

To Do, assignments and mentions

Tools and productivity

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

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