

Hesabu ERP Getting Started Guide

Getting started

Documentation version 1.0
Published 17 November 2026
https://www.hesabuerp.co.ke/documentation/

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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.

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Getting started

Sign in, find your way around, and learn the everyday skills you will use in every module.

Getting started

Signing in to your workspace

How to open your workspace, sign in, and recover a forgotten password.

Beginner · About 3 minutes · Version 1.0 · Updated 17 November 2026

Overview

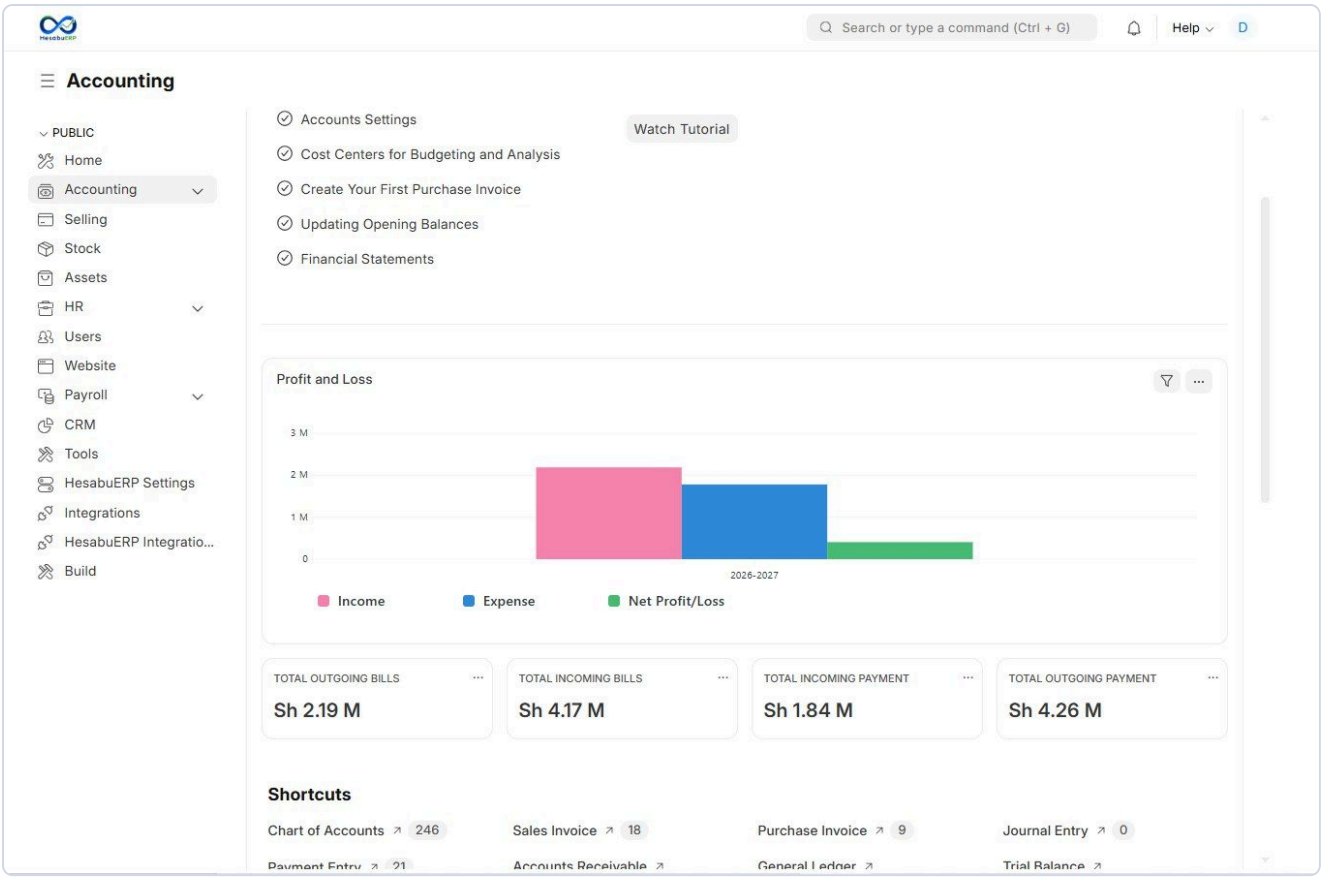
Your Hesabu ERP workspace has its own web address. You sign in there with the email and password you set when you signed up, or the ones your administrator gave you.

Prerequisites

- Your workspace address, for example `yourcompany.hesabuerp.co.ke`.
- Your email address and password.
- A modern browser (Chrome, Edge, Firefox or Safari) on a computer, tablet or phone.

Steps

1. Open your browser and type your workspace address in the address bar, then press **Enter**. The sign-in page appears.
2. Enter your **email address** and **password**.
3. Click **Login**. You land on your Home screen, with the modules your roles allow in the sidebar on the left.



The Hesabu ERP workspace after signing in.

If you forget your password

1. On the sign-in page, click **Forgot Password?**.
2. Enter your email address and click **Reset Password**.
3. Open the email we send you and click the link in it.
4. Choose a new password and save it, then sign in as normal.

Practical example

Wanjiru, the accountant, bookmarks `mwangaza.hesabuerp.co.ke` on her laptop and phone. She signs in each morning with her own email and password, never her manager's.

Important notes

- Bookmark your workspace address so you do not have to type it.
- Never share your password. Ask your administrator to create a user for each person. See Creating users and roles.
- Sign out on shared computers: click your profile picture at the top right, then **Logout**.

Common mistakes

- Using the main website address instead of your own workspace address.

- Typing the email with a different spelling from the one on your user record.

Troubleshooting

If the reset email does not arrive, check your spam folder and ask your administrator to confirm your email address. See Login problems.

Next steps

Continue with The dashboard and workspaces.

Related documentation

- Updating your profile and password
- Login problems

Getting started

The dashboard and workspaces

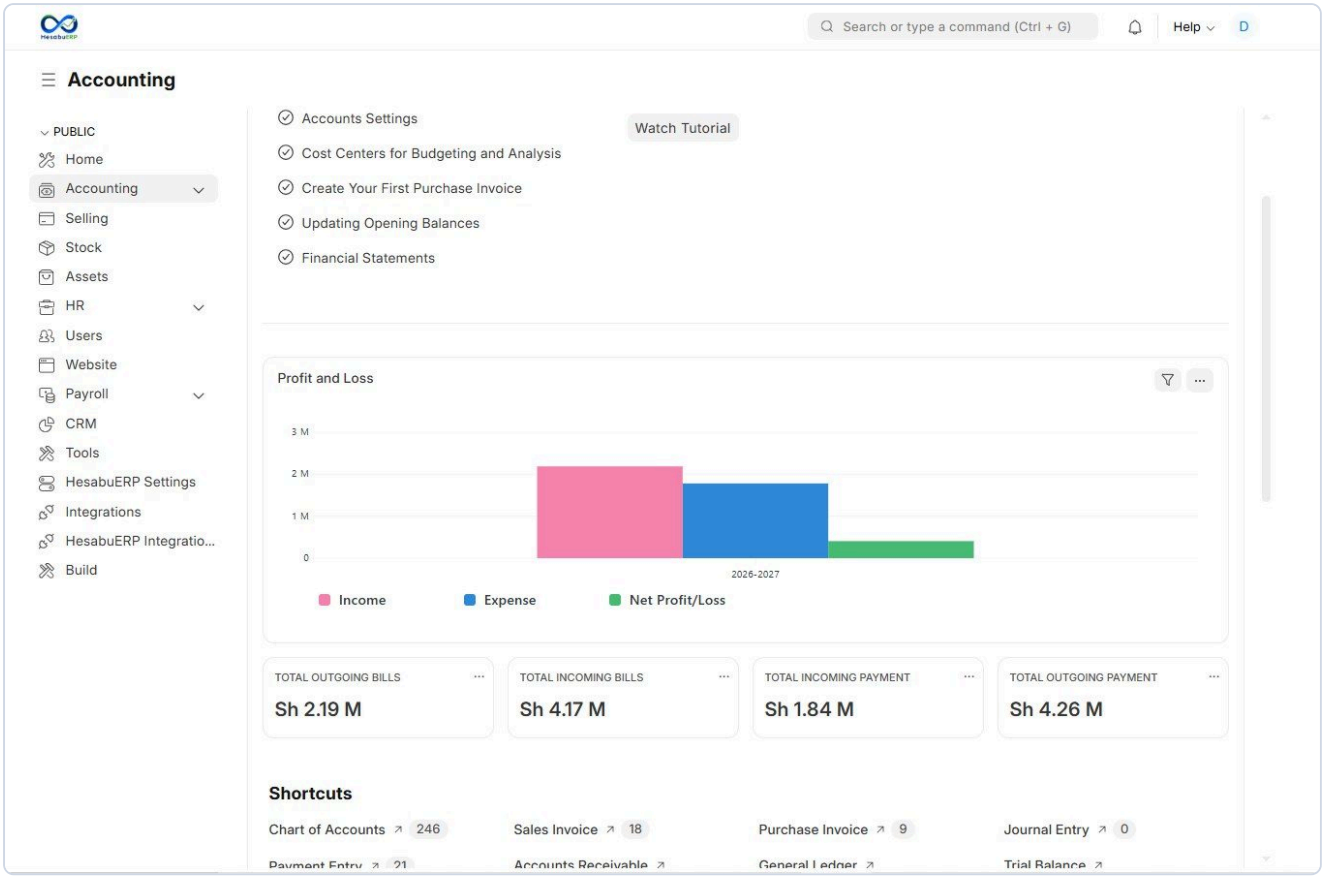
Read your workspace charts, number cards and shortcuts, and move between modules.

Beginner · About 8 minutes · Version 1.0 · Updated 17 November 2026

Overview

Every module has a **workspace**, a home screen that shows how that part of the business is doing and gives one-click access to common tasks.

What a workspace shows



The Accounting workspace with a profit and loss chart, four number cards and a list of shortcuts.

- **Charts**, such as Profit and Loss for the fiscal year, showing income, expense and net profit.
- **Number cards**, such as Total Outgoing Bills, Total Incoming Bills, Total Incoming Payment and Total Outgoing Payment. Click a card to see the records behind the number.
- **Shortcuts**, links to the things you do most, such as Chart of Accounts, Sales Invoice, Purchase Invoice, Payment Entry, Journal Entry and General Ledger. A small number beside a shortcut shows how many records exist.
- **Reports and masters**, grouped lists of every report and setup page in the module.

Steps

1. Click a module name in the sidebar on the left, for example **Accounting**.
2. Read the charts and number cards at the top.
3. Click a shortcut to open that list, or click **Dashboard** to see more charts.
4. Click the module name again, or use the breadcrumb, to return.

Practical example

The owner opens **Accounting** every morning. The *Total Incoming Bills* card shows what customers owe. Clicking it opens the list of unpaid sales invoices, which she sorts by due date to decide who to call first.

Important notes

- Numbers on a workspace are only as current as the last refresh. Use the refresh icon on a chart to reload it.
- You can customise your own workspace (rearrange shortcuts and charts) if your role allows it.

Common mistakes

- Reading a chart for the wrong fiscal year. Check the date range on the chart before you rely on it.

Next steps

Read Updating your profile and password.

Related documentation

- Understanding the Hesabu ERP interface
- Running and saving reports

Getting started

Updating your profile and password

Change your name, photo, language and password.

Beginner · About 4 minutes · Version 1.0 · Updated 17 November 2026

Overview

Each user can look after their own profile: their name, photo, language and password. Administrators manage other people's accounts separately.

Steps

Change your personal settings

1. Click your **profile picture** at the top right.
2. Choose **My Settings**. Your user record opens.
3. Update your **First Name**, **Last Name**, **Phone** and **User Image** as needed.
4. Check **Language** and **Time Zone**. A wrong time zone makes times on documents look wrong.
5. Click **Save**.

Change your password

1. Open **My Settings** as above.
2. Find the **Change Password** section and expand it.
3. Enter your new password, and your current one if asked.
4. Click **Update**. Use the new password the next time you sign in.

Important notes

- Choose a password that is long and not used anywhere else. A short phrase of several words is easier to remember than a complex short one.
- You cannot change your own roles. Ask your administrator.

Common mistakes

- Setting the wrong time zone, then wondering why posting times look off by hours.

Troubleshooting

If you cannot save your settings, you may have lost your connection. Refresh the page and try again. See Login problems.

Next steps

Read Notifications.

Related documentation

- Signing in to your workspace
- Creating users and assigning roles

Getting started

Notifications

See alerts about mentions, assignments and approvals, and control what you are told.

Beginner · About 5 minutes · Version 1.0 · Updated 17 November 2026

Overview

The **bell** icon in the top bar tells you when something needs your attention: a document assigned to you, a comment that mentions you, or an item waiting for your approval.

Steps

1. Click the **bell** icon. A list of recent notifications opens.
2. Click a notification to open the document it is about.
3. Use **Mark all as read** to clear the list.

Choose what you are notified about

1. Search for **Notification Settings** and open it.
2. Turn notification types on or off, and choose whether to also receive an **email** for them.
3. Click **Save**.

Practical example

The accountant assigns a purchase invoice to the owner for approval. The owner sees a number on the bell, opens the invoice from the notification, and approves it.

Important notes

- An administrator can create automatic alerts, such as an email when an invoice becomes overdue. See Workflows and notifications.
- Email notifications need email to be set up for your workspace. See Email and regional settings.

Common mistakes

- Turning off all notifications and then missing approvals.

Next steps

Read Using the global search.

Related documentation

- Workflows and notifications
- Updating your profile and password

Getting started

Using the global search

Find any record, report or page in seconds with the search bar.

Beginner · About 5 minutes · Version 1.0 · Updated 17 November 2026

Overview

The search bar at the top of every screen is the fastest way to get around. It finds records (customers, items, invoices), pages (reports, settings) and lets you start new documents.

Steps

1. Click the search bar, or press **Ctrl + G**.
2. Start typing. Results appear as you type, grouped by type.
3. Use the arrow keys and press **Enter**, or click a result.

What you can type

Type this	You get
`Baraka`	Records with that name, such as the customer Baraka Supplies
`Sales Invoice`	The Sales Invoice list
`new sales invoice`	A blank Sales Invoice form
`Accounts Receivable`	That report
`ACC-SINV-2026-00016`	That exact invoice

Practical example

A customer phones about "the cement invoice". Type the customer's name in the search bar, open their record, then use the **Connections** tab to jump to their latest invoices.

Important notes

- Search only shows what your roles allow you to see.
- If you cannot find something, try a shorter part of the name.

Common mistakes

- Typing a very long, exact phrase. Short is better.

Next steps

Read List views and form views.

Related documentation

- Navigation and keyboard shortcuts
- List views and form views

Getting started

List views and form views

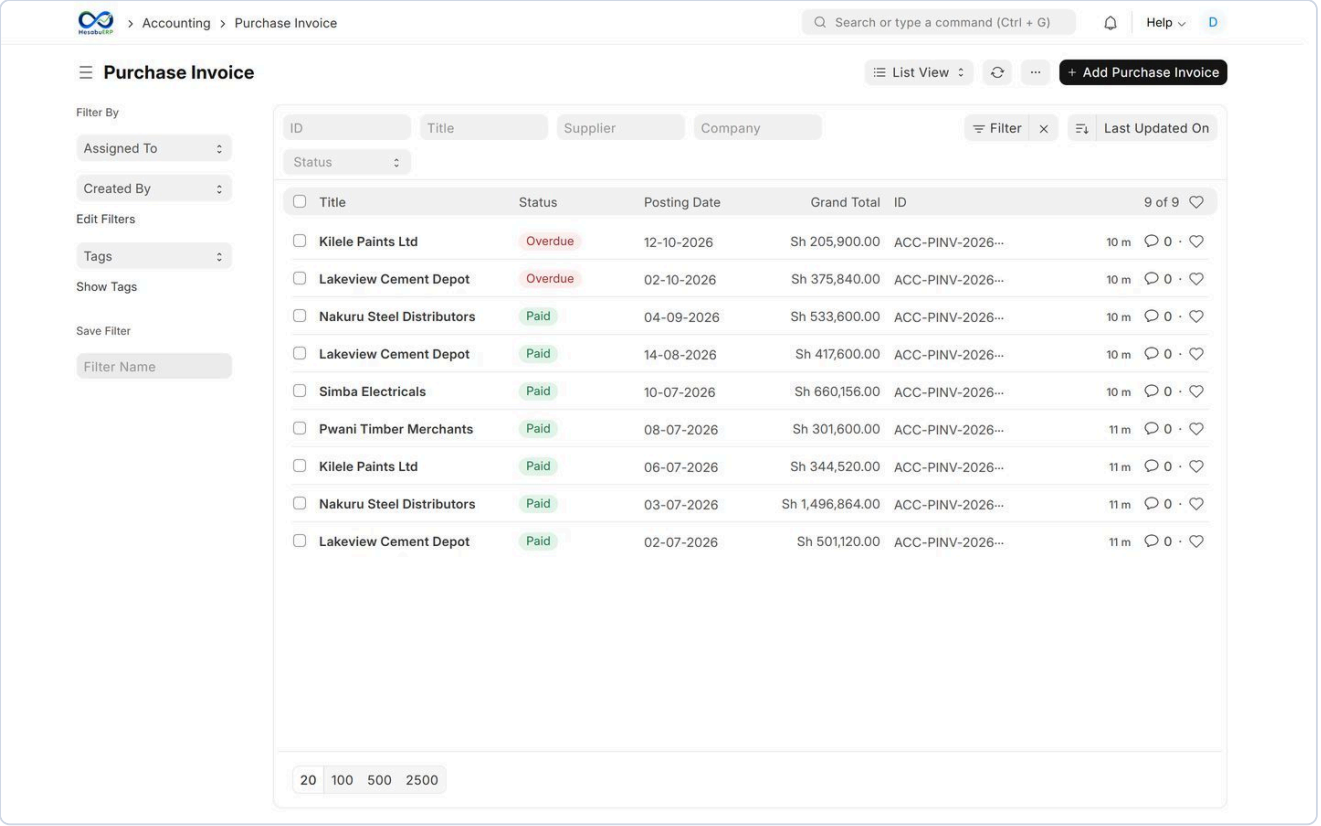
How to work with lists of records and with a single record, and how to save and submit.

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

Overview

You work with records in two ways: a **list view** shows many records of one type, and a **form view** shows one record in full.

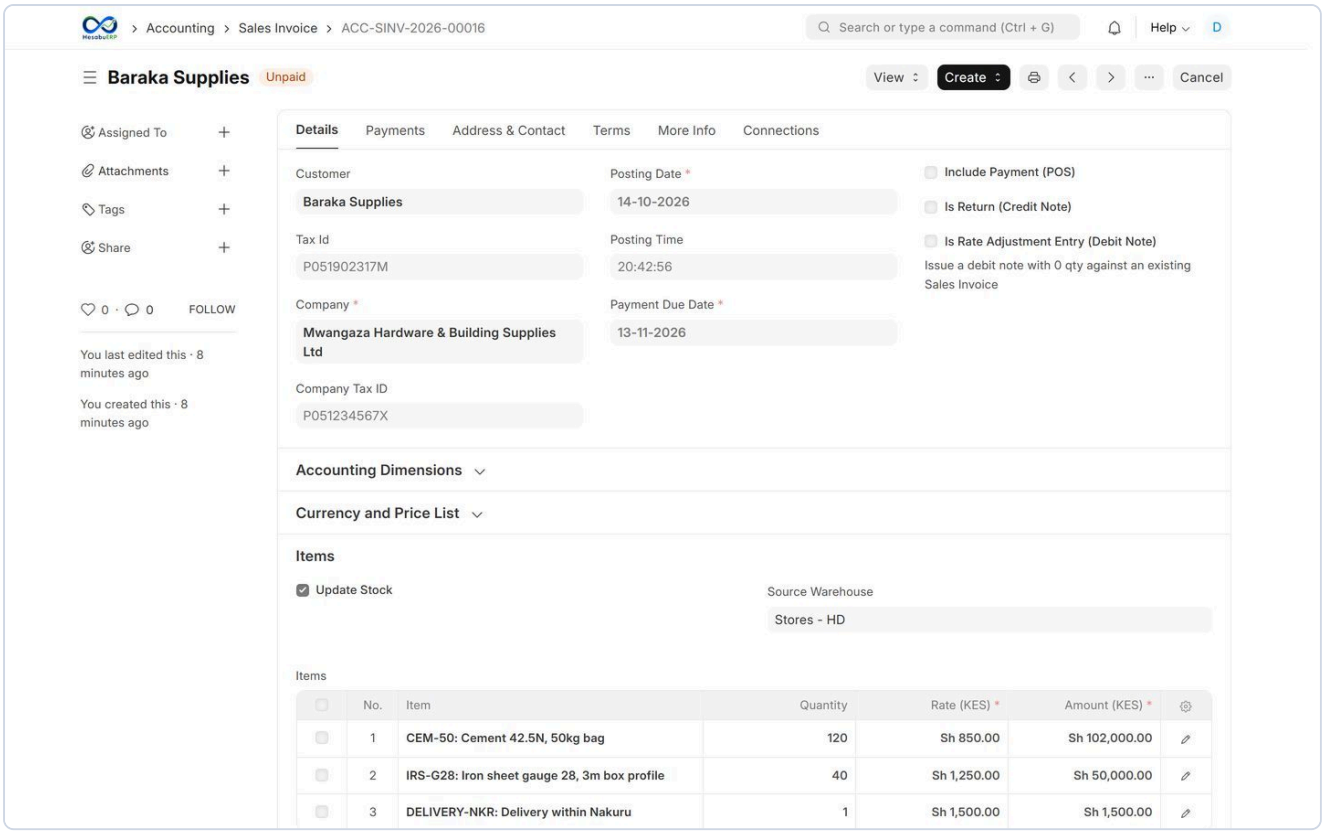
The list view



A list of purchase invoices with status labels, filters across the top and an Add Purchase Invoice button.

- The row of boxes above the table are **standard filters**. Type in them to narrow the list.
- **Status labels** (for example Paid and Overdue) show where each record stands.
- Use the **Add** button, such as **Add Purchase Invoice**, to create a new record.
- Click a row to open that record.
- The numbers at the bottom (20, 100, 500, 2500) set how many rows show per page.

The form view



A sales invoice form showing the customer, dates, company and an items table.

- The top shows the record's name and **status label**, such as Unpaid.
- Fields marked with a red star are **mandatory**.
- **Tabs** (Details, Payments, Address and Contact, Terms, More Info, Connections) organise the form. **Connections** lists related documents.
- The sidebar on the left holds **Assigned To**, **Attachments**, **Tags** and **Share**.
- The **Create** menu makes the next document in the chain. The **View** menu shows related ledgers. The **printer** icon prints.

Steps: create a record

1. Open the list and click **Add** (or use the search bar: `new` and the type).
2. Fill in the mandatory fields. Select existing records from drop-downs where offered.
3. Click **Save** (or **Ctrl + S**). The record is saved as a **Draft**.
4. Check it. For transactions such as invoices, click **Submit** to post it.

Practical example

The salesperson clicks **Add Sales Invoice**, picks the customer Baraka Supplies (the address and payment terms fill themselves in), adds three item rows, saves, and submits.

Important notes

- A saved draft has no effect on your books until you submit it.
- Unsaved changes show a **Not Saved** label. Save before leaving the page.

Common mistakes

- Closing the browser tab with the document still **Not Saved**.
- Editing a submitted document. It is locked; see Understanding document status.

Next steps

Read Filtering, sorting and exporting.

Related documentation

- Filtering, sorting and exporting records
- Understanding document status
- Documents, DocTypes and records

Getting started

Filtering, sorting and exporting records

Narrow a list to what you need, sort it, save the view and export it to a spreadsheet.

Beginner · About 10 minutes · Version 1.0 · Updated 17 November 2026

Overview

Lists can grow to thousands of rows. Filters and sorting let you find exactly what you need, and you can export the result.

Steps

Filter

1. Open a list, for example **Sales Invoice**.
2. Type into the boxes above the table, such as **Customer** or **Status**, for a quick filter.
3. For more control, click **Filter**, then **Add a Filter**. Choose a field, a condition (equals, like, between) and a value, for example *Status equals Overdue*.
4. Click the **x** next to Filter to clear all filters.

Sort

1. Use the **Last Updated On** button at the top right to choose a field.
2. Click the arrow beside it to flip between ascending and descending.

Save a filter

1. With your filters set, find **Save Filter** in the left sidebar.
2. Type a name, such as *Overdue invoices*, and click **Save**. It appears in the sidebar for next time.

Export

1. Click the **...** menu at the top right of the list.
2. Choose **Export**, then pick **Excel** or **CSV**.
3. Choose the columns you want, and click **Download**.

Practical example

To chase late payers: filter **Sales Invoice** by *Status equals Overdue*, sort by **Due Date**, save the filter as *Overdue invoices*, and export to Excel to share with the person making the calls.

Important notes

- The left sidebar of a list also has **Filter By** (Assigned To, Created By, Tags), which count records for you.
- Exports include only what you are allowed to see.

Common mistakes

- Forgetting a saved filter is on, then thinking records are missing. Check for a number beside the Filter button.

Next steps

Read Reports.

Related documentation

- Running and saving reports
- List views and form views

Getting started

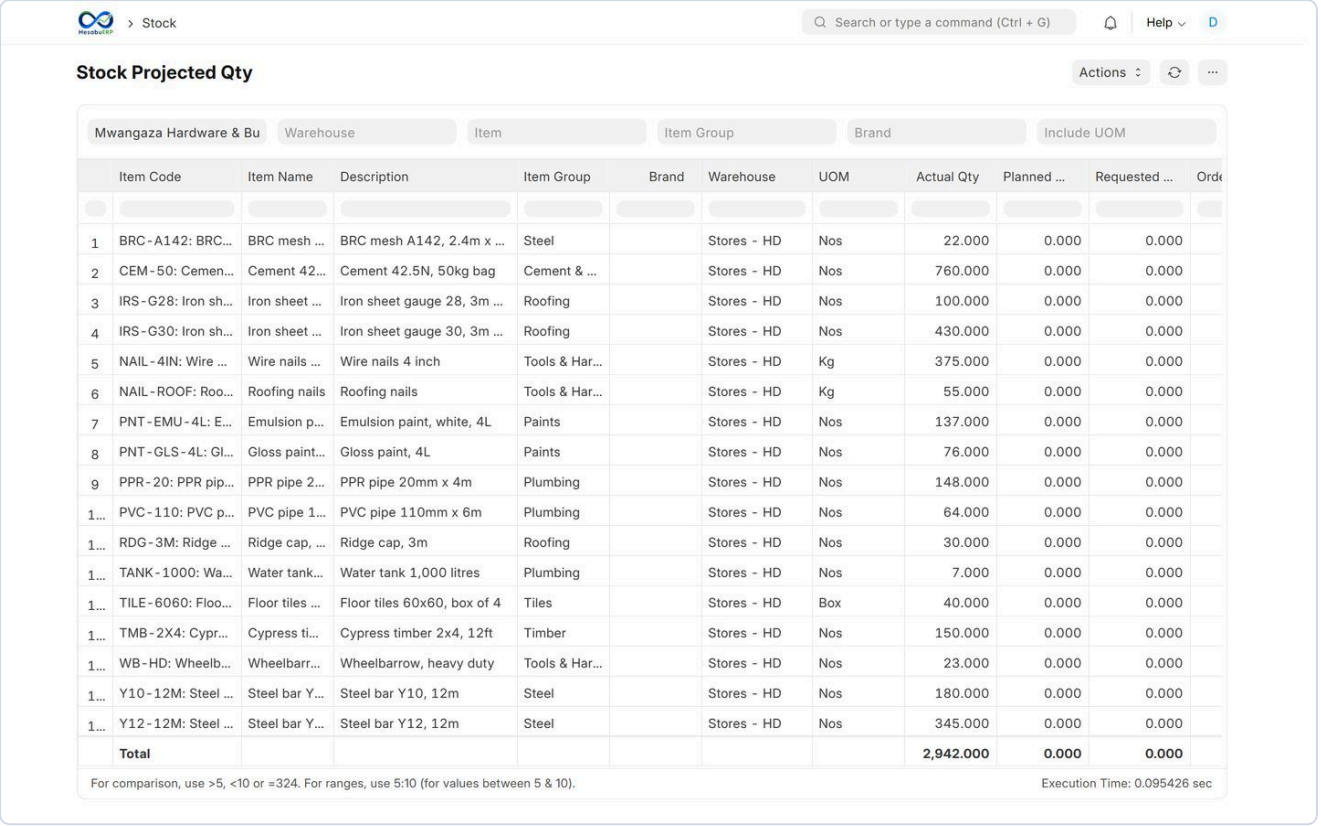
Running and saving reports

Open a report, change its filters, save your own version and export it.

Beginner · About 10 minutes · Version 1.0 · Updated 17 November 2026

Overview

Reports answer business questions: how much profit did we make, who owes us, what is in stock. Each module has its own reports, listed on its workspace under **Reports & Masters**.



The Stock Projected Qty report, with filters across the top and a total row at the bottom.

Steps

1. Open a module workspace, such as **Stock**, and find the report under **Reports**. Or type the report name in the search bar.
2. Set the **filters** at the top, such as **Company**, **Warehouse** or date range. The report updates.
3. Use the column headers to sort. Use the **Menu** at the top right for more options.
4. To keep your filters, choose **Save** in the menu and name the report. It appears in your list of reports.
5. To share it, use **Menu**, then **Export** (Excel or CSV) or **Print** (PDF).

Practical example

The storekeeper opens **Stock Projected Qty**, filters by the Stores warehouse and the Steel item group, and exports to Excel to send to the supplier as an order list.

Important notes

- Some reports need mandatory filters, such as the company or a date. If a report looks empty, check these first.
- Reports show posted (submitted) documents. Drafts are not included.
- Totals in the last row add the numeric columns.

Common mistakes

- Reading a report with the wrong company or fiscal year selected.
- Expecting a draft invoice to appear in a financial report.

Next steps

Read Attachments and files.

Related documentation

- Financial reports
- Stock reports
- Filtering, sorting and exporting records

Getting started

Attachments and files

Attach scanned documents and images to any record, and manage them.

Beginner · About 5 minutes · Version 1.0 · Updated 17 November 2026

Overview

You can attach files, such as a supplier's invoice scan or a signed delivery note, to any record. They stay with the record so they are easy to find later.

Steps

1. Open the record.
2. In the left sidebar, click the **+** beside **Attachments**.
3. Click **Upload**, choose the file, or drag it in. You can also attach a link or take a photo on a phone.
4. Leave **Private** ticked unless the file must be public, then click **Upload**.
5. The file appears under Attachments. Click it to open it, or the small **x** to remove it.

Practical example

When goods arrive, the storekeeper photographs the supplier's delivery note and attaches it to the Purchase Receipt. Months later, a query about the quantity is settled by opening the record.

Important notes

- **Private** files are visible only to signed-in users with access to the record. **Public** files can be opened by anyone who has the link. Keep customer and financial documents private.
- Very large files may be rejected. Compress photos before uploading.
- Files count towards your storage.

Common mistakes

- Making a sensitive file public.
- Attaching to the wrong record. Check the record name first.

Next steps

Read Understanding document status.

Related documentation

- List views and form views
- Backups, logs and security

Getting started

Understanding document status

What Draft, Submitted, Cancelled, Paid, Overdue and the other labels mean, and how to correct a mistake.

Beginner · About 8 minutes · Version 1.0 · Updated 17 November 2026

Overview

Transactions, such as invoices, move through stages. The label next to the record's name tells you which one it is in.

The three stages

Stage	What it means	Can you edit it?	In your books?
Draft	Saved, not final	Yes	No
Submitted	Final and posted	No	Yes
Cancelled	Reversed	No	Reversed

Submitted documents are locked on purpose, so your records can be trusted and audited.

Other labels you will see

- On invoices: **Unpaid**, **Partly Paid**, **Paid**, **Overdue**, **Return**, **Credit Note Issued**.
- On orders: **To Deliver and Bill**, **To Bill**, **Completed**, **Closed**.
- On leads: **Open**, **Replied**, **Opportunity**.

Steps: correct a mistake in a submitted document

1. Open the document.
2. If it has linked documents (for example a payment), cancel or unlink those first, using the **Connections** tab.
3. Click the **Cancel** button (or **...**, then **Cancel**) and confirm.
4. Click **Amend**. A new draft copy appears with the old number plus a suffix.
5. Correct it and submit again.

For small changes, such as a customer's address, many documents let you update a few fields without cancelling. Look for fields that are not greyed out.

Practical example

An invoice was raised at the wrong price. The accountant cancels it, clicks **Amend**, corrects the rate, and submits. The history shows the original, the cancellation and the amended invoice, so the audit trail is complete.

Important notes

- **Do not** delete submitted documents to hide mistakes. Cancel and amend.
- A document linked to others cannot be cancelled until those are cancelled.

Common mistakes

- Submitting before checking. Review the totals and taxes first.
- Trying to edit a submitted document and not realising it is locked.

Next steps

Read Importing data.

Related documentation

- List views and form views
- Creating a sales invoice
- Invoice submission errors

Getting started

Importing data

Load customers, items, opening balances and other records from a spreadsheet.

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

Overview

If you already keep customers, items or suppliers in a spreadsheet, you can load them in bulk with **Data Import** instead of typing each one.

Prerequisites

- The permission to create the record type (for example Item).
- Your data in a spreadsheet, one row per record.

Steps

1. Search for **Data Import** and click **Add Data Import**.
2. Choose the **Document Type**, for example *Customer*, and the **Import Type** (*Insert New Records*).
3. Click **Download Template**. Choose which columns you want, and download the Excel or CSV file.
4. Open the template and fill your data in, **keeping the column headings exactly as they are**. Do not remove the first rows.
5. Back in Data Import, attach your filled file.
6. Click **Start Import** after reviewing the **Preview**. Fix any rows with warnings first.
7. When it finishes, open the list to check your records.

Practical example

A hardware shop has 400 items in Excel. The administrator downloads the **Item** template, pastes the item codes, names, groups, units and prices into it, imports it, and finds all 400 items in the Item list in a few minutes.

Important notes

- Import a **small test file first**, with five or ten rows.
- Mandatory fields must be filled for every row.
- Linked values, such as the **Item Group**, must already exist. Create them first.
- To update existing records instead, use *Update Existing Records* and include the record IDs.

Common mistakes

- Changing the column headings, so the system cannot match them.
- Dates in the wrong format. Use the format the template shows.

Troubleshooting

See Data import errors.

Next steps

Move on to Creating your company.

Related documentation

- Data import errors
- Opening stock and stock counts

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.