TESSERACT ERP · USER MANUAL

CRM

Track every lead, move deals through your pipeline and never forget a follow-up. A won deal becomes an invoice in one click.

Before you start

The pipeline comes with standard stages (for example New, Proposal, Negotiation). Open **CRM** → **Pipeline** → **Stages** to rename, reorder or add stages and set the win probability of each.

Leads

A lead is a person or company that might buy from you.

1. Open **CRM** → **Leads** and click **New lead**.
2. Enter the name, company, email, phone, source and owner.
3. Move it through **New** → **Contacted** → **Qualified** as you talk to them.
4. If it goes nowhere, **Disqualify** it with a reason.

Convert a lead

1. Open a qualified lead and click **Convert**.
2. Tesseract creates the customer (or links an existing one) and, if you choose, a deal in the pipeline with its amount and expected close date.

The pipeline

1. **CRM** → **Pipeline** shows every open deal as a card in its stage.
2. Drag a card to the next stage as the deal moves forward.
3. Mark a deal **Won** or **Lost**. For a won deal, click **Create invoice** to bill the customer straight away.

Activities and to-dos

1. On a lead or deal, add an activity: call, meeting, email, task or note, with a due date.
2. **CRM** → **Activities** lists everything that is due, overdue or done.
3. When a task is assigned to someone, they get a notification.

Reports

The pipeline page shows the value of open deals, the weighted value by probability, deals won this month and the win rate.