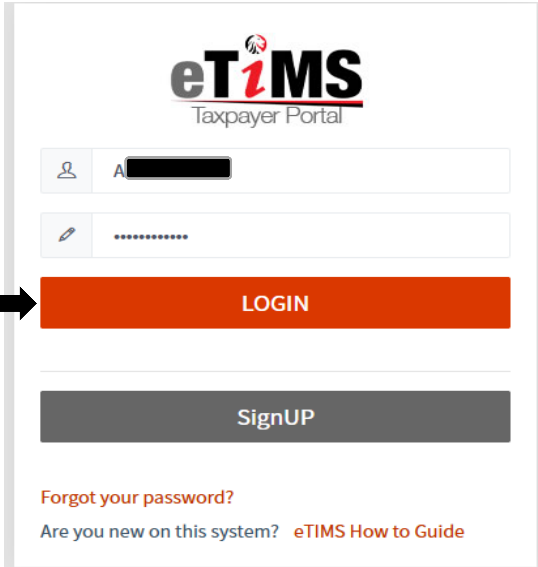
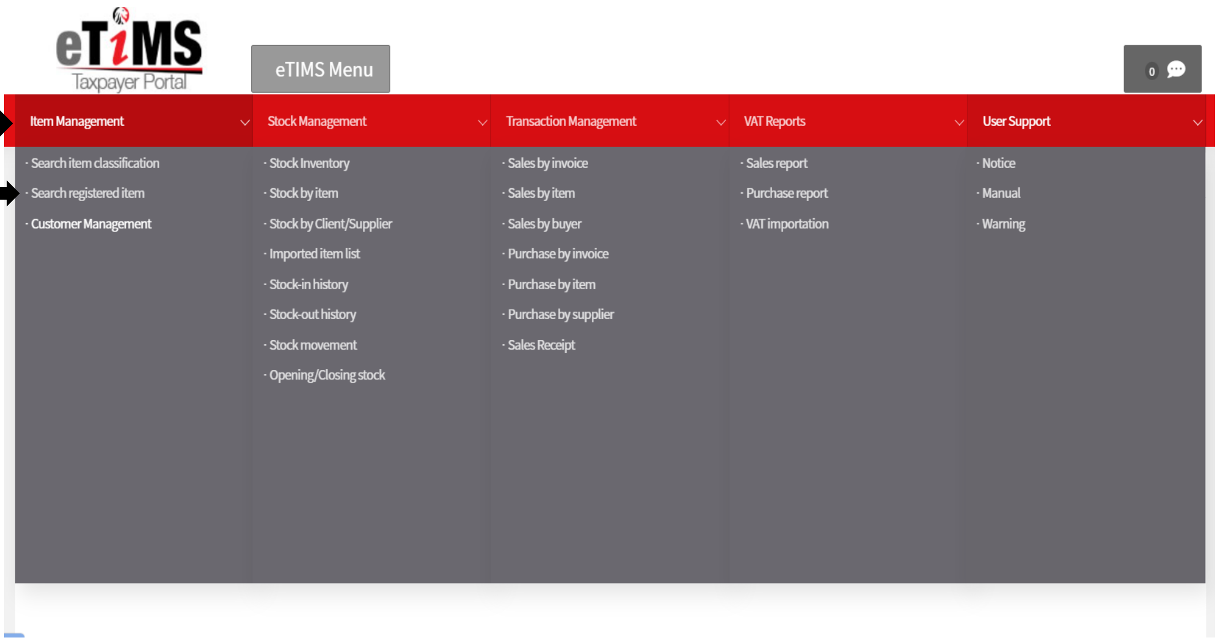
USER GUIDE FOR INVOICING VIA THE eTIMS ONLINE PORTAL

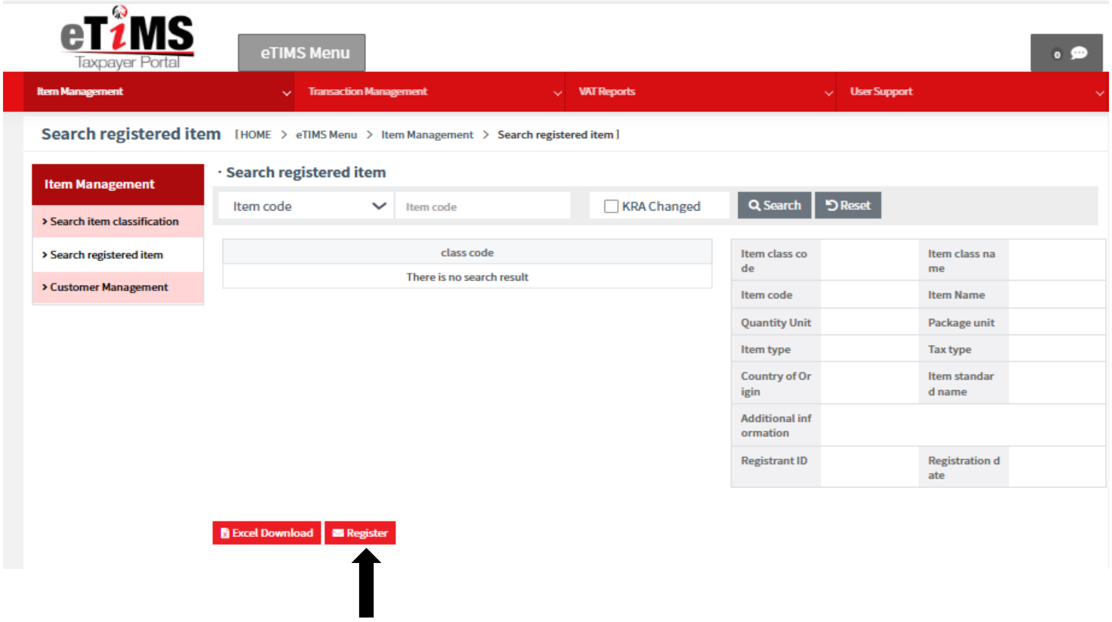
Step 1: Use (KRA PIN) as the '*User ID*' and '*Password*' created during sign-up to login



Step 2: On the '*eTIMS menu bar*' under '*Item management*' select '*search registered item*'

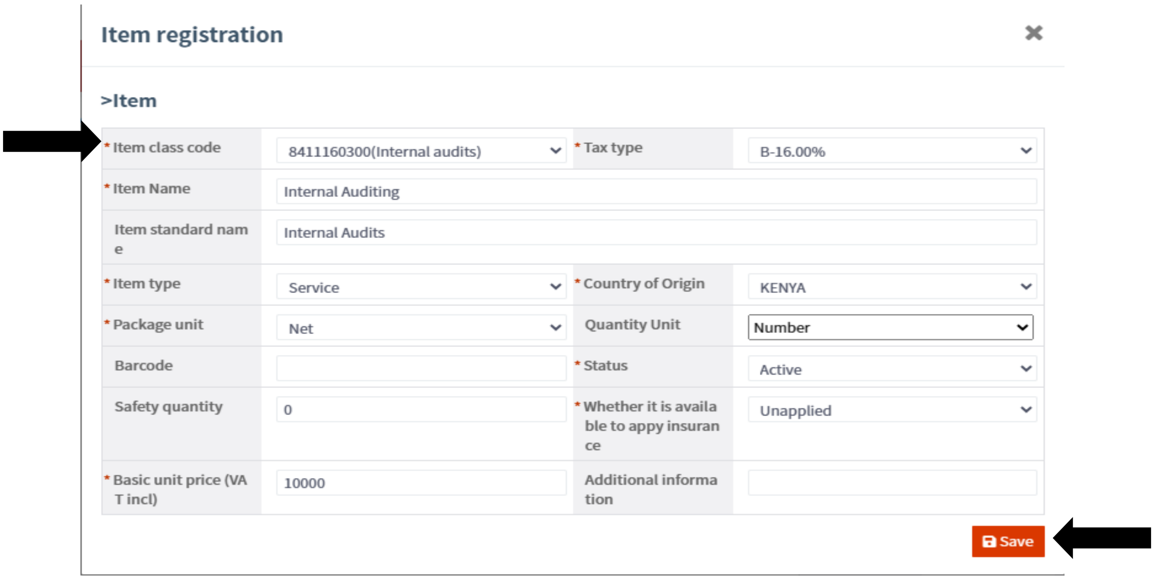


Step 3: Click the *register* button to add an item/service.



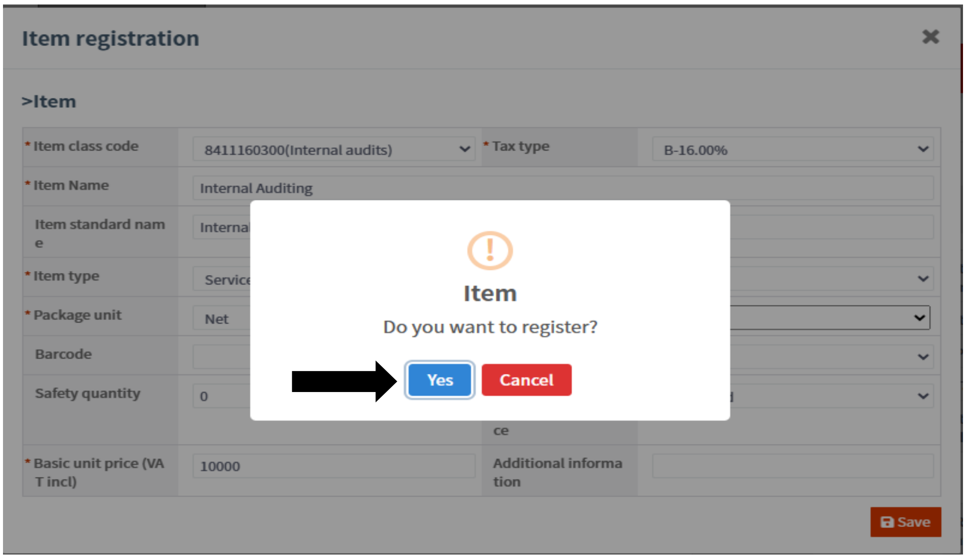
Step 4:

- Click the drop down on '*Item Class Code*'
- Enter the item name in the item class code search bar and select the class code that falls under that category.
- Fill in the other fields in asterisk (*) including quantity unit to register the item and click the '*Save*' button.

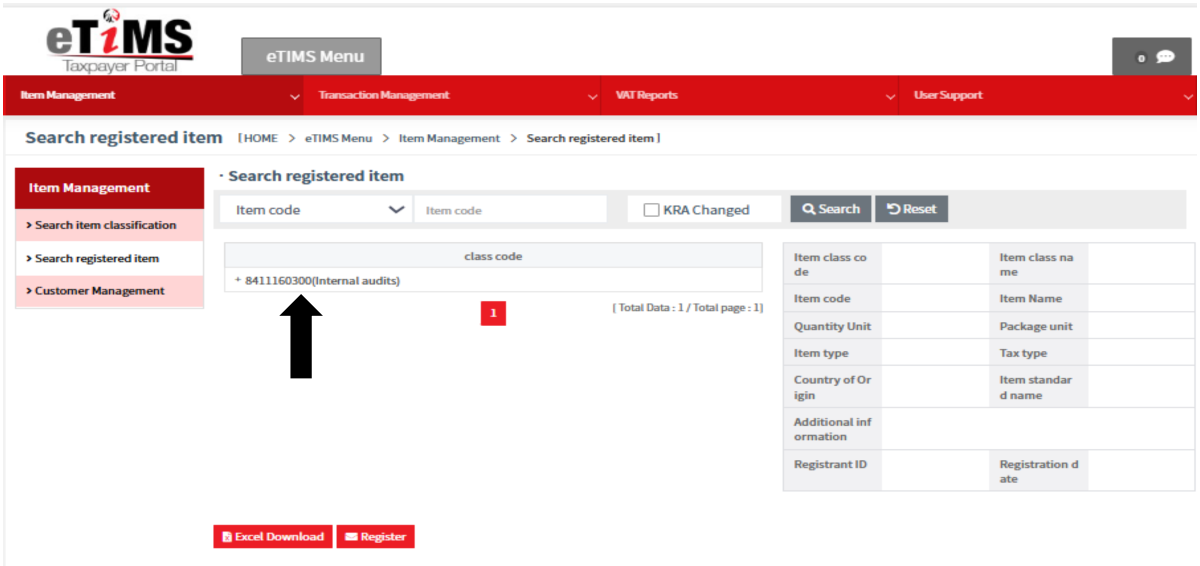


Step 5:

- A confirmation message will pop up.
- Click the '*Yes*' button to register the item.



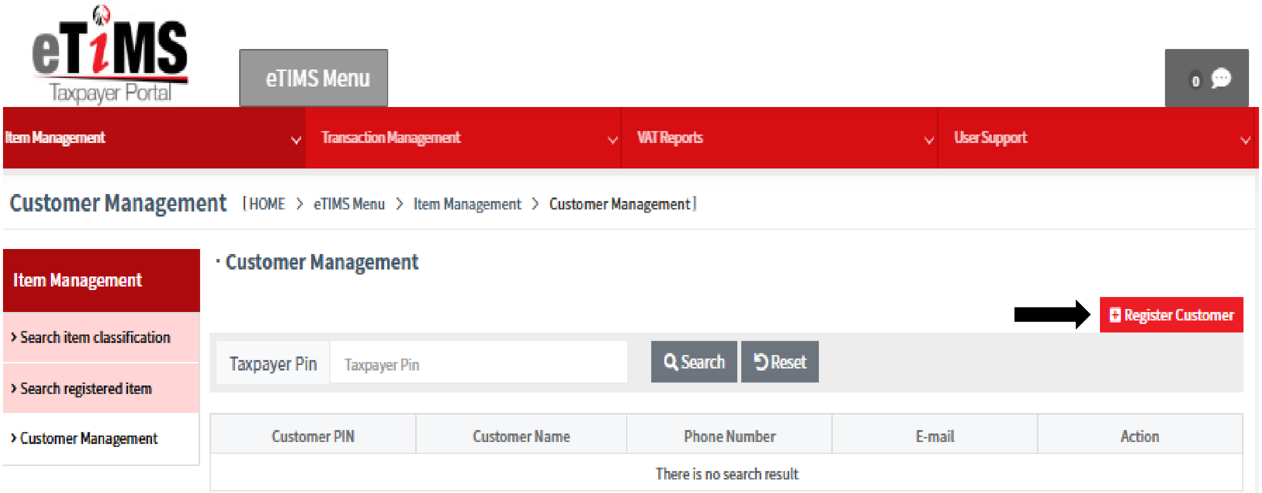
- The registered item/items should appear as below



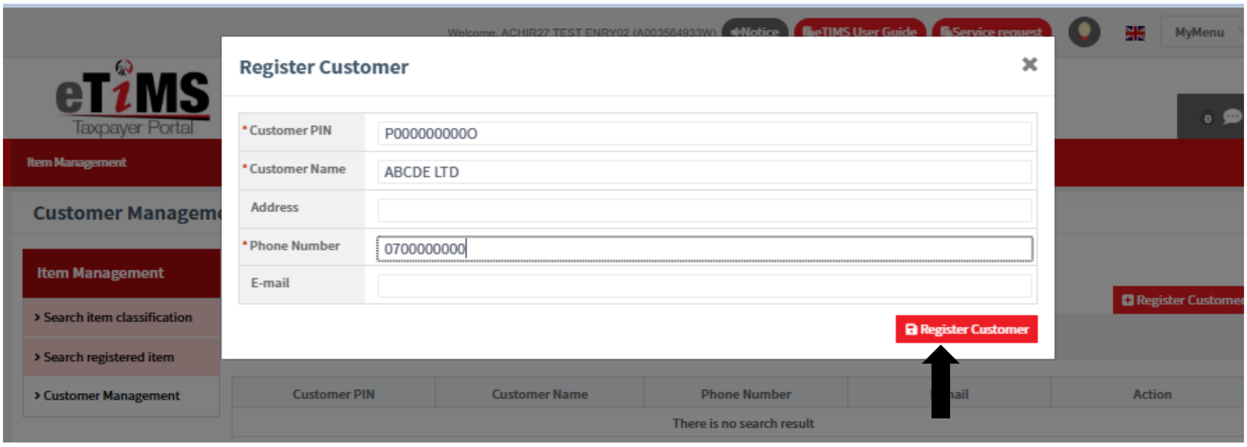
END OF ITEM REGISTRATION

Step 6: Customer Registration.

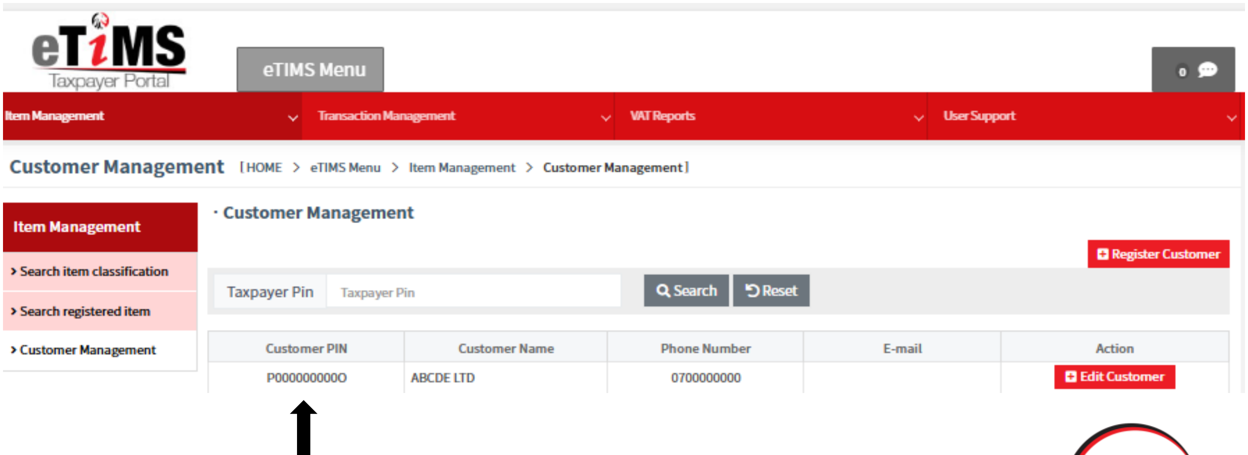
Select 'Customer Management' to Register a new customer, then click "Register Customer"



Step 7: Add Customer Details then Click 'Register'

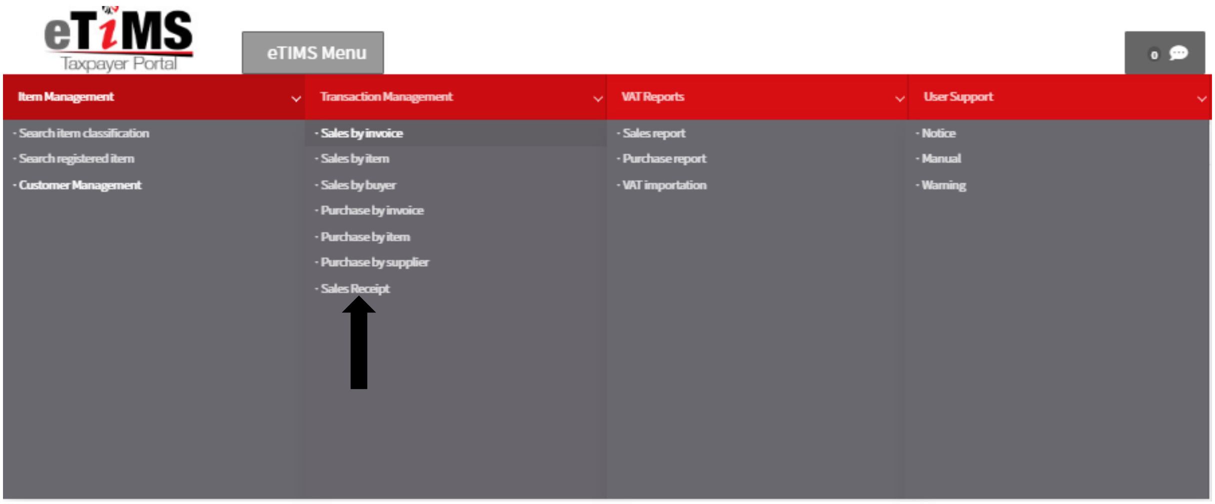


View of the Registered Customers

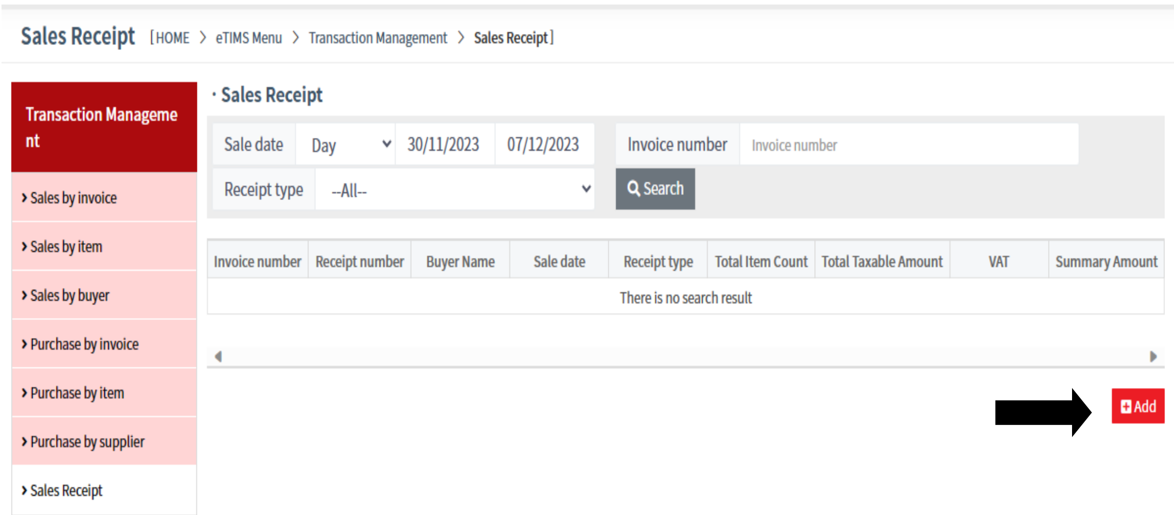


Step 8: **How to Generate a Sales Receipt**

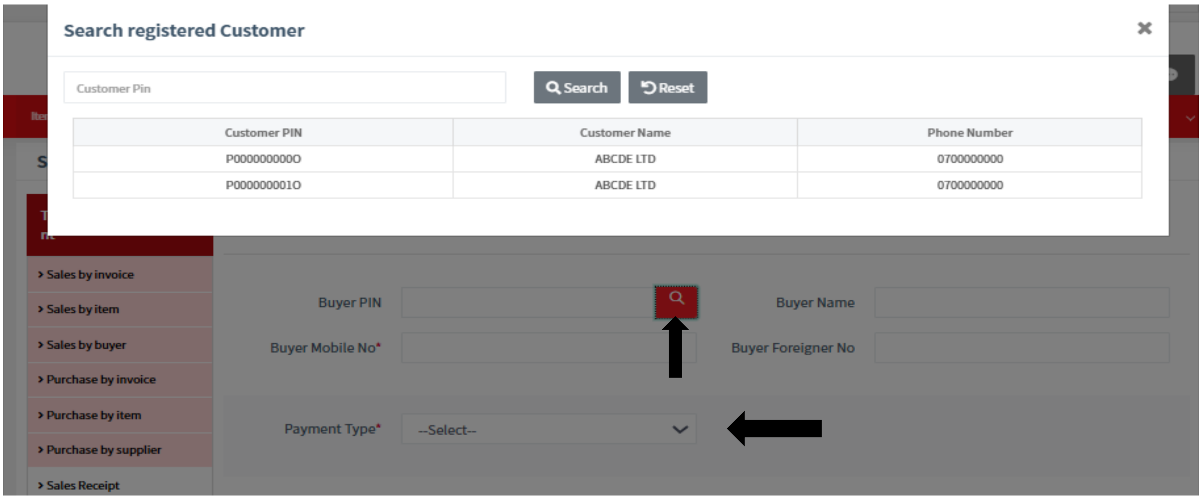
- Click on '*Transaction Management*'
- Select' *Sales Receipt'* option



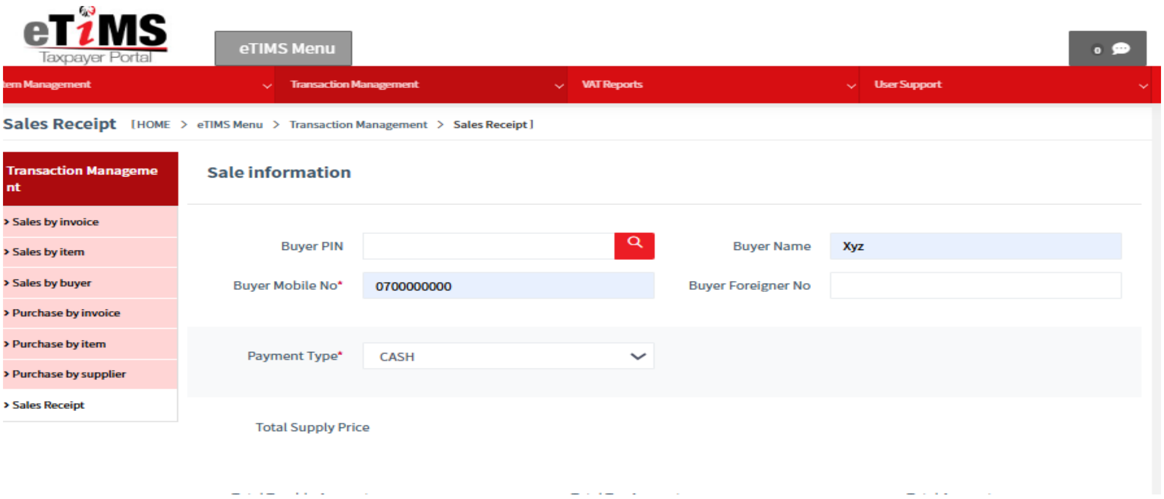
Step 9: Click the '*add'* button to proceed.



Step 10: Click the ‘Search button’ to select your Customer from the Registered Customers for business to business transactions-B2B, then Select the Payment type.

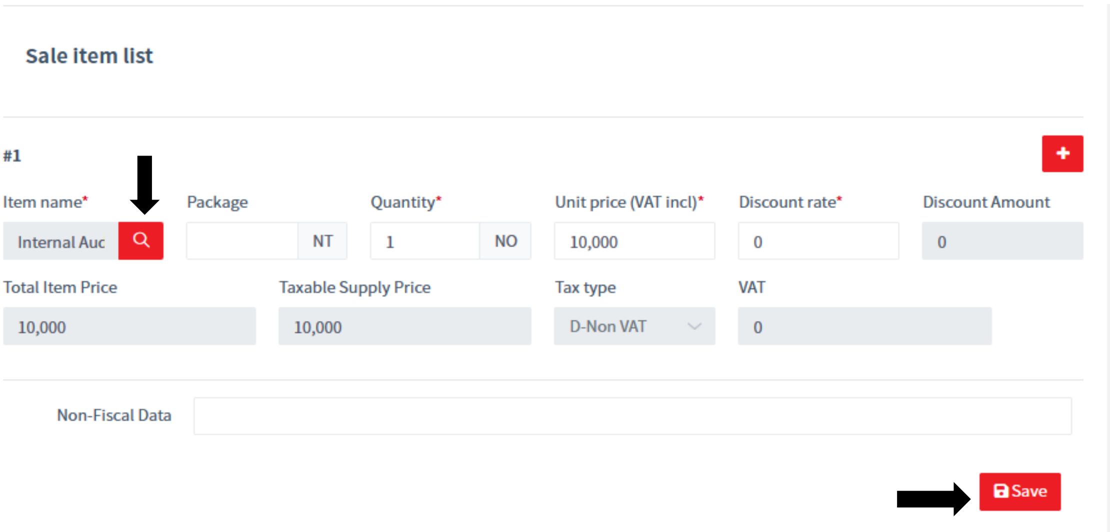


For B2C (Business to Customer) capture the name and Mobile Number of the Customer
then Select the Payment type



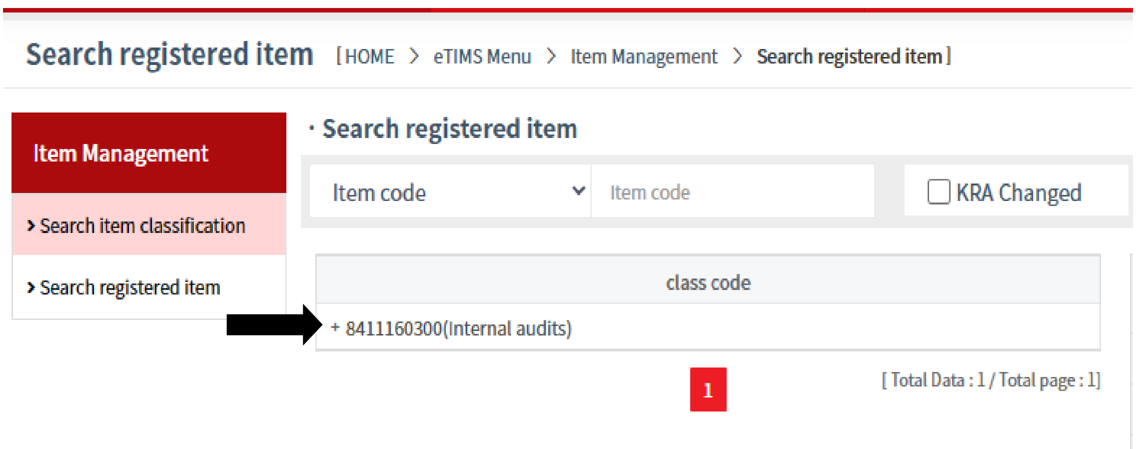
Step 11:

- Input the '*Sales Item List'* details
- Use the search button under *'Item name'* to select the item registered in *Step 5*.

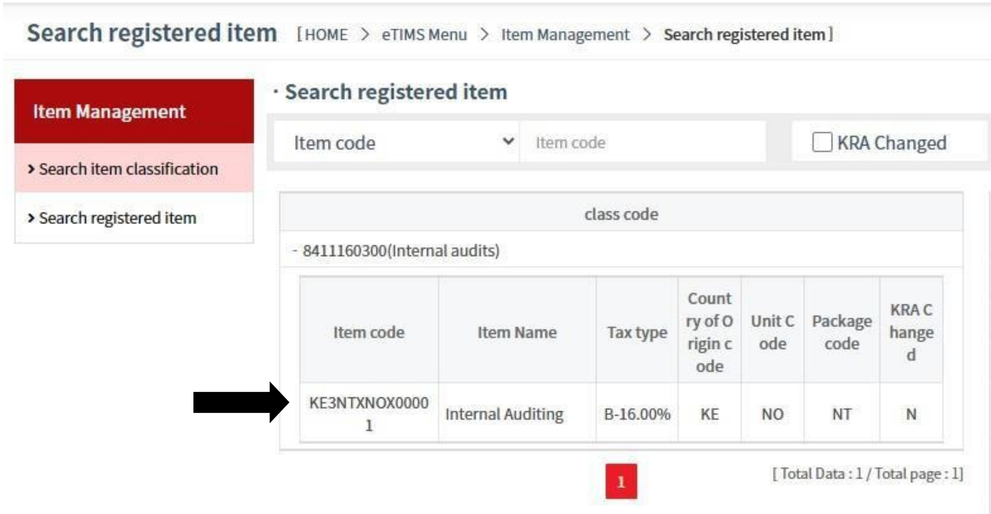


Step 12: How to select the item

- Click on the '+' button adjacent to the item code.

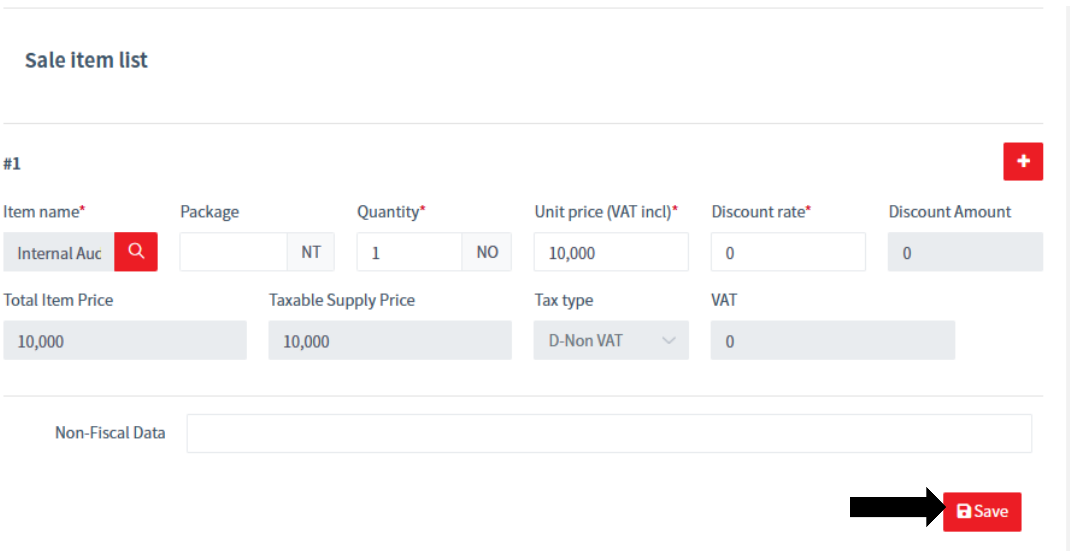


- The item details will display as below.
- Click inside the item code to select the specific item.



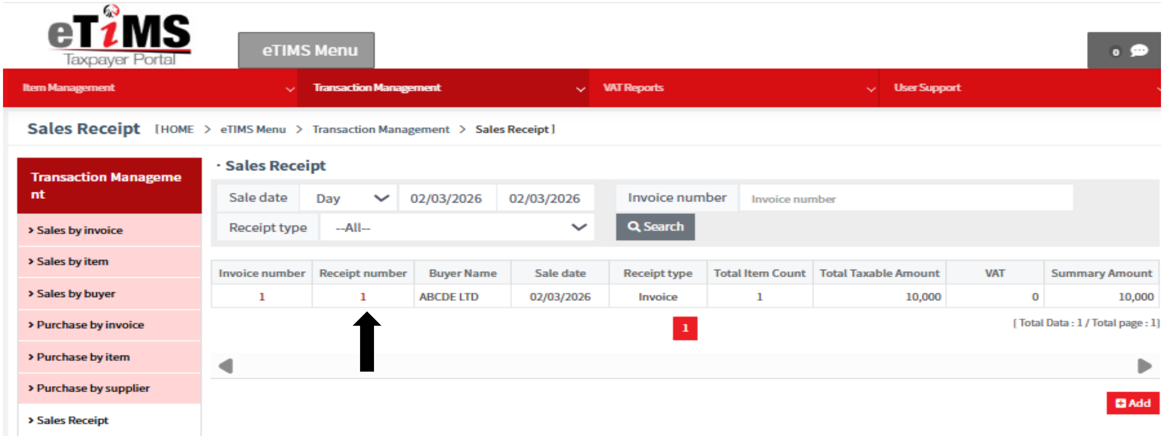
Step 13:

- The selected item will appear on the '*sale item list*' as shown below.
- Provide the quantity, the unit price (VAT inclusive and any discount where applicable).
- Click '*Save*'.



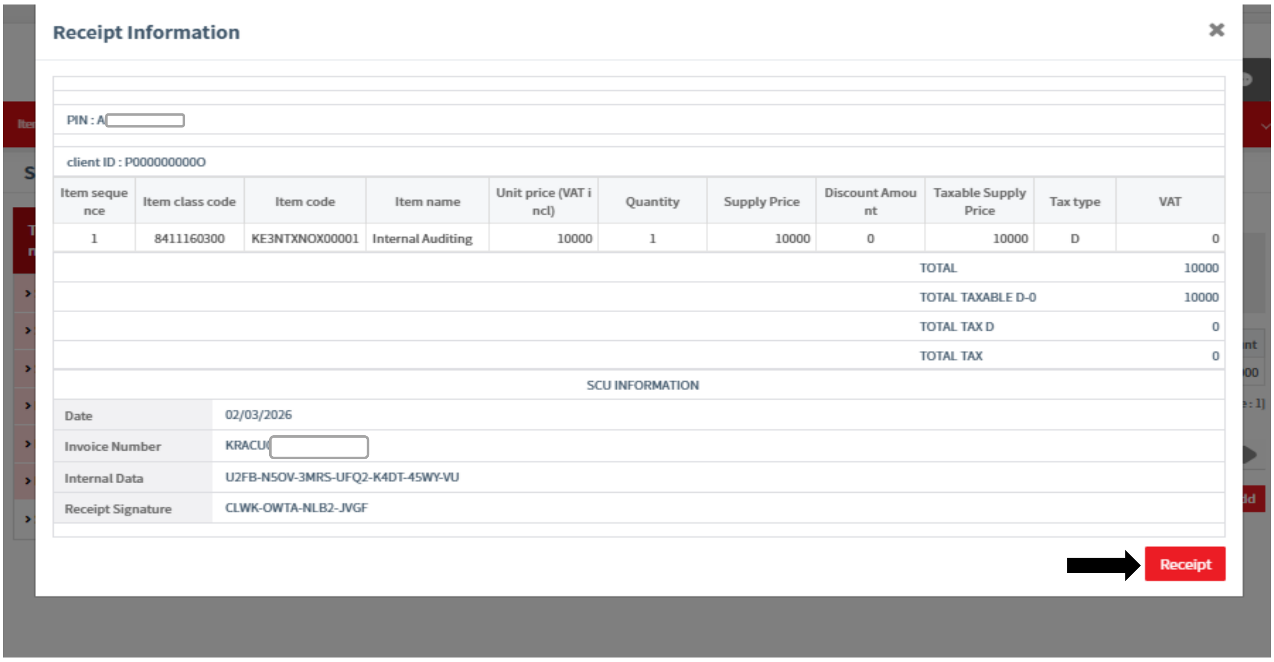
Step 14:

- The receipt/invoice will appear on the 'Sales Receipt" as below
- To download the invoice/receipt, click the value under *Receipt number*.



Step 15:

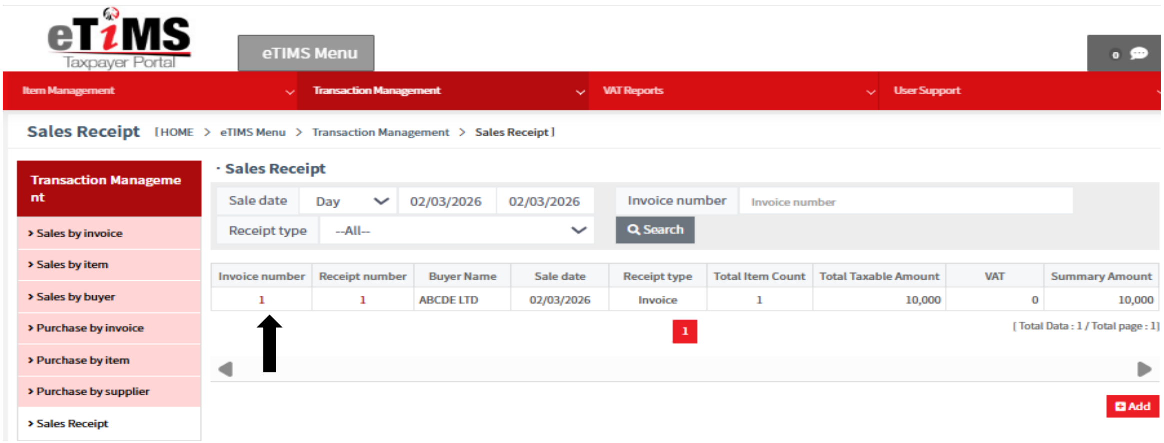
- The '*receipt information'* is displayed
- To download the invoice, click on '*Receipt*'.



END OF INVOICE/RECEIPT GENERATION

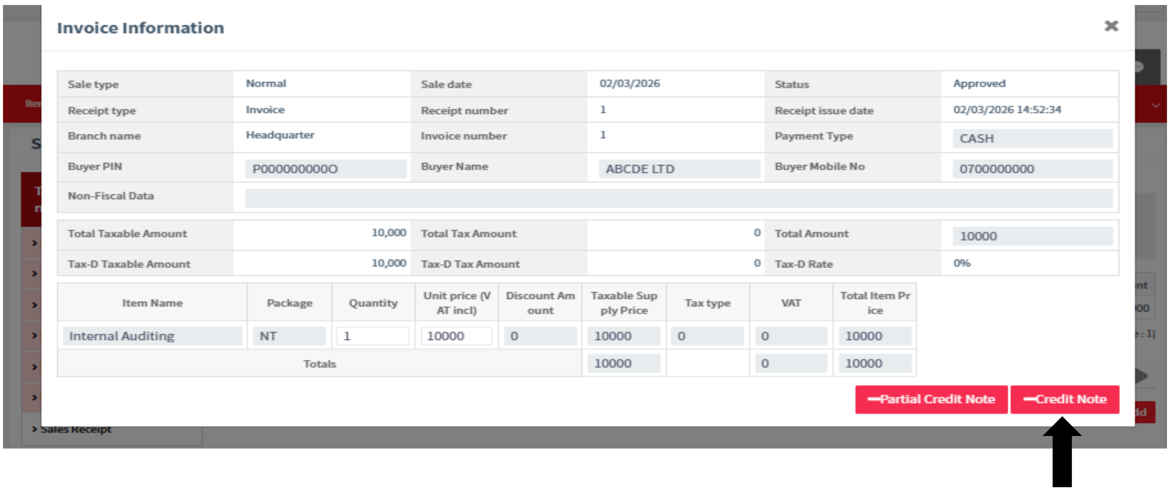
Step 16: How to issue a Credit note

- Click the value under '*Invoice number*' to generate a credit note.

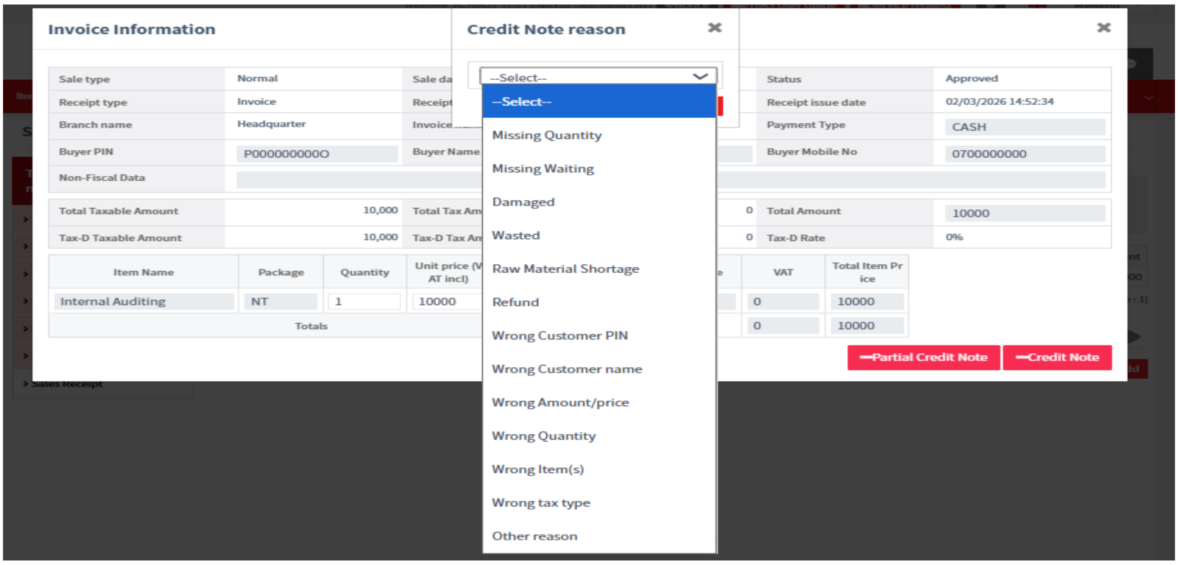


Step 17:

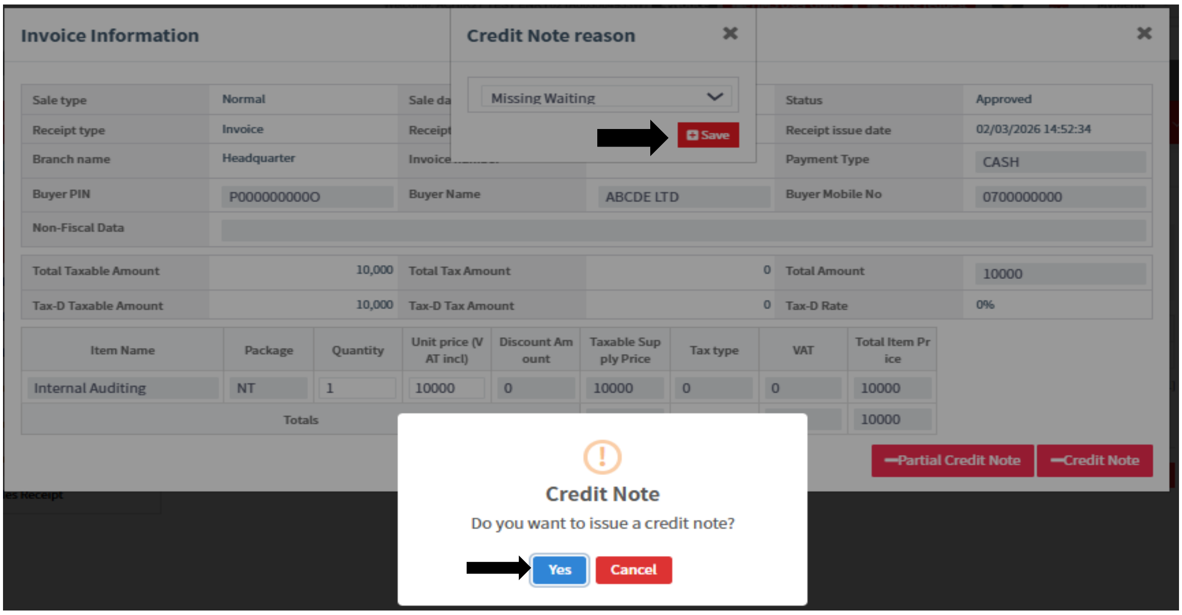
- For a full credit note, select '*Credit Note*'



Step 18: Provide the reason for raising the credit note.

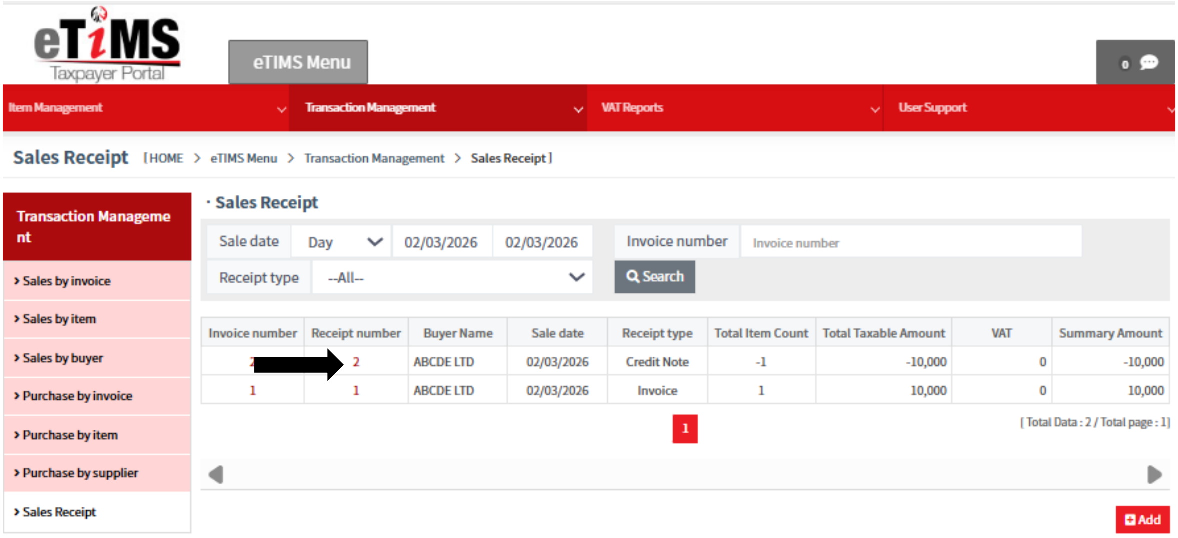


Step 19: Save and Click Yes to generate Credit Note



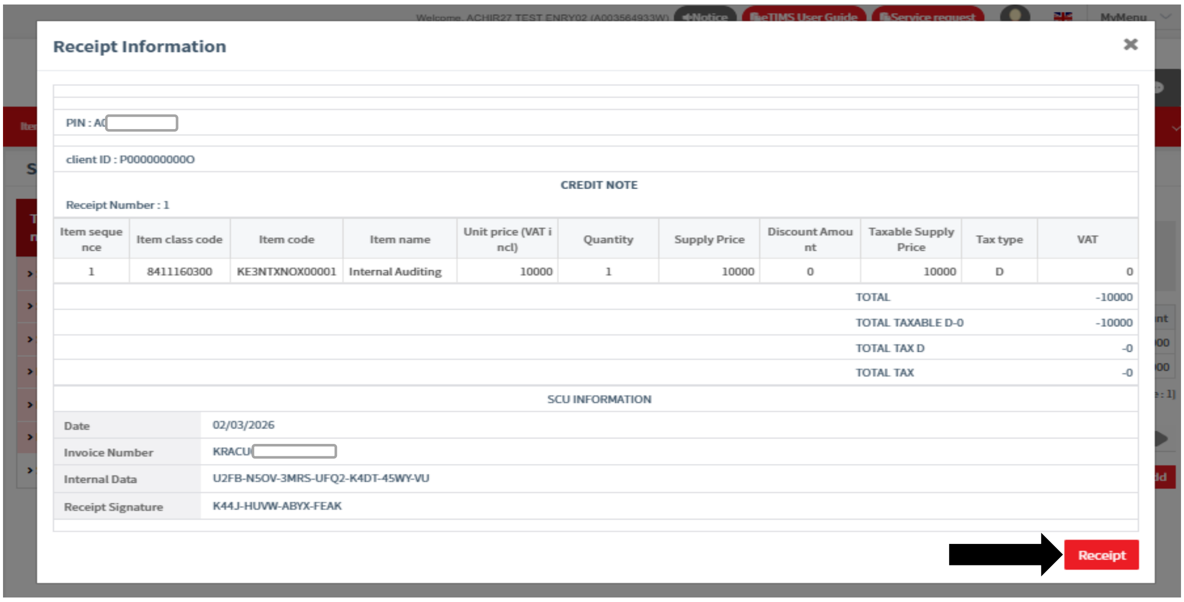
Step 20:

- The credit note will appear on the 'Sales Receipt" as below
- To view the Credit note details, click the digit under *Receipt number*



Step 21:

- The credit note information is displayed as shown below
- To download the credit note, click on '*Receipt*'



THE END