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# KRA eTIMS ERP integration checklist

A practical checklist for Kenyan finance and operations teams preparing to connect an ERP or invoicing system to KRA eTIMS: what to prepare, test, reconcile and agree before go-live.

> **What KRA says (checked 3 November 2026):** eTIMS (electronic Tax Invoice Management System) is KRA's software solution for electronic tax invoicing, and all persons engaged in business are required to on-board eTIMS and issue electronic tax invoices. For system-to-system integration, KRA describes the Online Sales Control Unit (OSCU) as suitable for taxpayers whose invoicing is always online, and the Virtual Sales Control Unit (VSCU) for bulk invoicing that is not always online. Source: kra.go.ke (eTIMS pages).

## 1. Decide what the integration must connect

- [ ] Agree where the commercial invoice is created and how its eTIMS submission status is recorded.
- [ ] Confirm which route (OSCU or VSCU) suits your invoicing pattern and connectivity.
- [ ] Keep the ERP invoice reference and the returned eTIMS details together on the same record.
- [ ] Decide how the finance team will spot transactions that need attention.

## 2. Prepare the invoice data before testing

- [ ] Pick a small, representative set of customers, products and services.
- [ ] Review customer details, item descriptions, units of measure, tax treatment and how discounts appear.
- [ ] Resolve duplicate or incomplete records before importing them.
- [ ] Write down who can create, approve, amend and review invoices.
- [ ] Create a short data dictionary: owner, source and validation rule for each important field.

## 3. Test complete business scenarios, including exceptions

- [ ] A straightforward sale
- [ ] A discounted invoice
- [ ] An invoice correction or credit note
- [ ] Every transaction type you actually use (branches, multiple entities)
- [ ] An interrupted connection
- [ ] A rejected request
- [ ] A user pressing submit twice (no duplicate)
- [ ] A pending transaction and its safe recovery route
- [ ] Keep a test log: scenario, expected result, actual result, open issue and owner. Re-test after each fix.
- [ ] Agree the acceptance criteria before switching the live invoicing process.

## 4. Reconcile invoicing with finance records

- [ ] Set a routine that compares issued invoices, submission statuses, credits and the sales ledger for the same period.
- [ ] Investigate missing references, unexpected amounts and transactions still awaiting attention.
- [ ] Name who reviews exceptions each day and who signs off period-end differences.
- [ ] Treat invoice acceptance, the accounting entry and the customer payment as separate checks: an accepted invoice does not prove payment.

## 5. Questions to ask before choosing an integration

- [ ] **Scope:** which invoice types, entities and branches are included, and what needs separate configuration?
- [ ] **Responsibilities:** who supplies credentials, validates the tax setup, cleans data and approves the tested workflow?
- [ ] **Support:** how are rejected or pending transactions investigated, and who monitors and maintains the connection?
- [ ] **Commercial terms:** what implementation, training, support and integration charges apply? Ask for a written scope.

## 6. Plan a controlled handover

- [ ] Identify the last transactions in the old process and the first in the new one.
- [ ] Train the staff who issue invoices and the finance users who reconcile them.
- [ ] Define a fallback procedure, an escalation contact and a short review period after go-live.
- [ ] Prepare a handover pack: invoice flow, exception information and decision owners.

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| **Project owner** | |
| **Finance reviewer** | |
| **Target go-live date** | |

Based on VisionONE's guide KRA eTIMS and ERP integration and What is KRA eTIMS?. KRA is the source for the eTIMS definition and integration routes; the preparation and testing steps are operational guidance, not legal or tax advice. Confirm your obligations on kra.go.ke. Explore VisionONE eTIMS integration · Book a demo: +254 791 737 401 · info@visionerpsolutions.com