

Hesabu ERP Projects Manual

Projects and timesheets

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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

Projects and timesheets

- **Projects and tasks**
- **Timesheets**
- **Billing clients and tracking project costs**

Projects and timesheets

Plan projects and tasks, record time, bill clients and track project costs.

Projects and timesheets

Projects and tasks

Create projects, break them into tasks, assign people and track progress.

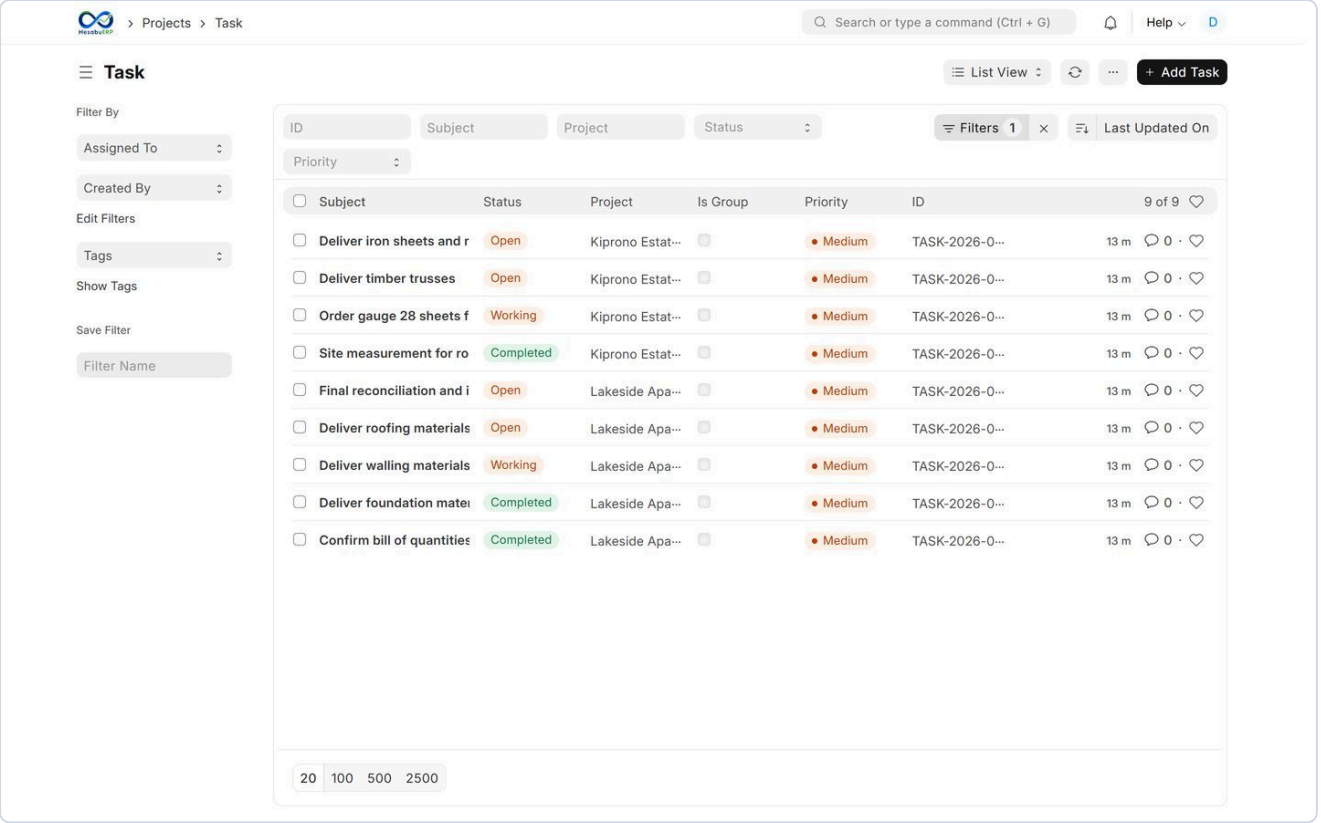
Beginner · About 25 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

A **Project** groups the work for one job, for a customer or for your own company. It is divided into **Tasks** that you assign, schedule and track.



Tasks in a project

Prerequisites

A **Customer** if the project is for a client. Users or employees to assign work to. The Projects Manager role to set things up.

Steps

Create a project

1. Search for **Project** and click **Add Project**.
2. Enter the **Project Name**, choose the **Customer** and the **Status** (*Open*).
3. Set the **Expected Start Date** and **Expected End Date**.
4. Choose the **% Complete Method**, which sets how progress is calculated: by tasks, by task progress or by task weight.
5. Under **Costing and Billing**, enter the **Estimated Cost** and **Total Sales Amount** if you know them.
6. Save.

Add tasks

1. From the project, click **Tasks** (or search for **Task** and click **Add Task**).
2. Enter the **Subject**, the **Project**, the **Expected Start and End dates**, the **Priority** and the **Expected Time** in hours.
3. Assign it with **Assigned To**. The person is notified.
4. For tasks that depend on others, add them in **Depends On**.
5. Save. Update the **Status** as work proceeds: *Open*, *Working*, *Pending Review*, *Completed*.

Views

In the **Task** list, use **Gantt** for a timeline, **Kanban** for columns and **Calendar** for dates. See Kanban boards, recurring documents and bulk tools.

Practical example

Mwangaza Interiors wins a contract to fit out an office. The project has tasks such as *Measure*, *Order materials*, *Install* and *Handover*, each assigned and dated. The manager checks the Gantt each Monday.

Important notes

- Use **Project Templates** to reuse the same set of tasks for repeat jobs.
- Close a project by setting the status to *Completed* only after billing is done.

Common mistakes

- Tasks with no assignee or dates.
- Never updating status, so the percent complete is meaningless.

Next steps

Read Timesheets.

Related documentation

- Timesheets
- Billing clients and tracking project costs
- Kanban boards, recurring documents and bulk tools

Projects and timesheets

Timesheets

Record hours worked against projects and tasks, with an activity type and billing rate.

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

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

A **Timesheet** records the hours an employee worked, and on which project or task. It is the basis for billing clients by time and for knowing what a project really costs.

Prerequisites

Employees created, and **Activity Types** set up (search for it), such as *Consulting*, *Installation* or *Planning*, each with a **Billing Rate** and **Costing Rate** per hour.

Steps

1. Search for **Timesheet** and click **Add Timesheet**.
2. Choose the **Employee**.
3. In the **Time Sheets** table, add a row for each piece of work: **Activity Type**, **From Time**, **To Time** or **Hrs**, the **Project** and the **Task**.
4. Tick **Is Billable** where the client should pay for the time.
5. Check the **Total Billable Hours** and **Total Billable Amount** at the top.
6. Save and **Submit**. A manager may approve it first.

Practical example

A technician spends 6 hours installing shelving, 2 of which are travel and not billable. She logs 4 billable hours at KES 1,500 and 2 non-billable ones, all against the *Install* task.

Important notes

- Record time the same day if possible. Memory fades quickly.
- Timesheets do not replace payroll or attendance. They record **what** was worked on.
- Submitted timesheets cannot be changed. Cancel and recreate if wrong.

Common mistakes

- Logging all time as billable.
- Choosing the wrong project, which distorts project costs.

Next steps

Read Billing clients and tracking project costs.

Related documentation

- Projects and tasks
- Billing clients and tracking project costs
- Employees

Projects and timesheets

Billing clients and tracking project costs

Invoice time and expenses to a client, and see profit on each project.

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

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

You can bill a client for **time and materials** from timesheets, or bill a **fixed price** in stages. Either way, the project accumulates its costs so you can see the margin.

Steps

Bill from a timesheet

1. Open the submitted **Timesheet** with billable hours.
2. Click **Create > Sales Invoice**.
3. Choose the customer and the service item, check the hours and the rate, and submit the invoice. See Creating a sales invoice.
4. The timesheet is marked as billed, so it cannot be billed twice.

Bill a fixed price in stages

1. Create a **Sales Invoice** for each milestone, such as 30% on start, 40% on delivery, 30% on handover.
2. Select the **Project** on each invoice, so it counts towards that project.

Link costs to the project

1. Choose the **Project** on purchase invoices for materials, and on expense claims. See Expense claims.
2. Timesheets add the cost of staff time, using the **Costing Rate**.

Check profitability

1. Open the **Project**. Under **Costing and Billing** you can see **Total Costing Amount**, **Total Billed Amount** and **Gross Margin**.
2. Open **Project Profitability** or **Profit and Loss by Project** reports for more detail.

Practical example

An office fit-out is quoted at KES 850,000. At the halfway point, the project shows KES 410,000 billed and KES 290,000 of costs. The manager sees a healthy margin, and notices that materials are being charged without the project selected on two bills. Fixing it brings the costs up to KES 330,000.

Important notes

- Costs only show if the **Project** is selected on the document. Make it a habit.
- Do not bill unapproved timesheets.
- Always agree billing terms with the client in writing.

Common mistakes

- Billing a timesheet twice by creating a manual invoice.
- Leaving the project off supplier bills.

Next steps

Return to Projects and tasks.

Related documentation

- Timesheets
- Creating a sales invoice
- Expense claims

Support

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