

Guide for the business owner or manager

Guides by job role

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What to look at, and when, to stay in control of your business without doing the data entry.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Your role

You do not need to enter transactions. You need to know how the business is doing, approve what matters and make sure the right people have the right access.

Your first day

1. Sign in and take the tour. See Signing in to your workspace and The Hesabu ERP interface.
2. Check that your company details are right. See Creating and configuring your company.
3. Make sure staff have their own users with the right roles. See Creating users and assigning roles.

Every day (5 minutes)

- Open the **Accounting** workspace and look at the cards: money owed to you, money you owe and cash. See The dashboard and workspaces.
- Check your **To Do** and notifications for approvals. See To Do, assignments and mentions.
- If you run a shop, look at yesterday's closing entries. See Point of sale reports and the daily routine.

Every week

- **Sales:** the pipeline and the sales register. See Sales pipeline and CRM reports.
- **Customers who owe you:** the *Accounts Receivable* report.
- **Suppliers you owe:** *Accounts Payable*.
- **Stock:** low and slow-moving items. See Stock reports.

Every month

- Profit and Loss and Balance Sheet. See Financial reports.
- Compare with the budget. See Budgets.
- Confirm VAT, PAYE and other taxes are filed and paid. See Kenya tax overview.
- Check the Hesabu ERP invoice is paid. See Your plan and your Hesabu ERP invoices.

Good habits

- Ask for reports from the system, not from spreadsheets.
- Never share your login. Give each person their own.
- Review who has access every quarter. See Backups, logs and security.

Common mistakes

- Letting one person do everything, with no second check.
- Only looking at sales, and never at what customers owe.

Who to ask

Your administrator for access. Hesabu ERP support for anything about the service.

Related documentation

- Financial reports
- The dashboard and workspaces
- Permissions and restricting access
- Guide for the administrator