TESSERACT ERP · USER MANUAL

AI assistant

Ask questions about your business in plain language and get answers from your own books, invoices, stock and pipeline.

What it can do

- "How much did we sell last month?"
- "Who owes me the most?"
- "Which products are running low?"
- "How many deals are in negotiation and what are they worth?"

It reads your data with the same permissions you have, answers in your language, and never changes anything.

Ask a question

1. Open **AI Assistant**.
2. Type your question and press Enter. The answer appears as it is written, with the data it looked at.
3. Ask follow-up questions in the same conversation; it remembers the context.
4. Start a **New conversation** for a new topic. Your conversations are private: nobody else sees them.

Good questions

- Name the period: "this month", "in October", "this year".
- Name the thing: a customer, a product, a warehouse.
- Ask for a list or a total: "list the 5 biggest unpaid invoices".

Limits

- Each organization has a monthly usage allowance; the assistant shows how much is used.
- The assistant explains numbers but is not a replacement for your accountant. Check important figures in the reports.
- It needs an AI provider key in the server settings (Claude, ChatGPT or Gemini). Ask us to set it up.