

What can you do with Sherkety ERP

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Sherkety ERP brings the covered Invoicing, Inventory, and Accounting work areas into one application menu. A landing screen is the first page for a work area, where its main groups and next actions are gathered. Use this page to choose the area that matches your work, open its landing screen, and continue to the detailed task page.

If you need to...	Go to
Open a destination from the application menu	Navigation basics
Understand the application shell	Understanding the interface
Work from the Accounting landing screen	Accounting Dashboard
Work from the Inventory landing screen	Inventory Overview
Work with customers, products, and invoices	Customers, products, and invoices
Process inventory transfers and returns	Inventory transfers and returns
Run accounting reports and audit work	Reports and audit work
Get help when a destination does not open as expected	Getting help

Before you start

Sherkety ERP starts from a signed-in application shell: the signed-in frame from which you open work areas. The available destinations and their ordering depend on your account, so use the labels currently shown in your application menu.

Prerequisites

- You are signed in to Sherkety ERP.
- You know whether your next task belongs to Invoicing, Inventory, or Accounting.

Choose the work area that matches your task

Invoicing covers customer-facing invoice and payment work. Inventory covers the movement, products, and reporting of stock. Accounting covers journals, bank activity, configuration, payments, budgets, assets, analytic accounting, and reports.

Use this table to choose the branch before opening a destination.

If you need to...	Choose this work area
Work with invoices, customers, products, payments, follow-ups, or electronic invoicing	Invoicing
Work with receipts, deliveries, internal movement, products, warehouses, replenishment, or stock reports	Inventory
Work with journals, bank activity, taxes, payments, budgets, assets, analytic accounting, or financial reports	Accounting

Steps

1. Choose the row that matches your task.
2. Select the corresponding application destination when it is shown in the menu.

Result: You have chosen the work area that matches your task and are ready to locate its destination.

Find a covered destination

An application tile is an entry that opens a work area from the application menu. Its visible name comes from the menu, so work from the name shown on your screen.

Steps

1. Open the application menu.
2. In the table below, select the destination label shown for the work area you chose.

Work area	Destination
Invoicing	The destination label currently shown for this work area
Inventory	Inventory
Accounting	Accounting

The application menu can show its sections on a mobile device or on a wider screen. The menu also provides a back control when you are on the home menu and a previous URL is available.

Result: The selected work area opens and its landing screen is visible.

Understand the covered work areas

The Accounting landing screen gathers customer, vendor, accounting, reporting, and configuration entry points. The Inventory landing screen gathers operations, products, reporting, and configuration entry points.

Use the headings and cards below to recognize the landing screen before choosing an action.

Landing screen	What you can recognize there
Accounting Dashboard	Customers, Vendors, Accounting, Reporting, Configuration, Accounting Dashboard, Favorites, and Accounting Periods
Inventory Overview	Operations, Products, Reporting, Configuration, Receipts, Delivery Orders, PoS Orders, Manufacturing, and Repairs

Counts displayed on Inventory cards vary by account. Use the card label, not a count from another account, to identify the work area.

Result: You can recognize the landing screen and its stable work groups before selecting an action.

Open Accounting or Inventory work

The landing screen is a starting point for operational work: Accounting presents entry points such as invoices, bills, bank activity, and accounting configuration, while Inventory presents stock-operation cards and their menus.

Steps

1. Select the control in the row that matches the task you need to start.

Task	Control
Configure accounting settings	Configure
Add a bank account	Add a bank account
Review an accounting entry point	Review
Start an accounting entry	New Entry
Start a customer invoice	New Invoice
Connect an accounting account	Connect
Start an accounting transaction	New Transaction
Upload accounting information	Upload
Work with receipts	Receipts
Work with delivery orders	Delivery Orders
Work with point-of-sale orders	PoS Orders
Work with manufacturing	Manufacturing
Work with repairs	Repairs
Open another action on an Inventory card	Dropdown menu

Result: The action you selected is ready to continue the detailed work for that area.

When a destination does not open as expected

A wrong landing screen means the screen you see does not match the destination you requested.

For example, a request for the application-menu route can land on `/web` and show the theme customizer instead of the destination menu.

What you see	What to do
The screen does not match the destination you selected	Return to the application menu and select the visible Accounting or Inventory destination again.
The destination groups do not match the work area	Use the labels in Understanding the interface , then reopen the destination from Navigation basics .
You need the detailed task after the landing screen opens	Use the destination links in Know what to open next .

Steps

1. Read the heading on the screen that opened.
2. Select the visible **Accounting** or **Inventory** destination from the application menu again.
3. Compare the landing-screen groups with the selected work area.

The covered navigation path does not change a record stage or open a dialog by itself.

Result: The expected landing screen is open, or you have identified that the destination requires help with navigation.

Know what to open next

After you recognize the landing screen, continue to the page that owns the next task. The landing screens are entry points; the detailed pages explain the work performed after you open the relevant destination.

After choosing...	Open next
Invoicing	Customers, products, and invoices
Inventory overview	Inventory transfers and returns or Inventory Overview
Inventory products and delivery	Products, packages, and delivery
Inventory warehouses and replenishment	Warehouses and replenishment
Inventory reports	Inventory reporting
Accounting journals and bank activity	Accounting journals and bank activity

After choosing...	Open next
Accounting reference data	Accounts, taxes, and currencies
Accounting reports	Reports and audit work

Steps

1. Choose the row that matches the work you want to continue.
2. Select the linked page in that row.

Result: You have a detailed page for the work area you selected.