TESSERACT ERP · USER MANUAL

Getting started: team, roles and settings

Set up your organization, invite your team and give everyone the right access.

First steps

1. Sign in with the owner account we created for you.
2. Open **Settings** → **Organization** and fill in your legal name, tax number, address, email, phone and invoice footer.
3. Check the **base currency**. It can be changed if it was picked by mistake (amounts are not converted).
4. Follow the getting-started checklist and the guided tour on the dashboard.

Invite your team

1. Open **Settings** → **Members** and click **Invite**.
2. Enter an email address or a mobile number and choose a role.
3. Email invitations are sent automatically; for a mobile number, copy the link and send it on WhatsApp or SMS.
4. Invitations are valid for 7 days. The person sets their own password when they accept.

Roles and permissions

- Built-in roles cover the usual jobs: Owner, Accountant, Sales, Inventory, HR, Viewer and more.
- Open **Settings** → **Roles** to create your own role and tick exactly what it may see and do.
- Nobody can give someone more access than they have themselves.
- To remove access, disable the member; their history stays.

Language and theme

Each person picks their own language (English, বাংলা, العربية, Español, Français) and light or dark theme from the top bar.

Several companies

One login can belong to several organizations. Switch between them from the organization menu at the top of the sidebar.

Help

- The **?** button in the top bar replays the guided tour of the page you are on.
- Our support team is on WhatsApp, email and phone.