TESSERACT ERP · USER MANUAL

Reports & exports

Every number in Tesseract can leave the system in the format you need: Excel, PDF or CSV.

Financial reports

Open **Accounting** → **Financial reports**:

- **Profit and loss** for any period.
- **Balance sheet** on any date.
- **Trial balance** for any period.
- **General ledger**: every posting per account with running balances.

Pick the dates at the top; the report updates at once.

Export anything

Look for the **Export** button on reports and lists (invoices, bills, contacts, products, stock, employees, leads, journal entries):

1. Click **Export**.
2. Choose **Excel (.xlsx)**, **PDF** or **CSV**.
3. For PDF, choose the language. The PDF carries your organization's letterhead.

Exports include every page of the list, not only the rows on screen, with the filters you applied.

The dashboard

The **Dashboard** shows this month's income, expenses and profit, cash and bank balances, recent invoices, overdue amounts and low-stock items.

Tips

- Send your accountant the trial balance and general ledger in Excel at month end.
- Use CSV to load data into other tools.
- Numbers use the international format (1,234,567.89) in every language.