

Hesabu ERP Sales Manual

Selling and customers

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Selling and customers

Customers, leads, quotations, sales orders, delivery and getting paid.

Selling and customers

Creating and managing customers

Add customers once, group them, and set their payment terms and contacts.

Beginner · About 12 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Kuza** and **Enterprise** plans. It is not part of **Biashara**. Contact us if you want to upgrade.

Overview

A **Customer** record stores everything about a customer that you reuse on every sale: their name, tax ID, address, contacts, payment terms and credit limit. Create each customer once, and select it on quotations, orders and invoices.

Steps

1. Search for **New Customer**.
2. Enter the **Customer Name**. Use the legal or common trading name, consistently.
3. Choose the **Customer Type**: *Company* or *Individual*.
4. Choose the **Customer Group** (for example *Commercial* or *Individual*) and **Territory** (for example *Kenya*). These are used to group sales in reports.
5. Enter the **Tax ID** (KRA PIN) if the customer has one, so it prints on invoices.
6. Save the customer. The **Connections** panel then lets you add an **Address** and a **Contact** with phone and email.
7. In the **Accounting** tab, set the **Payment Terms** (for example *30 days*) and a **Credit Limit** if you want a warning when a customer owes too much.

Practical example

Baraka Supplies is created as a *Company* in the *Commercial* group, territory *Kenya*, with the KRA PIN and the Nakuru address, and payment terms of 30 days. Every invoice for them then picks up the PIN and the due date automatically.

Important notes

- To see everything about a customer, open their record and use the **Connections** tab, or open the **Accounts Receivable** and **Customer Ledger Summary** reports.
- Search before you create. A second record for the same customer splits their history in two.

- You can merge a duplicate customer into another from the **...** menu, then **Rename**.

Common mistakes

- Typing the customer name differently each time, creating duplicates.
- Leaving the address empty, so invoices print without one.

Next steps

Read Leads and opportunities.

Related documentation

- From quotation to payment
- Creating a sales invoice
- Leads and opportunities

Selling and customers

Leads and opportunities

Capture enquiries, follow them up, and turn them into quotations and customers.

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

Plan availability

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

Overview

A **Lead** is someone who might buy from you. An **Opportunity** is a lead with a real chance of becoming a sale. Tracking them in one place means no enquiry is forgotten.

The Lead list, showing leads with statuses such as Open, Replied and Opportunity.

Prerequisites

The **CRM** module is included in your plan. Check your sidebar for **CRM**.

Steps

Record a lead

1. Open **CRM**, then **Lead**, and click **Add Lead**.
2. Enter the person's name, the **Organization Name**, their phone and email, and the **Source** (for example *Walk In* or *Campaign*).
3. Choose the **Territory** and **Status**.
4. Click **Save**.
5. Log each conversation: scroll to **Activity** and add a **Comment**, or send an **Email**.

Turn a lead into an opportunity

1. Open the lead and click **Create**, then **Opportunity**.
2. Enter what they want, the expected amount and schedule the next follow-up from the **Activities** tab (a **To Do** or **Event** with a date).
3. Click **Save**.

Make a quotation and a customer

1. In the opportunity, click **Create**, then **Quotation**. The lead becomes a customer when you confirm.
2. Continue as in From quotation to payment.

Practical example

Atieno Homes Ltd phones about 50 sheets of roofing. The salesperson records a lead, creates an opportunity worth KES 62,500, and schedules a follow-up for next Monday. On Monday a reminder appears, she calls, and creates a quotation.

Important notes

- Use the **Status** to see your pipeline at a glance: Open, Replied, Opportunity, Converted, Lost.
- Scheduling the next follow-up keeps leads warm. Without it, leads go cold.

Common mistakes

- Creating a customer straight away for a casual enquiry. Start with a lead.
- Not recording why an opportunity was lost. Use the **Lost** reason so you can learn from it.

Next steps

Read From quotation to payment.

Related documentation

- From quotation to payment
- Creating and managing customers

Selling and customers

From quotation to payment

The full sales process, from a price offer to delivery, invoice and payment.

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

Plan availability

Included in the **Kuza** and **Enterprise** plans. It is not part of **Biashara**. Contact us if you want to upgrade.

Overview

A complete sale passes through up to five documents. Each is created from the previous one with the **Create** button, so details are carried forward and everything stays linked.

1. **Quotation**: your price offer.
2. **Sales Order**: the customer's confirmed order.
3. **Delivery Note**: the goods leaving your warehouse.
4. **Sales Invoice**: the bill.
5. **Payment Entry**: the money received.

You can skip steps. A cash sale can start at an invoice.

Prerequisites

A customer (or lead) and items. See Customers and Creating items.

Steps

1. Quotation

1. Search for **New Quotation**. Choose the **Quotation To**: *Customer* or *Lead*.
2. Add the items, quantities and rates. Set **Valid Till**.
3. Save and submit. Print or email it to the customer.

2. Sales Order

1. When the customer accepts, open the quotation and click **Create**, then **Sales Order**.
2. Set the **Delivery Date**. Confirm the items and save.
3. Submit. The order is now **To Deliver and Bill**.

3. Delivery Note

1. In the sales order, click **Create**, then **Delivery Note**.
2. Check the quantities and the **Source Warehouse**. Save and submit.
3. Stock is deducted. The customer signs the printed note on delivery.

4. Sales Invoice

1. In the delivery note, click **Create**, then **Sales Invoice**.
2. Check taxes and the due date. Save and submit. See Creating a sales invoice.
3. Leave **Update Stock** unticked, because the Delivery Note already reduced it.

5. Payment

1. In the invoice, click **Create**, then **Payment**, and submit it. See Recording payments.

Practical example

Baraka Supplies asks for a price on 120 bags of cement. The salesperson sends **Quotation** `SAL-QTN-...` at KES 850 a bag. Baraka accepts. She creates the **Sales Order**, then the **Delivery Note** (the storekeeper issues the cement), then the **Sales Invoice**. Baraka pays by M-Pesa, recorded with a **Payment Entry**.

Important notes

- The **Connections** tab on any document shows the whole chain.
- A partly delivered order can be invoiced in stages.
- Reports such as **Sales Analytics** and **Accounts Receivable** use this chain to answer *who owes what*.

Common mistakes

- Typing a new invoice instead of creating it from the order, which breaks the link.
- Delivering and invoicing with **Update Stock** on both, so stock reduces twice.

Troubleshooting

If the **Create** button does not show the next document, the document may still be in **Draft**. Submit it first.

Next steps

Read Sales returns.

Related documentation

- Creating a sales invoice
- Recording customer and supplier payments
- How the modules connect

Selling and customers

Sales returns and customer refunds

Handle goods a customer sends back, and credit or refund them correctly.

Intermediate · About 12 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Kuza** and **Enterprise** plans. It is not part of **Biashara**. Contact us if you want to upgrade.

Overview

When a customer returns goods, two things must be recorded: the **goods coming back into stock** and the **money you no longer expect**. Hesabu ERP does this with a return document, linked to the original sale.

Steps

If goods were delivered with a Delivery Note

1. Open the submitted **Delivery Note**.
2. Click **Create**, then **Sales Return**.
3. Reduce the quantities to what actually came back. Choose the **Warehouse** it returns into.
4. Save and submit. Stock increases.
5. Then open the original **Sales Invoice** and click **Create**, then **Return / Credit Note** to reduce what the customer owes. See Credit notes and debit notes.

If the invoice updated stock itself

Create one **Return / Credit Note** from the invoice. The goods return to stock and the amount is credited in the same step.

Refund the money

1. If the customer already paid, open the credit note and click **Create**, then **Payment**.
2. Choose *Pay* as the type, enter the reference, and submit.

Practical example

Baraka Supplies returns 10 damaged iron sheets. The storekeeper receives them into a `Rejected - HD` warehouse using a Sales Return, so damaged goods do not go back on sale. The accountant

issues a credit note for KES 12,500.

Important notes

- Returns can only be made for items on the original document.
- Use a separate **Rejected** warehouse for damaged goods.

Common mistakes

- Creating only a credit note and forgetting the goods, so stock is wrong.
- Returning goods into the main warehouse when they are damaged.

Next steps

Move on to Buying.

Related documentation

- Credit notes and debit notes
- From quotation to payment
- Warehouses and stock entries

Selling and customers

Campaigns and appointments

Run marketing campaigns, track which leads they bring in and book customer appointments.

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

A **Campaign** groups the leads you gain from one marketing effort, such as a radio advert, a Facebook post or a trade show. An **Appointment** books a meeting with a lead or customer. Together they show what works and keep follow-up from slipping.

Steps

Create a campaign

1. Search for **Campaign** and click **Add Campaign**.
2. Enter the **Campaign Name**, such as *Back to School 2027*, and a description.
3. Save.
4. When you log a lead, choose the **Campaign** (and the **Source**) on the lead. Leads from the campaign are listed in the campaign.

Email the leads

1. Search for **Email Group** and add a group such as *Newsletter*. Add the leads or contacts in it.
2. Search for **Newsletter**, click **Add Newsletter**, choose the email group, write the subject and content, and click **Send**.
3. Only send to people who agreed to receive your messages.

Book an appointment

1. Search for **Appointment** and click **Add Appointment**.
2. Enter the **Scheduled Time**, the customer's name, email and phone, and any notes.
3. Save. If your calendar is connected, it appears there, and the customer can be sent a confirmation.

Check what works

Open **Lead Source** and **Campaign Efficiency** reports to compare the number of leads and orders per campaign.

Practical example

A school supplier runs a *Back to School 2027* SMS and Facebook campaign. Leads from it are tagged. At the end, the report shows the SMS brought 40 leads and 12 orders, and Facebook 25 leads and 3 orders, so next year more budget goes to SMS.

Important notes

- Tag every lead with a source. Without it, you cannot compare campaigns.
- Respect the Kenya Data Protection Act. Keep proof of consent, and give an easy way to unsubscribe.

Common mistakes

- Sending a newsletter to people who did not agree.
- Not recording the source at the time of the lead.

Next steps

Read Sales pipeline and CRM reports.

Related documentation

- Leads and opportunities
- Sales pipeline and CRM reports
- Calendar, events and notes

Selling and customers

Sales pipeline and CRM reports

See where each opportunity stands, forecast sales and find out why you win or lose.

Intermediate · 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

Your **sales pipeline** is the list of all opportunities and how far each has progressed. Hesabu ERP shows it as a funnel, a board and reports, so you can see what is likely to close.

Prerequisites

Leads and opportunities entered with a **Sales Stage** and an expected amount. See Leads and opportunities.

Steps

Use the pipeline

1. Open the **Opportunity** list and switch to **Kanban** or **Pipeline** view.
2. Drag an opportunity between columns as it moves, for example from *Prospecting* to *Proposal*.
3. Update the **Expected Closing Date** and **Opportunity Amount**.

Record a lost opportunity

1. Open the opportunity, click **Set as Lost**, and choose the **Lost Reason**, such as *Price* or *Went to a competitor*.
2. Add **Lost Reason** values under **Opportunity Lost Reason** so they are consistent.

Reports

Search for these in the search bar.

Report	Shows
Sales Funnel	Leads, opportunities, quotations and orders by stage
Lead Details and **Lead Conversion Time**	Who has not been followed up, how long they take to become customers
Opportunity Summary by Sales Stage	Value in each stage
Lost Opportunity	Why you lose sales
Sales Pipeline Analytics	Pipeline by person, territory or period
Prospects Engaged But Not Converted	Leads that need a push

Practical example

On Monday the sales manager opens the funnel and sees KES 4.2 million in *Proposal*. The lost report shows three losses to price, so she reviews the discount rules and asks reps to follow up the three oldest proposals.

Important notes

- A pipeline is only useful if people keep it up to date. Review it weekly.
- Do not count unlikely deals at full value when forecasting.

Common mistakes

- Leaving old opportunities open for months.
- Missing lost reasons, so you learn nothing.

Next steps

Return to Leads and opportunities.

Related documentation

- Leads and opportunities
- Campaigns and appointments
- From quotation to payment

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.