

Hesabu ERP Integrations Guide

Integrations

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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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Integrations

Payment gateways, API keys, webhooks, SMS and linking Hesabu ERP to other services.

Integrations

Integrations overview

What you can connect to Hesabu ERP and which connections are managed by your administrator.

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

Overview

An **integration** links Hesabu ERP to another service, so data moves between them without retyping. Examples are online payments, SMS alerts, a Google calendar or your own software.

Open the **Integrations** workspace in the sidebar to see what is available for your plan.

What you can connect

Need	Article
Take payments online	Payment gateways
Connect your own software or another app	API keys and webhooks
Calendar, contacts, storage and SMS	Connecting other services

Important notes

- Only the System Manager should set up integrations. They hold keys and secrets that must stay private.
- Some integrations are available only on certain plans, or are set up for you by Hesabu ERP support. Ask us first.
- Every integration has a cost, such as transaction fees or SMS charges, charged by the other service, not by us.

Next steps

Read Payment gateways.

Related documentation

- Payment gateways
- API keys and webhooks
- Connecting other services

Integrations

Payment gateways

Accept online payments against your invoices and see them recorded automatically.

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

Overview

A **payment gateway** lets customers pay your invoice online. The payment is recorded against the invoice automatically, so you do not match it by hand.

> Gateways available to you depend on your plan and region. Ask Hesabu ERP support which ones we have prepared for your workspace, and use that setup rather than building your own where possible.

Prerequisites

An account with the payment provider, such as Paystack, with **test** and **live** keys. A bank account or wallet set up in your chart of accounts to receive the money. See The chart of accounts.

Steps

1. Search for the gateway's settings, for example **Paystack Settings**, in the Integrations workspace.
2. Enter your **public key** and **secret key**, starting with test keys.
3. Search for **Payment Gateway Account**, add one, choose the gateway, the **payment account** and the currency, and save.
4. Create a test invoice, then click **Create > Payment Request**. Send the payment link to yourself and pay with a test card or wallet.
5. Check that a **Payment Entry** was created and the invoice shows as **Paid**.
6. Replace the test keys with your live keys when everything works.

Practical example

A wholesaler emails each invoice with a **Pay now** link. Customers pay by card or mobile money, and the receipt and payment entry appear within a minute.

Important notes

- Never share your **secret key** or paste it in an email.
- Gateway fees are charged by the provider. Record them as an expense, or ask your accountant how to book them.

- Keep the gateway's own statement. Reconcile it with your bank. See Bank accounts and bank reconciliation.

Common mistakes

- Using live keys while testing, which creates real charges.
- Choosing the wrong payment account, so money posts to the wrong place.

Troubleshooting

If a payment was taken but the invoice is still unpaid, check **Error Log** and the gateway's dashboard. A webhook may have failed. Contact support with the payment reference.

Next steps

To send a payment prompt straight to a customer's phone, read Requesting M-Pesa and Airtel Money payments from an invoice. Then read API keys and webhooks.

Related documentation

- Integrations overview
- Recording customer and supplier payments
- Creating and managing customers

Integrations

API keys and webhooks

Let other software read and write your data, or send events to other systems.

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

Overview

An **API** lets another program use Hesabu ERP, for example a website that creates orders. A **webhook** does the opposite: Hesabu ERP calls another system when something happens, such as a submitted invoice.

These tools are for developers or technical staff.

API keys

1. Use a **dedicated user** for the integration, such as `integration@yourcompany.co.ke`, with only the roles it needs. See Permissions and restricting access.
2. Open that user, scroll to **API Access** and click **Generate Keys**.
3. Copy the **API Secret** immediately. It is shown only once.
4. The other software sends `Authorization: token <api_key>:<api_secret>` with each request.

Webhooks

1. Search for **Webhook** and click **Add Webhook**.
2. Choose the **Document Type** and the **Event**, for example *Sales Invoice* and *on_submit*.
3. Enter the **Request URL** of the receiving system.
4. Optionally add **Request Headers**, a **Condition** and a **JSON body** with the fields to send.
5. Save. Submit a test document, then check the receiver and the **Webhook Request Log**.

Practical example

A courier company's system receives a webhook each time a delivery note is submitted, and starts the delivery job. Another uses an API key to read stock levels onto the shop's website.

Important notes

- Treat keys like passwords. Regenerate them if they leak, and remove them when a project ends.
- Use HTTPS addresses only.
- Mistakes in an API call can change real data. Test on a copy or with a test document.

Common mistakes

- Using the administrator's keys for an integration.
- Sending more fields than the receiver needs.

Troubleshooting

If a webhook fails, open its **Webhook Request Log** for the response from the other system, which usually names the reason.

Next steps

Read Connecting other services.

Related documentation

- Integrations overview
- Backups, logs and security
- Permissions and restricting access

Integrations

Connecting other services

Link calendars, contacts, file storage and SMS to your workspace.

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

Overview

Besides payments and the API, the **Integrations** workspace offers links to common services. The ones available depend on your plan, and some need extra setup on our side.

Common connections

Service	What it does	Where to set it up
Google Calendar	Syncs events with your Google calendar	**Google Calendar**
Google Contacts	Syncs contacts	**Google Contacts**
SMS	Sends messages from notifications and workflows	**SMS Settings**
Dropbox or Google Drive	Stores files	**Dropbox Settings** or **Google Drive**

Steps: Google Calendar

1. Create a project and **OAuth credentials** in the Google Cloud console, and enable the Calendar API. Your IT person or our support can help.
2. In Hesabu ERP, open **Google Settings**, enter the **Client ID** and **Client Secret**, and enable it.
3. Open **Google Calendar**, click **Add**, choose your user, and click **Authorize**.
4. Sign in to Google and allow access. Events now sync.

Steps: SMS

1. Open **SMS Settings** and enter the **SMS Gateway URL** and parameters from your SMS provider.
2. Add a number to send a test message.
3. Use SMS in a notification. See Workflows and notifications.

Practical example

Customers get an SMS when their order is ready for collection, sent from a notification on the delivery note.

Important notes

- Check data protection rules before you sync contacts or send marketing messages. Only message people who have agreed.
- Credentials expire sometimes. If a sync stops, re-authorize it.
- Ask support before connecting anything you are unsure about.

Common mistakes

- Pasting keys into emails or chats.
- Letting a staff member's personal Google account hold the business connection.

Next steps

Return to Integrations overview.

Related documentation

- Integrations overview
- Calendar, events and notes
- Workflows and notifications

Integrations

Requesting M-Pesa and Airtel Money payments from an invoice

Send a payment prompt to your customer's phone from a Sales Invoice, and have the payment recorded automatically.

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

Overview

You can ask a customer to pay a Sales Invoice by **M-Pesa** or **Airtel Money** without leaving the invoice. Hesabu ERP sends a prompt to the customer's phone. The customer enters their PIN, and the payment is recorded against the invoice for you, with the receipt number.

> This feature is set up for your workspace by Hesabu ERP support. Ask us to switch it on. After that, an administrator adds your payment provider details, as described below.

How the money reaches you

Hesabu ERP never holds your money. The payment goes to **your own** account with the provider you choose.

Provider	Where the customer's money goes	When you see it
Paystack (M-Pesa or Airtel Money)	Paystack first, then paid out to the bank account or M-Pesa number you added in your Paystack account	Usually the next business day. Paystack deducts its fee.
Safaricom Daraja (M-Pesa direct)	Your own paybill or till	Straight away. No Paystack fee. Needs Safaricom approval for your shortcode.
Airtel Money Open API (Airtel direct)	Your own Airtel Money merchant account	Straight away. Needs Airtel approval.

Hesabu ERP records the payment on the invoice as soon as the customer confirms, whichever provider you use. With Paystack, your till or bank statement shows the money only after Paystack pays out.

You can use a different provider for each network. For example, M-Pesa direct and Airtel Money through Paystack.

Prerequisites

- An approved account with your chosen provider, and its keys. Keep **test** keys for testing.
- A **bank or cash account** in your chart of accounts to record received money, one for M-Pesa and one for Airtel Money if you use both. See The chart of accounts.
- The invoice is **submitted**, in **KES**, and has an outstanding balance.
- Permission to create Payment Entries (for example Accounts User).

Steps

Set up (administrator, once)

1. Search for **Mobile Money Settings**.
2. For **M-Pesa via** and **Airtel Money via**, choose the provider for each network.
3. Enter the provider's keys. Secrets are hidden after you save.
4. Choose the **M-Pesa receiving account** and the **Airtel Money receiving account**.
5. Tick **Enabled** and save.
6. Click **Test > Test M-Pesa connection** and **Test Airtel Money connection**. Each should confirm your keys are accepted.
7. Copy the callback addresses shown at the bottom of the page. Register the Paystack address in your Paystack dashboard (Settings, API Keys & Webhooks) and the Airtel address in the Airtel developer portal. Safaricom needs nothing to be registered.

Send a prompt (everyday use)

1. Open a submitted Sales Invoice with a balance.
2. Click **Create > Request Mobile Money**.
3. Choose the **network** the customer will pay with, check the **phone number** (for example 0712 345 678) and the **amount**, then click **Send prompt**.
4. Ask the customer to enter their PIN. The window shows **Payment received** when it is confirmed, and the invoice updates.

To see every prompt for an invoice, click **View > Mobile Money Requests**.

Practical example

A clinic invoices a patient KES 3,500 for a consultation. At the desk, the receptionist opens the invoice, chooses M-Pesa, confirms the patient's number and sends the prompt. The patient approves on their phone. The invoice turns **Paid** and a Payment Entry appears with the M-Pesa receipt number, so the receipt is already attached when the day is reconciled.

Statuses

Status	Meaning
Pending	Waiting for the customer to enter their PIN
Success	Paid. A Payment Entry was created
Failed or **Cancelled**	The customer cancelled, entered a wrong PIN, or had too little money. Send a new prompt
Timeout	No answer within about 10 minutes
Needs Review	Money was received but something did not match, or the Payment Entry could not be created. See troubleshooting

Important notes

- Prompts are in **whole shillings** and **KES** only. If an invoice has cents, the cents stay outstanding.
- You can ask for less than the full balance. The invoice then shows **Partly Paid**.
- You cannot send a second prompt for the same invoice for about two minutes. Wait for the first to finish.
- Never share your provider's secret keys.
- Provider fees are charged by the provider. Ask your accountant how to book them.
- Ask the customer to check the amount on their phone before entering the PIN. Customers cannot undo a payment from the invoice.
- Keep the provider's statement and reconcile it with your bank. See Bank accounts and bank reconciliation.

Common mistakes

- Using **live** keys while testing, which takes real money.
- Forgetting to choose the receiving account, so prompts will not send.
- Registering the Paystack address while Paystack is in the wrong mode. Test and live have separate addresses.
- Expecting Paystack payments to appear in your till straight away. They arrive after Paystack pays out.

Troubleshooting

- **No prompt reached the phone.** Check the number and network. Open **Mobile Money Request**, find the request and read the note.
- **The invoice did not update after the customer paid.** Wait a minute, then reopen the invoice. If the request is still **Pending**, check that the callback address is registered with the provider.
- **Needs Review.** Open the request and read the note. If the money was received but the Payment Entry failed (for example, the invoice was paid in the meantime), fix the cause and

click **Retry posting**. If the amount did not match, check the provider's statement.
- **Test connection fails.** Re-enter the keys. Check that the Environment is **Sandbox** for test keys and **Production** for live keys.

Next steps

Read Payment gateways and Recording customer and supplier payments.

Related documentation

- Payment gateways
- Recording customer and supplier payments
- Creating a sales invoice
- Bank accounts and bank reconciliation

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.