

eTIMS Web

VAT Context

How to access
and use eTIMS on
<https://ecitizen.kra.go.ke/>

User Guide



eCitizen



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eTIMS

User Guide – eTIMS Web

How to access and use eTIMS on ecitizen.kra.go.ke

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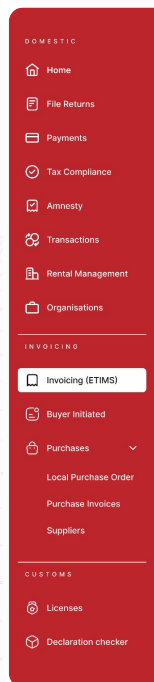
Getting Started

01 Getting Started:

Introduction

KRA eTIMS for VAT obligated taxpayers allows you to access simplified invoicing services for your businesses and allows you to:

- Onboard into eTIMS
- Manage Stocks
- Manage purchases
- Manage customers and suppliers
- Generate eTIMS invoices and credit notes



Manage your business seamlessly with ETIMS E-Invoicing

Transform the way you manage your business seamlessly with ETIMS E-Invoicing. In the fast-paced and dynamic landscape of modern business, efficient financial processes are crucial for success. ETIMS E-Invoicing is your comprehensive solution to streamline and optimize the invoicing workflow, allowing you to focus on what matters most – the growth and success of your business.

☒ Accept ETIMS [Terms and Conditions](#)

☒ I have read and understood the [Privacy Policy](#)

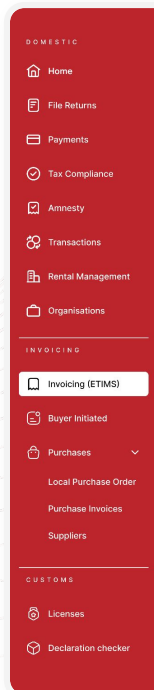
[Learn more](#)

[Activate E-Invoicing](#)

Activating eTIMS on eCitizen

To onboard on to eTIMS as a first time user:

- Visit **ecitizen.kra.go.ke**
- Login using your eCitizen credentials.
- Click on **“Invoicing (eTIMS)”** Module.
- Accept terms and conditions and Privacy Policy.
- Click on **“Activate E-Invoicing”**
- A notification will be displayed once you onboard successfully
- Features under Invoicing module will be visible.



02

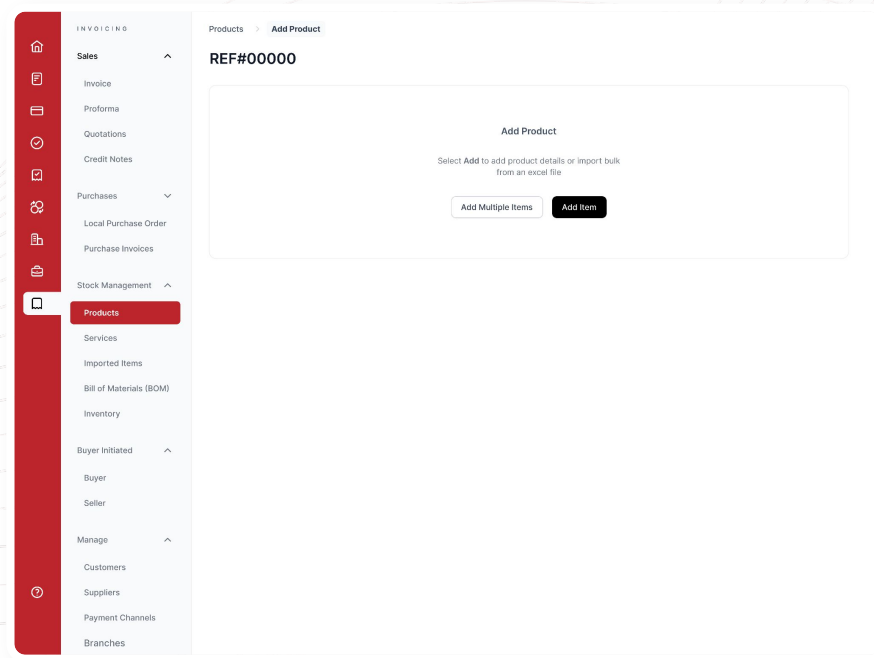
Stock Management

02 Stock Management:

Stock Management

Stock management module enables you to **add, edit** or **delete** details on;

- Products
- Services
- Bill of materials
- Imported items



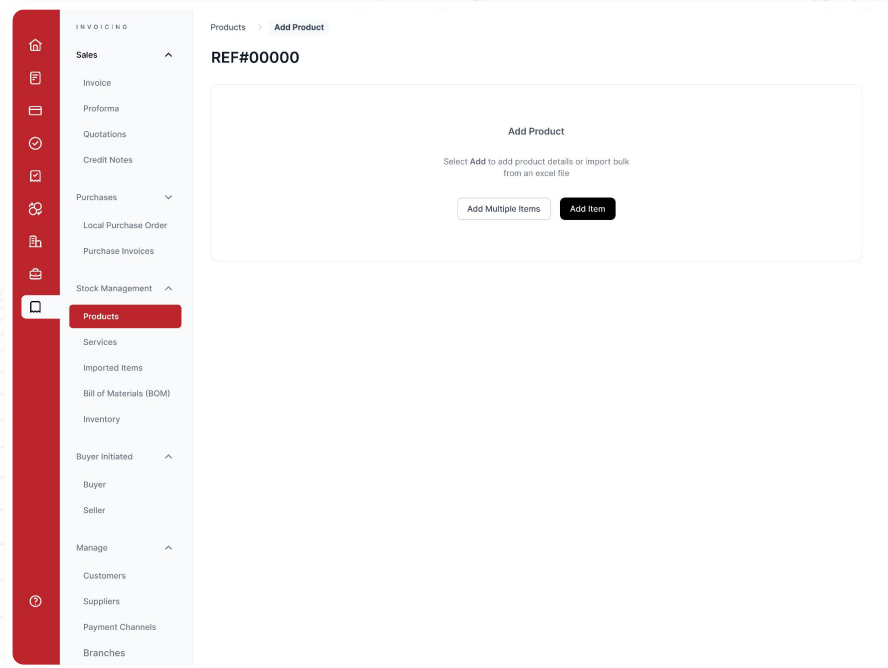
02 Stock Management:

Products

All available products are listed here. The section allows **viewing** and **editing** products' information.

From this section you can:

- Add products as single or batch by clicking on the **“Create New”** button.
- Add Stock Keeping Units(**SKU**) for products that have varying units
- Define stock levels and get notified when stocks are below the set limit.
- Manage product prices and discounts



Adding products with variations (SKU);

To add products with variations;

- Enable the variation slider
- Click on **“Add Variation”**
- Fill in the Product Variation Details form
- Click **“Add”** button

The screenshot displays the 'Add Product' form and a modal for 'Product Variation Details'.

Add Product Form:

- Product Name ***: Enter Product Name
- Item Details**: Section header
- Item Category ***: Select Item... [+ Add New](#)
- Description ***: Type
- Brand (Optional)**: Enter Brand (Optional)
- Product Variations**: Section header
- Does this item have variations?**: Unique identifier for each product to track inventory accurately. [Learn more](#) ☒
- + Add Variation**: Button to add a new variation
- Cancel** and **Add Product**: Buttons at the bottom

Product Variation Details Modal:

- Remove**: Button at the top right
- Variation Name ***: Enter Variation Name
- Unit Cost ***: KES 0
- Unit cost is VAT inclusive**: ☐
- Beginning Stock (Optional)**: 0
- Inventory Buffer Level (Optional)**: 0
- Get restock alert when inventory reached this quantity**: ☐
- Does this SKU allow breaking bulk**: ☐ Breaking bulk means splitting big SKUs into smaller ones. The child SKU will automatically calculate price based on parent SKU's price.
- Cancel** and **Add**: Buttons at the bottom

A red arrow points from the text 'Click Add Variation to add variations' to the '+ Add Variation' button in the main form.

02 Stock Management:

Add multiple products;

To add multiple products;

- Go to **Stock Management** menu
- Click **“Products”**
- Select **“Add Multiple Products”** button
- Download the CSV template and fill it in
- Upload file and submit to complete

The screenshot displays the eTIMS web application interface. On the left is a red sidebar with a menu. The 'Stock Management' menu item is expanded, and the 'Products' option is highlighted. The main content area shows a dropdown menu set to 'Individual'. Below this, there's a breadcrumb 'Products > Add Product' and a reference number 'REF#00000'. The 'Multiple Upload' section contains a box with instructions: '1. Download the skeleton file below and fill it with proper data. 2. Upload the updated file in the form below and submit.' Below the instructions is a button labeled 'Download Skeleton CSV'. Underneath is a dashed box for file upload with the text 'Upload a file or drag and drop' and 'XLSX, XLS, CSV up to 10MB'. At the bottom right of the upload area are 'Cancel' and 'Submit' buttons. The top right of the interface shows user information for 'Manaja James' and buttons for 'Checkers' and 'File Returns'.

02 Stock Management:

Services

- This section displays all available services.
- As a user, you can add new services to the list similar to the product section
- You can also **view** and **edit** service information.

Services
Create and manage services

Active Inactive

Search [Create New](#)

Date Created	Item Name	Class Name	Description	
Oct 05, 2021 11:05 AM	Message	Dairy products and eggs	Gold Crown Milk	View
Oct 05, 2021 11:05 AM	Conferencing	Cereal and pulse products	Solo Liquid Maize Flour	View
Oct 05, 2021 11:05 AM	Hotel Transferts	Dairy products and eggs	Tea Leaves	View
Oct 05, 2021 11:05 AM	Paragliding	Dairy products and eggs	Santa Lucia Spaghetti	View
Oct 05, 2021 11:05 AM	Boat Hire	Dairy products and eggs	Karunya Exercise Book	View

Item Details

Item Name

ITEM NAME: Message UNIMPEC CODE: 1000000

CLASS NAME: Nonperishable TAX TYPE: VAT 18%

TYPE: SERVICE

Remove

Service Name

Gold Crown Milk

Service Description (optional)

Type

Variations

Does this item have variations? ☐ Variations are different versions of the same service [Learn more](#)

Unit Cost

KES: 65

Unit cost is exclusive of VAT

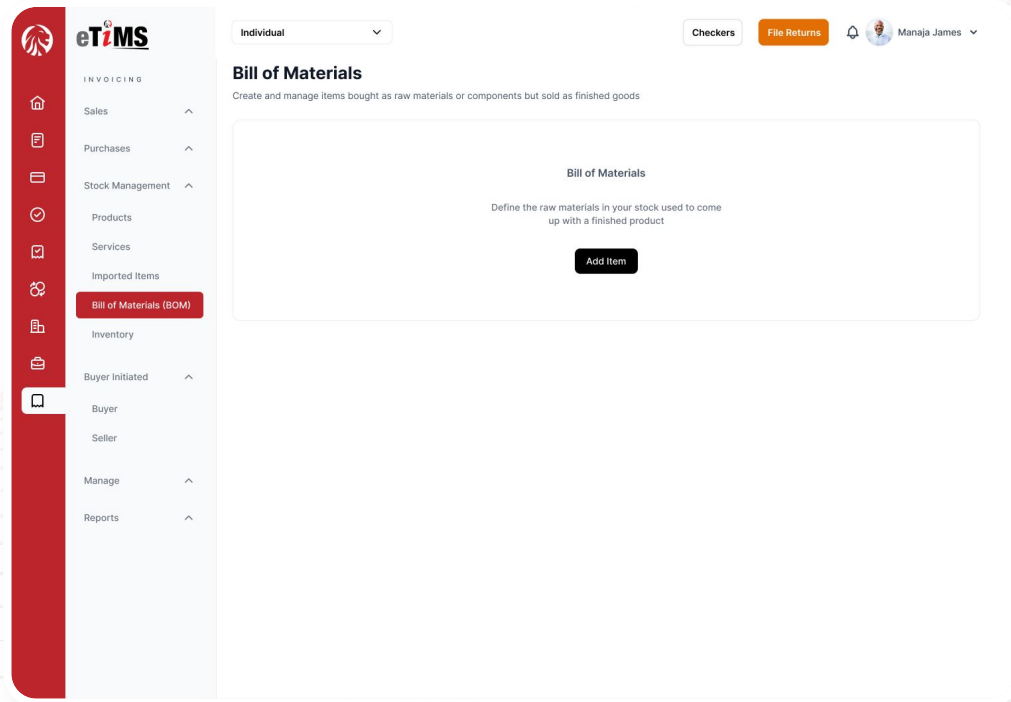
Discount (optional)

Percentage % 0

[Cancel](#) [Save Changes](#)

Bill of Materials

- The BOM section allows you to add raw materials in stock used to come up with a finished product
- You can include the name, quantity, cost and inventory buffer levels for each materials used.
- This section also allows you to **view** and **edit** the finished product and raw materials information.



Adding Raw Materials, part or components

- To add items already in the inventory, select “ **Add From Inventory**” option
- Fill in the form
- Click on “**Add**” to complete
- To add a new item, select the “**Add New Item**” option
- Fill in the form then add to complete

The image displays two versions of the 'Raw Material, Parts or Component details' form in the eTIMS web application.

Left Screenshot (Add from inventory selected):

- Title:** Raw Material, Parts or Component details
- Select Option:** ☒ Add from inventory ☐ Add new item
- Raw Material, Parts or Components:** Select... (dropdown menu)
- Quantity:** 0
- Buttons:** Cancel, Add

Right Screenshot (Add new item selected):

- Title:** Raw Material, Parts or Component details
- Select Option:** ☐ Add from inventory ☒ Add new item
- Raw Material, Parts or Components:** Select from masterlist... (dropdown menu)
- Product Name:** (text input field)
- Description (optional):** Type (text input field)
- Quantity:** 0
- Unit Cost:** KES 0.00
- Unit cost is exclusive of VAT:** (checkbox)
- Beginning Stock (optional):** 0
- Inventory Buffer Level (optional):** 0
- Get restock alert when inventory reached this quantity:** (checkbox)
- Buttons:** Cancel, Add

Inventory

All items added on the products and bill of materials sections are available in the inventory.

The section provides an overview of:

- All items in stock
- Total SKUs for all products in stock,
- Stock value
- Dead stock.

Product listing in the inventory are dependant on the SKUs per item.

Once a stock goes below the set buffer limit, the notification is also shown on this section.

The screenshot shows the eTIMS web application interface. On the left is a red sidebar with navigation icons and a menu. The main content area is white and displays the 'Inventory' section for 'Gold Crown Milk 500 ML' (SKU 12345678). A notification banner at the top states: 'You're running low on stock. Your inventory is below 10, restock now to be able to create invoices of this product. Restock Now →'. Below this, the 'Inventory Details' section shows 'STOCK QUANTITY 10' and 'REORDERING STOCK 0'. A table titled 'Purchases' lists recent transactions:

Date	Purchase Invoice Number	Quantity	Amount	Action
Oct 05, 2021	0000000000	37	KES 80,000	View
Oct 05, 2021	0000000000	34	KES 80,000	View
Oct 05, 2021	0000000000	10	KES 80,000	View
Oct 05, 2021	0000000000	56	KES 80,000	View
Oct 05, 2021	0000000000	76	KES 80,000	View

03

Customer Management

This module helps you to add, view and manage customers information.

03 Customer Management

Add Customers with PINs

This is a listing of customers entailing **date added, PIN number, name** and **email details**.

To add customers;

- Click on **“Create New”**
- Add **PIN of customer** and click on **“Validate”**
- Confirm details and click on **“Add”**
- **“Cancel”** takes you back to Step 1 without adding the customer.

The screenshot displays the eTIMS web interface. On the left is a sidebar with navigation options: Sales, Purchases, Stock Management, Buyer Initiated, Buyer, Seller, Manage, Customers (highlighted), Suppliers, and Payment Channels. The main area shows the 'Customers' page with a search bar and a table of existing customers.

Date Added	PIN Number	Name	Email	Action
Oct 05, 2021	0000000000	North Sun Limited	northsun@gmail.com	View
Oct 05, 2021	0000000000	North Start Limited	northsun@gmail.com	View
Oct 05, 2021	0000000000	North Pole Limited	northsun@gmail.com	View
Oct 05, 2021	0000000000	World Vision International	worldvision@africa.com	View
Oct 05, 2021	0000000000	MaryAnn hula	hula@gmail.com	View

Two modal windows are overlaid on the interface:

- Add New Customer**: This modal has two radio buttons: 'Use KRA PIN' (selected) and 'Manual'. Below is a text field labeled 'PIN of Customer' with the placeholder 'Enter PIN'. At the bottom are 'Cancel' and 'Validate' buttons.
- Add New Customer**: This modal shows the details for a customer named 'XYZ Company' with PIN '20102223'. It includes an email field with 'johndoe@gmail.com' and a billing address: 'Mama Ngina Drive P.O. BOX 00242-0100 Mombasa, Kenya'. At the bottom are 'Cancel' and 'Add' buttons.

03 Customer Management

Customers with PINs

Click on “**Create New**” Customer then;

- Select **Manual** option,
- Under **General** tab key in the required details .
- On Address Tab – Add the details if available
- **Other** Tab – Add the required details if available
-

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

The image displays three sequential screenshots of the 'New Customer' form, illustrating the steps to create a customer with a PIN. Red circles 1, 2, and 3 highlight key elements:

- Circle 1:** Points to the 'Manual' radio button in the 'New Customer' form, which is selected.
- Circle 2:** Points to the 'Save' button in the 'New Customer' form, which is active (black) when all mandatory fields are filled.
- Circle 3:** Points to the 'Other' tab in the 'New Customer' form, which is selected.

The form includes the following fields and tabs:

- General Tab:** Name *, Email *, Phone *, KRA Pin, Currency (Ksh).
- Address Tab:** Address, Town/City, Post Code, State, Country * (Kenya).
- Other Tab:** Website, Reference.

Sales Management

This module helps businesses create and track invoices as well as manage sales information . In this module, you can create, edit & view the following items :

- Quotations
- Proforma invoices
- Sales invoices
- Credit Notes

04 Sales Management

Sales

This section gives you a view of;

- Invoices
- Proforma
- Quotations
- Credit notes

The screenshot displays the eTIMS web application interface. On the left is a red sidebar with navigation icons and a menu. The main content area is titled 'Sales Invoice' and includes a search bar, a '+ Create New' button, and a table of invoice records.

Navigation Menu (Left Sidebar):

- Home
- Dashboard
- Sales
 - Invoice** (Active)
 - Proforma
 - Quotations
 - Credit Notes
- Purchases
- Stock Management
- Buyer Initiated
- Buyer
- Seller
- Manage
- Reports

Sales Invoice Section:

Individual (Dropdown) | Checkers | File Returns | Manaja James (User Profile)

Sales Invoice
Create and manage sales invoices

Search (Input) | + Create New (Button)

Invoice Date	Invoice Number	Due Date	Total Amount (KES)	Status	Action
Oct 05, 2021	0000000000	Oct 05, 2021	80,000	Synced	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	Pending	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	Pending	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	Pending	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	Pending	View

04 Sales Management

Invoices

An invoice is a document issued by the seller to the buyer to request for payment of goods and services that have been sold.

Under invoices, you can **view** a list of all the existing invoices, invoice particulars and the status of the invoices.

This section also allows you to **create** or **edit** an invoice.

You can also preview an invoice before printing or sending it.

The screenshot shows the eTIMS web application interface for managing sales invoices. On the left is a red sidebar with navigation icons and labels: Sales, Invoice, Proforma, Quotations, Credit Notes, Purchases, Stock Management, Buyer Initiated, Buyer, Seller, Manage, and Reports. The main content area is titled 'Sales Invoice' with the subtitle 'Create and manage sales invoices'. It features a search bar, a '+ Create New' button, and a table of invoices.

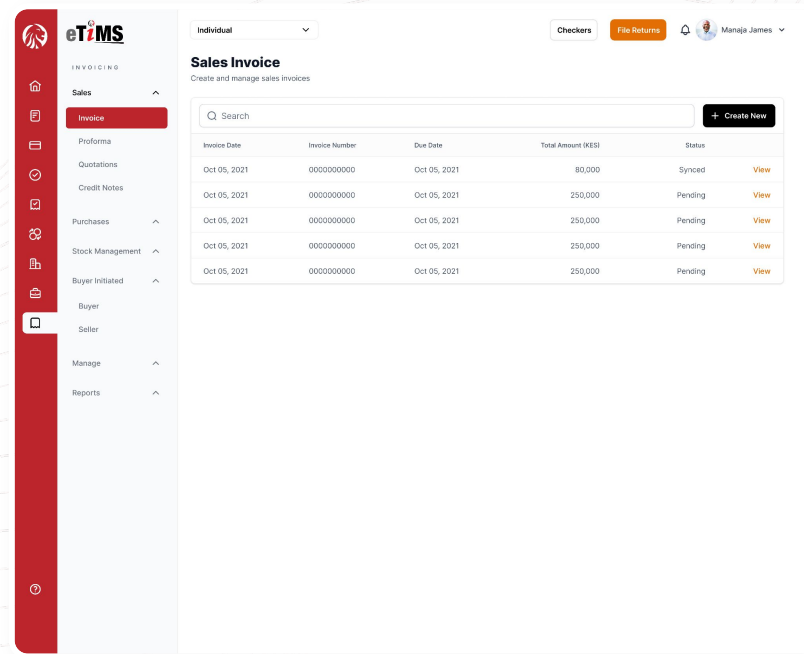
Invoice Date	Invoice Number	Due Date	Total Amount (KES)	Status	
Oct 05, 2021	0000000000	Oct 05, 2021	80,000	Synced	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	Pending	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	Pending	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	Pending	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	Pending	View

04 Sales Management

Creating a sales invoice

To create a sales invoice, click **“Create New”** then fill in the rest of the details required such as:

- **Upload of Logo** – This will appear on the invoice
- **Customer Name** – select from customers created
- **Type of Tax** – Default option is VAT
- **Add items** details by clicking **“Add New Item”** option.
- You can add as many products/services as you wish
- Fill in the Add Items Details form then click on **“Add”**
- **Add Payment Method** – Payment Instruction to buyer on how to settle
- **Add note:** Provides additional text you might want on the invoice
- **Term and conditions** – this is optional and represents instructions to the buyer
- Click on **“Create Invoice”** to preview and generate an invoice



04 Sales Management

Creating a sales invoice

Once you fill all the required fields the sales invoice is displayed.

Download the invoice or **send** to customers via email.

An eTIMS compliant Sales Invoice will have:

- 1. QR Code**– this can be scanned to avail the invoice details.
- 2. eTIMS SCU ID Number**
- 3. eTIMS CU Invoice number.**
- 4. eTIMS Logo.**

The screenshot shows the eTIMS web interface for creating a sales invoice. The left sidebar contains navigation options: Home, Invoicing, Sales, Invoice, Proforma, Quotations, Credit Notes, Purchases, Stock Management, Buyer Initiated, Buyer, Seller, Manage, and Reports. The main area is titled 'Create Sales Invoice' and includes a 'Pending ETIMS sync' status and a 'Sync Invoice' button. The invoice preview shows details for 'A Company Ltd' and 'Mauro Sicard', including their respective TINs and addresses. It lists items with quantities, prices, and taxes, and includes a payment method section. The total invoice amount is KES 17,920.00. A red circle highlights the 'Download' and 'Send' buttons at the top right of the invoice preview area.

04 Sales Management

Creating a sales invoice (Preview)

Preview allows you to view and confirm specific details on a draft invoice such as;

- Date
- Product/Services, Description
- Quantity,
- Unit Cost,
- Amount
- Customer Details
- Discount and Tax Details.

1

Sales Invoice
Create and manage sales invoices

Invoice Date	Invoice Number	Due Date	Total Amount (KES)	Status
Oct 05, 2021	000000000	Oct 05, 2021	80,000	Synced View
Oct 05, 2021	000000000	Oct 05, 2021	250,000	Pending View
Oct 05, 2021	000000000	Oct 05, 2021	250,000	Pending View
Oct 05, 2021	000000000	Oct 05, 2021	250,000	Pending View
Oct 05, 2021	000000000	Oct 05, 2021	250,000	Pending View

2

Sales Invoice INV#123456

INV#123456

Invoice Details

TYPE OF INVOICE
VAT Excluded

INVOICE DATE
00/00/0000

AMOUNT NET/20
MP/SA: 000000000

ADD NOTE
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

TERMS AND CONDITIONS
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Items Details

Date	Product/Service	Description	Quantity	Unit Cost KES	Amount KES
Oct 05, 2021	HP laptop	HP laptop	1	80,000	80,000
Oct 05, 2021	iphone 14 pro	The iPhone 14 Pro Max...	5	250,000	1,250,000

Subtotal KES 1,330,000.00
Discount % 10%
Total KES 1,187,000.00

Customer Details

NAME
Attec Wot Mayer Attec

04 Sales Management

Proforma

A proforma invoice is a document that declares scope and anticipated costs of a sale transaction.

It is sent before goods and services are delivered for information purposes only.

It **cannot be used as a legal demand for payment**

In this module you can **create**, **edit** and **view** existing proforma invoices.

Proforma

Invoice Date	Invoice Number	Due Date	Total Amount (KES)	
Oct 05, 2021	0000000000	Oct 05, 2021	80,000	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	View

PROFORMA INVOICE

Proforma from: **A Company Ltd**
 PIN: 000000**
 info@company.com
 AB PLAZA, P.O.BOX 000**, Nairobi, Kenya

Proforma to: **Mauro Sicard**
 PIN: 000000***
 maurosicard@mail.com
 Nairobi P.O.BOX 000**, Nairobi, Kenya
 070 000 00***

Proforma number: **Nº: 000027**
 Proforma Date: **23/03/2023**

Item	Description	Price	Qty	VAT	Total
Web design	Description of item...	KES 5,250.00	1	KES 800	KES 6,050.00
Brand book design	Description of item...	KES 2,750.00	1	KES 400	KES 3,150.00
UI/UX App design	Description of item...	KES 7,520.00	1	KES 1,200	KES 8,720.00

Terms & Conditions:
 Fees and payment terms will be established in the contract or agreement prior to the commencement of the project. An initial deposit will be required before any design work begins. We reserve the right.

Note:
 Please ensure that payment is made by the due date mentioned above.

Subtotal KES 15,520.00
Discount (Special Offer) KES 0.00
VAT: KES 2,400.00
Invoice total **KES 17,920.00**

Payment Method
 M-pesa
 07000000000

Quotations

A quotation is a formal document issued by a seller that states the estimated price and terms for supplying goods and services to a buyer.

In this module you can create, edit and view existing quotations.

Quotation

Search + Create New

Date Created	Reference Number	Due Date	Total Amount (KES)	
Oct 05, 2021	0000000000	Oct 05, 2021	80,000	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	View
Oct 05, 2021	0000000000	Oct 05, 2021	250,000	View

A Company Ltd
 PIN: 00000001
 contact@maurosicard.com
 Mombasa PLAZA, P.O.BOX 94109,
 Nairobi, Kenya

Mauro Sicard
 PIN: 000000***
 maurosicard@mail.com
 Nairobi P.O.BOX 000**, Nairobi,
 Kenya
 070 000 00***

Nº: 000027
Quotation Date:
 23/03/2023

Item	Description	Price	Qty	VAT	Total
Web design	Description of item...	KES 5,250.00	1	KES 800	KES 6,050.00
Brand book design	Description of item...	KES 2,750.00	1	KES 400	KES 3,150.00
UI/UX App design	Description of item...	KES 7,520.00	1	KES 1,200	KES 8,720.00

Terms & Conditions:
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Note:
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Subtotal KES 15,520.00
Discount (Special Offer) KES 0.00
VAT: KES 2,400.00
Invoice total **KES 17,920.00**

Payment Method
 M-pesa
 07000000000

04 Sales Management

Credit Notes

A credit note is issued by a seller to a buyer to reduce or cancel part of or an entire invoice already issued.

A credit note allows you to adjust the quantity of or reverse an already issued invoice.

You can issue a Partial Credit Note (for part quantities) or a Full Credit Note (for the entire invoice quantity).

Credit notes are transmitted to eTIMS.

In this module you can create, edit, view and download both new and existing credit notes

eTIMS Individual Checkers File Buttons Manage James

Credit Notes

Search

Credit Note Date	Invoice Number	Credit Note Ref	Total Amount (KES)	
Oct 05, 2021	0000000000	0000000000	80,000	View
Oct 05, 2021	0000000000	0000000000	250,000	View
Oct 05, 2021	0000000000	0000000000	250,000	View
Oct 05, 2021	0000000000	0000000000	250,000	View
Oct 05, 2021	0000000000	0000000000	250,000	View

A Company Ltd
 PIN: 00000001
 contact@maurosicard.com
 Mombasa PLAZA, P.O.BOX 94109,
 Nairobi, Kenya

Mauro Sicard
 PIN: 00000001
 maurosicard@mail.com
 Nairobi P.O.BOX 0001, Nairobi,
 Kenya
 070 000 0000

N°: 000027
Credit note Date:
 23/03/2023

Item	Description	Price	Qty	VAT	Total
Web design	Description of item...	KES 5,250.00	1	KES 800	KES 6,050.00
Brand book design	Description of item...	KES 2,750.00	1	KES 400	KES 3,150.00
UI/UX App design	Description of item...	KES 7,520.00	1	KES 1,200	KES 8,720.00

Reason for credit note
 Damaged goods

Subtotal
 VAT:
Invoice total

KES 15,520.00
 KES 2,400.00
KES 17,920.00

Payment Method
 M-pesa
 0700000000

04 Sales Management

Creating a 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 eTIMS transactions, a 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.

The screenshot shows the eTIMS web interface. On the left is a sidebar with a red header and a list of navigation items: Sales, Invoice, Proforma, Quotations, Credit Notes (highlighted in red), Purchases, Local Purchase Order, Purchase Invoices, Delivery Notes, Return Notes, Item Management, Products, Services, and Buyer Initiated. The main content area shows the 'Credit Notes' section for 'Individual' user type. It displays 'Credit Notes > INV#123456' and 'INV#123456'. Below this, there's a search bar and a table with columns: Credit Note Date, Credit Note Ref, Type, and Amount (KES). The table has two rows: one for a partial credit note dated Oct 05, 2021 with a reference of 0000000000, and another for a full credit note dated Oct 05, 2021 with a reference of 0000000000. A red circle highlights the 'Create New' button and the 'View PDF' button in the top right corner of the main content area.

04 Sales Management

Creating a Credit Note

1. Creating a Partial Credit Note

For partial credit note options, changes can be done on:

1. Quantity.
2. Unit price.
3. Removal of an item. However, all items cannot be removed.

NB: Addition of new items is not possible on a credit note.

Note: You can only generate one partial credit note on an invoice. For additional invoice adjustment generate full credit note

2. Creating a Full Credit Note

The user is able to cancel the full invoice.

The image displays two screenshots of the eTIMS web application interface, specifically the 'Generate Credit Note' modal forms.

Top Screenshot: Generate Partial Credit Note

- Supplier Information:** Supplier Name: XYZ Company, PIN: P000000002, Invoice Number: 1234568.
- Items Table:**

Item 2	Unit Cost	Quantity
HP Laptops	KES 80,000	10
- Summary:** Unit Cost KES: 80,000, Amount KES: 250,000. Total: KES 1,330,000.00 (10%), KES 1,197,000.00.
- Buttons:** Cancel, Generate Credit Note.

Bottom Screenshot: Generate Full Credit Note

- Supplier Information:** Supplier Name: XYZ Company, PIN: P000000002, Invoice Number: 1234568.
- Items Table:**

Item 2	Unit Cost	Quantity
Please Note: A full credit note includes all items in the invoice		
- Summary:** Unit Cost KES: 80,000, Amount KES: 250,000. Total: KES 1,330,000.00 (10%), KES 1,197,000.00.
- Buttons:** Cancel, Generate Credit Note.

04 Sales Management

Creating a Credit Note

Sending a 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**

The screenshot shows the eTIMS web interface. A 'CREDIT NOTE' form is displayed, showing details for 'A Company Ltd' and 'Mauvo Sward'. The form includes a table of items and a total amount of KES 15,750.00. A 'Send Email' dialog box is open, showing fields for 'To' (making@gmail.com), 'Subject' (Invoice from ABC Company), and 'Body' (A short explanation about the product/ service). The 'Send and Close' button is highlighted with a red circle.

Item	Description	Price	Qty	Total
Item design	Description of item...	KES 5,000.00	1	KES 5,000.00
Item design	Description of item...	KES 5,000.00	1	KES 5,000.00
Item design	Description of item...	KES 5,000.00	1	KES 5,000.00
Item design	Description of item...	KES 5,000.00	1	KES 5,000.00

Send & Close

05

Supplier Management

This module helps you to add, view and manage suppliers.

03 Supplier Management

Supplier

You can create a new supplier by first identifying the supplier type. On this section you're also required to indicate whether the supplier has a PIN or not.

After selecting the supplier type, enters details such as

- Name
- Id number
- Email
- Phone number

If supplier has a PIN, once the PIN is entered the other details will be auto-filled.

The screenshot displays the eTIMS web application interface. On the left is a red sidebar with navigation icons and a menu. The main content area shows the 'Suppliers' section. At the top right of the main area, there are buttons for 'Checkers', 'File Returns', and a user profile for 'Manoja James'. Below these is a search bar and a '+ Create New' button. A table lists suppliers with columns for Date Added, PIN Number, Name, Email, and a 'View' link. The table contains five entries, all dated 'Oct 05, 2021'.

Date Added	PIN Number	Name	Email	
Oct 05, 2021	0000000000	North Sun Limited	northsun@gmail.com	View
Oct 05, 2021	0000000000	North Start Limited	northsun@gmail.com	View
Oct 05, 2021	0000000000	North Pole Limited	northsun@gmail.com	View
Oct 05, 2021	0000000000	World Vision International	worldvision@africa.com	View
Oct 05, 2021	0000000000	Maryken hula	hula@gmail.com	View

06

Purchase Management

06 Purchases Management

Purchases

The purchases section has two main sub-sections which are;

- Local purchase order
- Purchase invoices

The screenshot displays the eTIMS web interface. On the left is a red sidebar with navigation icons and a menu. The main content area is titled 'Local Purchase Orders' and features a search bar, a '+ Create New' button, and a table of purchase orders.

Navigation Menu (Left Sidebar):

- INVOICING
 - Sales
 - Purchases
 - Local Purchase Order**
 - Purchase Invoices
 - Stock Management
 - Buyer Initiated
 - Buyer
 - Seller
 - Manage
 - Reports

Local Purchase Orders Table:

Purchase Order Date	Reference Number	Amount (KES)	
Oct 05, 2021	0000000000	80,000	View
Oct 05, 2021	0000000000	250,000	View
Oct 05, 2021	0000000000	250,000	View
Oct 05, 2021	0000000000	250,000	View
Oct 05, 2021	0000000000	250,000	View

06 Purchases Management

Local purchase order

This is a formal legally binding document issued by a buyer to a supplier to initiate a purchase of goods or services within the same country.

This module allows you to:

- Create
- Edit
- And view existing and new LPOs

The screenshot shows the eTIMS web application interface. On the left is a sidebar with navigation icons and labels: INVOICING, Sales, Purchases, Local Purchase Order (highlighted), Purchase Invoices, Stock Management, Buyer Initiated, Buyer, Seller, Manage, and Reports. The main content area is titled 'Local Purchase Orders' and includes a search bar and a '+ Create New' button. Below this is a table of purchase orders with columns for Purchase Order Date, Reference Number, and Amount (KES). The table lists five orders from October 5, 2021, with amounts ranging from 80,000 to 250,000 KES, each with a 'View' link.

Below the table is a detailed view of a purchase order for 'Mauro Sicard'. It includes the company's PIN (000000***), email (maurosicard@mail.com), and address (Nairobi P.O.BOX 000**, Nairobi, Kenya). The order number is N°: 000027 and the order date is 23/03/2023. A table of items is shown with columns for Item, Description, Price, Qty, VAT, and Total. The items are Web design, Brand book design, and UI/UX App design. The subtotal is KES 15,520.00, the discount is KES 0.00, and the VAT is KES 2,400.00. The final invoice total is KES 17,920.00. The payment method is M-pesa (0700000000).

06 Purchases Management

Purchase order

- This is a document received by business from a supplier after buying goods or services. It shows the amount a business is required to pay for the purchased items or services.
- On this module you can view all eTIMS compliant purchase invoices issued to them and capture details of any other invoices.
- Purchase invoices increases stock levels.

Purchase Invoices

Self-Generated Supplier-Generated

Search

Date	Due Date	Purchase Invoice Number	Amount Due (KES)
Oct 05, 2021	Oct 05, 2021	0000000000	80,000 View
Oct 05, 2021	Oct 05, 2021	0000000000	250,000 View
Oct 05, 2021	Oct 05, 2021	0000000000	250,000 View
Oct 05, 2021	Oct 05, 2021	0000000000	250,000 View
Oct 05, 2021	Oct 05, 2021	0000000000	250,000 View

A Company Ltd
 PIN: 000000**
 info@acompany.com
 AB PLAZA, P.O.BOX 000**, Nairobi, Kenya

Mauro Sicard
 PIN: 000000***
 maurosicard@gmail.com
 Nairobi P.O.BOX 000**, Nairobi, Kenya
 (012) 856 - 0989

Nº: 000027
 Invoice Date: 23-03-2023
 Payment Due: 23-03-2023

Item	Description	Price	Qty	VAT	Total
Web design	Description of item...	KES 5,250.00	1	KES 800	KES 6,050.00
Brand book design	Description of item...	KES 2,750.00	1	KES 400	KES 3,150.00
UI/UX App design	Description of item...	KES 7,520.00	1	KES 1,200	KES 8,720.00

Terms & Conditions:
 Fees and payment terms will be established in the contract or agreement prior to the commencement of the project. An initial deposit will be required before any design work begins. We reserve the right.

Note:
 Please ensure that payment is made by the due date mentioned above.

Subtotal KES 15,520.00
Discount (Special Offer) KES 520.00
VAT: KES 750.00
Invoice total KES 15,750.00

Payment Method
 M-pesa
 07000000000

06 Buyer Initiated

Buyer initiated Invoicing

This feature allows a **buyer** to initiate generation of an invoice and the seller approves or rejects the raised invoice.

The screenshot displays the eTIMS web interface for Buyer Initiated Invoicing. The interface is divided into two main sections: 'Buyer' and 'Seller'.

Buyer Section:

- Navigation Menu:** Includes Sales, Purchases, Stock Management, Buyer Initiated, Buyer, Seller, Manage, and Reports.
- Buyer Initiated Invoicing:**
 - Single Invoices:** Drafts, Pending, Complete.
 - Batch Invoices:** Drafts, Pending, Complete.
- Pending Invoices Table:**

Date Created	Batch No	Action
Oct 05, 2021	00000	View
Oct 05, 2021	00000	View
Oct 05, 2021	00000	View
Oct 05, 2021	00000	View
Oct 05, 2021	00000	View

Seller Section:

- Navigation Menu:** Includes Sales, Purchases, Stock Management, Buyer Initiated, Buyer, Seller, Manage, and Reports.
- Seller Initiated Invoicing:**
 - Pending:** Drafts, Pending, Complete.
 - Complete:** Drafts, Pending, Complete.
- Pending Invoices Table:**

Order Date	Order Number	Buyers Name	Buyers PIN	Total Amount (KES)	Expiry
Oct 05, 2021	0000000000	ABC limited	A0000000000	80,000	2 days
Oct 05, 2021	0000000000	flow ban ltd	A0000000000	250,000	
Oct 05, 2021	0000000000	Brian Okal	A0000000000	250,000	10 days
Oct 05, 2021	0000000000	Mercy Hanal	A0000000000	250,000	10 days
Oct 05, 2021	0000000000	OCCAP CITY	A0000000000	250,000	

Drafts

Single invoice

This section allows you to review a list of individual buyer initiated invoices currently in draft status.

The screenshot displays the eTIMS web application interface for a Buyer. On the left is a red sidebar with navigation icons and a menu. The main content area is titled 'Buyer' and 'Create and manage buyer-initiated invoices'. It features a 'Single Invoices' dropdown menu with options: Drafts (selected), Pending, Complete, Batch Invoices, Drafts, Pending, and Complete. To the right, under the 'Drafts' heading, there is a search bar and a '+ Create Invoice' button. Below this is a table listing draft invoices.

Date Created	Action
Oct 05, 2021	Edit
Oct 05, 2021	Edit
Oct 05, 2021	Edit
Oct 05, 2021	Edit
Oct 05, 2021	Edit

Create Invoice

To create a buyer initiated invoice enter all required details on the form:

- Type of sale
- Seller details
- Invoice details
- Items
- Payment option
- Other

When adding the Seller's details, it's mandatory to enter their valid KRA PIN.

The screenshot displays the eTIMS web application interface for creating a buyer-initiated invoice. The interface is divided into a sidebar and a main content area. The sidebar on the left contains navigation icons and labels: 'eTIMS', 'INVOICING', 'Sales', 'Purchases', 'Stock Management', 'Buyer Initiated' (highlighted), 'Seller', 'Manage', and 'Reports'. The main content area shows the 'Buyer Initiated' form. At the top, there's a dropdown for 'Individual' and a 'Buyer' field with the value '000000'. Below this is the 'Invoice Logo' section with a placeholder image. The 'Type of Sale' section has two radio buttons: 'Business To Business' (selected) and 'Business To Customer'. The 'Seller' section includes a 'Seller Name' field with an 'Add New' button and a 'Select' dropdown. The 'Invoice Details' section has a 'Type Of Tax' dropdown set to 'VAT'. The 'Items' section has a 'Select: Add to add details of Items sold' prompt and 'Add Multiple Items' and 'Add Item' buttons. The 'Attachments' section has an 'Add New' button. The 'Payment option' section has a dropdown for 'Mpesa Till', a 'TS: 000000' field, and a 'Default' button. The 'Other' section has an 'Add Note' label and a 'Type' text area. The 'Terms and Conditions' section has a 'Type' text area. At the bottom of the form are three buttons: 'Cancel', 'Save draft', and 'Create Invoice'.

Add Items

Here, you can either **“Add New”** item or choose an existing item **“Select Product.”**

Enter all the required details on the items. These include:

- Unit cost
- Quantity
- Amount

The total amount will be calculated automatically.

Click **“Add”** to complete the process.

The seller will have to approve the buyer initiated invoicing request for the Invoice to be generated

NB: Taxpayers with VAT obligation cannot issue or approve Buyer Initiated Invoices as they are expected to issue normal invoices

Add Item Details

☒ Product ☐ Service

Select Product

Select...

Unit Cost

KES 65.00

Add Item Details

☒ Product ☐ Service

Search

Gold Crown Milk 500 ML

Unit Cost

KES 65.00

Quantity

2

Current Quantity In Stock: 10

Amount

KES 130.00

Cancel Add

DIAL *222*5#

**IT TAKES YOU LESS
THAN 30SEC TO
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eTIMS