.

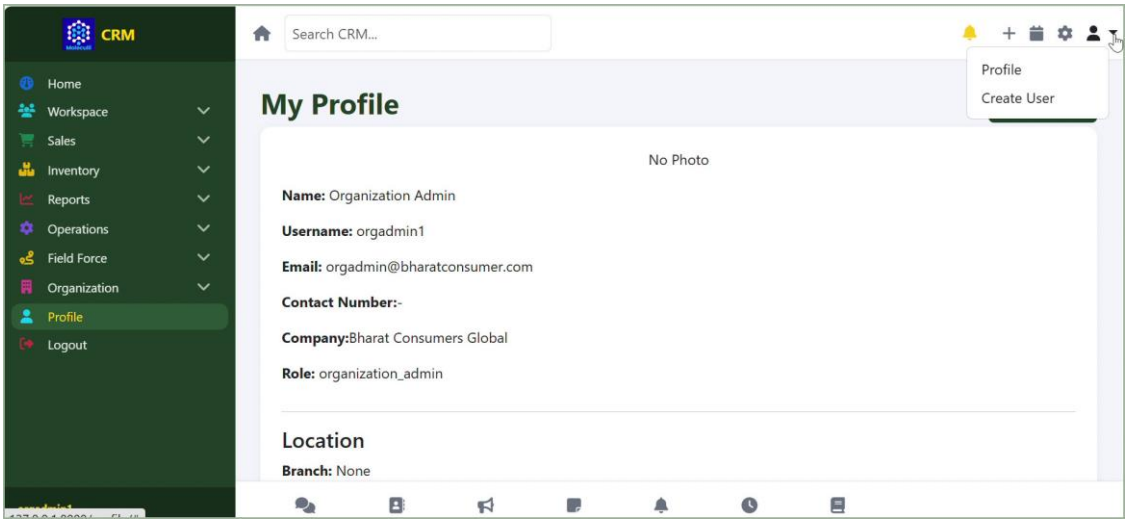


Figure 4. *My Profile page.*

2.4 Internal chat

Moleculli includes internal chat so teams can talk without leaving the CRM. Click the chat icon in the quick-access bar at the bottom of the screen. A chat window opens where you can search contacts, start a conversation and type a message.

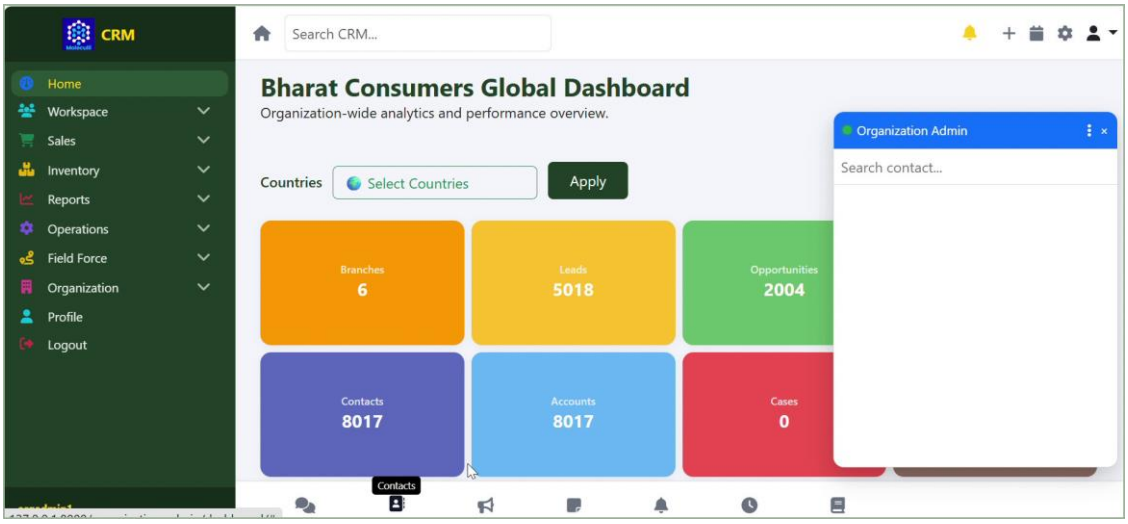


Figure 5. *The chat window opens on top of your dashboard.*

2.5 If something goes wrong

What you see	What to do
“CSRF verification failed” page after logging in	Do not use the browser Back button. Open the login page again from www.moleculli.com and sign in once more. If it repeats, clear your browser cookies for the site and try again.
You cannot sign in	Check username and password, and make sure the “Login As” role matches your role.
A menu or button is missing	Menus depend on your role. Ask your administrator if you need extra access.
Numbers on the dashboard look different	A filter may be applied. Use **Clear** next to the filter to see the full view.
Anything else	Contact us (see Chapter 10) with your role, the page name and a screenshot.

3. Roles and the Hierarchy

3.1 The role hierarchy

Moleculli is built on a powerful role hierarchy. At the top is the **Organization Admin**, with full control. Below sit the **Country, Zone and State Admins**, then the **District, Area and Branch Admins**, each limited to their own territory. **Managers and Employees** do the daily work. Outside the organization, **Customers** have their own portal.

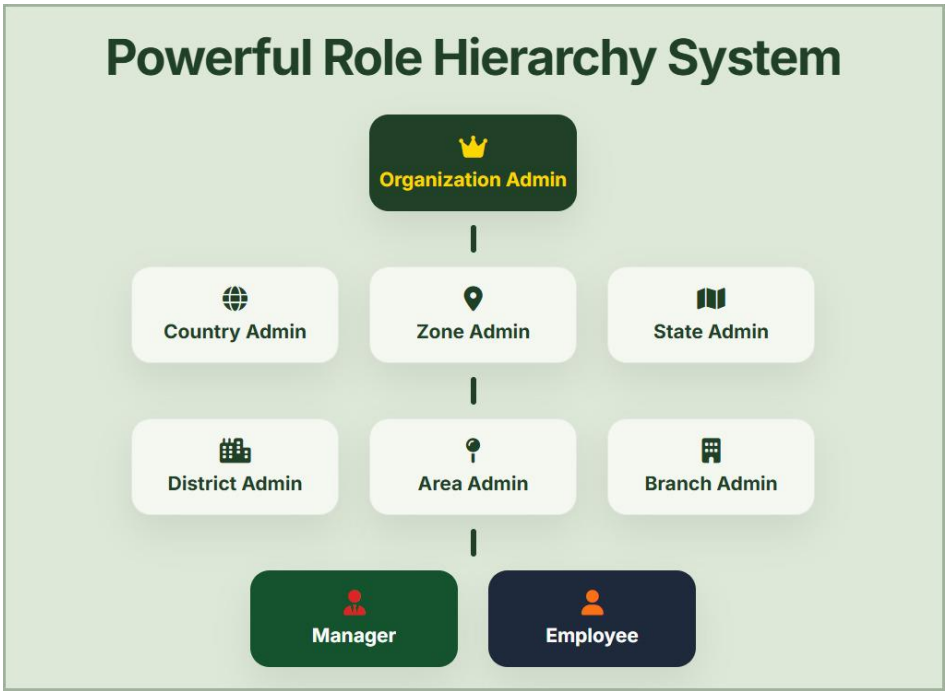


Figure 6. *Moleculli role hierarchy.*

3.2 What each role works with

Role	Scope	Dashboard highlights
Organization Admin	Whole organization, all countries and branches	Branches, leads, opportunities, team members, contacts, accounts, cases, tasks; country filter; pipeline; branch overview
Country Admin	One country	Active leads, opportunities, accounts, contacts, pipeline value, forecast, hierarchy counts
State Admin	One state	Leads, opportunities, won and lost deals, revenue, pipeline, conversion rate, branches, sales leaderboard
Zone Admin	One zone	Active leads, pipeline value, revenue, target vs achieved, conversion, deals stuck over 30 days, employees, managers
District Admin	One district	Won and lost deals, revenue, conversion rate, sales leaderboard, recent leads and opportunities

Role	Scope	Dashboard highlights
Area Admin	One area, several branches	Leads, opportunities, won and lost deals, recent leads, recent opportunities, area activity feed
Branch Admin	One branch	Active leads, opportunities, accounts, contacts, pending tasks, pipeline, employees, managers, forecast
Manager	A team	Create Lead, Assign Task, Create Deal; total leads, new leads today, pending and overdue tasks, won and lost deals, pipeline value, team revenue
Employee	Own work	New Lead, New Task, New Deal, Calendar; priority leads, follow-ups pending, overdue tasks, deals closed, conversion rate, monthly sales target
Customer	Own account	Own portal, available from the Login menu

3.3 How access works

- **Role-based access.** What you can open depends on your role. Higher roles see more; lower roles see their own scope.
- **Territory-based access.** Users are placed in a Country, State, Zone, District, Area and Branch, and see data for that territory.
- **Setting up people.** Administrators add people from **Organization > Invite Users**, or **Create User** in the profile menu, choosing the role and location (see section 4.9).

4. Organization Admin Guide

The Organization Admin has the widest view and sets up the organization. This chapter covers every module in the order of the sidebar. Other roles use many of the same screens with a narrower scope.

4.1 Global dashboard

Click **Home** to open the global dashboard. The title shows your organization's name and the page gives organization-wide analytics and performance at a glance.

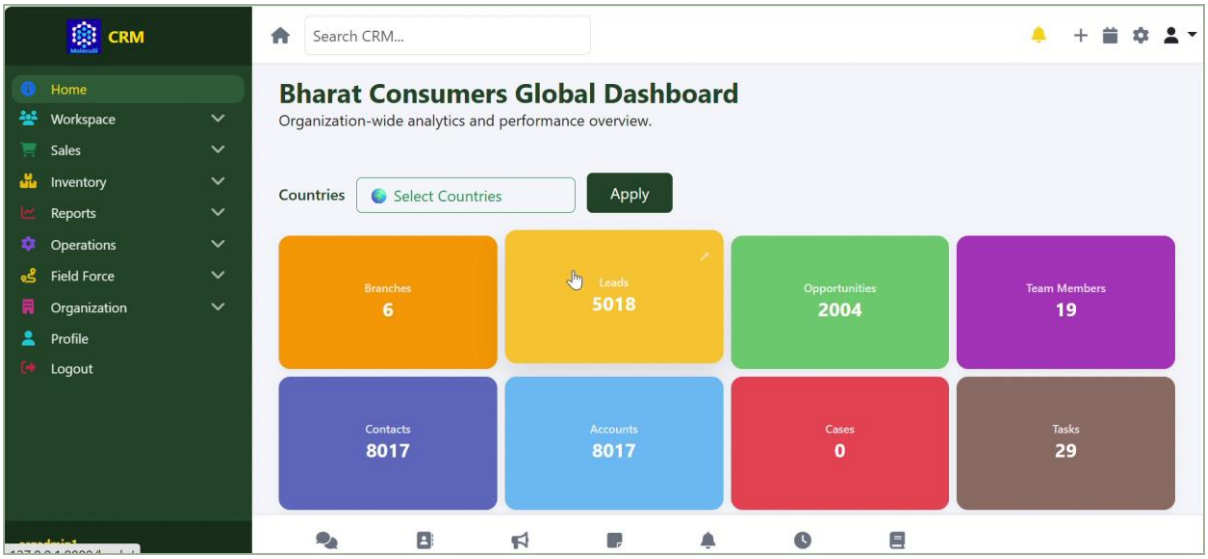


Figure 7. *Organization Admin dashboard with summary cards.*

Card	Shows
Branches	Number of branches in the organization
Leads	Total leads
Opportunities	Total sales opportunities
Team Members	Number of people in the organization
Contacts and **Accounts**	Total contacts and customer accounts
Cases	Support cases
Tasks	Tasks across the team

Scroll down for more panels:

- **Sales Pipeline:** pipeline value and expected revenue.
- **Opportunity Status:** won and lost opportunities.
- **Organization Team:** counts of Country, State, Zone, District and Area Admins, Branch Admins, Managers and Employees.
- **Branch Overview:** each branch with code, country, state, city and status.
- **Opportunity Performance** and **Team Structure** charts, and a **Pipeline Overview** chart.

- **Quick Actions:** Manage Branches, Invite User, Managers, Employees.

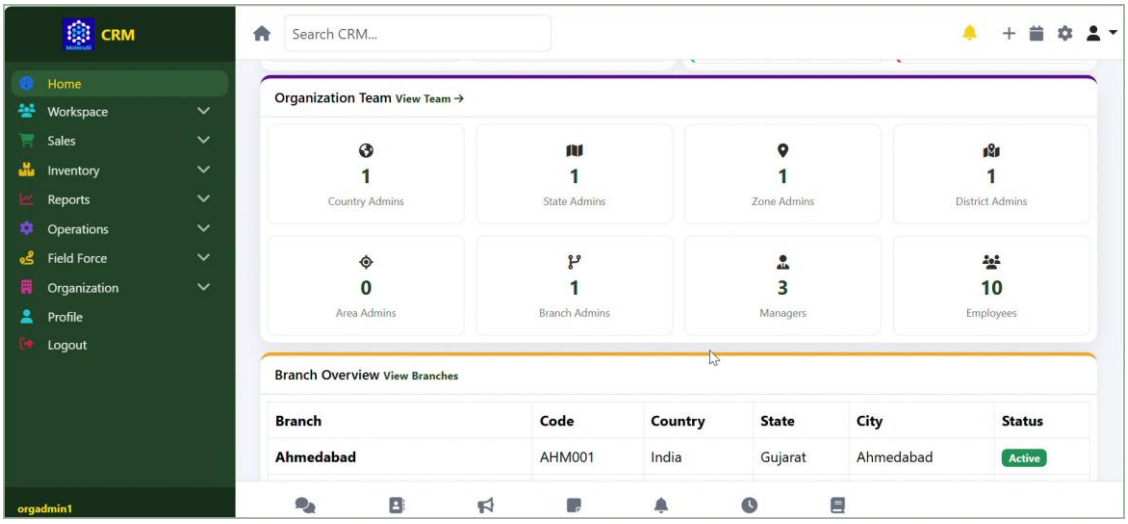


Figure 8. *Organization Team and Branch Overview panels.*

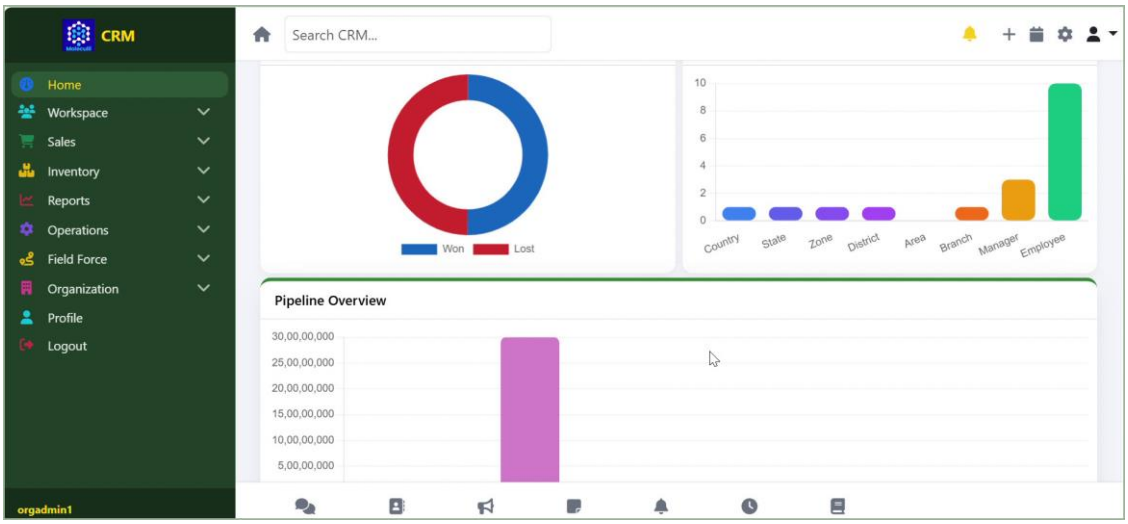


Figure 9. *Opportunity Performance and Team Structure charts.*

4.2 Filtering by country

If your organization works in several countries, you can focus the whole dashboard on any combination.

1. On the Home dashboard, click the **Countries** selector.
2. Tick one or more countries, for example Canada and India.
3. Click **Apply**. Every number on the dashboard updates for the selected countries.
4. Click **Clear** to return to the full organization view.

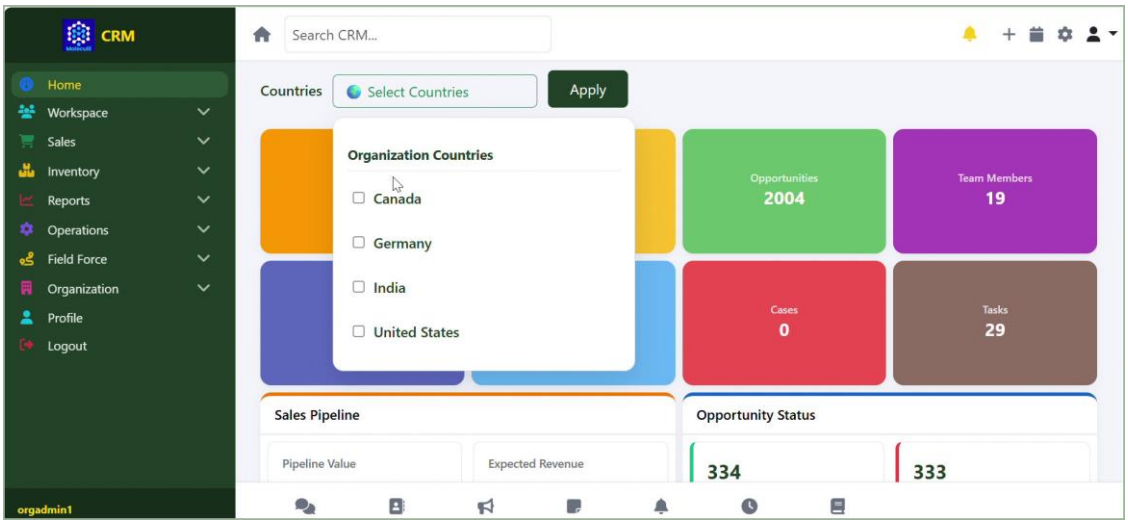


Figure 10. *Choosing countries from the Organization Countries list.*

4.3 Workspace

The **Workspace** menu holds your customer relationships: **Leads, Contacts, Accounts and Deals**. Search, filter and open any record. Use the green button at the top right of each page to add a new record.

Contacts

Lists every contact with name, email, phone, organization and created date. Use the search box and the department and country filters, then click **Filter**. Click **+ Add Contact** to add a new one.

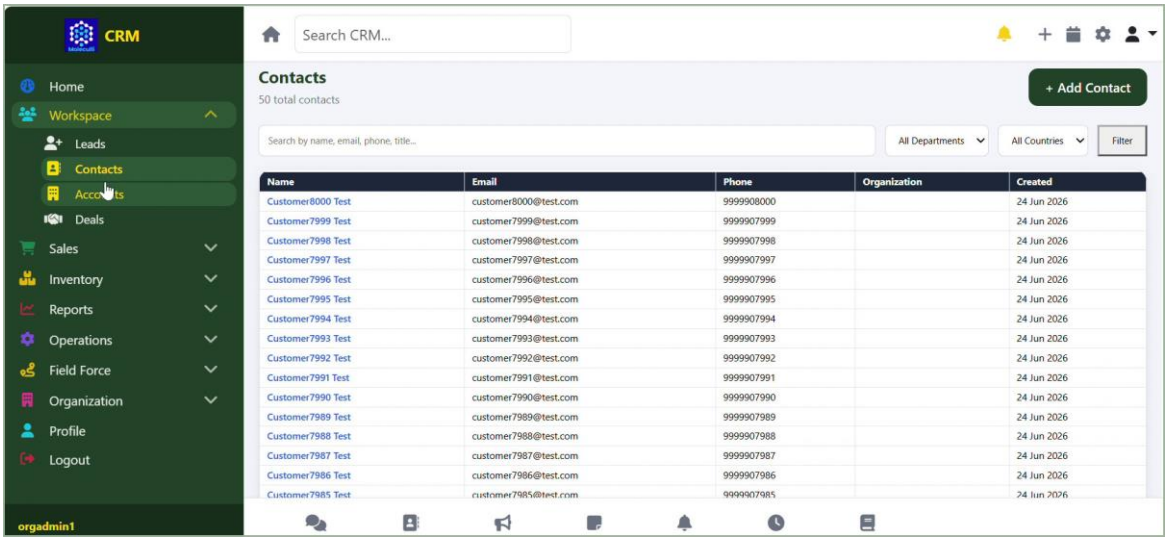


Figure 11. *Contacts list.*

Accounts

Accounts are the companies or customers you work with. Summary tiles at the top give totals, and **+ Create New Account** adds a new one.

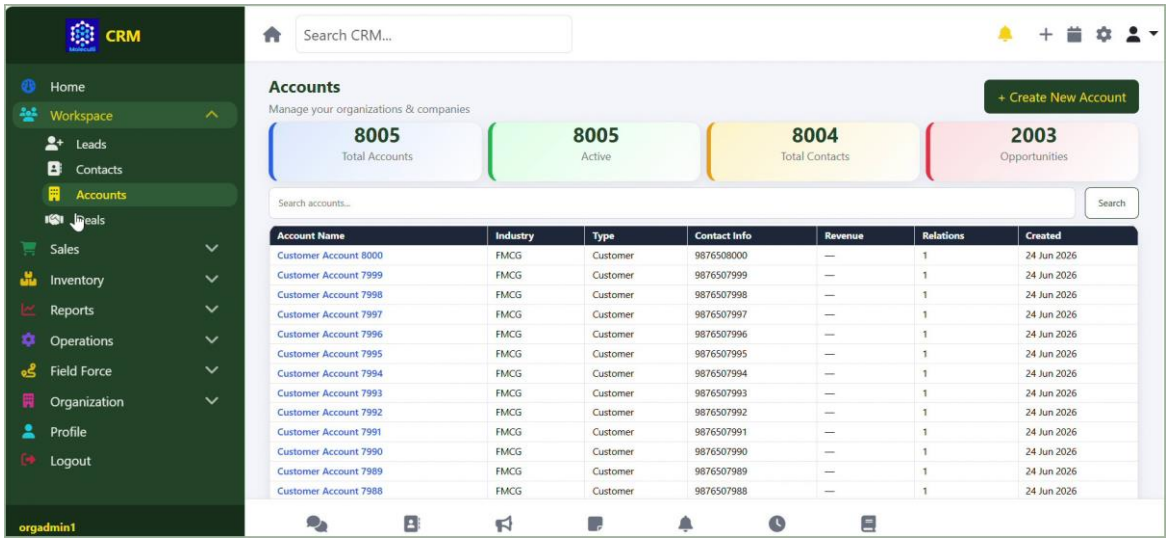


Figure 12. *Accounts list.*

Deals

Summary tiles show total deals and their value. Search by deal, account or owner, filter by stage, and click **+ New Deal** to add one. The table lists each deal with account, stage, amount, close date and owner.

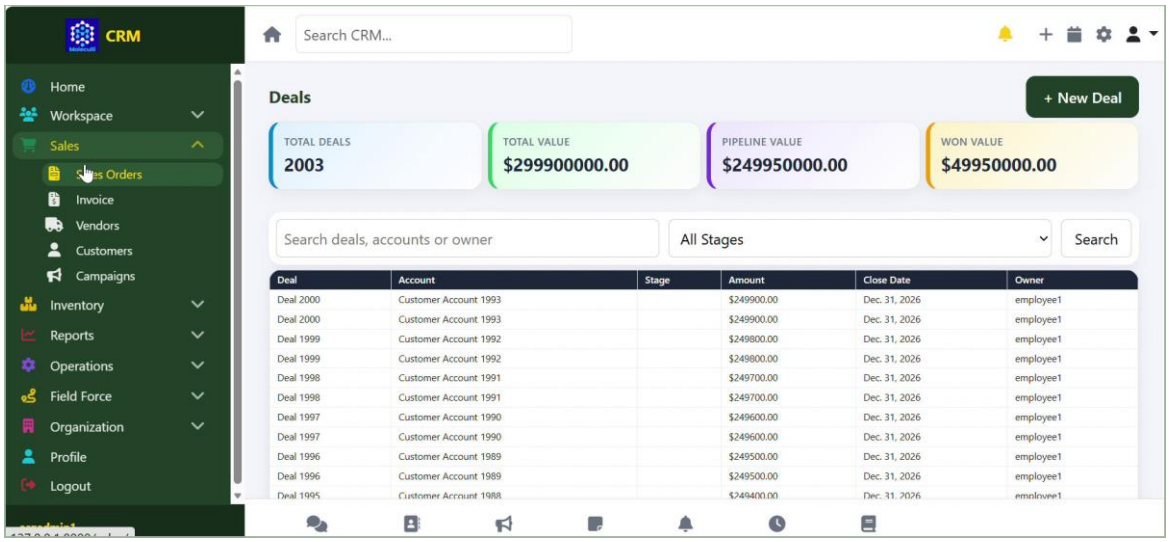


Figure 13. *Deals list with summary tiles.*

4.4 Sales

The **Sales** menu contains **Sales Orders, Invoice, Vendors, Customers and Campaigns**.

- **Sales Orders:** every order with invoice number, customer, total and payment status. Click **Create Sale** to add one.
- **Invoice:** invoices raised for your customers. Click **Create Invoice**.
- **Vendors:** your suppliers. Click **Create Vendor**.

- **Customers:** customer records with code, account and branch.
- **Campaigns:** manage your sales and marketing campaigns.

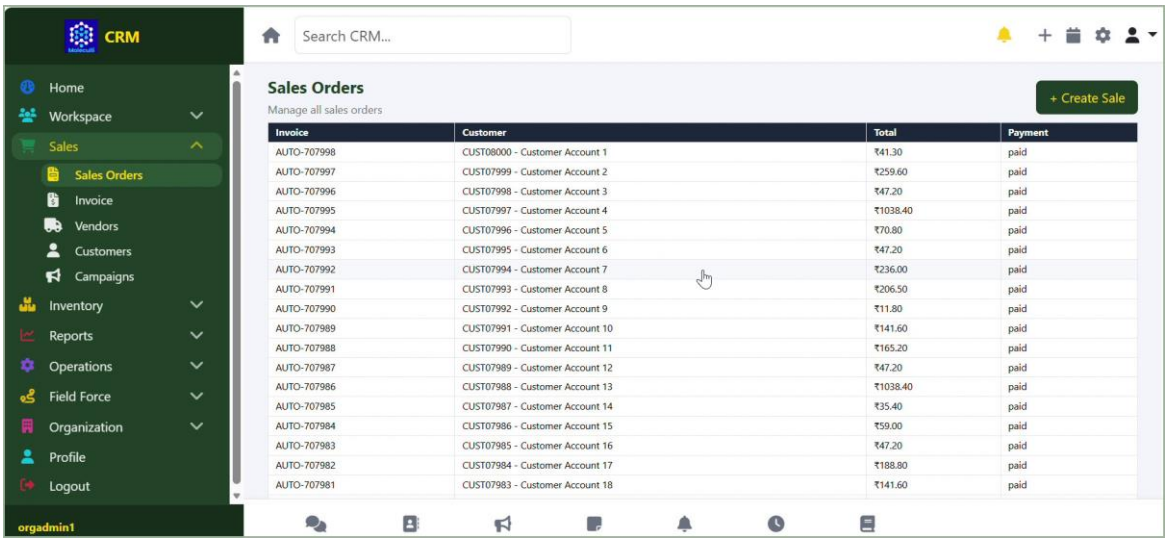


Figure 14. *Sales Orders.*

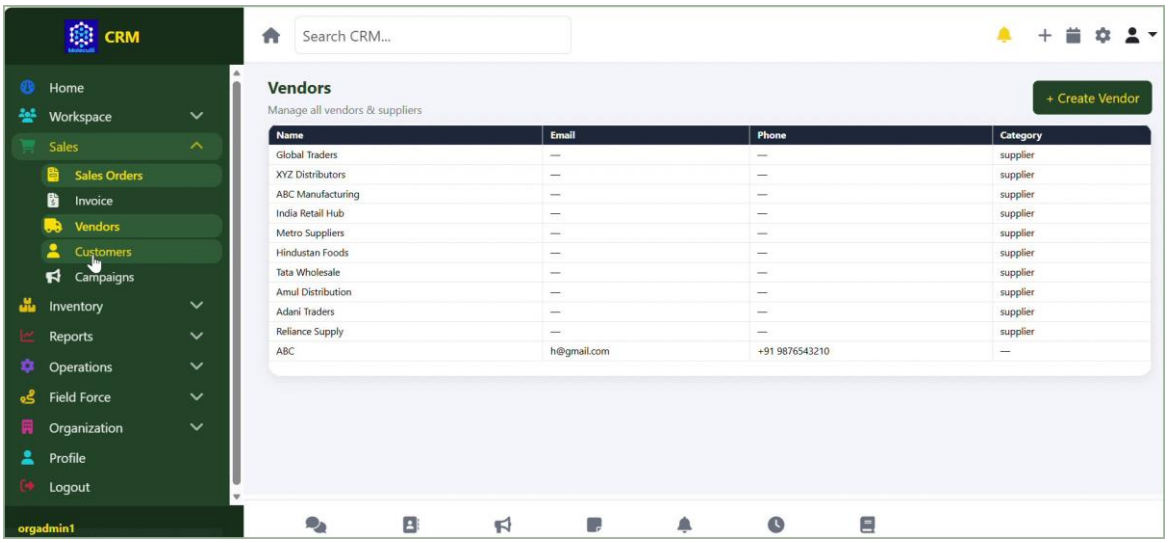


Figure 15. *Vendors.*

4.5 Inventory

The **Inventory** menu contains **Products, Price Book, Purchases and Stock**.

- **Products:** your product list with SKU, category, selling price and status. Click **Add Product**.
- **Price Book:** create price books for your pricing structures, with a pricing model and an active setting.
- **Purchases:** purchase orders with supplier, branch and status. Click **Create Purchase Order**.
- **Stock:** the inventory dashboard with stock levels.

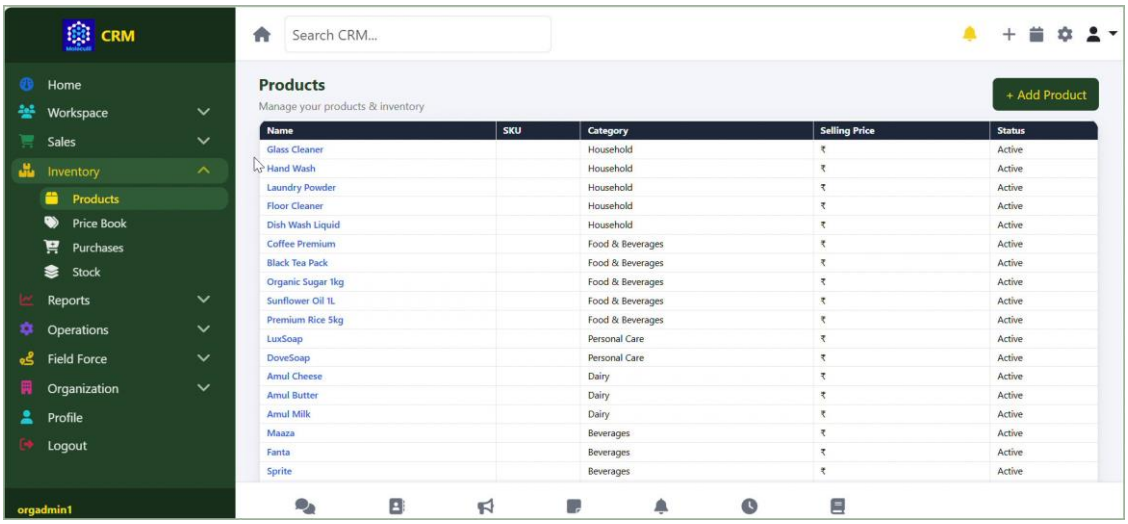


Figure 16. *Products.*

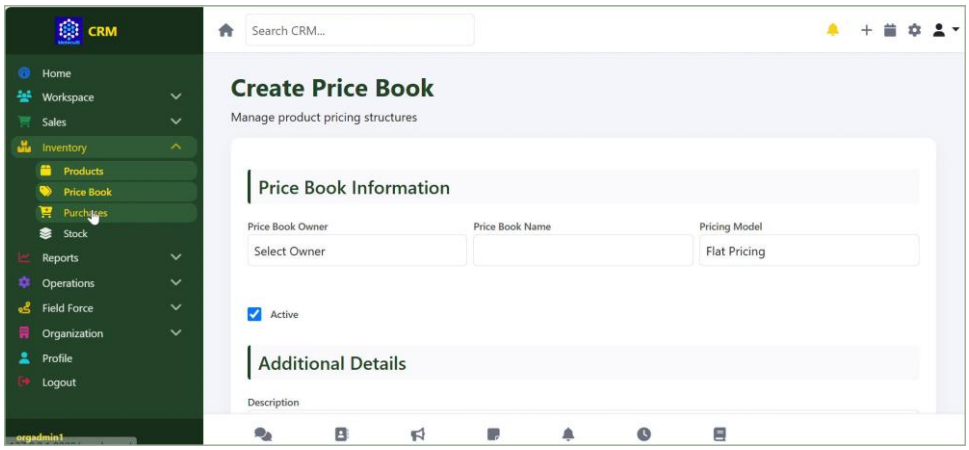


Figure 17. *Create Price Book.*

Stock dashboard

The Stock page shows summary tiles and a **low-stock alert** list so you can reorder before you run out. Action buttons let you **Add Stock, Transfer Stock, Adjust Stock**, open **Movement History** and **Inventory Reports**. Charts show **Stock by Branch** and **Top Products**.

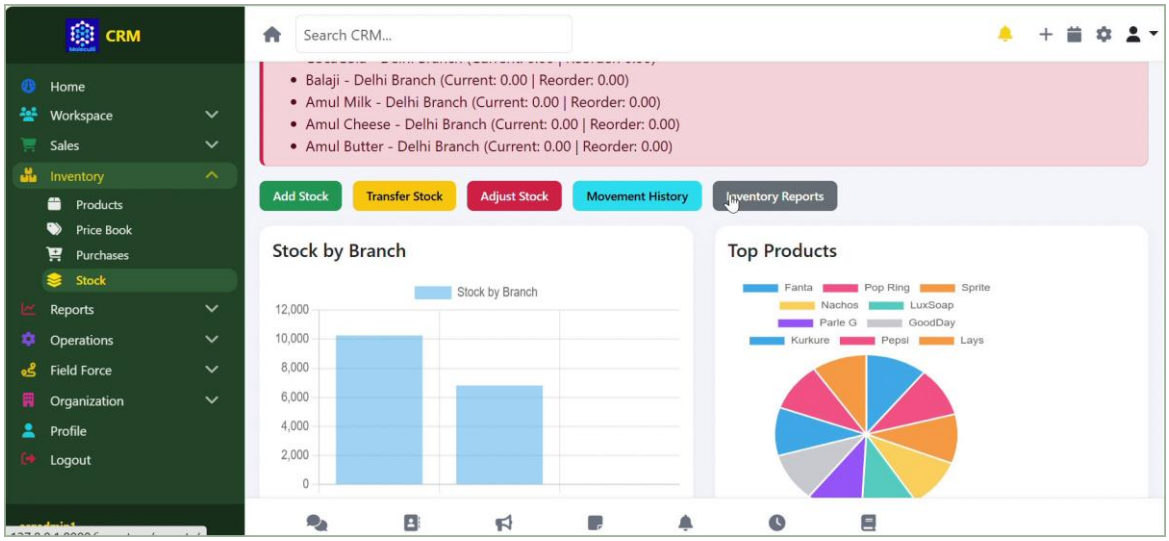


Figure 18. *Stock dashboard with action buttons, Stock by Branch and Top Products.*

4.6 Reports

The **Reports** menu contains **Dashboard, Branch Comparison and Employee Comparison**.

Reports Dashboard

Choose a period (for example Monthly) to see total revenue, total leads and total opportunities. Buttons open the **Revenue Report, Sales Performance and Lead Analytics**, and **Download Sales Excel** exports sales to a spreadsheet. **Activity Analytics** below summarises activity: leads created and converted, tasks completed, contacts created and opportunities created.

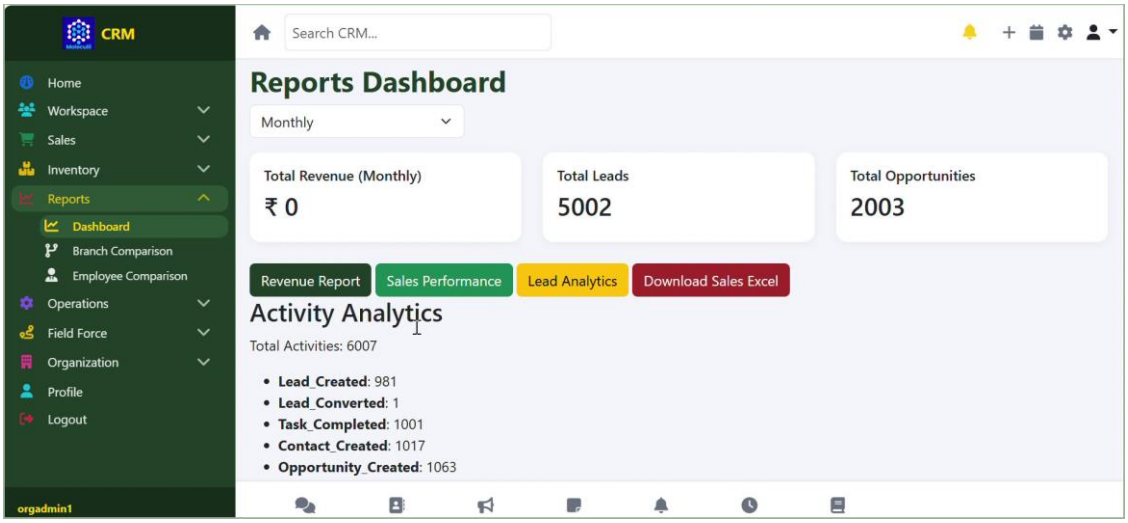


Figure 19. *Reports Dashboard.*

Branch Comparison

Ranks branches side by side by revenue, deals, won and lost deals, conversion rate and average deal size, with a conversion-rate chart.

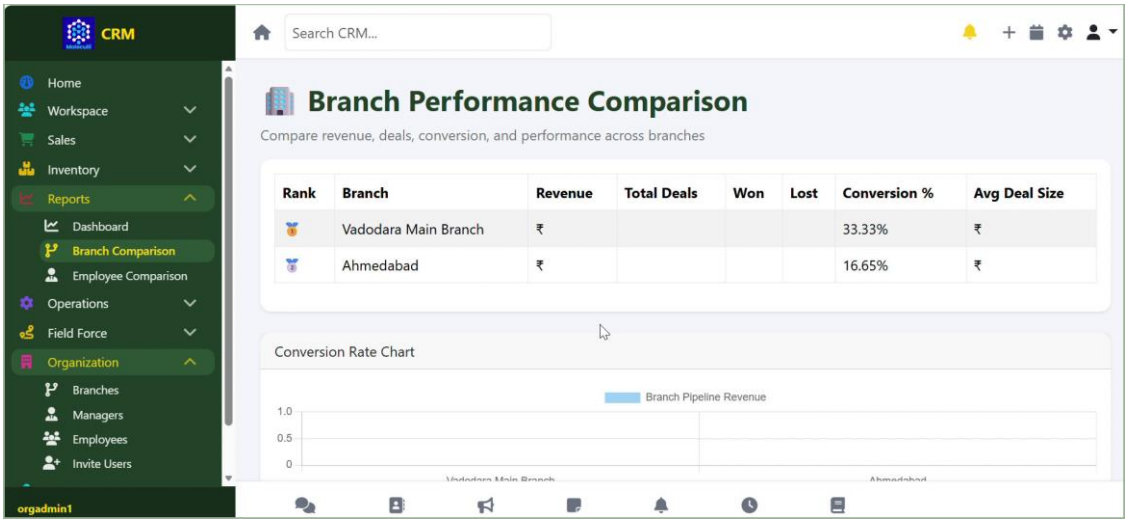


Figure 20. *Branch Performance Comparison.*

Employee Comparison

Set a date range and choose a stage, branch or employee, then click **Apply** to compare sales by employee in a chart and table.

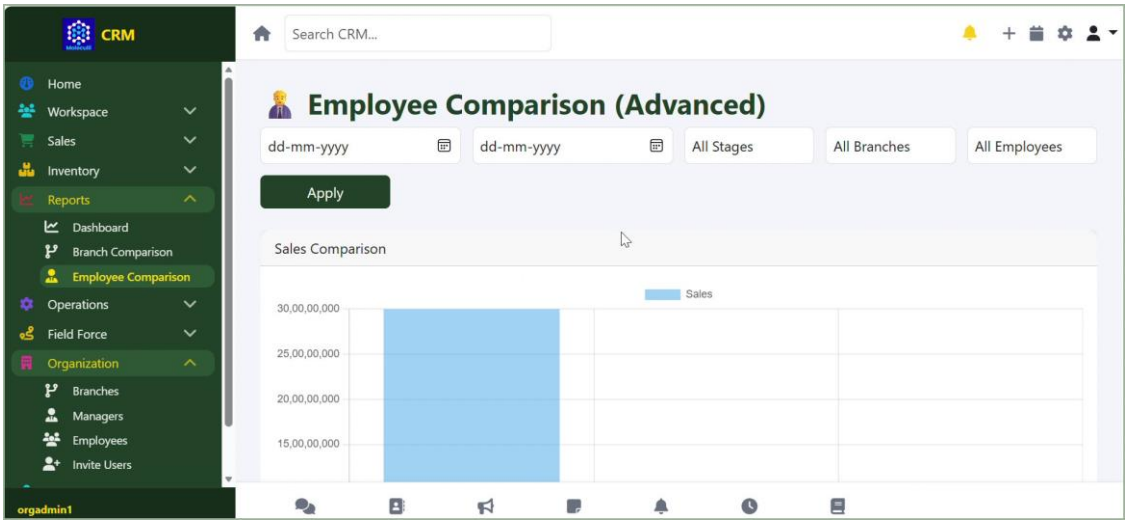


Figure 21. *Employee Comparison (Advanced).*

4.7 Operations

The **Operations** menu contains Tasks, Cases, Solutions, Broadcast Message, Broadcast Inbox, Follow-ups and Notifications. The most used are described below.

Tasks

Manage and track your team's tasks. The list shows subject, owner, priority, status and due date. Click **New Task** to create one, or **Calendar** to see tasks by date.

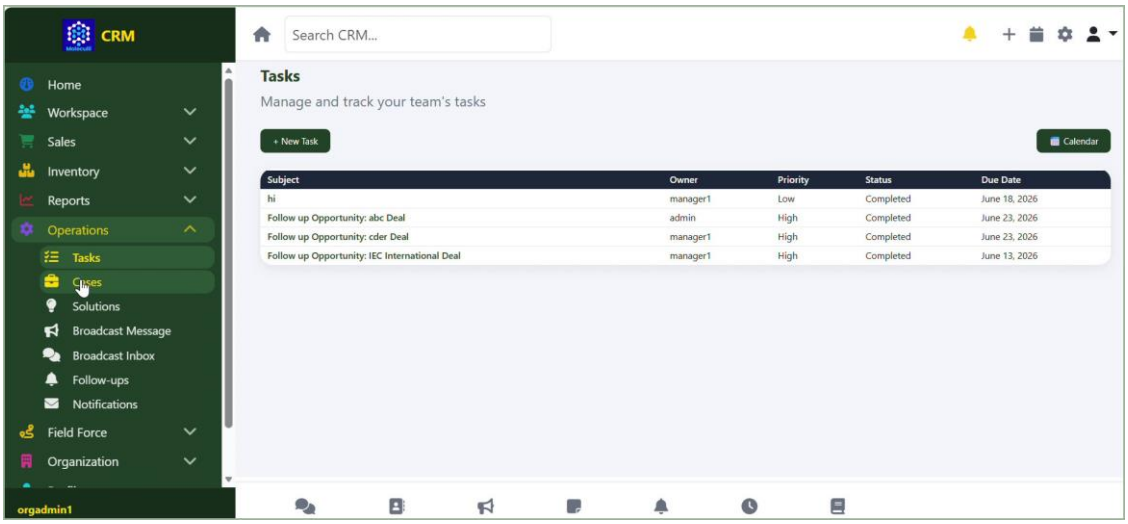


Figure 22. *Tasks.*

Broadcast Message

Send one message to many people at once.

1. Open **Operations > Broadcast Message**.
2. Choose the **Target**: **All Users** or **Selected User**.

3. Enter a **Subject** and your **Message**.
4. If you chose Selected User, tick the people in the **Select Users** list.
5. Click **Send Message**.

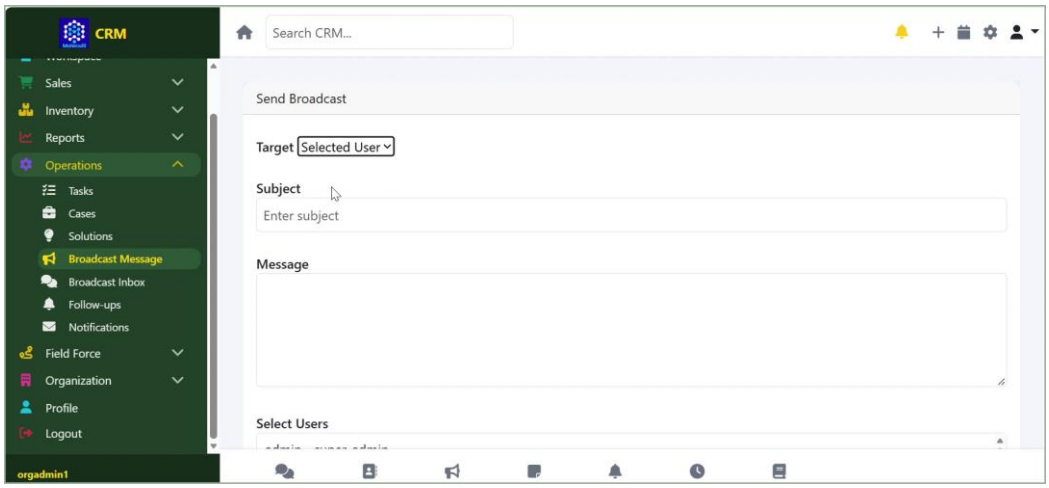


Figure 23. *Send Broadcast form.*

Broadcast Inbox and Notifications

Messages you receive appear in **Broadcast Inbox**. The **Notifications** page lists system alerts; when there is nothing new it shows “No notifications”.

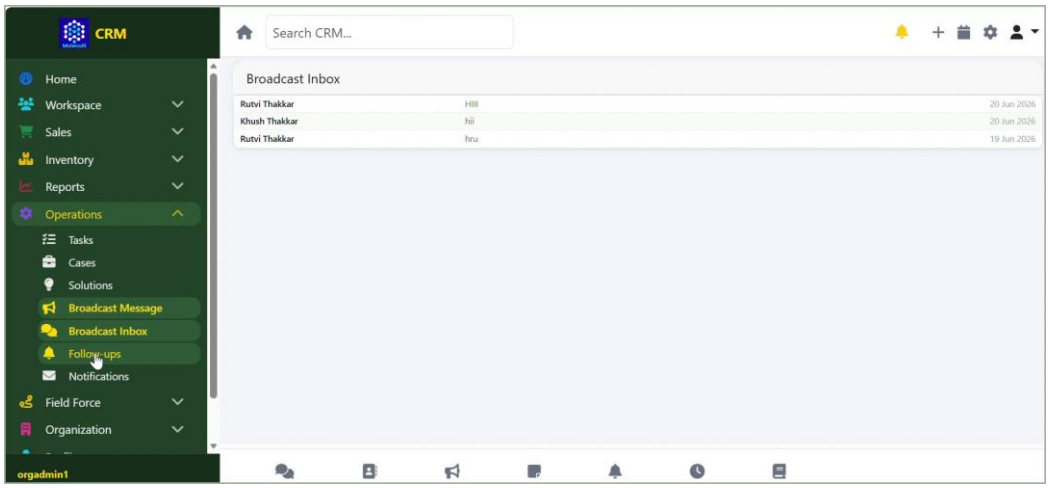


Figure 24. *Broadcast Inbox.*

4.8 Field Force

The **Field Force** menu contains Dashboard, Tour Plans, Tour Calendar, Create Tour, Visits and Expenses. It helps you plan, approve and review field work.

- **Dashboard:** total tours and how many are pending, approved and completed, with shortcuts to Tour Plans, Visits, Expenses and Pending Approvals.
- **Tour Plans:** every plan with title, start, end and a colour status (Pending, Approved, Completed). Click **View** to open a plan.
- **Tour Calendar:** see tours on a monthly calendar.
- **Visits:** the stops visited on each tour and their outcome.

- **Expenses:** travel expenses with type, amount, status and receipt, with Edit and Delete actions.

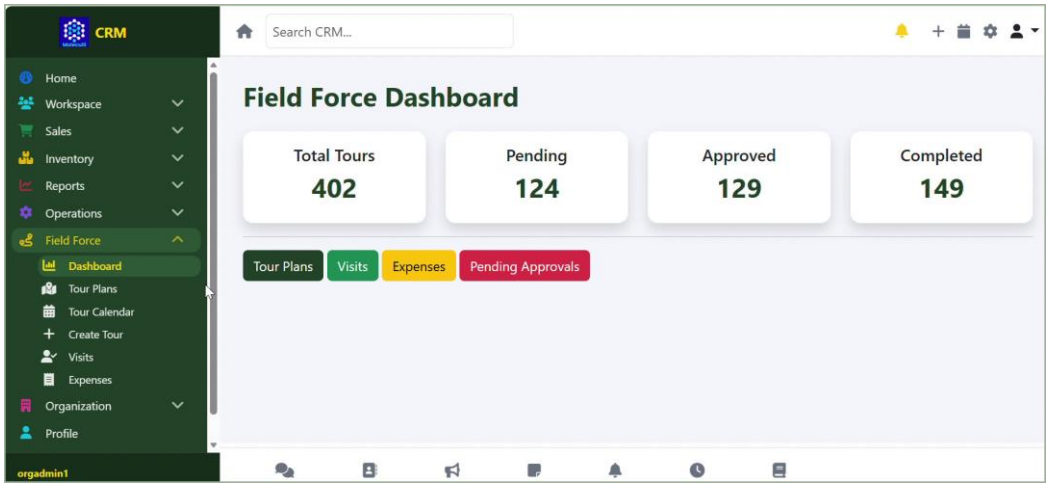


Figure 25. *Field Force Dashboard.*

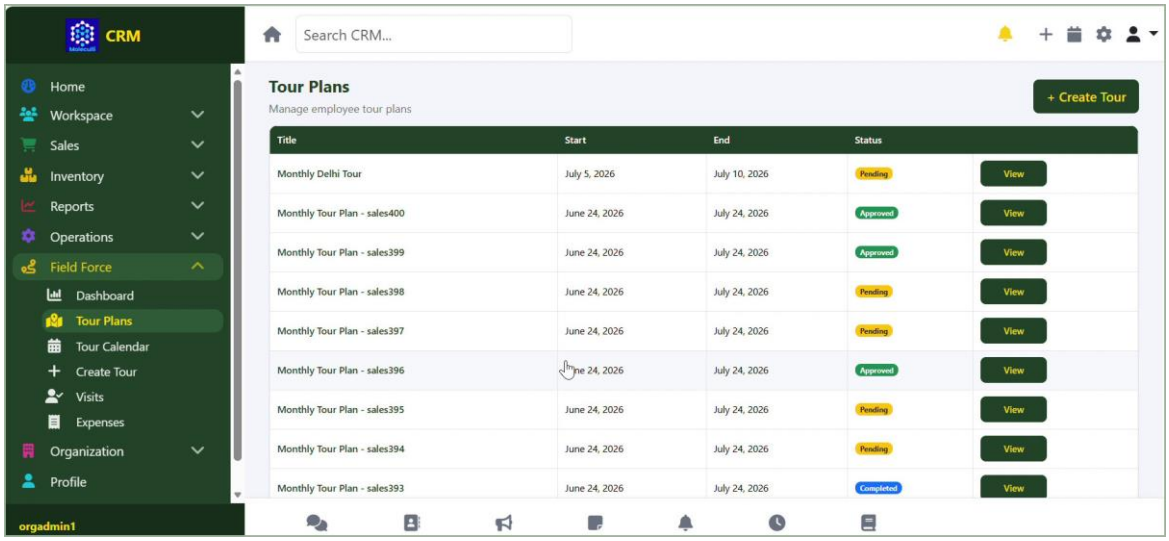


Figure 26. *Tour Plans with status badges.*

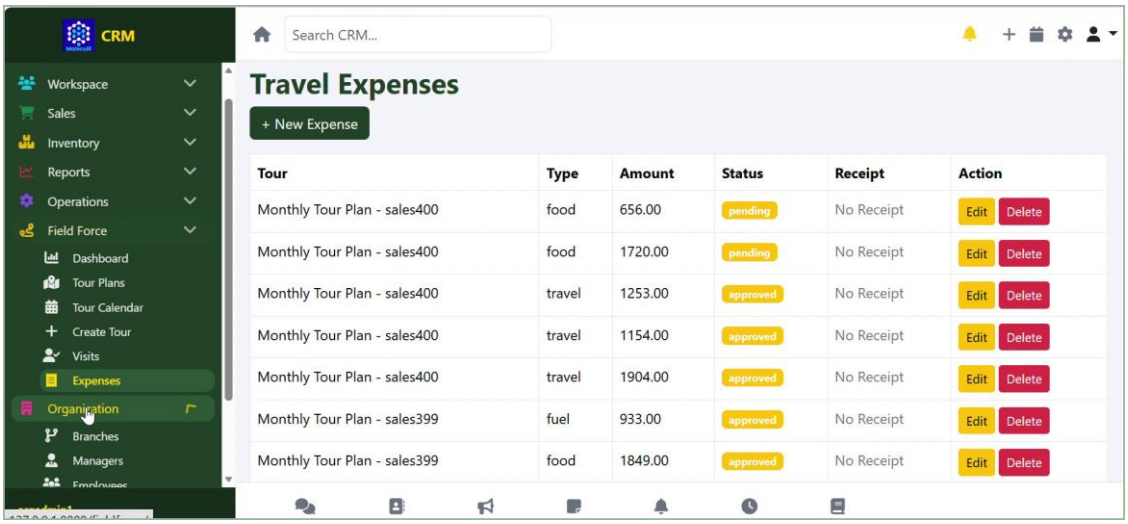


Figure 27. *Travel Expenses.*

4.9 Organization

The **Organization** menu contains Branches, Managers, Employees and Invite Users. This is where you build your structure.

Branches

Lists each branch with name, code, city and manager. Click **Add Branch** to create a branch in any city or country.

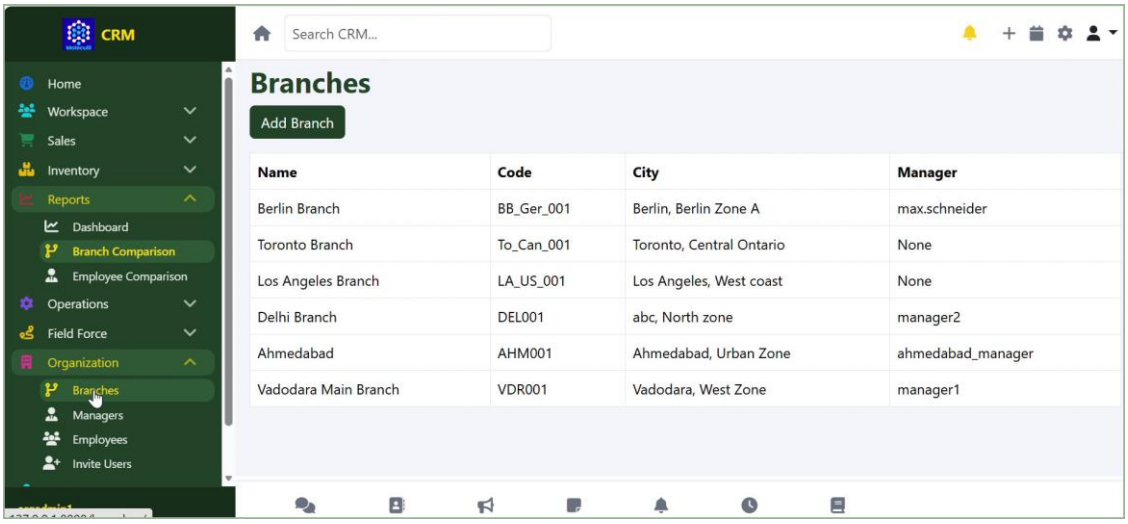


Figure 28. *Branches.*

Managers and Employees

See the people in your organization with username, email, branch and contact number. Use **Add Manager** or **Add Employee** to add someone.

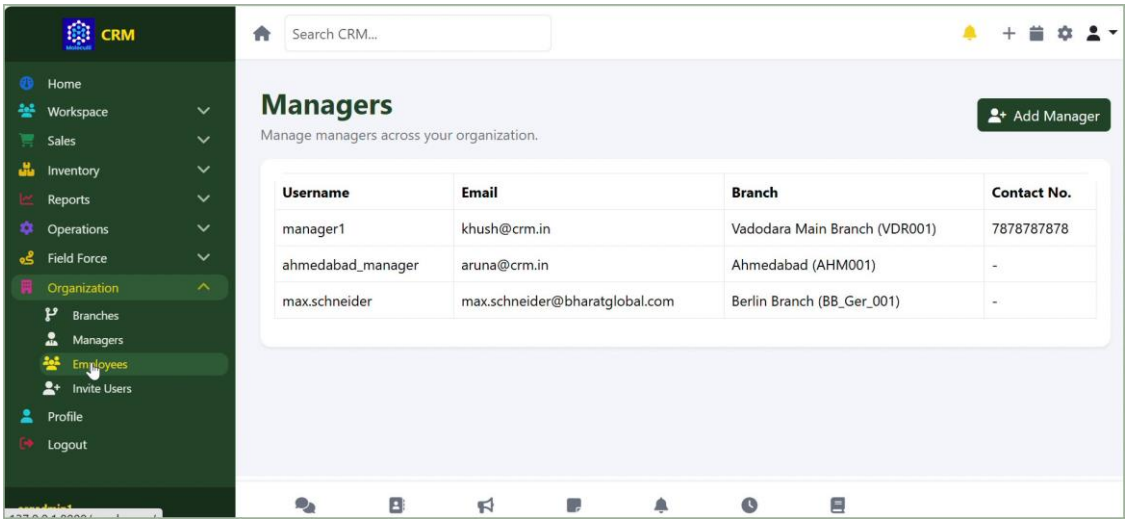


Figure 29. *Managers.*

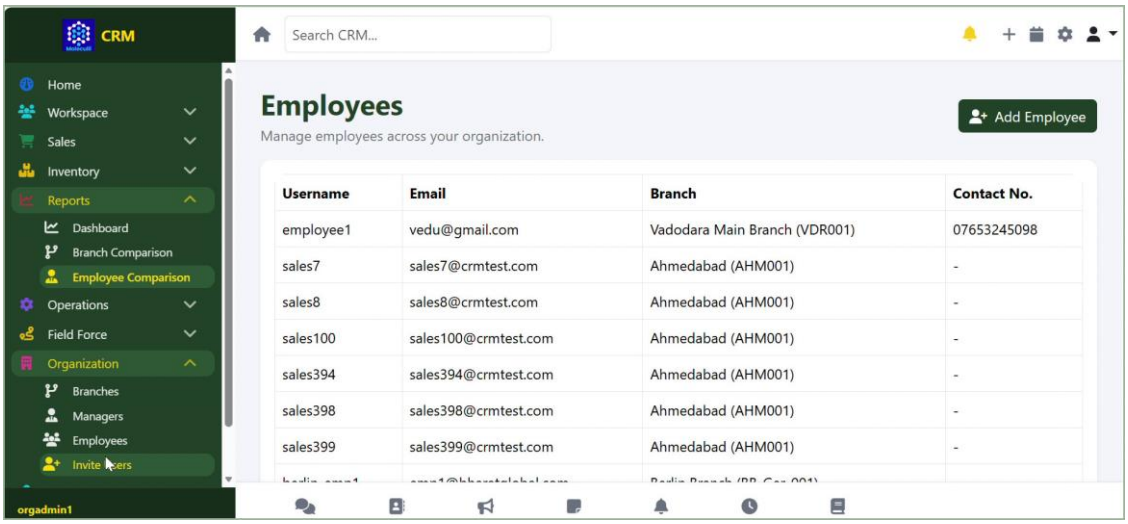


Figure 30. *Employees.*

Invite a team member

1. Open **Organization > Invite Users**.
2. Enter the person's **Email Address**.
3. Choose their **Role** from the drop-down list.
4. Click **Send Invite**. The panel on the right explains which roles can be assigned.

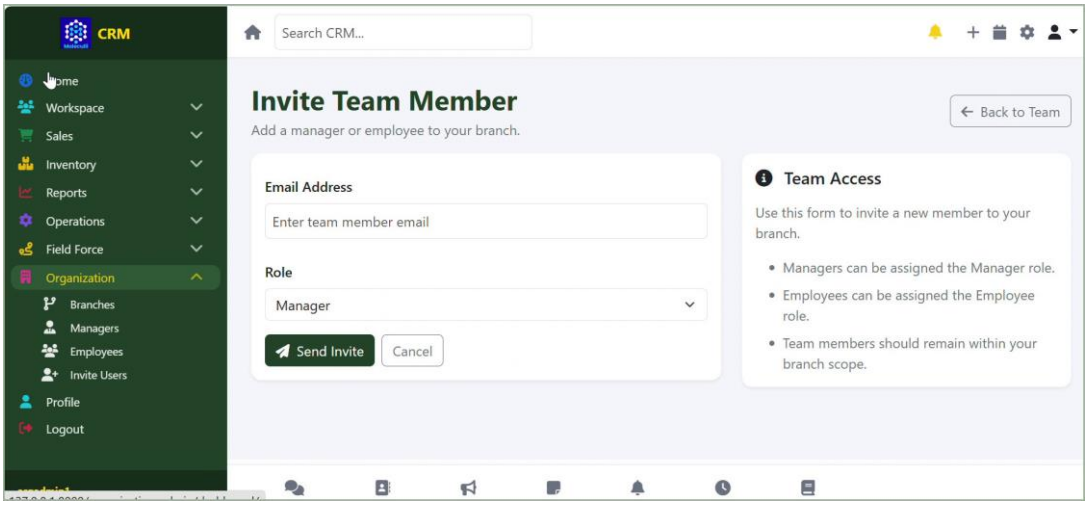


Figure 31. *Invite Team Member.*

Create User

From the profile menu at the top right choose **Create User**. The form asks for email, password, **Role**, **Reporting to**, profile photo, contact number, and the location: **Country, State, Zone, District, Area and Branch**. Fill the location fields that apply so the person lands in the correct territory.

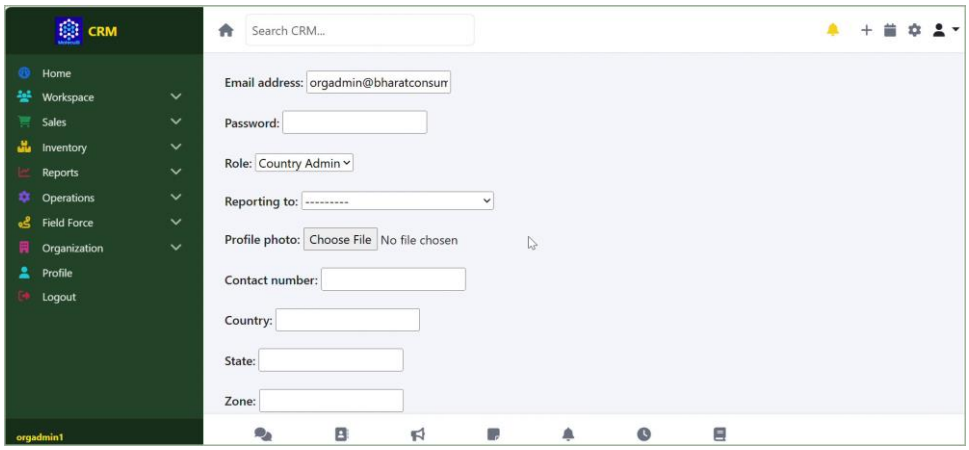


Figure 32. *Create User form.*

5. Guides for Other Roles

Every role signs in the same way (section 2.1) and uses the same layout (section 2.2). This chapter shows each role's own dashboard.

5.1 Country Admin

The Country Admin manages every state and branch inside one country.

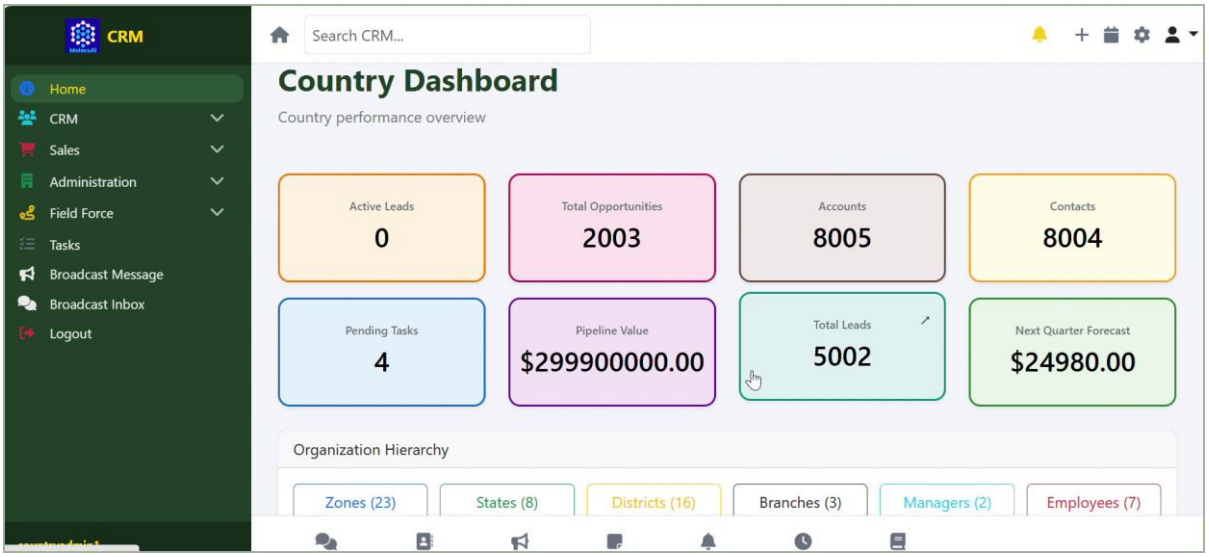


Figure 33. *Country Dashboard.*

- **Cards:** active leads, total opportunities, accounts, contacts, pending tasks, pipeline value, total leads and next-quarter forecast.
- **Organization Hierarchy:** counts of zones, states, districts, branches, managers and employees beneath you.
- **Charts:** revenue by month, deals won versus lost, top performers and employee sales.
- **Menu:** Home, CRM, Sales, Administration, Field Force, Tasks, Broadcast Message and Broadcast Inbox.

5.2 State Admin

The State Admin sees state-level performance.

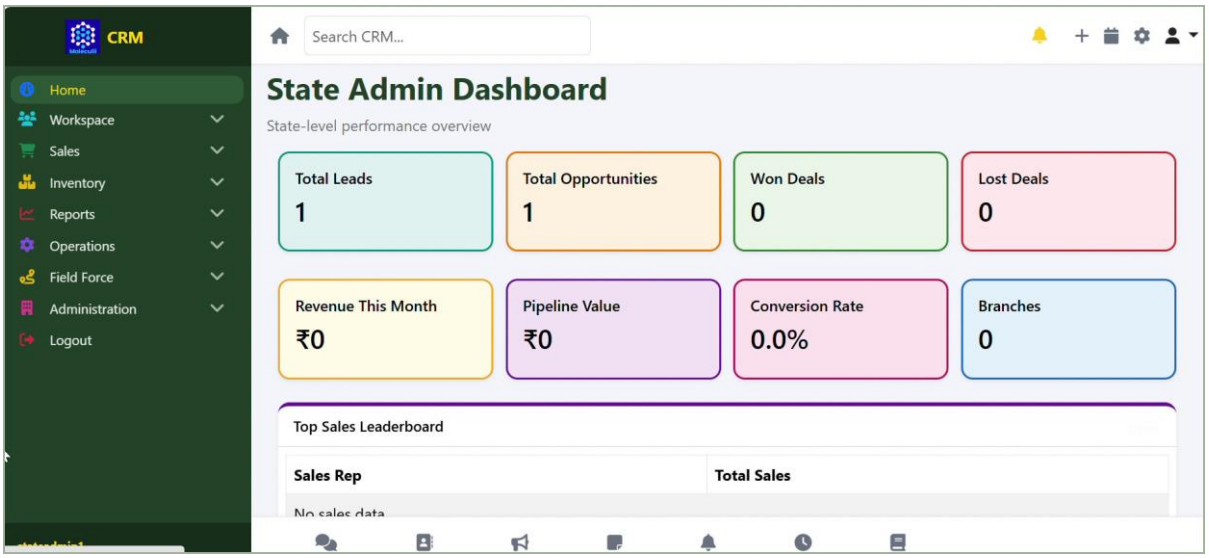


Figure 34. *State Admin Dashboard.*

- **Cards:** total leads, total opportunities, won deals, lost deals, revenue this month, pipeline value, conversion rate and branches.
- **Top Sales Leaderboard:** who is selling the most.
- **Menu:** Home, Workspace, Sales, Inventory, Reports, Operations, Field Force and Administration.

5.3 Zone Admin

The Zone Admin watches zone analytics, branch performance, employees and sales.

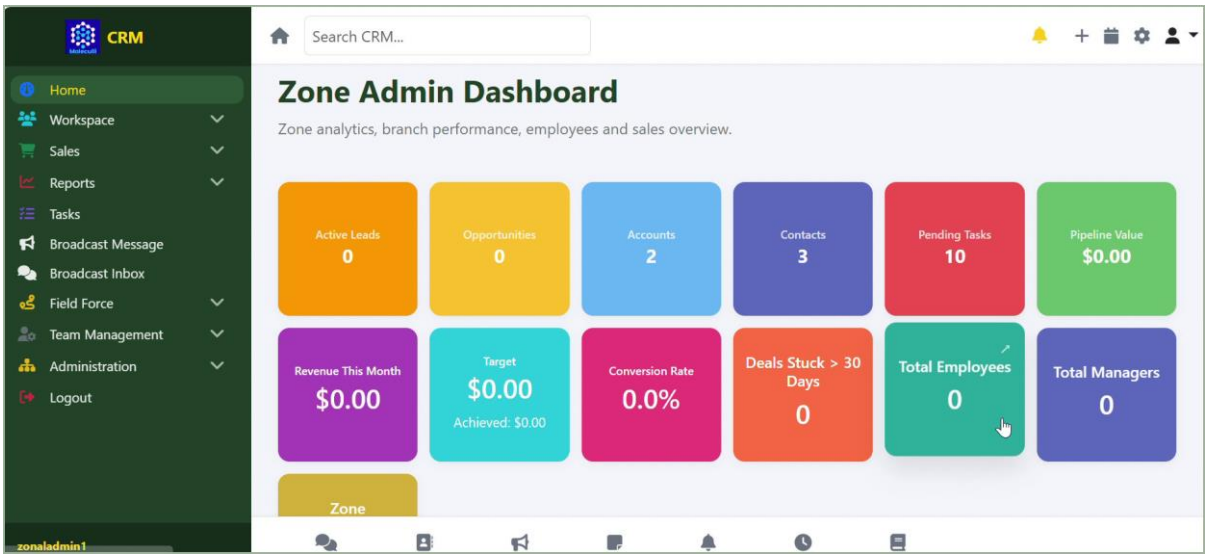


Figure 35. *Zone Admin Dashboard.*

- **Tiles:** active leads, opportunities, accounts, contacts, pending tasks, pipeline value, revenue this month, target and achieved, conversion rate, deals stuck over 30 days, total employees and total managers.
- **Menu:** Home, Workspace, Sales, Reports, Tasks, Broadcast Message, Broadcast Inbox, Field Force, Team Management and Administration.

5.4 District Admin

The District Admin oversees every area and branch in the district.

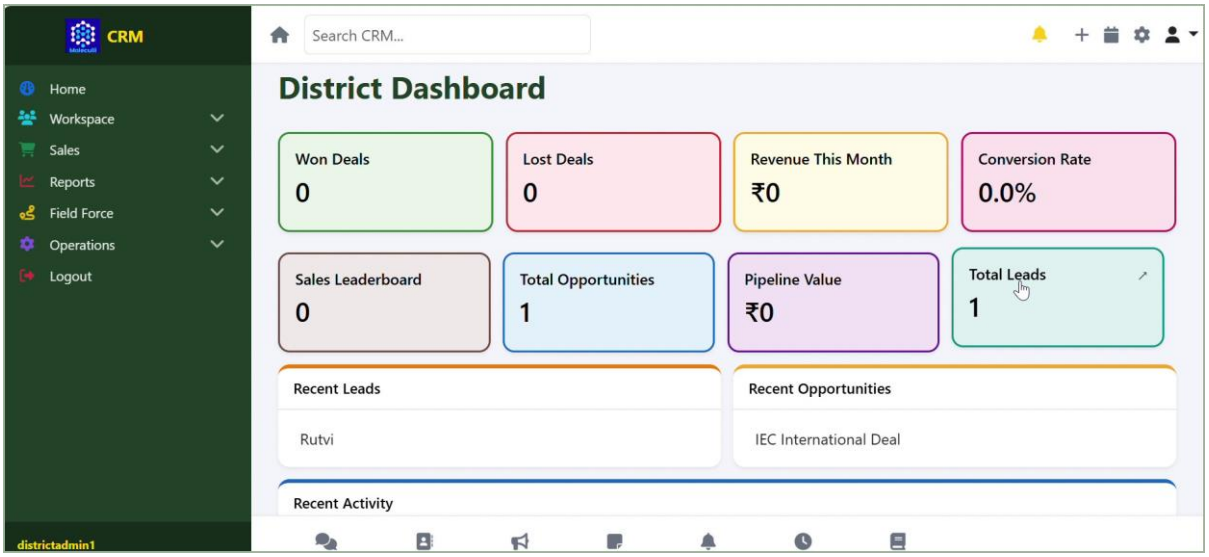


Figure 36. *District Dashboard.*

- **Cards:** won deals, lost deals, revenue this month, conversion rate, sales leaderboard, total opportunities, pipeline value and total leads.
- **Panels:** recent leads, recent opportunities and recent activity.

5.5 Area Admin

The Area Admin gets a multi-branch view of the area.

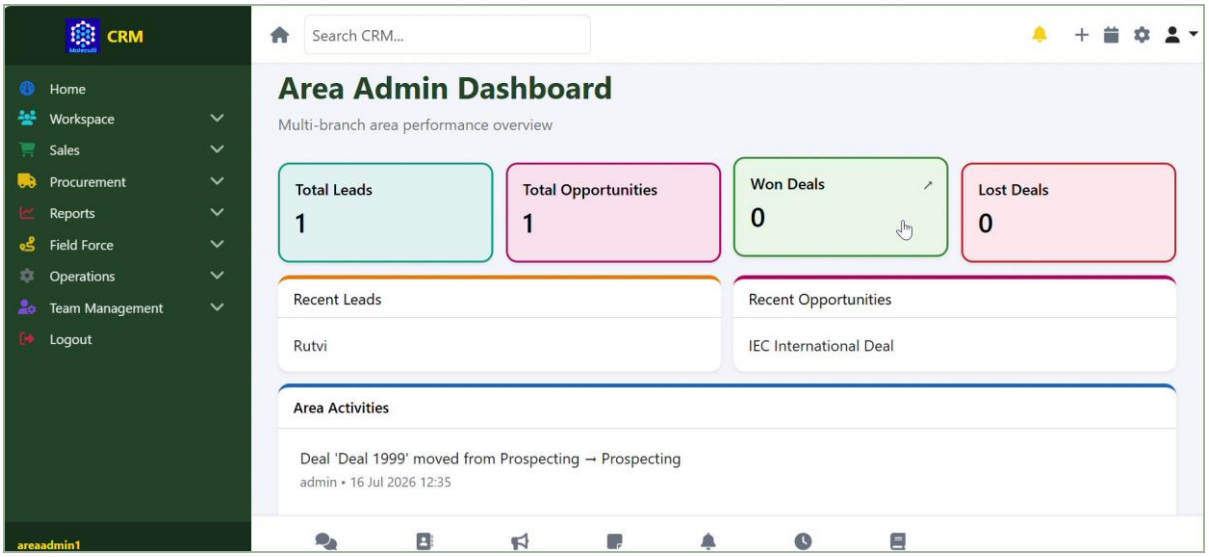


Figure 37. *Area Admin Dashboard.*

- **Cards:** total leads, total opportunities, won deals and lost deals.
- **Panels:** recent leads, recent opportunities and an **Area Activities** feed, for example a deal moving between stages.
- **Menu:** Home, Workspace, Sales, Procurement, Reports, Field Force, Operations and Team Management.

5.6 Branch Admin

The Branch Admin runs a single branch.

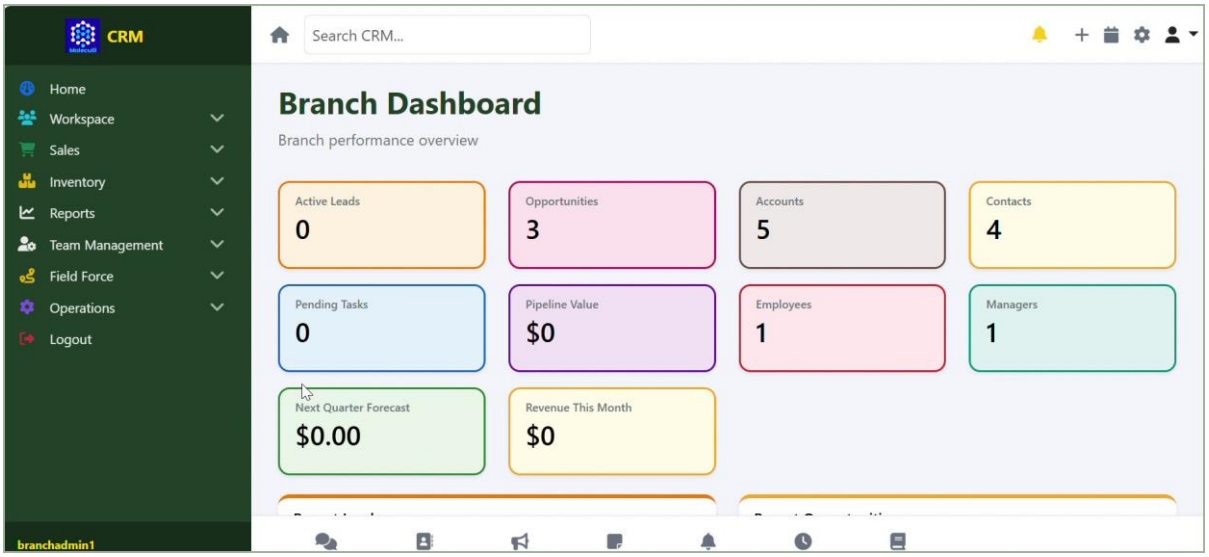


Figure 38. *Branch Dashboard.*

- **Cards:** active leads, opportunities, accounts, contacts, pending tasks, pipeline value, employees, managers, next-quarter forecast and revenue this month.
- **Menu:** Home, Workspace, Sales, Inventory, Reports, Team Management and Operations.

5.7 Manager

The Manager leads a team and keeps leads, tasks and deals moving.

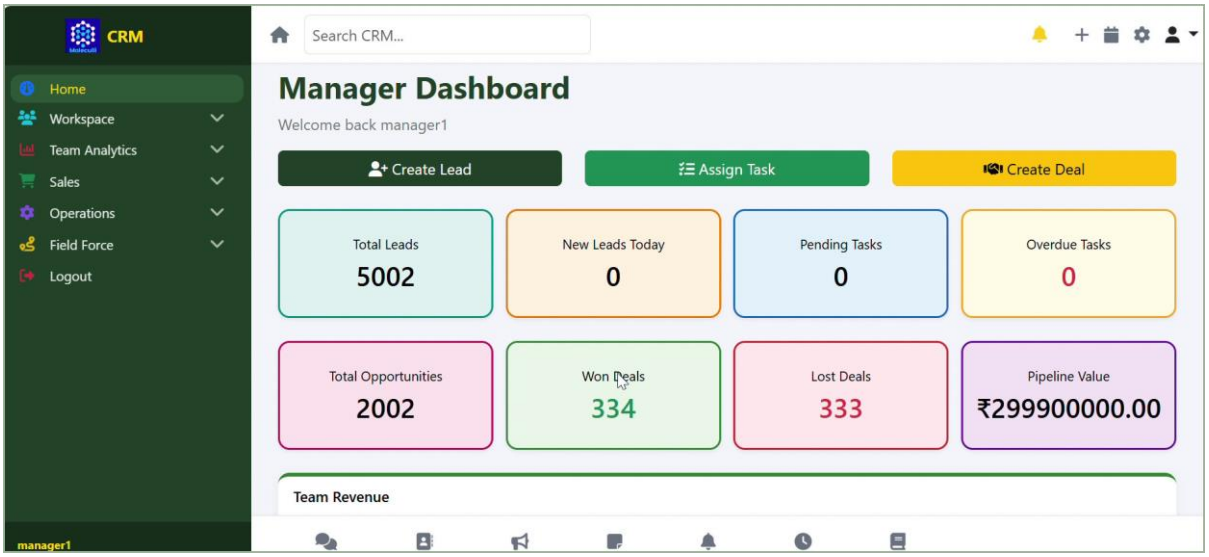


Figure 39. *Manager Dashboard.*

- **Quick buttons: Create Lead**, **Assign Task** and **Create Deal**.
- **Cards:** total leads, new leads today, pending tasks, overdue tasks, total opportunities, won deals, lost deals and pipeline value; **Team Revenue** below.
- **Menu:** Home, Workspace, Team Analytics, Sales, Operations and Field Force.

5.8 Employee

The Employee focuses on personal leads, tasks and follow-ups.

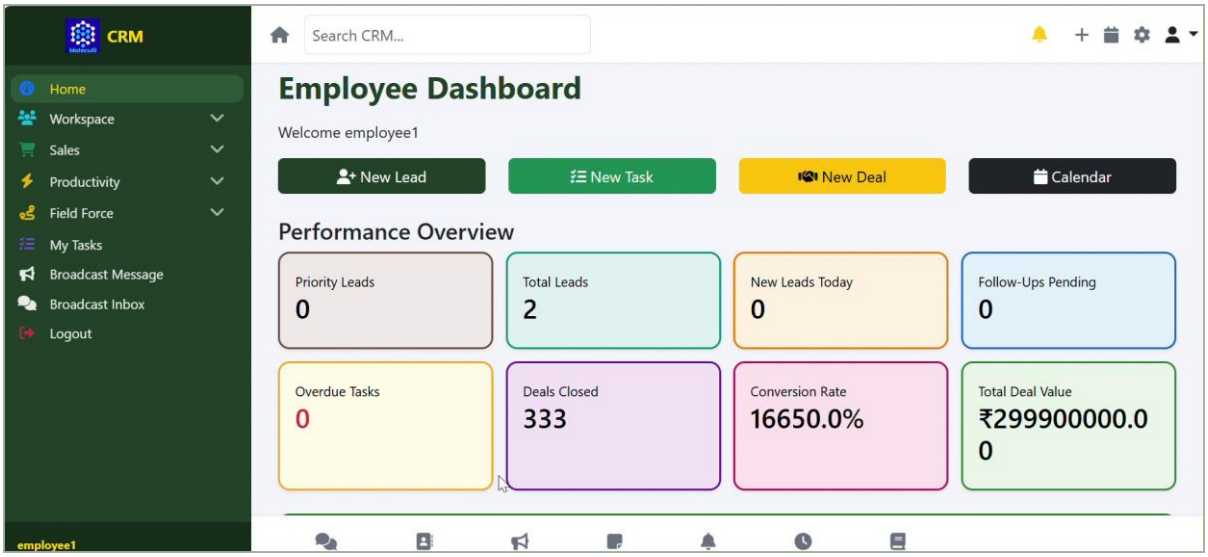


Figure 40. *Employee Dashboard.*

- **Quick buttons: New Lead**, **New Task**, **New Deal** and **Calendar**.
- **Performance Overview:** priority leads, total leads, new leads today, follow-ups pending, overdue tasks, deals closed, conversion rate and total deal value.
- **Monthly Sales Target:** your progress against target.
- **Menu:** Home, Workspace, Sales, Productivity, Field Force, My Tasks, Broadcast Message and Broadcast Inbox.

5.9 Customer

Customers have their own portal. Choose **Login > Customer Portal** on www.moleculli.com, sign in, and you stay connected with the business through your own dashboard. To learn more about the Customer Portal or to have customers set up, contact us (Chapter 10).

6. Features Overview

Moleculli brings these 13 features together in one platform.

Feature	What it does for you
Role-Based Access Control	Every person sees the screens and data that fit their role.
Dynamic Access Control	Access follows the user's role and territory, so people see what belongs to them.
Multi-Organization CRM	Run many companies from one platform.
Lead Management	Capture, assign and follow up leads in one place.
Contact Management	Keep every contact organised, searchable and up to date.
Deal Tracking & Sales Forecasting	Follow every deal through its stages and see where revenue is heading.
Pipeline Management	See and manage opportunities across your sales pipeline.
Sales Analytics	Dashboards and charts that turn data into decisions.
Internal Chat Integration	Talk to colleagues without leaving the CRM.
Team Tasks & Projects	Create and track tasks with priorities and due dates.
Collaborative Projects	Teams work together on shared projects.
Smart Team Workspace	One shared workspace for the whole team.
Documents Vault	A secure place to keep and share your documents.

7. Ready-made Templates

Start fast with 11 ready-made templates. You can browse them on the Templates page of www.moleculli.com.

Template	Use it to...
Team KPI Dashboard	Track key performance indicators for the whole team in one view.
Campaign Launch Kit	Plan and launch a campaign step by step.
Lead Verification & Approval	Review new leads and approve them before they enter the pipeline.
Communication & Scheduling	Plan calls, meetings and follow-up messages.
Deals Pipeline	Follow deals from first contact to close.
Territory Performance Sheet	Compare results across territories.
Client Projects	Manage the work you deliver for each client.
Sales Target Planner	Set sales targets and track progress.
Daily Activity Tracker	Log daily calls, visits and tasks.
Quarterly Goal Tracker	Set goals for the quarter and measure progress.
Team Collaboration Board	Share updates and tasks with the team on one board.

8. Tips and Best Practices

8.1 Daily habits

- Start on **Home** each morning and check overdue tasks and new leads.
- Update a deal's stage as soon as something changes, so forecasts stay accurate.
- Use **Broadcast Message** for announcements instead of many separate messages.
- Use filters (country, stage, branch, date) to focus before you export or share numbers.

8.2 Setting up your organization

- Create branches first, then invite managers, then employees.
- Always give people the correct role and location so they see the right data.
- Review team structure on the dashboard after adding people.

8.3 Frequently asked questions

Question	Answer
Why do I see fewer menus than my manager?	Menus follow your role. Higher roles see more of the organization.
How do I see only one country?	Organization Admins can use the Countries filter on the Home dashboard (section 4.2).
How do I add a new employee?	Organization > Invite Users, or Add Employee, or Create User from the profile menu (section 4.9).
Can I export my sales?	Yes. On the Reports Dashboard, click Download Sales Excel.
How do I message everyone?	Operations > Broadcast Message, with Target set to All Users.
Where can customers sign in?	Login > Customer Portal on www.moleculli.com.

9. Glossary

Term	Meaning
Lead	A potential customer who has shown interest but is not yet qualified.
Contact	A person you do business with.
Account	A company or customer you work with.
Opportunity	A possible sale that is being worked on.
Deal	An opportunity tracked with a stage, amount and close date.
Pipeline	All open deals arranged by stage.
Pipeline value	The total value of deals in the pipeline.
Conversion rate	The share of leads or opportunities that become won deals.
Forecast	The revenue you expect to close in a future period.
Tour plan	A planned trip for field work, with start and end dates and an approval status.
Broadcast	A message sent to many users at once.
Branch	A business location in a city, managed by a Branch Admin and Managers.
Territory	The country, state, zone, district, area or branch a user is responsible for.

10. Support and Contact

We are happy to help with setup, training and questions.

Contact	Details
Email	info@moleculli.com
Phone	7567148677
Website	www.moleculli.com