

Hesabu ERP Administration Manual

System administration

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Documentation version 1.0, published 17 November 2026. The screens in your own workspace may differ slightly depending on your plan and settings.

Contents

System administration

- **Print formats and letterheads**
- **Custom fields and forms**
- **Workflows and notifications**
- **Document numbering**
- **Backups, logs and security**

System administration

Print formats, custom fields, approvals, notifications, backups and logs.

System administration

Print formats and letterheads

Design branded invoices and other printouts, and choose which format each document uses.

Intermediate · About 25 minutes · Version 1.0 · Updated 17 November 2026

Overview

A **Print Format** controls how a document looks when printed or emailed as a PDF. Hesabu ERP has standard formats, and you can build your own with your logo, colours, bank and M-Pesa details and footer wording. A **Letter Head** adds your company header and footer.

Prerequisites

The System Manager role. A logo image, if you want one.

Steps

Create a letter head

1. Search for **Letter Head** and click **Add Letter Head**.
2. Enter a name, tick **Is Default** if it should be used automatically, and add your header (logo and company details) and optional footer.
3. Save.

Build a print format

1. Search for **Print Format Builder** and choose the **Document Type**, for example *Sales Invoice*.
2. Click **Create New**, and give the format a name.
3. Drag fields in from the left, and arrange sections and columns.
4. Click **Save**.

For full control, use **Print Format** instead, choose **Custom Format** and write the design in HTML.

Make it the default

1. Search for **Customize Form** and choose the **Document Type**.
2. Set **Default Print Format** to your format.
3. Click **Update**.

Preview

Open any submitted document, click the **printer** icon, and choose your **Print Format** from the drop-down to preview it.

Practical example

Mwangaza Hardware creates a format called `Mwangaza Invoice` with its logo, KRA PIN, and a footer reading *"Pay by Paybill 880100, account number is your invoice number"*. They set it as the default for **Sales Invoice**, so every printed and emailed invoice uses it.

Important notes

- Use images that are not too large, so the PDF stays small.
- Keep a copy of a custom format before you edit it.
- If you embed a logo that is private, it may not appear in some outputs. Use a public file for logos.

Common mistakes

- Choosing a format but forgetting to set it as the default, so staff keep printing the old one.
- Very wide tables that get cut off in the PDF.

Troubleshooting

See Printing and PDF problems.

Next steps

Read Custom fields and forms.

Related documentation

- Creating a sales invoice
- Custom fields and forms
- Printing and PDF problems

System administration

Custom fields and forms

Add your own fields, hide ones you do not use and change how a form is laid out, without any coding.

Intermediate · About 20 minutes · Version 1.0 · Updated 17 November 2026

Overview

Every business has a detail the standard forms do not capture, such as a delivery driver or a customer's PO number. **Customize Form** lets you add fields and change existing ones, safely, and your changes survive software updates.

Prerequisites

The System Manager role.

Steps

Add a field

1. Search for **Customize Form**.
2. Choose the **Document Type**, such as *Delivery Note*.
3. Scroll to the **Fields** table and click **Add Row**.
4. Enter the **Label** (for example `Delivery Driver`), choose the **Type** (Data, Link, Select, Date, Check and so on).
5. Use the **Insert After** setting to place it, and tick **Mandatory** if it must be filled.
6. Click **Update**. Reload the form to see the new field.

Change an existing field

1. In the **Fields** table, click the field.
2. Change its **Label**, tick **Hidden**, or tick **Read Only**.
3. Click **Update**.

Practical example

The shop adds a *Customer PO Number* field (type *Data*) to **Sales Invoice**, placed after *Customer*. It is also added to the print format, so the number appears on each invoice. It is easy to find when a customer queries the invoice.

Important notes

- **Do not hide mandatory fields** the system needs, or documents cannot be saved.
- Test on a draft record before using it widely.
- Choose the **Type** carefully. Changing it later can lose data.

Common mistakes

- Adding many fields nobody uses.
- Forgetting to add the new field to the print format so it never prints.

Next steps

Read Workflows and notifications.

Related documentation

- Print formats and letterheads
- Document numbering

System administration

Workflows and notifications

Require approvals before documents are submitted, and send automatic alerts.

Advanced · About 30 minutes · Version 1.0 · Updated 17 November 2026

Overview

A **Workflow** forces a document to pass through approval stages before it can be submitted. A **Notification** sends an email or system alert when something happens, such as an invoice becoming overdue.

Prerequisites

The System Manager role. Roles for the approvers must exist. See Creating users and roles.

Steps

Create a workflow

1. Search for **Workflow** and click **Add Workflow**.
2. Enter a name and choose the **Document Type**, for example *Purchase Order*.
3. In the **States** table, add each state, for example *Draft*, *Pending Approval*, *Approved*, *Rejected*, and the **Doc Status** for each (*Draft* for the first ones, *Submitted* for Approved).
4. In **Transitions**, define who can move from one state to another: for example from *Draft* to *Pending Approval* by *Purchase User*, with the action *Request Approval*, and from *Pending Approval* to *Approved* by *Purchase Manager*, with the action *Approve*.
5. Tick **Is Active**, and click **Save**.

Create a notification

1. Search for **Notification** and click **Add Notification**.
2. Choose the **Document Type** and the **Send Alert On** event (for example *Days After* a date field, or *Value Change*).
3. Add **Recipients** (a role, a user, or a field such as the customer's email).
4. Write the **Subject** and **Message**. You can use values from the document with `{{ doc.customer }}`.
5. Save.

Practical example

Purchase orders above KES 100,000 need the owner's approval. A workflow with a condition on the grand total moves large orders to *Pending Approval*. A notification emails the owner each time

one is waiting.

Important notes

- Only one active workflow can apply to a document type.
- Test with a user who has only the roles in the workflow.
- Notifications need working outgoing email. See Email and regional settings.

Common mistakes

- A workflow without a way back from *Rejected*, which traps documents.
- Forgetting to set the **Doc Status**, so documents never become submitted.

Next steps

Read Document numbering.

Related documentation

- Permissions and restricting access
- Notifications

System administration

Document numbering

Control how invoices, orders and other documents are numbered.

Intermediate · About 12 minutes · Version 1.0 · Updated 17 November 2026

Overview

Each document gets a number such as `ACC-SINV-2026-00016`, built from a **naming series**: a prefix, the year and a counter. You can choose your own series, for example `INV-.YYYY.-.####`.

Prerequisites

The System Manager role.

Steps

Add a naming series

1. Search for **Document Naming Settings**.
2. Choose the **Transaction** (for example *Sales Invoice*).
3. Click **Get Options** to see the current series.
4. Edit the list: add your own, one per line, such as `INV-.YYYY.-.####`. In the pattern, `.YYYY.` is the year and `.####` is a four-digit counter.
5. Click **Update**.

Choose which series a document uses

1. On the new document, pick the series from the **Series** field at the top.
2. To make one the default, put it first in the list.

Change the counter

1. In **Document Naming Settings**, under *Update Series Counter*, choose the series and enter the **Current Value**.
2. Click **Update Series Counter**.

Practical example

The business wants invoice numbers like `INV-2026-0001`. The administrator adds `INV-.YYYY.-.####` to *Sales Invoice* and puts it first. New invoices are numbered in that style from now on.

Important notes

- Do not reset a counter to a number that is already used. It will clash.
- Existing document numbers do not change.
- For legal or audit reasons, avoid gaps and changes during the year. Ask your accountant.

Common mistakes

- Changing the series mid-year without telling the accountant.
- Setting the counter lower than the highest existing number.

Next steps

Read Backups, logs and security.

Related documentation

- Documents, DocTypes and records
- Custom fields and forms

System administration

Backups, logs and security

Know what is backed up, where to look when something goes wrong, and how to keep your workspace secure.

Advanced · About 20 minutes · Version 1.0 · Updated 17 November 2026

Overview

This article covers what **you**, the business administrator, can see and do. Server-level work, such as software updates, restoring a database and scheduled jobs, is handled by Hesabu ERP on the hosted service.

Backups

Your data is backed up by us as part of running the service. Ask support for the current backup arrangements for your plan, and for a copy of your data when you need one, for example before a major clean-up.

Download your own data

1. Search for **Data Export** or use **Export** on a list to download records as Excel or CSV. See Filtering, sorting and exporting records.
2. Keep downloaded files secure. They contain your business data.

Logs

Search for these in the search bar.

Log	What it shows
Error Log	Technical errors, with the time and the user
Activity Log	Logins and important changes
Email Queue	Emails waiting, sent or failed, with the error
Scheduled Job Log	Whether automatic jobs ran
Version	The history of changes on a record (also under *Activity* on each document)

Who changed this record?

1. Open the document.
2. Scroll to **Activity**. Each change shows who made it, when, and the old and new values.

Security best practices

- Give each person their own user, with the least access they need.
- Use strong, unique passwords. Turn on **two-factor authentication** if it is enabled for your workspace.
- Disable users who leave on the same day.
- Do not make confidential attachments public.
- Review your users and roles every few months.
- Be careful with exports and who receives them.

Practical example

A user reports that a customer's email never arrived. The administrator opens **Email Queue**, filters by the customer's address, and sees the status *Error*, with a message saying the recipient address was invalid. The address is corrected on the customer and the email is resent.

Important notes

- Logs are for diagnosis. If you cannot explain an error, send the entry to support.
- Do not delete logs to hide problems.

Common mistakes

- Waiting weeks to look at an error.
- Sharing an administrator login.

When to contact support

For restoring from a backup, a suspected security problem, or anything involving the server.

Next steps

Look through Troubleshooting for common fixes.

Related documentation

- Login problems
- Creating users and assigning roles
- Attachments and files

Support

Call or WhatsApp 0117 801 786.
Support requests: https://www.hesabuerp.co.ke/support.html
Website: https://www.hesabuerp.co.ke
Online documentation: https://www.hesabuerp.co.ke/documentation/

When you contact us, please give your workspace address and a short description of what you were doing. A screenshot helps.