KRA Invoicing Context - eTIMS

Access Kenya Revenue Authority services using your eCitizen account.

eCitizen | KENYA REVENUE AUTHORITY | eTIMS
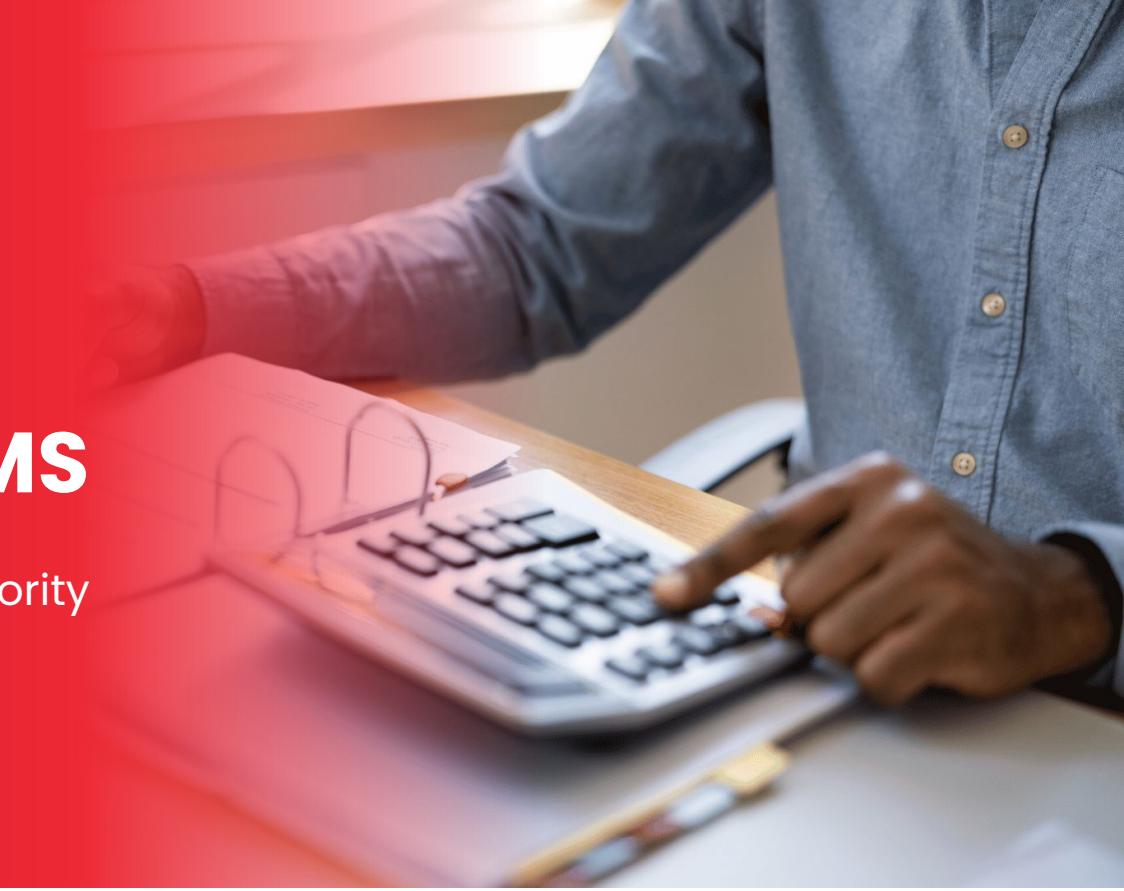
Activation of eTims

- Click on Invoicing (ETIMS) Module.
- To activate, accept the terms and conditions and Privacy Policy.
- Click on **Activate E-Invoicing**
- A notification upon successful initialisation will be displayed.
- Features under Invoicing module will be visible.
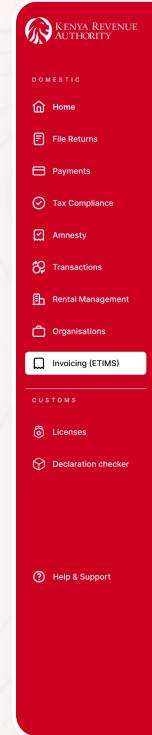
Customers

Customers with PINs

This is a listing of customers entailing date added, pin number, name, email details.

1. **Step 1** - Click on **Create New Customer**
2. **Step 2** - Add **PIN of customer** and click on **validate**
3. **Step 3** - Confirm details and click on **Add**.
4. **Cancel** takes you back to Step 1 without adding the customer.

Customers

Customers without PINs

Click on **Create New** Customer

1. **Step 1** - Click on **Manual** under General - Key in the available details requested for.
2. **Step 2** - On Address Tab - Add the details if available
3. **Step 3** - Other Tab - Add the required details if available
4. Once all the details are input, click on **Save**. **Cancel** will automatically delete the data.

Note: Fields marked in * are mandatory. The save button will only be active once filled

New Customer

○ Use KRA PIN ● Manual

General   Address   Other

Name *

Email *

Phone *

KRA Pin

Currency

Ksh

Cancel

New Customer

○ Use KRA PIN ● Manual

General   **Address**   Other

Address

Enter Address

Town/City

Enter Town/City

Post Code

Enter Post Code

State

Enter State

Country *

Kenya

Cancel   Save

New Customer

○ Use KRA PIN ● Manual

General   Address   **Other**

Website

Enter Website

Reference

Enter Reference

Cancel   Save

Item Management

This module is for creation or managing both products/items and services.

The preview page shows all products and services created. To get more details, click on **view as** shown on **2**

To add product or service, click on **Create New**

Create Product/Service

A product/service can be added by either;

1. Multiple Items - allows for upload if the item/services are many.
2. Add Item - This allows for adding one item at a go.

Click on **Add Item** option.
Provide the details required then click on **Add**

Item Management - Add Multiple Items

Select **Add Multiple Items**
Download the CSV template and fill and save it.
Proceed to upload the CSV file.
Click on **Submit.**

Sales Invoice

This page will display a listing of all historical sales invoices created.

- Click on **Create Invoice**.
- Click on **View** to get more details on the invoice.

Create Sales Invoice

Select the Type of Sale

Fill in the rest of the details required such as:

- **Upload of Logo** - This will appear on the invoice
- **Type of sale** - Business to Business option, or Business to customer
- **Customer Name** - select from customers created
- **Type of Tax** - Select the default option for Non-Vat
- Due date for Invoice
- Items details by **Add Item** or **Add Multiple Items** option.

- Add from the Item Management or create new item/service.
- **Term and conditions** - this is optional and represents instructions to the buyer
- **Add Payment Method** - Payment Instruction to buyer on how to settle
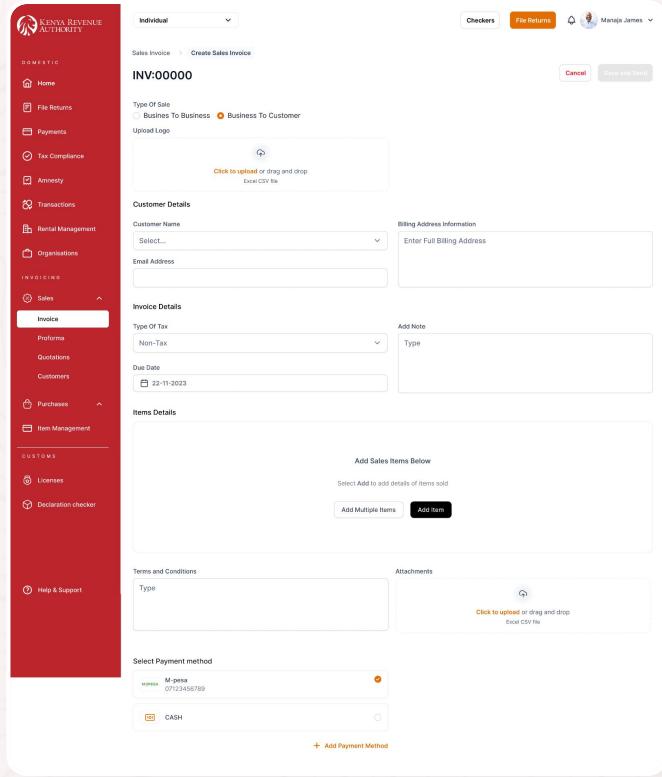
Create Sales Invoice

Upon filling in the invoice details.
You can either:

1. **Cancel Invoice** - Delete the invoice created.
2. **Save** - Creates an invoice.
3. **Save and Send** - Allows user to save the invoice and share with buyer via email.
4. **Edit** - Allows for change of the item content.
5. **Delete** - this allows for removal of the line item.

Sales Invoice

Upon completion of uploading relevant information or filling relevant details provided the system displays the sales invoice.

Download the invoice or **send** to customers via email.
An eTims generated Sales Invoice will have:

1. **QR Code**- this can be scanned to avail the invoice details.
2. eTims **CU Invoice number**.
3. eTims **Logo**.

Invoice Items Preview

- **Step 1** - In this section the user gets to view a listing of invoice items it entails; date, product/services, description, quantity, unit cost, amount and an add item button above.
- **Step 2**- In this section the displays the customer's details, invoice details and items details.

Credit Note

Credit Note Module shows a view of all credit notes created.

To create Credit Note. Click on Sales Invoice module.
Proceed to click on **View** of the invoice to be canceled as shown on screen **2**

Credit Note

Click on Invoice view.
To create Credit Note - Click on **Create Credit Note**

A credit note can either be:
1. Partial Credit Note - applies to partial cancellation.
2. Full Credit Note -applies to cancellation of the full invoice.

Select the type of credit note.

Note: For partial credit note can only be done once. KRA does not allow for multiple partial credit notes for the same invoice. However, it does allow for full credit note after the first partial credit note is done.

Partial Credit Note

For partial credit note options. The change can be done on:

1. Quantity.
2. unit price.
3. Removal of an item. However, all items cannot be removed.
4. Also addition of new items is not possible for a credit note.

Full Credit Note

For full credit note option.
The user is able to cancel the full invoice.

Credit Note

Upon completion of creating a credit note the system displays the credit note alongside a **download** and **send** button.
Download the invoice or **send** to customers via email.
An etims generated Sales Credit Note will have;

1. QR Code- this can be scanned to avail the invoice details.
2. eTims credit note number
3. eTims Logo .

Send Credit Note

Click the Send button.
Key :

1. Email address.
2. The subject.
3. Body of the email.
4. Click **send and close** button or **Cancel**
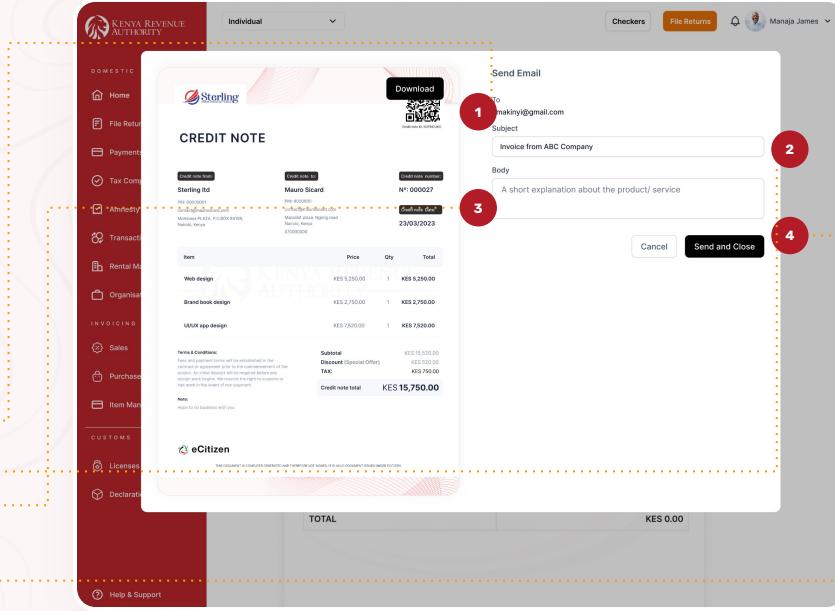
Proforma Invoice

This is a listing entails:
- Invoice date.
- Invoice number.
- Name.
- Total amount
- View button.

Create Proforma Invoice

Type of Sales is in two categories:

1. Business to Customer
2. Business to Business

Provide the information required, once done. Click on **Save and Send** or **Cancel**

Note:
Cancel clears and resets the proforma invoice details.

Proforma INVOICE

This section displays the Proforma invoice after completion of filling in relevant information.

Download the invoice or click on **send** to share with customer.

Send Proforma invoice

When a user clicks the send button, the system prompts user to key in :

1. Email address.
2. The subject.
3. Body of the email.
4. Click **send and close** button or **Cancel**
5. **Download Invoice**
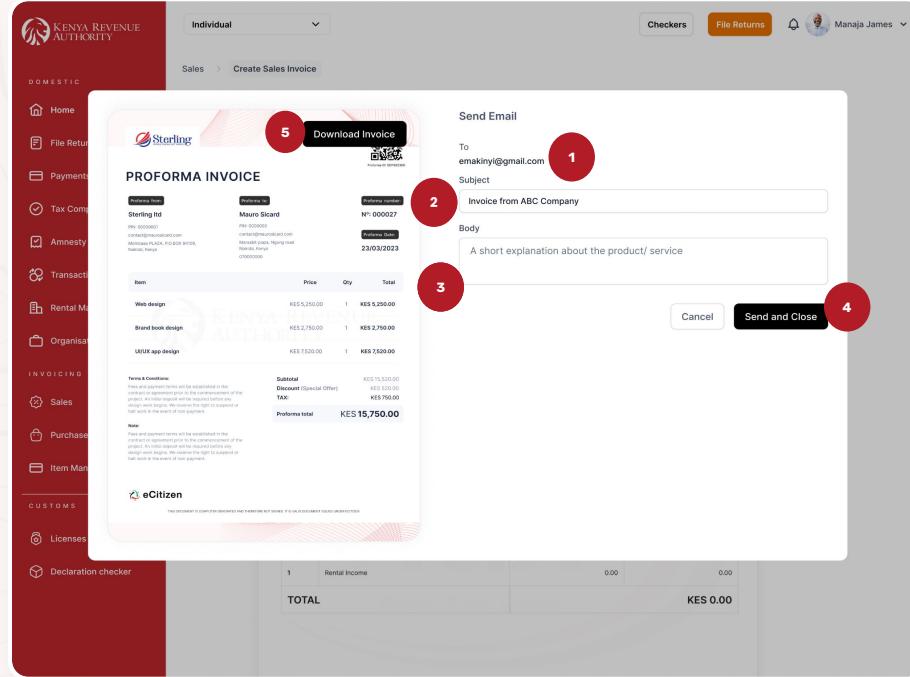
Reference Number

In this section the displays the customer's details, invoice details and items details when a user keys in the reference number on the search tab.
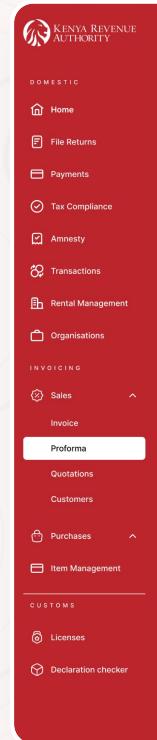
Quotation

This section displays a listing of quotations entailing; invoice date, invoice number, name, total amount and a view button.

Create Quotation

In this section a user can create a quotation by selecting the a business to customer type of sale and uploading relevant information or filling in customer details, invoice details, items details , term and conditions with selection of a payment method.

Create Quotation

In this section a user can create a quotation by filling in customer details, quotation details, items details , term and conditions with selection of a payment method.

Quotation

Upon completion of creating a quotation the system displays the credit note alongside a download button.
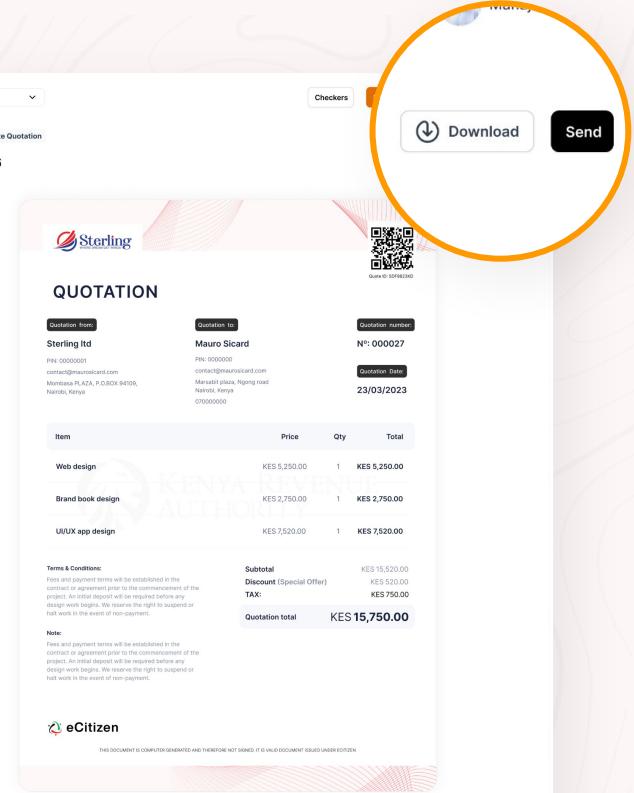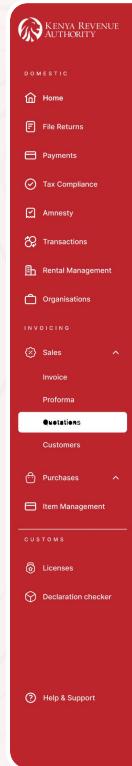
Send Quotation

When a user clicks the send button,the system prompts user to key in :

1. Email address.
2. The subject.
3. Body of the email.
4. Click **send and close** button or **Cancel.**
5. **Download Invoice.**
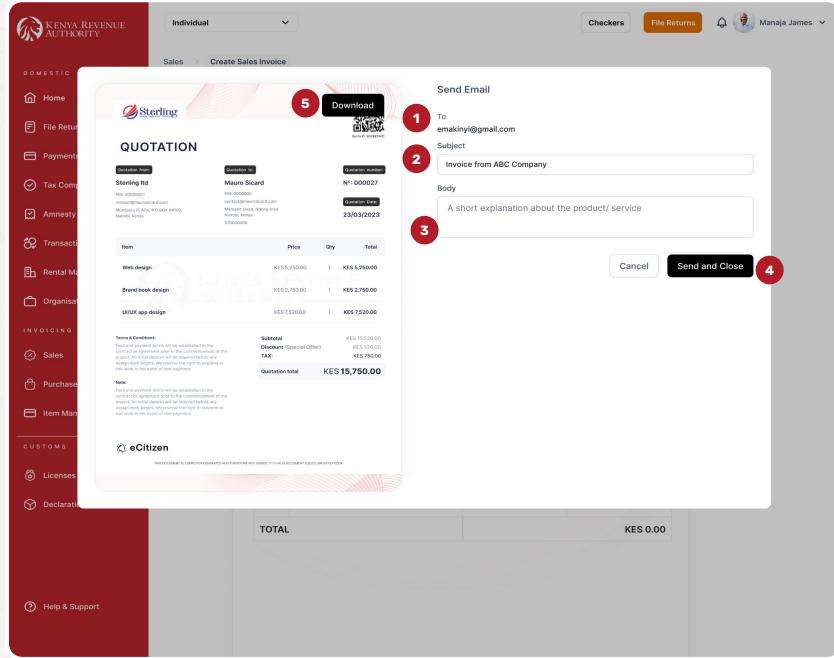
Reference Number

This section displays the customer's details, quotation, details and item details when you keys in the reference number on the search tab.

The user can convert the quotation to an invoice upon confirmation.

Transactions by Customers

A visibility of all transactions by customer is availed on customer module.

Click on view customer and log of all sales invoices, proforma invoices and quotations is availed.

Click on view to check on details of invoices or quotations created.

Suppliers

This is a list of suppliers entailing; date added, pin number, name, email, and a view button.

Click on **Create New** fill in required information and save the supplier.

Local Purchase Orders

This section displays a listing of local purchase orders entailing;

purchase order, date, reference number, amount and a view button.

Create Local Purchase Order

In this section a user can create a local purchase order by filling in supplier's details, purchase order details, item details, term and conditions.

Create Local Purchase Order

In this section, you can create a local purchase order by filling in supplier's details, purchase order details, items details, term and conditions.

Create Local Purchase Order

In this section you can create a local purchase order by filling in supplier's details, purchase order details, item details, terms and conditions.
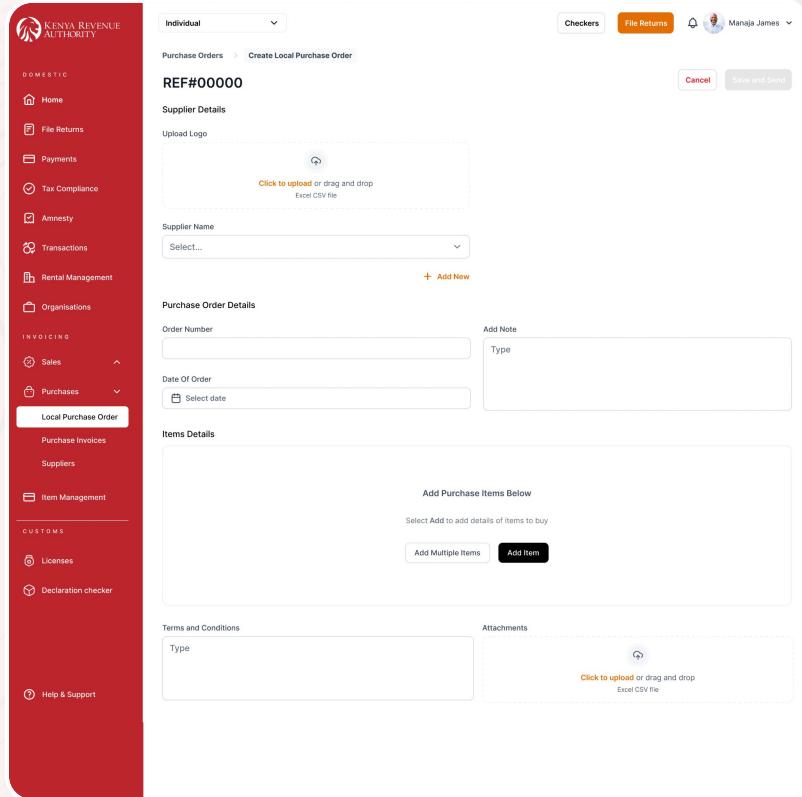
Local Purchase Order

Upon completion of creating a Local Purchase Order, the system displays the Local Purchase Order alongside a download button.

Send Purchase Order

When a user clicks the send button, the system prompts user to key in :

1. Email address.
2. The subject.
3. Body of the email.
4. Click **send and close** button or **Cancel.**
5. **Download Invoice.**

Reference Number

This section displays the supplier's details, purchase order details and item details when you key in the reference number on the search tab.

Purchase Invoices

This displays a listing of purchase invoices entailing; bill date, due date, bill number, amount due and a view button.

Create Bill

In this section you can create a bill by filling in the supplier's details, bill details, item details, term and conditions.

Bill

Upon completion of creating a bill, the system displays the bill alongside a download button.

Send Bill

When a user clicks the send button, the system prompts user to key in :

1. Email address.
2. The subject.
3. Body of the email.
4. Click **send and close** button or **Cancel.**
5. **Download Invoice.**

Reference number

This section displays the supplier's details, purchase order details and item details when you key in the reference number on the search tab.

Local Purchase Order

This is a listing of local Purchase Order.

END