

Billing clients and tracking project costs

Projects and timesheets

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

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