Hesabu ERP Troubleshooting Guide

Troubleshooting

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Troubleshooting

Diagnose and fix the most common problems.

Troubleshooting

Login problems

Fix a forgotten password, a locked or disabled account and a page that will not load.

Beginner · About 10 minutes · Version 1.0 · Updated 17 November 2026

Problem

You cannot sign in to your workspace.

Symptoms

- "Invalid login credentials"
- The page does not load, or shows a blank screen
- You are told your account is disabled or locked
- The reset email never arrives

Possible causes

- A mistyped email or password (check Caps Lock)
- The wrong workspace address
- The user is disabled
- Too many failed attempts, which temporarily locks the account
- Email not arriving, so the reset link is missing

Diagnosis and resolution

1. **Check the address.** You must sign in at your own workspace address, such as `yourcompany.hesabuerp.co.ke`.
2. **Check the email and password.** Retype slowly. Use **Forgot Password?** to reset.
3. **Check your spam folder** for the reset email.
4. **Ask your administrator** to open your user record. They should make sure **Enabled** is ticked and your email is correct.
5. **Wait a few minutes** if you made several failed attempts, then try again.
6. **Try another browser** or a private window, to rule out a stored old session.
7. If a page will not load at all, check your internet connection and try another site.

Prevention

- Bookmark your workspace address.
- Keep your email address on your user record up to date.
- Use a password manager.

When to contact support

If the administrator's own account is locked, or no reset email ever arrives. Call or WhatsApp us with your workspace address.

Related documentation

- Signing in to your workspace
- Creating users and assigning roles

Troubleshooting

Missing modules or permissions

Work out why you cannot see a module, a button or a record.

Beginner · About 10 minutes · Version 1.0 · Updated 17 November 2026

Problem

A module, button or record that you expect to see is not there, or you get a *Not permitted* message.

Symptoms

- The sidebar lacks a module such as Stock or HR
- The **Submit**, **Cancel** or **Create** button is missing
- "Not permitted" or "No permission for..."
- A list is empty, though you know records exist

Possible causes

- Your user lacks the **role** for that document type
- A **User Permission** restricts you to certain companies or warehouses
- Your plan does not include the module
- The record is a **Draft** and the button needs it submitted first

Diagnosis and resolution

1. **Check your roles.** Ask your administrator to open your user record and look at the **Roles** section.
2. **Check the document type.** The administrator opens **Role Permissions Manager**, chooses the document type, and checks your role has the right ticked (read, write, submit and so on).
3. **Check restrictions.** Search for **User Permission** and look for entries for your user. A restriction to one warehouse hides other warehouses' records.
4. **Check the status.** The **Create** menu appears only on submitted documents.
5. **Check your plan.** Some modules, such as Manufacturing or HR, depend on the plan. Call us to confirm.
6. Sign out and in again after any change, so it takes effect.

Prevention

Set up roles using the examples in Example access setups and document who has what.

When to contact support

If a module that is in your plan does not appear for the administrator.

Related documentation

- Permissions and restricting access
- Creating users and assigning roles

Troubleshooting

Invoice submission errors

Understand the most common errors when saving or submitting an invoice, and how to clear them.

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

Problem

You click **Save** or **Submit** on an invoice and get an error.

Symptoms and fixes

Message (or meaning)	Cause	Fix
"Mandatory fields required"	A required field with a red star is empty	Fill in the listed field
Fiscal year does not exist for the date	No fiscal year covers the posting date	Create it. See Currency, fiscal year and accounting periods
"Due date cannot be before posting date"	The dates are the wrong way round	Correct the **Payment Due Date**
Insufficient stock	**Update Stock** is on and the warehouse has too little	Check the stock, or untick **Update Stock** if a delivery note was used
"Account … is a group"	A group account was chosen	Choose a non-group account
Debit and credit not equal (journals)	The entry does not balance	Correct the amounts
Period closed	An accounting period blocks that date	Use a date in an open period, or ask the accountant
"Cannot cancel: linked with …"	Other documents depend on this one	Cancel or unlink those first

Diagnosis steps

1. Read the **whole message**. It names the field or account.
2. Check the **Posting Date** against your fiscal year.
3. Check the **Customer** and **Company** match your accounts.
4. If stock is involved, open the **Stock Balance** report for the item.
5. If you still cannot find it, note the exact message and the document number.

Prevention

- Create the new fiscal year before the old one ends.
- Do not tick **Update Stock** on invoices that follow a delivery note.
- Keep your chart of accounts tidy.

When to contact support

Send the exact message, the document number and a screenshot.

Related documentation

- Creating a sales invoice
- Currency, fiscal year and accounting periods
- Warehouses and stock entries

Troubleshooting

Email problems

Find out why emails are not arriving or not sending from your workspace.

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

Problem

An email you sent from Hesabu ERP, such as an invoice or notification, does not arrive.

Symptoms

- The customer says nothing was received
- A *Sending failed* message appears
- The email shows **Error** in the queue

Possible causes

- The customer's email address on the record is wrong
- The email went to spam or a filtered folder
- Your outgoing email account's password or settings are wrong
- Your mail provider limits how many emails can be sent

Diagnosis and resolution

1. Search for **Email Queue** and find the email. Check its **Status**: - **Sent**: it left our system. Ask the recipient to check spam and promotions, and add your address to their safe list. - **Error**: open it and read the **Error** text. - **Not Sent** or **Sending**: wait a few minutes, as emails are sent in batches.
2. **Check the recipient's address** on the customer record, for typing errors.
3. **Check your outgoing account.** Open **Email Account**, and confirm **Enable Outgoing**, the SMTP server and the password are right. See Email and regional settings.
4. Send a **test email** to yourself.
5. If you use a personal mail provider (Gmail, Yahoo), you may need an **app password**.

Prevention

- Use a business email on your own domain, with proper authentication records (SPF and DKIM), so messages are trusted.
- Send invoices as PDF from the document, not from your personal mailbox.

When to contact support

If the queue shows *Sent* for every message but recipients never get them, or after a change of mail provider.

Related documentation

- Email and regional settings
- Backups, logs and security

Troubleshooting

Printing and PDF problems

Fix a missing logo, a cut-off table, a blank PDF or the wrong print format.

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

Problem

A printout or PDF looks wrong or will not generate.

Symptoms

- The PDF is blank, or the download fails
- The logo or an image is missing
- A table is cut off at the right edge
- Staff print the old format

Possible causes

- The wrong **Print Format** or **Letter Head** is selected
- The logo file is private, or its link is broken
- The design is too wide for the page
- A temporary fault in the PDF service

Diagnosis and resolution

1. **Choose the format.** In the print preview, check the **Print Format** and **Letter Head** boxes.
2. **Set the default.** Use **Customize Form** to choose the default print format for the document type. See Print formats and letterheads.
3. **Check images.** Open the image's address in a private browser window. If it asks you to sign in, make the file public or reattach it.
4. **Check the width.** In the print format, reduce column widths or tick **Landscape**.
5. **Try again** after refreshing the page. If the **PDF** button fails but the print preview shows, try printing to PDF from the browser as a workaround.

Prevention

- Test a new print format with a real document before staff use it.
- Keep image files small.

When to contact support

If every PDF fails, or one does not load after you have tried another document.

Related documentation

- Print formats and letterheads
- Creating a sales invoice

Troubleshooting

Incorrect stock balances

Find why the system's stock differs from the shelf and put it right.

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

Problem

The quantity in the system does not match what is on the shelf.

Symptoms

- A negative quantity
- A count that is higher or lower than the report
- An item is "out of stock" but you have it

Possible causes

- Stock was reduced twice, because **Update Stock** was ticked on an invoice that followed a delivery note
- A **Delivery Note** or **Purchase Receipt** was never submitted
- Goods were received into the wrong warehouse
- Returns were not recorded
- Stock moved without a document (for example, someone took goods unrecorded)
- A unit-of-measure mistake (bags versus kilograms)

Diagnosis steps

1. Open the **Stock Ledger** report for the item and warehouse. It lists every movement.
2. Look for the date things went wrong. Is there a movement twice? A large unexpected number?
3. Check for **Draft** documents. Open the lists for Delivery Note and Purchase Receipt filtered by *Draft*.
4. Check the other warehouses. The stock may be sitting somewhere else.
5. Check the **UOM**. A movement of 50 kg is not 50 bags.

Resolution

- If a document was missed, submit or create it.
- If a document was wrong, cancel and amend it.
- For a true difference, do a physical count and create a **Stock Reconciliation**. See Opening stock and stock counts.

Prevention

- Do not tick **Update Stock** on invoices that follow a delivery note.
- Count regularly, a few items each week.
- Give each storekeeper their own login.

When to contact support

If the ledger shows entries you cannot explain, or negative stock persists after corrections.

Related documentation

- Opening stock and stock counts
- Stock reports
- Warehouses and stock entries

Troubleshooting

Data import errors

Fix common problems when importing customers, items and other records from a spreadsheet.

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

Problem

A Data Import fails, or some rows are rejected.

Symptoms

- The preview shows warnings or red rows
- "Column not found", "Mandatory field missing" or "Could not find ..."
- Only some records were created

Possible causes

- The template's column headings were changed
- A mandatory field is empty
- A linked value does not exist yet (for example, an **Item Group** that has not been created)
- The wrong date or number format
- A duplicate of an existing record

Diagnosis and resolution

1. **Use a fresh template** from Data Import, and paste your data into it without changing the headings.
2. **Fix the red rows** in the preview. Each shows the cause.
3. **Create missing linked records first**, such as item groups, units of measure and customer groups.
4. **Check formats.** Use the date format in the template. Remove thousands separators from numbers.
5. **Import a small sample** of five or ten rows to test.
6. For updates, use *Update Existing Records* and include the **ID** column.

Prevention

- Clean your spreadsheet before importing: remove blank rows and duplicates.
- Keep one record per row.

When to contact support

For very large imports, or errors you cannot read. Send the file and the message.

Related documentation

- Importing data
- Creating items

Support

Call or WhatsApp 0117 801 786.
Support requests: https://www.hesabuerp.co.ke/support.html
Website: https://www.hesabuerp.co.ke
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.