

Hesabu ERP Website and Portal Manual

Website and portal

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

Website and portal

- **Website and portal overview**
- **Web pages and the blog**
- **Web forms**
- **The customer and supplier portal**

Website and portal

Publish pages and a blog, collect enquiries with web forms, and give customers a portal.

Website and portal

Website and portal overview

What the Website module offers and how it differs from your main company website.

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

Plan availability

Offered in **custom packages**. Contact us to ask about it.

Overview

The **Website** module lets you publish simple pages from inside Hesabu ERP and gives your customers and suppliers a **portal** where they can see their own documents.

What it offers

Feature	Use it to
Web Page	Publish simple pages such as About or Contact
Blog	Post news and updates
Web Form	Collect enquiries, applications or orders into Hesabu ERP records
Portal	Let customers and suppliers sign in and view their own invoices, orders and quotations
Website Settings	Set the site title, logo, menu and footer

Things to know

- This is a simple site builder. It is **not** a replacement for a full marketing website. Many businesses keep their main site elsewhere and use the portal and web forms only.
- Web pages are **public**: anyone on the internet can read them. Never publish confidential information.
- Portal users see only their own records. Use portal access carefully. See The customer portal.

Next steps

Read Web pages and the blog.

Related documentation

- Web pages and the blog
- Web forms
- The customer and supplier portal

Website and portal

Web pages and the blog

Create and publish pages and blog posts, and set the menu and footer.

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

Plan availability

Offered in **custom packages**. Contact us to ask about it.

Overview

Pages and blog posts are written in the browser. Published ones appear on your Hesabu ERP website address.

Steps

Set up the site

1. Search for **Website Settings**.
2. Enter a **Title Prefix** (shown in the browser tab before each page title) and upload your logo as the **Brand Image**.
3. Under **Top Bar Items**, add menu links, such as *About* and *Contact*, with the page route.
4. Under **Footer Items**, add footer links and a copyright note.
5. Save.

Create a page

1. Search for **Web Page** and click **Add Web Page**.
2. Enter the **Title**, which also creates the web address (route), such as `about`.
3. Write the content. You can use the page builder, markdown or HTML depending on the **Content Type**.
4. Tick **Published** and save. The page appears at `/about`.

Write a blog post

1. Search for **Blogger** and add yourself as an author.
2. Search for **Blog Category** and add categories such as *News*.
3. Search for **Blog Post**, click **Add**, choose the category and blogger, write the post, and tick **Published**.

Search engine details

On each page or post, fill in the **Meta Title** and **Meta Description**. They are what search engines show.

Practical example

A school supplier publishes an *About* page, a *Contact* page and a monthly blog post about new stock, and adds them to the top bar menu.

Important notes

- Unpublish a page by unticking **Published**. Do not delete it unless you are sure.
- Use images that are not too large, so pages load quickly on mobile data.
- Your public website should not show internal prices or customer names.

Common mistakes

- Typing spaces or capitals in the route.
- Publishing a draft page by accident.

Next steps

Read Web forms.

Related documentation

- Website and portal overview
- Web forms

Website and portal

Web forms

Collect enquiries, applications or requests from the public straight into Hesabu ERP records.

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

Plan availability

Offered in **custom packages**. Contact us to ask about it.

Overview

A **Web Form** is a form on your website that creates a record when someone submits it, for example a **Lead** from an enquiry or a **Job Applicant** from a careers page.

Steps

1. Search for **Web Form** and click **Add Web Form**.
2. Enter the **Title**, and choose the **DocType** that will be created, such as *Lead*.
3. The **Route** is its web address, for example `contact-us`.
4. Tick **Published**. Leave **Login required** unticked if the public may submit it.
5. In the **Web Form Fields** table, choose the fields the visitor should fill, and mark the important ones **Mandatory**.
6. Write the **Success Message** that appears after submitting.
7. Tick **Allow Editing After Submit** or **Allow Multiple Responses** only if visitors should change or submit several records. Save. Open `/contact-us` on your site, and submit a test.
8. Check the new record, for example in **Lead**.

Practical example

A hardware shop publishes a *Request a quote* form creating Leads. Each enquiry arrives in the sales team's list, and a notification email alerts them. See Workflows and notifications.

Important notes

- Public forms attract spam. Keep the number of fields small and enable the captcha option if your version has one.
- Do not collect sensitive data, such as ID numbers or card details, on a public form.
- Tell visitors how you will use their information.

Common mistakes

- Choosing too many fields, so people give up.
- Forgetting to test it.

Next steps

Read The customer portal.

Related documentation

- Website and portal overview
- Leads and opportunities
- Recruitment

Website and portal

The customer and supplier portal

Let customers and suppliers sign in to see their own quotations, orders, invoices and tickets.

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

Plan availability

Offered in **custom packages**. Contact us to ask about it.

Overview

The **portal** is a simple area for people outside your company. A customer signs in and sees only **their own** quotations, orders, invoices and shipments. It saves phone calls asking for copies.

Steps

Choose what appears

1. Search for **Portal Settings**.
2. In the menu table, tick the items you want to show, such as *Invoices*, *Orders* and *Quotations*, and untick the rest.
3. Save.

Invite a customer

1. Open the **Customer** record.
2. Add a **Contact** with the person's email address.
3. In the contact, click **Invite as User**. A portal user is created and they receive an email to set a password.
4. The person signs in at your Hesabu ERP address and sees their portal.

Check what they see

Use a test customer contact, sign in on another browser, and check that only that customer's documents are visible.

Practical example

A key customer is invited. The next month their accountant signs in, downloads three invoices and views the statement, with no need to ask your office.

Important notes

- Portal users are **not** staff. They have no access to your desk or other customers' data.
- Remove access when a contact leaves their company. See Creating users and assigning roles.
- Check portal visibility with a test account before inviting real customers.

Common mistakes

- Inviting the wrong email address, which gives a stranger access to a customer's invoices.
- Forgetting to untick menu items you do not want to share.

Troubleshooting

If a customer cannot see their invoices, check that the contact is linked to the right customer, and that the invoices are submitted and not drafts.

Next steps

Return to Website and portal overview.

Related documentation

- Website and portal overview
- Permissions and restricting access
- Creating and managing customers

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.