

Hesabu ERP Tools Guide

Tools and productivity

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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.

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Tools and productivity

- **To Do, assignments and mentions**
- **Calendar, events and notes**
- **Kanban boards, recurring documents and bulk tools**

Tools and productivity

To-dos, calendar, notes, assignments, Kanban boards, recurring documents and bulk updates.

Tools and productivity

To Do, assignments and mentions

Keep a task list, assign documents to colleagues and ask for their attention.

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

Overview

Tools in Hesabu ERP help your team work together without leaving the system. **To Do** is your personal list, **assignments** hand a document to someone, and **mentions** call a colleague into a conversation.

Steps

Your To Do list

1. Search for **To Do** and click **Add To Do**.
2. Write the **Description**, set a **Due Date** and a **Priority**, and optionally assign it to someone else.
3. Save. Mark it **Closed** when finished.

Assign a document

1. Open any document, such as a sales invoice or an issue.
2. In the sidebar under **Assigned To**, click **+** and choose the person. Add a comment if useful.
3. The person gets a To Do and a notification. When they finish, they click **Done**.

Mention someone

1. In the **Comments** box at the bottom of a document, type `@` and choose the colleague.
2. Write your message and click **Comment**. They are notified and can open the document directly.

See what is waiting for you

Click the **To Do** shortcut on your Home workspace, or filter any list by **Assigned To me**.

Practical example

The accountant assigns a disputed invoice to the sales manager with the comment "Customer says the price was 950. Please confirm." The manager replies, then marks it done.

Important notes

- Comments stay on the document, so there is a record of who said what.
- Use assignments for tasks tied to a document, and To Do for general reminders.

Common mistakes

- Assigning without a comment, so the person does not know what to do.
- Never closing finished To Dos.

Next steps

Read Calendar and notes.

Related documentation

- Calendar, events and notes
- Kanban boards, recurring documents and bulk tools
- Notifications

Tools and productivity

Calendar, events and notes

Schedule meetings and reminders and keep shared notes.

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

Overview

The **Calendar** shows events, tasks and due dates in one place. **Notes** are short pieces of text you can share.

Steps

Add an event

1. Search for **Event**, or open **Calendar**, and click an empty date.
2. Enter the **Subject**, the **Starts On** and **Ends On** times, and the **Type** (*Private*, *Public* or *Public with participants*).
3. In **Event Participants**, add colleagues or customers, and set a **Repeat** schedule if it recurs.
4. Save. Invited staff see it on their calendars and are notified.

Reminders

Tick **Send an email reminder** and choose when. Use it for follow-up calls and payment collections.

Keep notes

1. Search for **Note** and click **Add Note**.
2. Enter a **Title** and the **Content**.
3. Tick **Public** to share it with everyone, or add people in **Share**.

Connect an outside calendar

If your plan includes it, you can link a Google Calendar. See Connecting other services.

Practical example

The sales rep creates a recurring event, *Monthly stock review*, with the shop manager and the storekeeper as participants. A note called *Delivery rules* is shared with all drivers.

Important notes

- Do not put passwords or confidential information in public notes.
- Private events are visible only to you.

Common mistakes

- Creating a *Public* event for a private meeting.

Next steps

Read Kanban boards, recurring documents and bulk tools.

Related documentation

- To Do, assignments and mentions
- Connecting other services

Tools and productivity

Kanban boards, recurring documents and bulk tools

Organise work visually, repeat documents automatically and update many records at once.

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

Overview

Three tools save time once you know them: **Kanban boards** to see work as cards in columns, **Auto Repeat** to create documents on a schedule, and **bulk update** to change many records together.

Steps

Kanban boards

1. Open a list, such as **Issue** or **Task**, and switch the view to **Kanban** from the **View** menu.
2. Click **New Kanban Board**, name it and choose the field that makes the columns, such as **Status**.
3. Drag a card to another column to change its status.

Auto Repeat

1. Open a submitted document you want to repeat, such as a monthly rent invoice.
2. Click **Actions > Repeat** (or search for **Auto Repeat**).
3. Choose the **Frequency** (*Weekly*, *Monthly*, *Quarterly* or *Yearly*), the **Start Date**, and an optional **End Date**.
4. Add recipients to email each new copy.
5. Save. A new document is created on each date.

Bulk update

1. In any list, tick several records.
2. Click **Actions > Edit**, choose the field and the new value, then click **Update**.
3. Use **Actions > Assign To** or **Add Tags** the same way.

Practical example

A landlord customer is billed KES 45,000 on the first of every month. The invoice is set to repeat monthly. A shop manager ticks 30 items and bulk-updates their **Item Group** after a reorganisation.

Important notes

- Check a bulk edit on two or three records first. Some changes cannot be undone.
- Auto-repeated invoices are created as submitted or draft, depending on your setting. Review the first one.
- You cannot bulk-edit submitted documents.

Common mistakes

- Setting Auto Repeat on the wrong document, which sends customers duplicate invoices.
- Selecting all records instead of a few.

Next steps

Return to Tools overview.

Related documentation

- List views and form views
- Filtering, sorting and exporting records
- To Do, assignments and mentions

Support

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Support requests: https://www.hesabuerp.co.ke/support.html
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Online documentation: https://www.hesabuerp.co.ke/documentation/

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