

Hesabu ERP Introduction Guide

Introduction to Hesabu ERP

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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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Introduction to Hesabu ERP

What Hesabu ERP is, how the modules connect, and how the screen works.

Introduction to Hesabu ERP

What is Hesabu ERP?

A plain-language introduction to Hesabu ERP, what it does, and who it is for.

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

Overview

Hesabu ERP is online business software. It brings your accounting, sales, purchasing, stock and staff records into one system, so that everybody in your business works from the same information.

ERP stands for *enterprise resource planning*. In practice it means that when a storekeeper receives goods, the stock count goes up, the supplier's bill appears in your accounts, and the money you owe is visible to the person who pays suppliers, all without anyone typing the same thing twice.

Each customer has a private workspace at an address like `yourcompany.hesabuerp.co.ke`. Your data lives in your workspace only.

What you can do with it

Area	What it helps you do
Accounting	Keep your books, issue invoices, record payments, reconcile the bank and produce financial statements
Selling	Track leads, send quotations, take orders and bill customers
Buying	Order from suppliers, receive goods and pay bills
Stock	Track items across warehouses, count stock and see its value
HR and payroll	Keep employee records, leave and run payroll
Projects	Plan tasks, log time and see what each job earns
Point of sale	Sell at the counter with a touch-friendly screen
Assets	Record equipment and its depreciation

Which modules appear in your workspace depends on your plan. The articles in this guide say when a feature depends on a module.

Who it is for

Hesabu ERP suits owner-managed businesses that have outgrown spreadsheets and notebooks: shops, distributors, hardware and building suppliers, clinics, service businesses and small

manufacturers. If more than one person touches your sales, stock or books, you will benefit from a shared system.

Practical example

Mwangaza Hardware & Building Supplies, a demo company used throughout this guide, sells cement, roofing sheets and timber from a store in Nakuru.

1. A customer asks for a price. The salesperson records a **Quotation**.
2. The customer accepts, and it becomes a **Sales Order**.
3. The storekeeper issues the goods on a **Delivery Note**, and the stock count drops.
4. The accountant sends a **Sales Invoice**.
5. When the customer pays by M-Pesa or bank transfer, a **Payment Entry** closes the invoice.

Every step is created from the one before it, so nothing is retyped and everything traces back to the original request.

> **About the screenshots**
>
> Screens in this guide come from a demonstration company with sample data. Your own screens will show your own records, and may differ slightly depending on your plan and settings.

Important notes

- Hesabu ERP records what you enter. It does not replace your accountant's judgement, for example on tax treatment.
- Submitted documents cannot be edited, so your records stay trustworthy. See Understanding document status.

Common mistakes

- **Using it like a spreadsheet.** Enter each thing once, in the right place (for example, stock movements through stock documents, not by overwriting a number).
- **Sharing one login.** Give each person their own user so you can see who did what.

Troubleshooting

If you cannot sign in or a module is missing, see Login problems.

Next steps

Read How the modules connect, then Signing in to your workspace.

Related documentation

- How the modules connect
- Understanding the Hesabu ERP interface
- Signing in to your workspace

Introduction to Hesabu ERP

How the modules connect

Understand how one transaction flows between selling, buying, stock and accounting.

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Overview

The main idea of an ERP is that **one transaction touches several parts of the business**. Hesabu ERP links the modules so each department sees the effect of what the others do.

The two main chains

Selling chain

1. Lead, then Opportunity
2. Quotation
3. Sales Order
4. Delivery Note (stock goes out)
5. Sales Invoice (the customer owes you)
6. Payment Entry (money comes in)

Buying chain

1. Material Request
2. Request for Quotation and Supplier Quotation
3. Purchase Order
4. Purchase Receipt (stock comes in)
5. Purchase Invoice (you owe the supplier)
6. Payment Entry (money goes out)

You can start in the middle. A cash sale can go straight to a Sales Invoice, and a small purchase can start at a Purchase Invoice.

What happens in your books

Posting a document creates accounting entries automatically. Using the demo company as an example:

You submit	Debit	Credit
Sales Invoice for KES 100,000	Accounts Receivable	Sales income
Payment Entry received	Bank or Cash	Accounts Receivable
Purchase Invoice for KES 60,000	Stock or Expense	Accounts Payable
Payment Entry paid	Accounts Payable	Bank or Cash

You do not have to make these entries yourself. You can see them on the invoice under **View, then Accounting Ledger**.

Practical example

A customer orders 120 bags of cement. When the **Delivery Note** is submitted, stock falls by 120 in the Stores warehouse. When the **Sales Invoice** is submitted, the customer's balance rises. When the **Payment Entry** is submitted, the balance falls to zero and your bank balance rises. The same chain is visible in the stock, accounts receivable and general ledger reports.

Important notes

- Create each document **from the previous one** using the **Create** button. This keeps the link, so you can open the related documents from the **Connections** tab.
- If an invoice has **Update Stock** ticked, it moves stock itself and you do not need a separate delivery note or purchase receipt.

Common mistakes

- Creating a Delivery Note **and** an invoice that also updates stock. This reduces stock twice. Use one or the other.
- Typing the same customer in again instead of selecting the existing record.

Next steps

Read Documents, DocTypes and records.

Related documentation

- What is Hesabu ERP?
- Documents, DocTypes and records
- From quotation to payment

Introduction to Hesabu ERP

Understanding the Hesabu ERP interface

A tour of the sidebar, workspaces, search bar, lists and forms.

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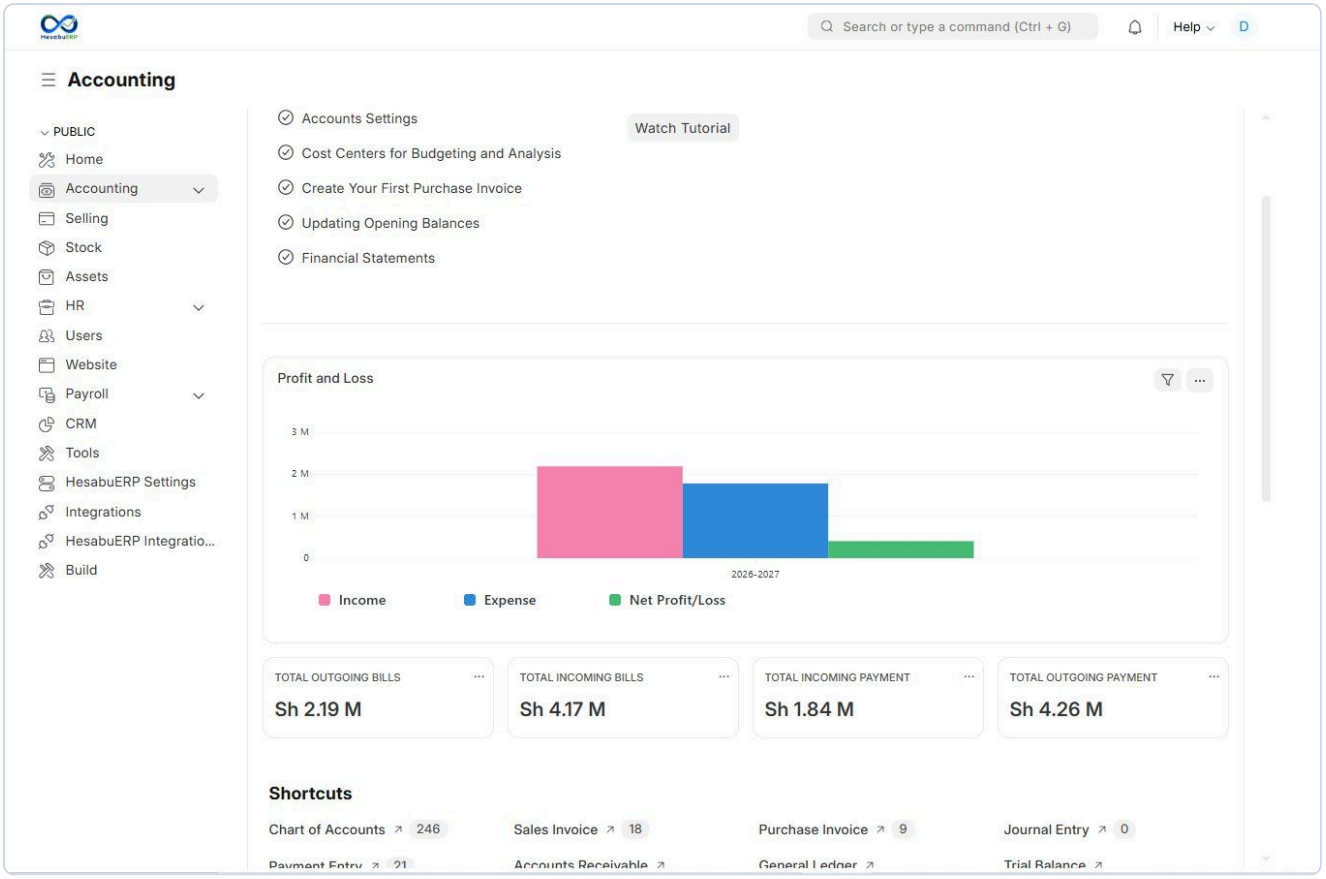
Overview

The working area of Hesabu ERP is called the **Desk**. Once you sign in you will spend your time in four places: the sidebar, workspaces, list views and forms.



The Accounting workspace in a demonstration company, showing the sidebar, a profit and loss chart, number cards and shortcuts.

The parts of the screen

1. **Top bar.** The Hesabu ERP logo, the breadcrumb showing where you are, the search bar (press **Ctrl + G**), notifications, **Help** and your profile picture.
2. **Sidebar.** On the left, a list of modules such as Home, Accounting, Selling, Stock, Assets, HR, Payroll, CRM and Tools. Click one to open its workspace. Which modules you see depends on your plan and your roles.
3. **Workspace.** A module's home screen with charts, number cards (such as total incoming payments) and shortcuts to the records and reports you use most.

4. **List view.** A table of records of one type, for example every Sales Invoice, with filters on top.
5. **Form view.** A single record opened for reading or editing.

Practical example

To find out what customers owe you, click **Accounting** in the sidebar, then **Accounts Receivable** under Shortcuts. The report opens. To see one customer's invoices instead, open **Selling**, then **Sales Invoice**, and filter by customer.

Important notes

- The breadcrumb at the top is clickable. Use it to go back to the list or the workspace.
- Use the search bar rather than hunting through menus. See Using the global search.

Common mistakes

- Looking for a module that is not in your plan. If a module you expect is missing, see Missing modules or permissions.

Next steps

Continue with Navigation and shortcuts.

Related documentation

- The dashboard and workspaces
- Using the global search
- Navigation and keyboard shortcuts

Introduction to Hesabu ERP

Navigation and keyboard shortcuts

The quickest ways to get around, including the search bar and the most useful shortcuts.

Beginner · About 6 minutes · Version 1.0 · Updated 17 November 2026

Overview

A few habits will make you much faster. The search bar at the top of every screen takes you anywhere, and a handful of keyboard shortcuts save clicks.

Steps

1. Press **Ctrl + G** (or click the search bar) to focus it.
2. Type what you want, for example `Sales Invoice` to open the list, or `new sales invoice` to start one.
3. Use the arrow keys to choose a result and press **Enter**.

Useful shortcuts

Shortcut	What it does
Ctrl + G	Focus the search bar
Ctrl + S	Save the document you are editing
Ctrl + Enter	Submit the document (on a saved draft)
Esc	Close a dialog

See every shortcut

Open the **Help** menu in the top bar and choose **Keyboard Shortcuts** to see the full list for your screen.

Practical example

To raise an invoice fast: press **Ctrl + G**, type `new sales invoice`, press **Enter**, fill in the form, press **Ctrl + S** to save, then **Ctrl + Enter** to submit.

Important notes

- Shortcuts may differ slightly between browsers or operating systems. If one does not work, use the equivalent button.
- On a phone there is no keyboard shortcut. Tap the search bar instead.

Common mistakes

- Pressing **Ctrl + Enter** before checking the document. Submitting posts it to your books. See Understanding document status.

Next steps

Read Documents, DocTypes and records.

Related documentation

- Using the global search
- Understanding the Hesabu ERP interface

Introduction to Hesabu ERP

Documents, DocTypes and records

What the words document, DocType and record mean, and how they relate to your daily work.

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Overview

You will see three words used a lot in Hesabu ERP.

- **DocType** is a *type* of record, such as Customer, Item or Sales Invoice. It decides which fields the form has and which rules apply.
- **Document** (or **record**) is one actual thing of that type, such as the invoice numbered `ACC-SINV-2026-00016`.
- **Child table** is a table inside a document, such as the list of items on an invoice. Each row belongs to the invoice.

Masters and transactions

	What it is	Examples
Master	Reference information you set up once and reuse	Customer, Supplier, Item, Warehouse, Account
Transaction	Something that happened on a date	Sales Invoice, Purchase Order, Payment Entry, Stock Entry

Good masters make good transactions. A customer's address and payment terms are filled into every new invoice automatically, because the customer is a master.

Naming and numbering

Each document gets a unique ID such as `ACC-SINV-2026-00016`. The prefix tells you the type (SINV is Sales Invoice) and the year, and the number counts up. You can change numbering rules in the administration section. See Document numbering.

Practical example

`Baraka Supplies` is a **Customer** (a master). Their invoice `ACC-SINV-2026-00016` is a **Sales Invoice** (a transaction). The three lines for cement, roofing sheets and delivery are the **child table** of items.

Important notes

- Search by DocType name to open its list, for example type `Item` or `Customer`.
- A DocType's list view is where you filter, sort and export.

Common mistakes

- Creating a duplicate customer because you could not find the original. Search first, using part of the name.

Next steps

You now have the basics. Continue with Signing in to your workspace.

Related documentation

- How the modules connect
- List views and form views
- Understanding document status

Support

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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.