TESSERACT ERP · USER MANUAL

Sales & invoicing

Create professional invoices, email them as PDFs, record payments and let Tesseract remind customers who pay late.

Before you start

- Fill in **Settings** → **Organization**: legal name, tax number, address and the invoice footer (bank or bKash details). They are printed on every invoice.
- Add your customers in **Contacts** and your products or services in **Products**.

Create an invoice

1. Open **Invoices** and click **New invoice**.
2. Choose the customer, the invoice date and the due date.
3. Add lines: pick a product (price and tax fill in) or type a description, quantity and price. Add a discount per line if needed.
4. The totals, discount and tax are calculated as you type.
5. **Save as draft** to keep working, or **Post** to issue it. Posting gives it a number (INV-00001…), puts it in the books and, for stock items, takes the goods out of the warehouse.

> A posted invoice cannot be edited. If it is wrong and has no payments, **Void** it and create a new one.

Send it to the customer

1. Open the invoice and click **Email**. Choose the language of the PDF and edit the message if you like.
2. The customer receives the invoice as a PDF attachment. Every email sent is listed on the invoice.
3. You can also **Download PDF** to print it or send it on WhatsApp.

Record a payment

1. Open the invoice and click **Record payment**.
2. Enter the date, the amount, the method (cash, bank, mobile money…) and the account the money went to.
3. Partial payments are fine; the invoice shows **Partially paid** until the balance reaches zero.

4. Each payment has its own receipt PDF.

Automatic payment reminders

1. Open **Settings** → **Organization** → **Payment reminders**.
2. Switch reminders on and choose the days, for example 3 days before the due date and 7 days after.
3. Customers with an email address get a polite reminder with the invoice attached. Each reminder is sent once.

Find invoices

The list filters by status (draft, posted, paid, overdue…), by customer and by text. Export any list to **Excel, PDF or CSV**.