

Creating a sales invoice

Accounting and finance

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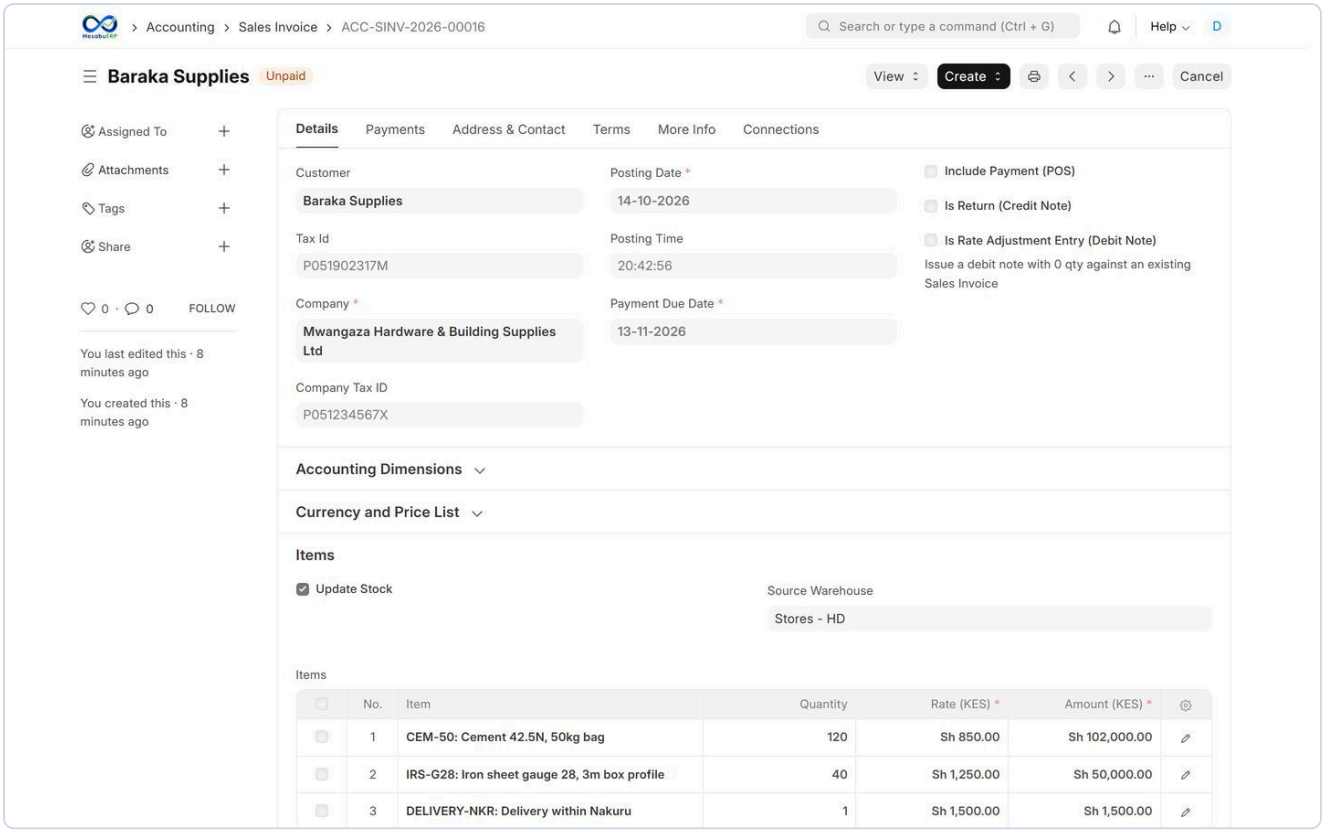
Raise an invoice, add items and taxes, submit it, and email or print it.

Beginner · About 15 minutes · Version 1.0 · Updated 17 November 2026

Overview

A **Sales Invoice** is the bill you send to a customer. When you submit it, the amount is added to what the customer owes (Accounts Receivable) and recorded as income.



A submitted sales invoice for Baraka Supplies, showing the customer, dates, company details, an Update Stock option and three item rows.

Prerequisites

- A **Customer** record. See Customers.
- **Items** created, if you bill for goods. See Creating items.
- The Accounts User or Sales User role.

Steps

1. Search for **New Sales Invoice**.

2. Choose the **Customer**. Their tax ID and address fill in.
3. Check the **Posting Date** and **Payment Due Date**. The due date follows the customer's payment terms.
4. In the **Items** table, click **Add Row** and choose the **Item**. The description and rate fill in. Enter the **Quantity**.
5. If this invoice should reduce stock itself, tick **Update Stock** and choose the **Source Warehouse**. Leave it unticked if a Delivery Note already moved the stock.
6. Under **Taxes and Charges**, choose a **Sales Taxes and Charges Template** if the sale is taxable. See Sales taxes and VAT.
7. Check the **Grand Total** at the bottom.
8. Click **Save**, then **Submit**. The invoice gets its number, for example `ACC-SINV-2026-00016`.

Send it to the customer

1. On the submitted invoice, click the **printer** icon to print, or the **...** menu, then **Email**.
2. Choose your **Print Format** if you have a branded one. See Print formats.
3. Click **Send**. The PDF is attached.

Practical example

Baraka Supplies orders 120 bags of cement at KES 850, 40 iron sheets at KES 1,250 and a delivery fee of KES 1,500. The invoice totals KES 153,500, is due in 30 days, and shows as **Unpaid** until the payment is recorded.

Important notes

- A submitted invoice cannot be edited. To fix a mistake, cancel and amend it, or issue a credit note. See Understanding document status.
- The **Is Return (Credit Note)** option on an invoice is for returns. Do not tick it for a normal sale.
- If your business must issue KRA eTIMS invoices, ask support to set up the eTIMS connection before you go live. See Electronic tax invoices and eTIMS.

Common mistakes

- Ticking **Update Stock** and also raising a Delivery Note. Stock then reduces twice.
- Not setting the right tax template, so VAT is missing.

Troubleshooting

See Invoice submission errors.

Next steps

Read Recording customer payments.

Related documentation

- Recording customer and supplier payments
- Credit notes and debit notes
- Sales taxes and VAT
- From quotation to payment