

Guide for the project manager

Guides by job role

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

Guides by job role

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Plan projects, assign tasks, approve time and watch costs and billing.

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

Your role

You deliver projects on time and on budget, and make sure the client is billed correctly.

Start a project

1. Create the **Project** with client, dates and the estimated cost and price. See Projects and tasks.
2. Break it into **Tasks** with dates, hours and an owner. Reuse a template for repeat jobs.
3. Agree milestones and billing terms with the client in writing.

Every day

- Check your **Kanban** or **Gantt** view of tasks, and clear blockers. See Kanban boards, recurring documents and bulk tools.
- Answer mentions and comments on tasks.

Every week

1. Review the percent complete and the tasks that are late.
2. Approve **Timesheets**. Check that time is on the right tasks, and that billable hours are correct. See Timesheets.
3. Check that supplier bills and expense claims carry the **Project**. If not, costs are missing.

Billing

- Raise invoices at milestones, or from timesheets. See Billing clients and tracking project costs.
- Follow up unpaid invoices with the credit controller. See Guide for the credit controller.

At the end

1. Complete all tasks and get client sign-off.
2. Make sure everything is billed.
3. Check the final **Gross Margin**, and note what you learned.
4. Set the project status to *Completed*.

Common mistakes

- Starting work without agreed scope and billing.
- Leaving costs without a project, so the margin looks good until the audit.

Who to ask

The accountant about billing and costs, HR about staff availability.

Related documentation

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