

eTIMS Mobile App

VAT Context

How to access and use
eTIMS on the **mobile app**

User Guide

User Guide – eTIMS Mobile

How to access and use eTIMS on mobile

Starter Pack

01

**Getting
Started**

02

**Stock
Management**

03

**Customer
Management**

04

**Sales
Management**

05

**Suppliers
Management**

06

**Purchases
Management**

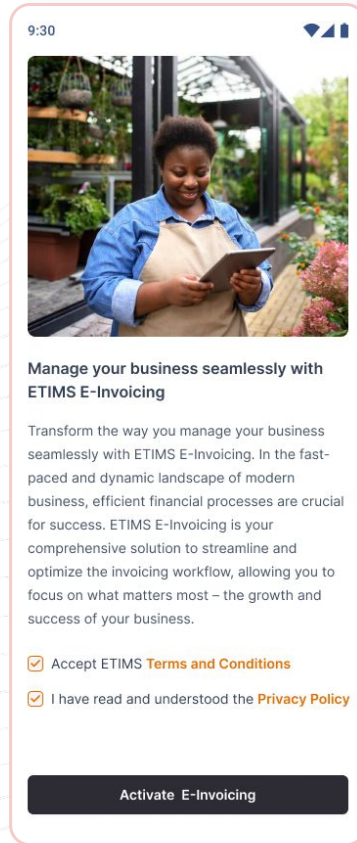
01

Getting Started

Introduction

KRA eTIMS for VAT obligated taxpayers allows the taxpayers to access simplified invoicing for their businesses allowing a user to:

- Activate eTIMS
- Manage Stock
- Manage purchases
- Manage customers and suppliers
- Generate eTIMS invoices and credit notes

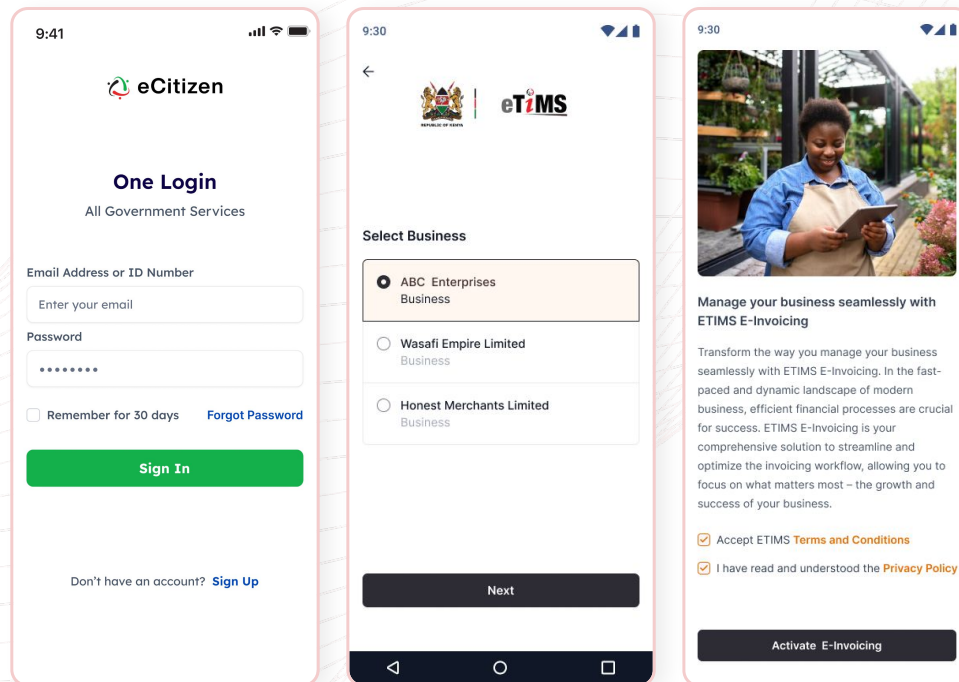


01 Getting Started:

Sign In & eTIMS Onboarding

The eTIMS e-invoicing mobile app enables you to manage your business invoicing by enabling creation of invoices and quotations, LPOs, Purchase invoices and syncing data to eTIMS web.

- Use ecitizen account credentials to sign in.
- Select business.
- Click **“Next”** button.
- Click **“Activate E-invoicing”**



02

Stock Management

This module helps you add:

- Products
- Services
- Imports
- Bill of Materials
- Inventory

02 Stock Management

Adding a product

The first screenshot shows the 'Products' list with a search bar and a list of 'Soko Maize Meal' items. A plus icon is at the bottom right.

The second screenshot shows the 'Add Product' screen with fields for Item Name, Description, Brand, Stock Keeping Units (SKU), Unit Cost, and a 'Benjamin Stock (optional)' section.

The third screenshot shows the 'Add New Item' screen with fields for Item Name, Item Type, Packaging Type, Unit of Measurement, Tax Type, and a description.

The fourth screenshot shows the 'Soko Maize Meal' item details screen with fields for Item Name, Item Code, Class Name, Cereals, Origin, Item Type, Finished Product, Packaging Type, Packets, Unit Of Measurement, Tax Type, VAT 16%, Description, and Stock Keeping Units (SKUs).

Click on **“Products”**, under item name:

- Add a product by selecting from already added by Clicking on **“Add New”**.
- Proceed to add product description and brand
- Turn on the **“SKU”** button for products with variations (SKUs).
- Key in the number of units and unit cost.

Under add new item:

- You can add item by searching for the **UNSPSC** codes
- Select **item type**
- **Packaging type**
- **Unit of measurement**

NB: The tax type is based on the UNSPC code

02 Stock Management

Adding a service

The screenshots illustrate the steps to add a service in the eTIMS Mobile app:

- Services List:** Shows a list of services with columns for item name, price (KES 1,050.00), and time (Today • 12:35). A search bar is at the top, and a plus icon is at the bottom right.
- Add Service:** A form with sections for Item Details (Item Name, Description, Variations), Unit Cost, and Discount. It includes an 'Add Service' button at the bottom.
- Add New Item:** A form with fields for Item Name, Unit of Measurement, Tax Type, and a description. It includes an 'Add' button at the bottom.
- Message:** A form with sections for Item Details (Item Name, Item Code, Class Name, Unit of Measurement, Tax Type, Description) and Variations. It includes an 'Add' button at the bottom.

To add a Service:

- Select item name from existing file or click **"Add New"**
- Proceed to give a description of service
- Turn on the **"Variation"** to include the versions of the services
- Put in the unit cost
- Include discount if any. This can be included as a percentage or fixed amount
- Click on the **"Add Button"** to add Service

Under add new item:

- Search item name using the UNSPSC Codes
- Select the unit of measurement
- Click on the **"Add Button"**

02 Stock Management

Adding a Imported items

The screenshots illustrate the steps to add a new product in the eTIMS Mobile app:

- Imported Items:** A list of items with columns for item name, price, and date. A search bar is at the top, and a plus icon is at the bottom right.
- Add New Product:** A form with fields for 'Select Item' (HP Laptop), 'Product Name', 'Quantity' (1), 'Description (optional)', 'Brand (optional)', 'Stock Keeping Units (SKU)', and a toggle for 'Does this item have SKUs?'. A plus icon is at the bottom right.
- Map to Existing:** A form with fields for 'Select Product' (Gold Crown Milk 500 ML), 'Unit Cost' (KES 65.00), 'Quantity' (2), and 'Amount' (KES 130.00). An 'Add' button is at the bottom.
- Soko Maize Meal:** A form with fields for 'Item Details' (Maize, 18934, Cereals, Kenya), 'Item Type' (Finished Product), 'Packaging Type' (Packets), 'Unit Of Measurement' (Liters (L)), 'Tax Type' (VAT 16%), and 'Description' (Grade 1 Sifted Maize Meal fortified with essential Vitamins (Vits A, B) & Minerals (Iron, Zinc, folic acids)). A 'View in inventory' link is at the top right. A 'Stock Keeping Units (SKUs)' section is at the bottom.

Under add new product:

- Select item from drop down
- Indicate the product name
- Proceed to capture the product quantity
- Capture the item code and class name
- Include Country of origin
- Capture the Item type
- Include brief description
- Brand of product (Optional)
- Turn on the SKU tab and indicate the amount

Map to existing product by:

- Selecting product
- Key in the Unit cost exclusive of VAT
- Indicate the quantity and amount
- Click on the **"Add Button"**
- An overview of the details can be viewed in inventory

02 Stock Management

Bill of Materials

Bill Of Materials (BOM)

Search

Soko Maize Meal 010205295	KES 1,050.00 Today • 12:35
Soko Maize Meal PRO00000	KES 1,050.00 Today • 12:35
Soko Maize Meal PRO00000	KES 1,050.00 Today • 12:35
Soko Maize Meal PRO00000	KES 1,050.00 Today • 12:35
Soko Maize Meal PRO00000	KES 1,050.00 Today • 12:35

Add BOM

Item Details

Item Name Of Finished Product + Add New

Select...

Total Expected Produce (Number of Items)

0

Description (optional)

Enter a description...

Brand (optional)

Select...

Inventory Buffer Level (optional)

0

Get restock alert when inventory reached this quantity

Discount (optional)

Percentage % 0

Bill of Materials Details

Bread View in inventory

Item Name
Bread

Item Code
18934

Class Name
Cereals

Origin
Kenya

Item Type
Finished product

Packaging
Packet

Unit Of Measurement
Kilograms (KG)

Tax Type
VAT Zero Rated

Description
Grade 1 Sifted Maize Meal fortified with essential Vitamins (Vits A, B) & Minerals (Iron, Zinc, folic acids).

Raw Materials, parts or components

Search

Under Bill of Materials:

- Select item name of finished product under drop down or click on **“Add New”**
- Key in the total expected produce
- Include a description of item and brand (Optional)
- Include inventory buffer level
- If a discount is given, select from the drop down to include whether it is a percentage or fixed amount
- Capture the item code, class name and origin
- Indicate the item type, packaging and unit of measurement
- Capture Raw Materials, Parts and Components
- Click on **“Add Button”**

02 Stock Management

Managing Inventory

The screenshots illustrate the following steps in the eTIMS Mobile app:

- Inventory:** A list of items with a search bar. Items like 'Soko Maize Meal' are marked as 'Low Stock'.
- Soko Maize Meal (Inventory Details):** Shows 'In Stock' status, stock quantity (45), unit cost (KES 142), and stock value (KES 7,429). It includes a table of records with columns for item name, quantity, and price.
- Stock Adjustment:** Allows for adjusting stock levels. Options include 'Stock In' (selected) or 'Stock Out'. Fields for quantity added, new quantity, reason for adjustment, and description are provided.
- Restock:** A form to create a new purchase order (LPO). Fields include supplier, buying price, quantity, and amount.

This module allows you to:

- Track stock quantities
- Adjust the Stock

To adjust the stock:

- Select the type of adjustment either Stock In/Stock Out
- Include the quantity added
- Select the reason for stock adjustment from the drop down.
- Give a description
- Click on **“Update Stock”** button

Under Restock, you are required to indicate:

- Name of product being restocked
- Supplier Name
- Buying Price
- Quantity

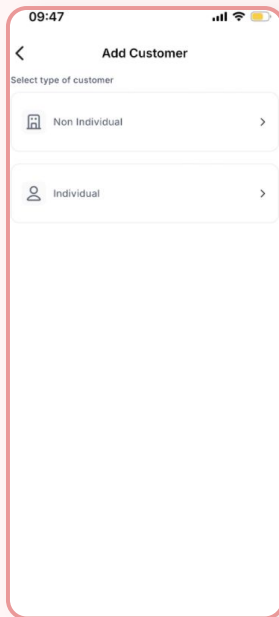
03

Customer Management

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

03 Customer Management

Adding Customers



To add a customer:

- Select it if the customer is an individual or non individual
- Proceed to key in:
 - PIN of the Customer
 - Name of the Customer
 - Email Address
 - Mobile Number
- Click on the **“Add Button”** to add customer.

Non Individual

A screenshot of the 'Add Customers' screen for a 'Non Individual' customer. The title is 'Add Customers'. Below the title, it says 'Type of customer: Non Individual' with a 'Change' link. The form fields are: 'PIN of customer*' (with a sub-label 'Enter PIN'), 'Name*' (with a sub-label 'Enter Name..'), 'Email' (with a sub-label 'Enter Email..'), and 'Phone*' (with a sub-label '+254'). At the bottom is an 'Add' button.

Individual

A screenshot of the 'Add Customer' screen for an 'Individual' customer. The title is 'Add Customer'. Below the title, it says 'PIN of Customer' with a text input field containing 'Peter Doe' and '20102223'. Below this is a 'Wrong User?' link and a 'Cancel' button. Then, it says 'Phone Number' with a text input field containing '254'. At the bottom is an 'Add' button.

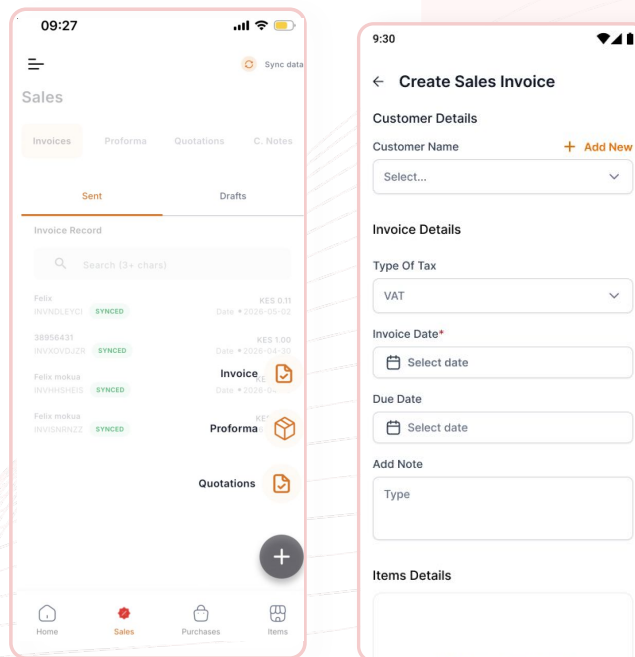
Sales management

This module helps businesses create, track invoices and manage sales. In this module, you can create, edit & view :

- A sales invoice
- A proforma invoice
- A quotation

04 Sales Management:

Creating a Sales Invoice



1 To begin, select the type of invoice

To create a sales invoice:

Key in the Customer name or select from already added customers.

- Tax Type is VAT by default
- Select Invoice date and due date
- Add notes

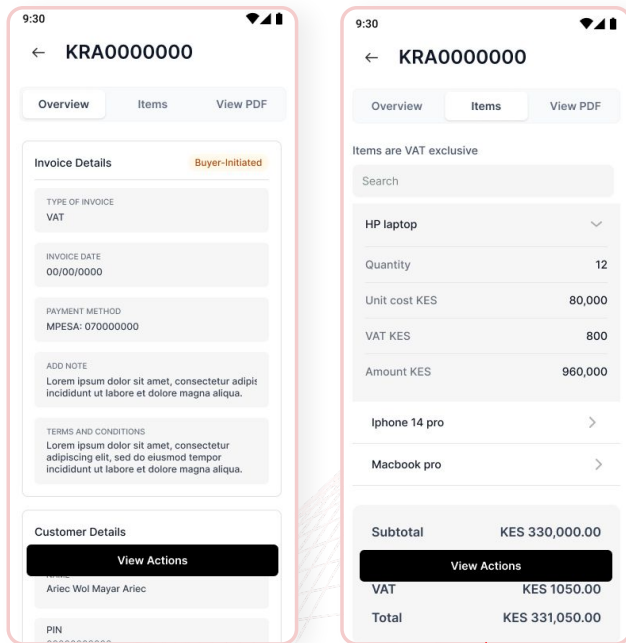
Under add item, the user can select from

- existing items
- add new items.

Enter amount and quantity
Click **"Add"** to create the sales invoice.

04 Sales Management:

Overview of Invoices



Download Invoice

Generate Partial Credit Note

Generate Full Credit Note

04 Sales Management:

Creating a Proforma Invoice

1 Sales Management: Invoices, Proforma, Quotations, C. Notes

2 Create Proforma Invoice

Please Note
This is not a sales invoice. You will be required to create a tax invoice to receive payment

Customer Details
Customer Name + Add New
Select...

Proforma Details
Type Of Tax
VAT

Invoice Date*
Select date

Due Date
Select date

Add Note
Type

3 Add Items

Add New ☐ Add from Items ☐

Item Type
Select...

Product/Service Name
Product/Service Name

Description
A short explanation about the product/ service

Unit Cost
KES 1,000.00

Quantity*
0

Discount
Percentage % 0

Total Amount
KES 0.00

4 Add Items

Select...

Product/Service Name
Product/Service Name

Description
A short explanation about the product/ service

Unit Cost
KES 1,000.00

Quantity*
0

Discount
Percentage % 0

Total Amount
KES 0.00

To create a pro forma invoice:

Key in the Customer name or select from already added customers

- Tax Type is VAT by default
- Select Invoice date and due date
- Add notes

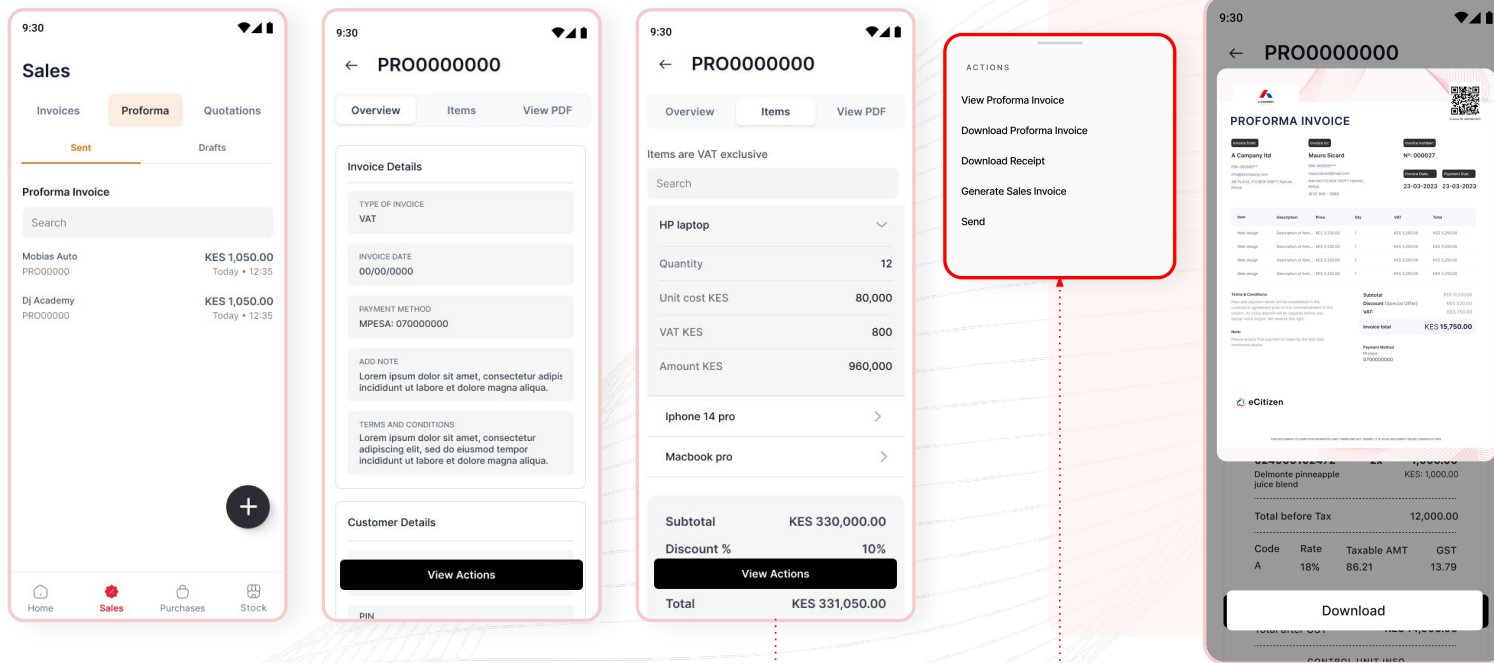
Under **"Add Item"**, the user can select from

- Existing items or add new items.
- Proceed to fill in the Product/Service name
- Give a short description of the Product/Service
- Enter unit cost and quantity
- Indicate discount as a fixed amount or percentage

Click on the **"Add"** button to create the proforma invoice

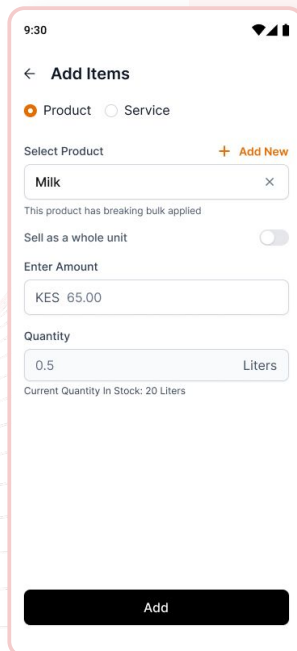
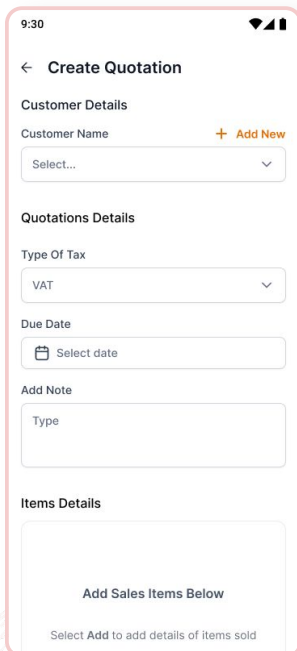
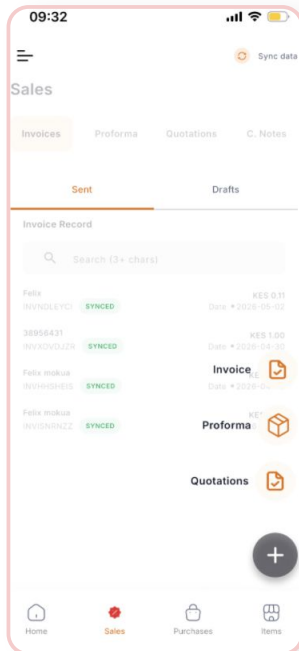
04 Sales Management:

Proforma Invoice Overview



04 Sales Management:

Creating a Quotation



To create a quotation:

Key in the Customer name or select from already added customers

- Tax Type is VAT by default
- Select due date
- Add notes

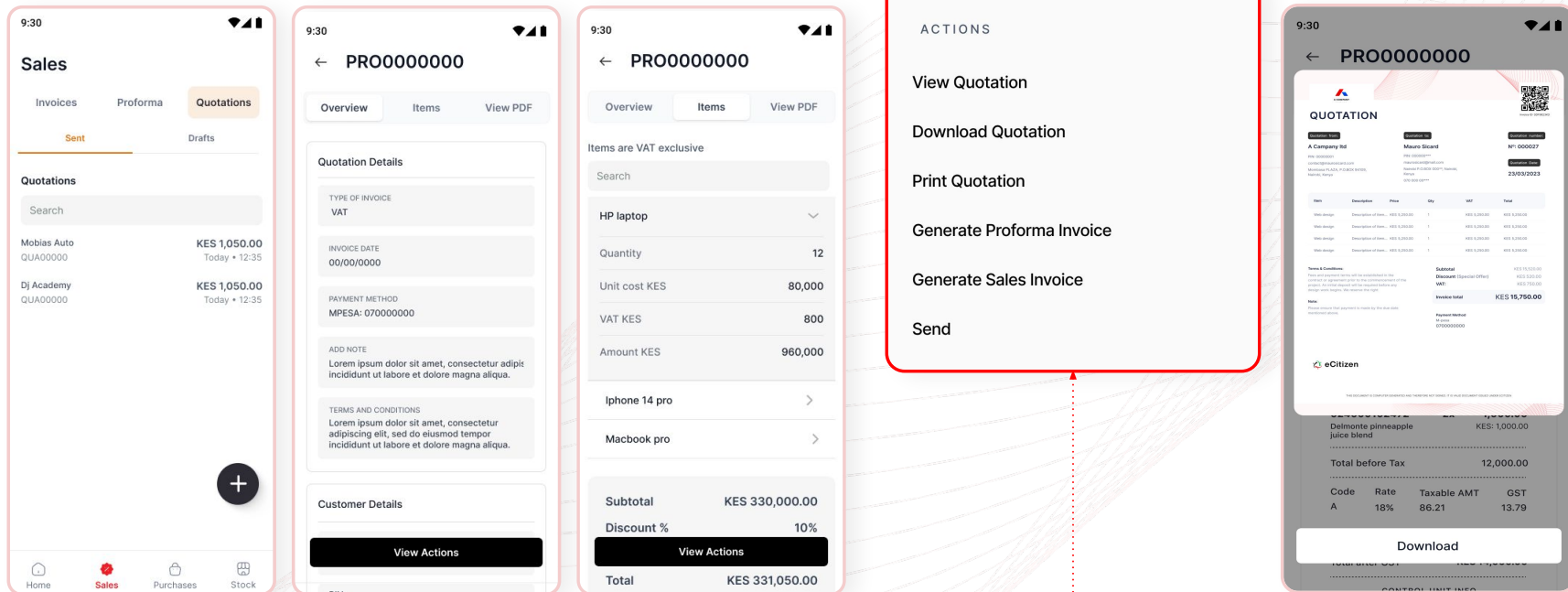
Under **“Add item”**, the user can select from

- Existing items
- Add new items.

Select product from the drop down
Enter amount and quantity
Click **“Add”** to create the quotation.

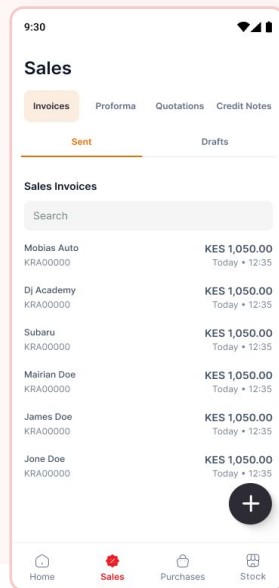
04 Sales Management:

Quotation Overview

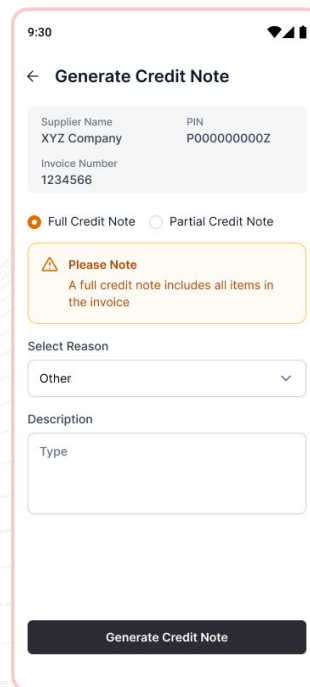


04 Sales Management:

Creating a Credit Note

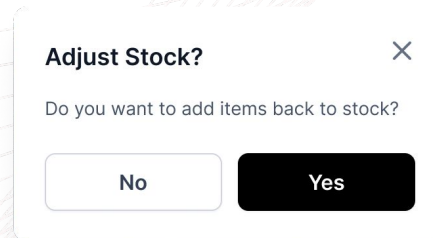


To create a Credit Note, you search for the specific invoice by invoice number or customer name and view details



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.

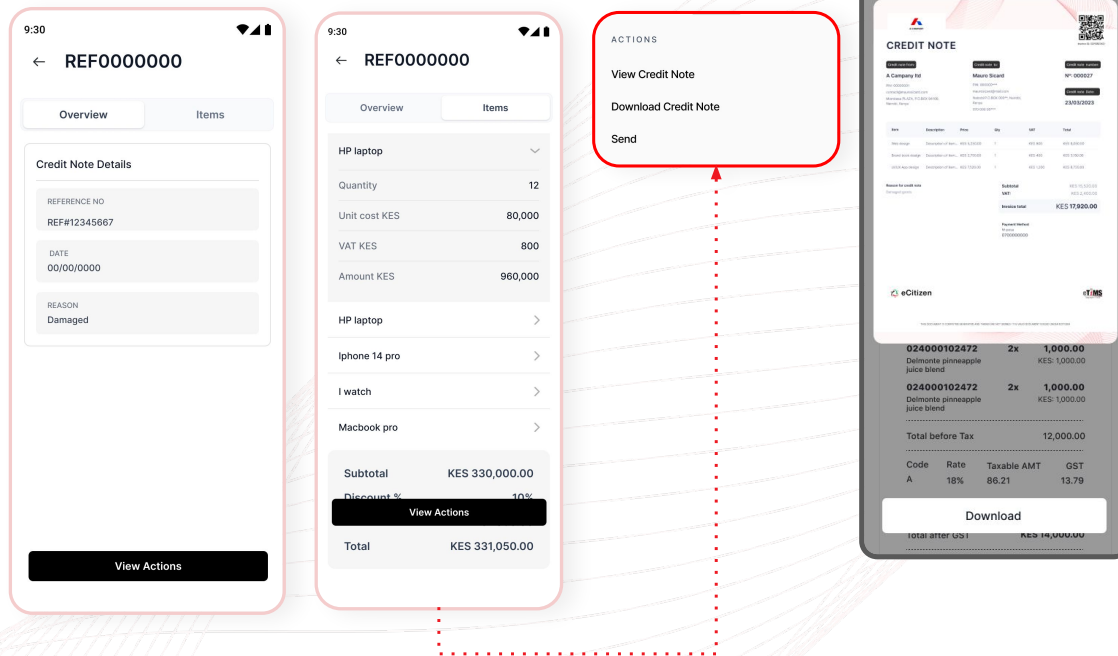
- Select the sales invoice you want to create the credit note for
- Select whether you want to create a **“Full Credit Note”** or a **“Partial Credit Note”**.
- From the drop down options, indicate the reason for creating the credit note
- Select **“Generate Credit Note”**



There is an option to return the items/s back to stock or not

04 Sales Management:

Creating a Credit Note



This sections allows you to view , download and send the credit note.

05

Supplier Management

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

05 Supplier Management

Adding Suppliers

9:30

← Suppliers

Search

ABC Company
P1234567890

Supply Ltd
P1234567890

Doshi Ltd
P1234567890

GOOD WILL LTD
P1234567890

New Files Org.
P1234567890

+

9:30

← Add Supplier

PIN of Supplier

Enter PIN

Phone Number

254

Validate

9:30

← Add Supplier

PIN of Supplier

XYZ Company
20102223

Wrong User? Cancel

Phone Number

254

Add

To add a supplier:

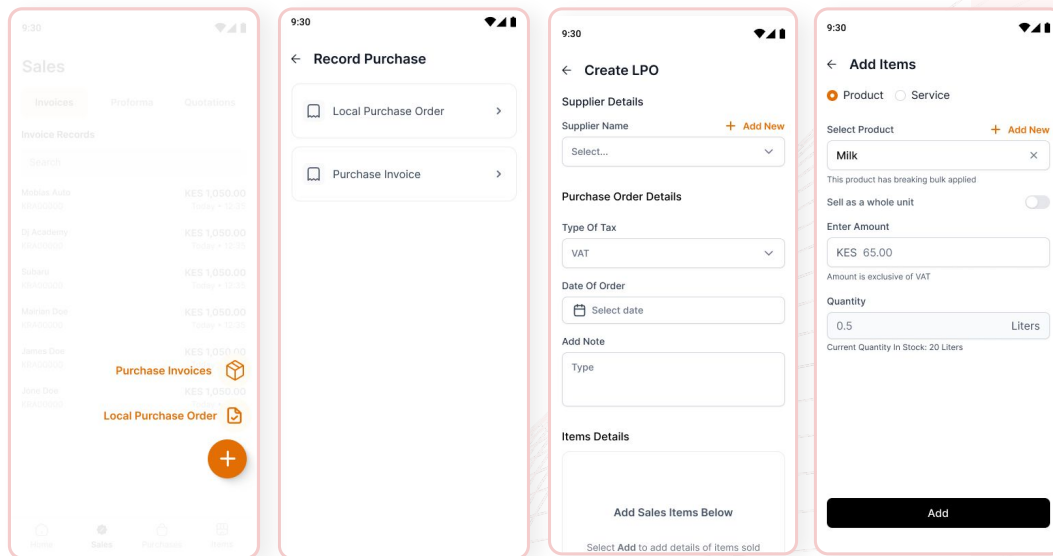
- Search for supplier
- Proceed to key in the PIN and phone number of supplier
- Click **“Validate”**
- Click on the **“Add”** button to add supplier.

06

Purchase management

06 Purchase Management:

Creating an LPO



A local purchase order is a formal, legally binding document issued by a buyer to a supplier, authorizing the purchase of goods or services.

To create an LPO:

- Key in the supplier details.
- You can do this by selecting from already added suppliers or create new by clicking on **“Add New”**.
- Type of tax is set to VAT by default
- Select date of order
- Add note

Under add item:

- Select the Product/Service by selecting from existing or adding new products/services
- Key in the amount and quantity
- Click on the **“Add Button”** to create the LPO.

06 Purchase Management:

Creating Delivery Notes & Return Notes

The screenshots illustrate the workflow for creating delivery and return notes in the eTIMS Mobile app. The first screen shows the 'Generate Delivery Note' screen with a 'Please Note' warning and a table of items (HP laptop, Iphone 14 pro, I watch, Macbook pro). The second screen shows the 'Delivery Notes' list with two entries. The third screen shows the 'REF00000000' reference page with tabs for Overview, Items, and View PDF, and a 'Return Notes' section. The fourth screen shows the 'Generate Return Note' screen with a table of items (Iphone 14 pro, I watch, Macbook pro) and a 'Reason For Return' dropdown.

Generate Delivery Note

Please Note
The delivery note will automatically be converted into a purchase invoice.

Supplier Name: XYZ Company
PIN: P000000000Z
Order Number: 1234566

Items Details **Add Item**

Item	Unit cost KES	Expected Quantity	Delivered Quantity
HP laptop	80,000	12	12
Iphone 14 pro			
I watch			
Macbook pro			

Remove **Edit**

Delivery Notes

REF#12345667
12/01/2024

REF#12345667
12/01/2024

REF00000000

Overview **Items** **View PDF**

Return Notes 2 **View**

Purchase Invoice Details

ORDER NUMBER: 12345566
DATE OF ORDER: 00/00/0000
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.

Supplier Details

NAME:
PIN:
View Actions

Generate Return Note

Supplier Name: XYZ Company
PIN: P000000000Z
Invoice Number: 1234566

Items Details **Add Item**

Item	Unit cost KES	Expected Quantity	Delivered Quantity
HP laptop	80,000	12	12
Iphone 14 pro			
I watch			
Macbook pro			

Remove **Edit**

Reason For Return

Other

Description

A Delivery Note is a document accompanying the shipment of goods that lists the type, quantity and description of items included.

A Return Note is a document that accompanies the goods being returned stating why they are being returned.

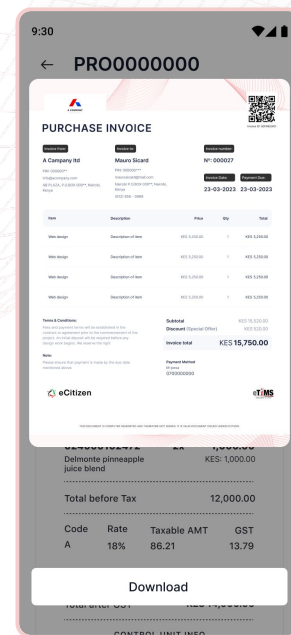
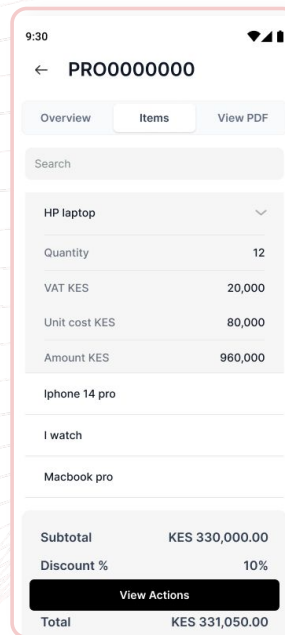
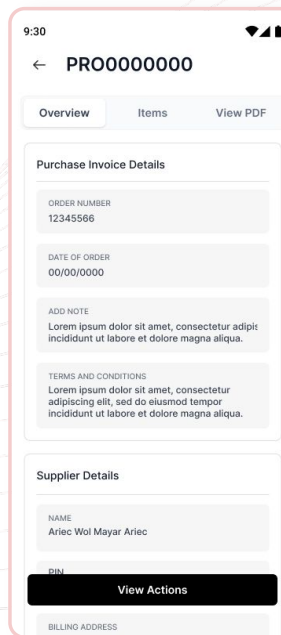
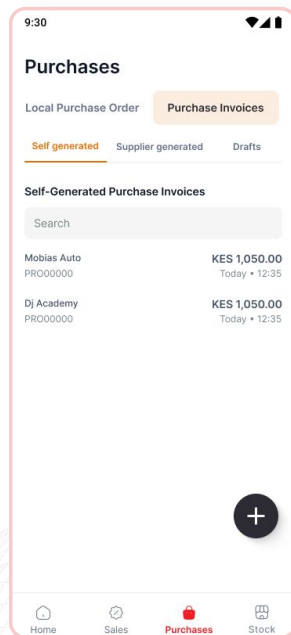
Please note that a delivery note will automatically be converted to a purchase invoice.

To generate a delivery note

06 Purchase Management:

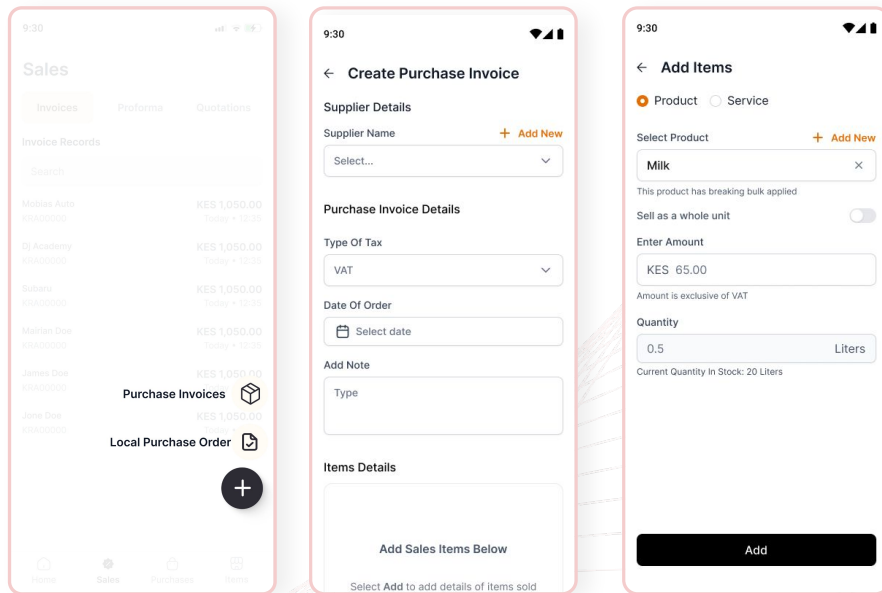
Purchase invoices

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.



06 Purchase Management:

Creating a purchase invoice



This section allows you to view your purchase invoices and create new ones

To create a purchase invoice:

- Select the **“Supplier Details”** from the drop down or click **“Add New”** to add new suppliers.
- Type of tax is already selected as VAT by default.
- Select the date of Order
- Add note

Under add items, select Product/Service

- You can either select from the already existing version or add new
- Enter the amount and quantity
- Click on the **“Add Button”** to create a purchase invoice.
- View the invoice and download

DIAL *222*5#

**IT TAKES YOU LESS
THAN 30SEC TO
GET YOUR SERVICE**

Call or Whatsapp: **0711 099 999**
Email: **callcentre@kra.go.ke**

Follow KRA Online

- Facebook: Kenya Revenue Authority
- X: @KRACare
- Instagram: @kra_care
- LinkedIn: Kenya Revenue Authority
- YouTube: Kenya Revenue Authority