

Hesabu ERP User Management Guide

Users and access control

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

Copyright and ownership

© 2026 Hesabu Ledger LTD. Hesabu ERP and its documentation are owned by Hesabu Ledger LTD. This document may be shared with Hesabu ERP customers and prospective customers. It may not be sold or republished without permission.

Documentation version 1.0, published 17 November 2026. The screens in your own workspace may differ slightly depending on your plan and settings.

Contents

Users and access control

- **Creating users and assigning roles**
- **Permissions and restricting access**
- **Example access setups**

Users and access control

Add your team, give each person the right access, and keep sensitive information safe.

Users and access control

Creating users and assigning roles

Add team members, give them roles, disable accounts and understand what each role allows.

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

Overview

Every person who uses your workspace should have their own **user**. A user's **roles** decide which modules they can open and what they can do. Giving each person only the access they need keeps your data safe.

Prerequisites

You must have the **System Manager** role.

Steps

Add a user

1. Search for **User** and click **Add User**.
2. Enter the person's **Email** and **First Name**.
3. Leave **Send Welcome Email** ticked so they get a link to set their password.
4. Click **Save**.
5. In the **Roles** section, tick the roles they need. See the table below.
6. Click **Save** again.

Disable or enable a user

1. Open the user.
2. Untick **Enabled** to disable, or tick it to re-enable.
3. Save. A disabled person can no longer sign in, but their past work remains in the records.

Common roles

Role	Typical use
System Manager	Administrator. Full access, including users and settings
Accounts Manager	Senior accountant. All accounting functions
Accounts User	Accountant or bookkeeper. Enter invoices and payments
Sales Manager / Sales User	Manage or record sales
Purchase Manager / Purchase User	Manage or record purchases
Stock Manager / Stock User	Manage or record stock
HR Manager / HR User	Employee records, leave and payroll

Practical example

The owner adds Wanjiru as an **Accounts User**, Kamau as a **Stock User** and Aisha as a **Sales User**. Each sees only their own modules in the sidebar.

Important notes

- Do not give System Manager to everyone. Keep it to one or two administrators.
- Remove access the day someone leaves. Disable the user, do not delete them, so the audit trail stays intact.
- Share the workspace address with new users. See Signing in to your workspace.

Common mistakes

- Sharing one login between several people.
- Giving a Manager role when a User role is enough.

Troubleshooting

If a new user says a module is missing, check their roles. See Missing modules or permissions.

Next steps

Read Permissions and restricting access.

Related documentation

- Permissions and restricting access
- Example access setups

- Updating your profile and password

Users and access control

Permissions and restricting access

Control what each role can do on each document type, and limit users to specific companies or records.

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

Overview

Access in Hesabu ERP works in two layers:

1. **Role permissions** say what a role can do with a document type: read, write, create, submit, cancel, delete, export, print, email.
2. **User permissions** narrow a user down to specific records, such as one company, one warehouse or one customer.

Steps

See and change role permissions

1. Search for **Role Permissions Manager** and open it.
2. Choose a **Document Type**, for example *Sales Invoice*.
3. The table lists each role and what it may do. Tick or untick the boxes.
4. Click **Update** (the change takes effect immediately for new sessions).

Restrict a user to certain records

1. Search for **User Permission** and click **Add User Permission**.
2. Choose the **User**.
3. Choose the **Allow** document type, such as *Company* or *Warehouse*, and the **For Value**, such as `Stores - MHB`.
4. Tick **Apply to all Document Types** if the restriction should apply everywhere, then Save.

Practical example

Tabitha manages the Eldoret shop. The administrator adds a **User Permission** for her user: *Warehouse* equals `Eldoret Shop - MHB`. She now sees stock for her shop only, and invoices linked to it.

Important notes

- **Submit** and **Cancel** are separate permissions. Give them only to people who should post and reverse transactions.

- Sensitive fields, such as salaries, can be hidden using **permission levels**. Ask your administrator.
- Test a restriction by signing in as that user in a private browser window.

Common mistakes

- Giving **Delete** to many roles. Cancel and amend is safer.
- Creating a user permission and forgetting it. A restricted user then wonders why records are missing.

Troubleshooting

If a user gets *Not permitted*, check the role permission for the document type, then any user permissions. See Missing modules or permissions.

Next steps

Read Example access setups.

Related documentation

- Creating users and assigning roles
- Example access setups

Users and access control

Example access setups

Practical role combinations for an accountant, salesperson, storekeeper, branch manager and owner.

Beginner · About 8 minutes · Version 1.0 · Updated 17 November 2026

Overview

These examples show how a small business can split access sensibly. Adjust them for your own team.

Examples

Person	Roles	What they can do	Restrictions
Owner	System Manager, Accounts Manager	Everything, including approving and reports	None
Accountant	Accounts User	Enter invoices, payments and journals, run reports	Cannot manage users
Sales person	Sales User	Quotations, orders, customers	Cannot see purchase or payroll data
Storekeeper	Stock User	Receipts, delivery notes and transfers	User Permission on their warehouse only
Branch manager	Sales User, Stock User	Day-to-day for one branch	User Permission on their warehouse and cost centre
HR officer	HR User	Employee records and leave	Cannot see accounting

Practical example

Kamau, the storekeeper in Nakuru, can receive goods and issue stock, but cannot see invoices, prices that are not on his documents, or payroll. When he receives cement, the delivery is recorded under his own name, which gives a clear audit trail.

Important notes

- **Separate the jobs** where possible: the person who raises a payment should not also approve it. You can enforce approvals with a workflow. See Workflows and notifications.
- Review your users every few months and remove anyone who no longer needs access.

- Audit what users did by opening a record and reading its **Activity** section, or by searching for **Activity Log**.

Common mistakes

- Giving the owner's login to a manager, so there is no trace of who acted.
- Leaving accounts of former staff enabled.

Next steps

Move on to Accounting.

Related documentation

- Creating users and assigning roles
- Permissions and restricting access

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.