Taxlane

Taxlane client guide

Everything you need to know to use Taxlane, step by step.

Version 1.0

Questions? taxlane@dfts.cloud

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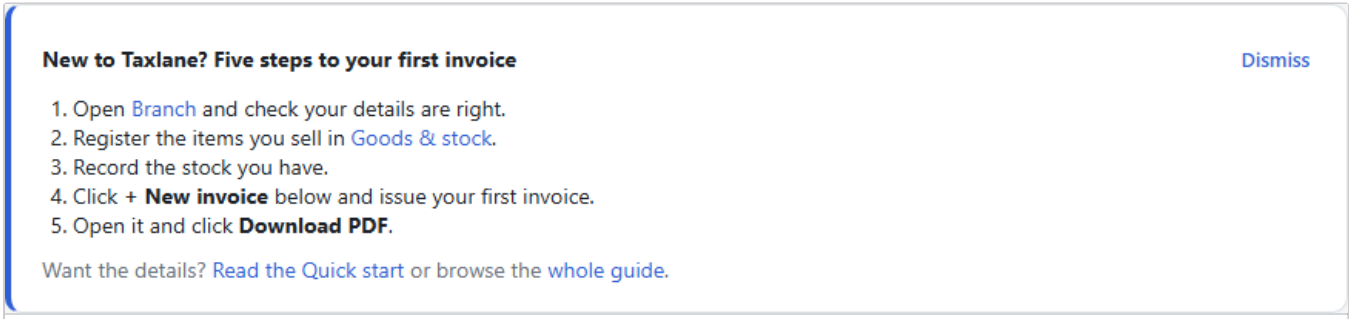
Everything you need to know to use Taxlane, from your first sign-in to everyday invoicing. You don't need any technical knowledge. If you only have five minutes, read the **Quick start** below.

Quick start

This takes you from your invitation to your first invoice. Each step is explained in full later in the guide.

1. **Open your invitation.** Taxlane emails you a link. Click it. (If you were given a temporary password instead, go straight to the portal and sign in with it.)
2. **Choose your password.** Use at least 15 characters. A few unrelated words works well, for example *blue river tractor lamp*.
3. **Sign in** to the Taxlane Portal with your email and your new password.
4. **Check your branch.** Open **Branch** and make sure the details are right. If something looks wrong, tell us before you issue anything.
5. **Register your items.** Open **Goods & stock**, click **+ Register goods**, and add each item you sell. URA only accepts invoices for items it knows about.
6. **Record your stock.** In **Goods & stock**, use **Record stock-in** to say how many of each item you have.
7. **Check a buyer** (optional). Open **Buyers** and enter a business customer's tax number (TIN) to confirm it's valid. For walk-in customers you can skip this.
8. **Issue your first invoice.** Open **Invoices**, click **+ New invoice**, fill it in and click **Issue invoice**.
9. **Open it and download a copy.** Click the invoice number, then **Download PDF**.
10. **Owners only: invite your team** in **Team**, and ask your developers to connect your software in **API keys** if you want invoices to flow in automatically.



The Invoices page with the Getting started card

> **Tip:** Your account starts in a **test setup**, so everything you try in the first days is practice and creates no real tax documents. Your Taxlane contact tells you when you go live.

Understanding Taxlane

What Taxlane does

Uganda Revenue Authority (URA) requires businesses to report every sale to its **EFRIS** system. Each sale produces a **tax invoice** with a unique number and a QR code. Doing this directly with URA is technical and unforgiving. Taxlane sits between your business and URA and does the technical part for you.

Through the **Taxlane Portal** you can:

- issue tax invoices, one at a time or many at once,
- see all your invoices in one place, and download a PDF of any of them,
- correct an invoice properly with a **credit note**,
- register your items and keep your stock up to date with URA,
- check a buyer's tax number before you invoice them,
- see a permanent record of everything sent to URA on your behalf.

Taxlane can also connect directly to your accounting, sales or stock software so invoices flow through without anyone retyping them. See Connecting your own software.

How an invoice travels

1. **Your business** makes a sale and needs a tax invoice.
2. **Taxlane** prepares the invoice, signs it securely, sends it to URA, and keeps a copy and a record of what happened.
3. **URA** checks it and answers with an **invoice number**, a **verification code** and a **QR code**. Taxlane brings these back to you in seconds.

If your software or your connection drops halfway, Taxlane checks before it tries again, so the same invoice is never filed with URA twice.

Test setup and live

Your account starts in a **test setup**. Invoices go to URA's practice system, so no real tax documents are created and nothing can go wrong. This is the right place to learn, to train your staff and to check your items and prices.

When you're ready, your Taxlane contact switches you to **live**. Going live is always a separate step that only happens when you say so. After that, every invoice is a real, legally binding tax document, and a mistake can only be corrected with a credit note.

> **Warning:** The portal's confirmation message before issuing always says the invoice is real and can't be cancelled. In your test setup nothing is actually real, but practise treating every invoice as if it were, so there are no surprises on the day you go live.

Who does what

- **You and your colleagues** use the portal. Each person has a role: **owner** or **member** (see Owners and members).
- **The Taxlane team** sets up your company, connects it to URA and supports you. They can't issue invoices for you.
- **URA** receives and validates every invoice, and approves credit notes.

Where Taxlane stands with URA

Taxlane is in pilot testing with URA. Everything URA requires technically is built, and URA's formal approval of Taxlane as an accredited provider is still in progress. This doesn't change how you use Taxlane, and your invoices are filed with URA in the normal way.

Joining Taxlane

What we set up for you

Your Taxlane contact does the technical setup: your company profile, your connection to URA, and the secure keys that sign your invoices. You don't need to do any of that yourself.

What we'll ask you for

URA requires a few things from every business that uses a provider like Taxlane. Your Taxlane contact will tell you exactly what's needed in your case and help you complete each step. Typically this includes:

- confirming with URA that you've appointed Taxlane to submit invoices for you,
- a signed letter or form giving the details of your digital certificate,
- your tax identification number (TIN) and your branch details as registered with URA.

Before you start

Have these ready:

- your **TIN** and the name URA has registered for your business,
- the list of **items** you sell: a name, your own code, the unit you sell them in (for example pieces or kilograms) and the price,
- the **tax number (TIN)** of your regular business customers,
- the email addresses of the colleagues who will use the portal.

Go-live checklist

Your Taxlane contact switches you from test to live once all of this is true:

- [ ] Everyone who will use the portal can sign in.
- [ ] Your branch details in **Branch** are correct.
- [ ] Your items are registered and your stock is recorded.
- [ ] You've issued several test invoices and one test credit note, and you're happy with how they look.
- [ ] You know who your owners are and who can issue invoices.
- [ ] Your accounting or sales software, if connected, has been tested end to end.
- [ ] You've agreed the go-live date with your Taxlane contact.

Your account

Getting your account

Taxlane creates your account for you, so you can't sign up on your own. Your company's account owner, or the Taxlane team, adds your email address. You then receive either:

- an **email invitation** with a link (the usual way). The link works once and expires after 7 days; or
- a **temporary password** handed to you privately. You sign in with it, and Taxlane asks you to choose your own straight away.

Choosing a password

- Use **at least 15 characters**. A few unrelated words works well, for example *blue river tractor lamp*.
- You don't need capital letters, numbers or symbols, and spaces are fine.
- Don't use your email name, "Taxlane" or "EFRIS" in it.
- Taxlane checks new passwords against lists of passwords that have leaked online and may ask you to choose another.
- Use a password you don't use anywhere else.

Choosing a new password: the button turns on once you reach 15 characters

Signing in and out

1. Open the Taxlane Portal.
2. Enter your email and your password. Click **Show** if you want to check what you typed.
3. Click **Sign in**.

For your safety, Taxlane signs you out after **an hour with no activity**, and always after 12 hours. Use **Log out** (top right) when you finish, especially on a shared computer.

The sign-in page

If you forget your password

1. On the sign-in page click **Forgot your password?**.
2. Enter your email and click **Send reset link**.

3. If the address belongs to an active account, an email arrives with a link. It works **once** and expires after **1 hour**.
4. Open the link and choose a new password.

You can ask for up to three links an hour, and only the newest works. When you choose a new password you are signed out everywhere else. The page gives the same reply whether or not the email is registered, so nobody can use it to find out who has an account. If nothing arrives after a few minutes, check your spam folder, then ask the owner of your account.

Asking for a password reset link

If sign-in pauses

After several wrong passwords in a row, sign-in pauses for a short time, and for longer if you keep trying (up to 15 minutes). This protects your account from guessing. Wait, then try again, or use **Forgot your password?**. The message is the same whether the email or the password was wrong.

First sign-in with a temporary password

If you were given a temporary password, Taxlane shows a **Set a new password** page after you sign in. Enter the temporary password, then your new password twice. Until you do this you can't use any other part of the portal.

Finding your way around

The menu runs across the top of every page. On each page, **Help with this page** (top right of the content) opens the right part of this guide.

MENU	WHAT IT'S FOR
Invoices	See, search, issue and download invoices; bring in invoices from URA
Credit notes	Correct an invoice you've already issued
Goods & stock	Register your items and record stock coming in
Buyers	Check a buyer's tax number with URA
Branch	Your registered branch details
Webhooks	Have Taxlane tell your own software when something happens
Reference	Look up the unit and category codes URA uses
Activity	The record of everything sent and received
Team *(owners only)*	The people who can sign in for your company
API keys *(owners only)*	Keys that let your own software connect
Help	This guide, searchable, inside the portal

Owners and members

Every person has one of two roles.

	OWNER	MEMBER
Issue invoices and credit notes	Yes	Yes
See invoices, stock, activity and everything else	Yes	Yes
Register goods, record stock, look up buyers	Yes	Yes
Sync from URA and **Refresh from URA**	Yes	No
Add and manage people (**Team**)	Yes	No
Create and revoke API keys	Yes	No
Register and deactivate webhooks	Yes	No

Every company always has at least one owner. If you can't see a menu item or button this guide mentions, it's probably for owners only.

The portal's Help page, searchable and inside the portal

Common tasks at a glance

Not sure where to start? Find what you want to do, then follow the page named in the second column.

I WANT TO…	GO TO	WHO CAN DO IT
Issue an invoice	**Invoices**, then **+ New invoice**	Anyone
Issue many invoices at once	**Invoices**, then **+ Batch upload**	Anyone
Find an invoice	**Invoices**, then the search box	Anyone
Get a PDF of an invoice for my customer	Open the invoice, then **Download PDF**	Anyone
Bring in invoices that were issued somewhere else	**Invoices**, then **Sync from URA**	Owners
Correct an invoice	**Credit notes**, then **Submit a credit note**	Anyone
See where a credit note has got to	**Credit notes**, then **Check status**	Anyone
Register a new item	**Goods & stock**, then **+ Register goods**	Anyone
Add stock that has arrived	**Goods & stock**, then **Record stock-in**	Anyone
Check a buyer's tax number	**Buyers**	Anyone
Update my branch details	**Branch**, then **Refresh from URA**	Anyone
Add a colleague	**Team**, then **Add team member**	Owners
Reset a colleague's password	**Team**, then **Reset password**	Owners
Change my own password	Log out, then **Forgot your password?**	Anyone
Connect my accounting or sales software	**API keys**, then **Create API key**	Owners

I WANT TO…	GO TO	WHO CAN DO IT
Have my software told when an invoice is issued	**Webhooks**, then **+ Register webhook**	Owners
See everything that was sent to URA	**Activity**	Anyone
Find an answer in this guide	**Help**, then the search box	Anyone

Invoices

Open **Invoices**. This is your home page in the portal. It lists every invoice Taxlane holds for you: the ones you issued here and the ones brought in from URA.

The Invoices page

Reading the list

Each row shows the **Invoice No** (URA's number), your **Reference**, the **Buyer**, the **Gross** amount (the total including tax), when it was **Issued**, its **Status** and its **Source**.

Status can be:

- **Valid**: issued and accepted by URA.
- **Credited**: a credit note has been raised against it.
- **Invalid**: URA doesn't treat it as valid.

Source says where it came from: **issued here** (created in Taxlane) or **found at URA** (brought in from URA).

Finding an invoice

- Type in the search box: an invoice number, your own reference, or part of a buyer's name. Click **Search**.
- Narrow by **status** (Any, Valid, Credited, Invalid) or **source** (Issued here, Found at URA).
- Click **Clear** to start again. Use the arrows at the bottom to move through pages.

Opening one invoice

Click an invoice number to see everything about it on one page.

One invoice, with items, tax, payment, QR code and credit notes

- **The summary**: when it was issued, your reference, the verification (antifake) code, the currency, and the **net amount**, **tax** and **gross amount**.
- **The QR code**: anyone can scan it to confirm the invoice is genuine on URA's site. **Verify on URA** does the same by link.
- **Parties**: who issued it and who it was issued to, with their TINs.
- **Items**: each line with its code, quantity, unit price, tax rate, tax and total.
- **Tax breakdown** and **Payment**: how the tax splits up and how it was paid.

- **Credit notes**: any raised against it, with their status.

Buttons at the top of the page:

- **Download PDF** saves a clean copy you can email or file. It includes the QR code.
- **Print** gives a paper copy without the menus.
- **Refresh from URA** *(owners)* fetches the latest details from URA, for example after a credit note is approved.

Issuing a new invoice

1. On **Invoices**, click **+ New invoice**.
2. **Reference No**: your own number for this sale. Taxlane suggests one (it starts with *REF-*), and you can replace it with your own, such as your order number. Use a different reference for every sale. If you send the same reference twice by mistake, you get the original invoice back, never a second one.
3. **Buyer**: type a name for a walk-in customer (the default is *Walk-in customer*), or click **Look up by TIN instead**, enter the buyer's TIN and click **Look up**. A buyer confirmed by TIN is named on the invoice with their tax number.
4. **Line items**: for each thing you sold, fill in:
   - **Item name** and **Code**: use the code you registered the item with.
   - **Qty**: how many.
   - **Unit**: the unit it's sold in. Start typing its name (for example *piece* or *kilogram*) and pick it from the list. If you already know the code, click **Enter code manually** and type it (**PCE** means pieces).
   - **Unit price**: the price for **one** unit, **including tax**.
   - **Category**: start typing a name (for example "water") and pick the product category URA expects, or click **Enter code manually**.
   - Click **+ Add line** for more items, or **Remove** to delete a line.
5. Click **Issue invoice**, then confirm.



The new invoice form

What happens next. Within seconds the invoice appears in your list with its URA invoice number, verification code and QR code. If URA refuses it, the portal shows URA's own reason and a code. Nothing is issued, and you can fix the problem and try again. See Troubleshooting.

> **Note:** Unit prices include tax. Taxlane works out the net amount and the tax for you, so you only enter the price a customer pays.

What the portal doesn't do yet

Be aware of the limits so you can plan around them. Invoices issued from the portal are in **Ugandan shillings** and apply the **standard rate of VAT (18%)** to every line. There are no discounts, excise duty or other currencies in the portal. If you need any of these, talk to your Taxlane contact before you go live.

Issuing several invoices at once

Use **+ Batch upload** when you have many invoices to file together, for example catching up after a break or moving old records over.

1. Click **+ Batch upload**.
2. Fill in one block per invoice (a reference, a buyer and its lines), exactly as for a single invoice. Click **+ Add invoice to batch** for each extra invoice and **Remove this invoice** to drop one.
3. Click **Submit batch** and confirm.
4. You get a **result for each invoice**. URA judges each one separately, so some can succeed while others fail. Read the table, fix the failures and send those again.

The batch form: one block per invoice, then Submit batch

Bringing in invoices from URA

Invoices you issue in Taxlane appear on their own. If invoices were also issued some other way (for example directly on URA's website), bring them in:

1. *(Owners)* Click **Sync from URA**.
2. Choose the **From** and **To** dates. You can bring in **up to one year at a time**.
3. Start it. It runs in the background, so you can keep working. You'll see progress ("120 of 300 done").
4. When it finishes you'll see how many invoices were **new**, how many were **refreshed**, and how many **failed**.

Sync from URA, with a date range and progress

You can run it as often as you like. It never creates duplicates. Invoices it brings in show **found at URA** as their source, and their credit notes come with them. Only one sync can run at a time.

> **Tip:** After a credit note is approved, open the invoice and click **Refresh from URA** (owners) to see the final status.

Fixing a mistake

An issued invoice can't be edited or deleted, because it is a tax document held by URA. To correct one, raise a **credit note** against it, then issue a new, correct invoice. See Credit notes.

The numbers on an invoice

Every invoice shows three amounts, and they always add up the same way:

- **Gross** is the total the customer pays, tax included. It is the unit price multiplied by the quantity, added up over all the lines.
- **Tax** is the VAT contained in the gross amount.
- **Net** is the amount before tax: gross minus tax.

Here is a worked example. You sell **2 units of Spring water 20L** at a unit price of **5,900**.

LINE	AMOUNT (UGX)
Quantity × unit price: 2 × 5,900 = **gross**	11,800
Tax: 11,800 ÷ 1.18 × 0.18 = **tax**	1,800
Gross − tax = **net**	10,000

Taxlane works each line out to two decimal places and adds the lines together, so an invoice with several lines can show amounts with cents. The tax on the invoice is always the sum of the tax on its lines, and this is how URA checks it.

> **Tip:** If a customer asks "how much is this before tax?", look at the **Net amount** on the invoice. If they ask "how much do I pay?", it's the **Gross amount**.

Credit notes

A **credit note** corrects or reduces an invoice that has already been issued: goods were returned, an amount was wrong, or the sale was cancelled. You never edit an invoice. You raise a credit note against it instead.

Open **Credit notes**. The page has four parts: **Eligible invoices**, **Submit a credit note**, **Check status** and **History**.

Which invoices can have one

Eligible invoices lists the invoices you can still raise a credit note against. Search it by buyer name or reference number. Click an invoice to fill in the form below for you.

Raising a credit note

1. In **Eligible invoices**, choose the invoice. The form is filled in with its details and items. (You can also type the **Original Invoice No** yourself.)
2. **Reference No**: your own number for this credit note.
3. **Reason code**: choose why. The choices are:
   - Return of products due to expiry or damage
   - Cancellation of the purchase
   - Invoice amount wrongly stated, for example a miscalculation of price, tax or discounts
   - Partial or complete waive-off of the sale after the invoice was sent to the customer
   - Others
4. **Buyer**, and optionally **Contact name**, **Contact mobile** and **Contact email**.
5. **Lines**: the items being credited. They start as a copy of the original invoice. For a **partial credit**, change the quantities or delete the lines that aren't being credited. Each line must match the original invoice.
6. Click **Submit credit note** and confirm.

> **Warning:** A submitted credit note can't be withdrawn from the portal. Check the amounts before you confirm.

The credit note form, with the original invoice, reason, contact and items filled in

What happens after you submit

A new credit note is **pending** until URA approves it. Only then does it get its own **credit note number**. The statuses are:

- **Submitted**: waiting for URA.
- **Approved**: URA accepted it. The original invoice now shows **Credited**.
- **Rejected**: URA refused it. Nothing changed on the invoice. Read the reason, correct it and submit again.
- **Voided**: it was cancelled.

Checking on a credit note

Use **Check status**, enter the original invoice number, and you see every credit note against it and where each one stands. **History** lists every credit note you've raised, with its number, reference, status, amount and date.

Worked examples

The customer returns everything. Open **Credit notes**, find the invoice in **Eligible invoices**, and click it. The form fills in with all the original items and quantities. Choose the reason *Return of products due to expiry or damage* (or *Cancellation of the purchase*), and submit.

The customer returns some of it. Choose the invoice the same way, then change the quantities. Suppose the invoice was for 3 notebooks and 1 comes back: change the **Qty** on that line from 3 to 1, or delete the lines that aren't being credited. Only what is on the credit note is reversed.

The price was wrong. A wrong price can't be edited. Raise a credit note for the whole invoice (reason: *Invoice amount wrongly stated*), wait for it to be approved, then issue a new invoice with the correct price.

After you submit. Tell your customer a credit note is on its way. It's final once URA approves it. Open the original invoice any time to see the credit notes against it and their status.

What isn't in the portal yet

Cancelling a credit note that URA has already approved isn't available in the portal yet. Email us if you need that.

Goods & stock

URA wants to know about every item you sell, and about your stock. Open **Goods & stock**.

Goods and stock

Why items are registered

Every item on an invoice must be registered with URA first. Registering gives each item a **code** (yours), a **name**, a **unit**, a **price** and a **category** URA uses to decide the tax treatment.

Registering an item

1. Click **+ Register goods**.
2. Fill in:
   - **Code**: your own code for the item. Keep it short and never reuse it for a different item.
   - **Name**: what it's called on invoices.
   - **Unit**: how it's sold (pieces, kilograms, litres...). Search by name.
   - **Unit price**: the usual selling price including tax.
   - **Category**: search by name (for example "water") and choose the closest match.
3. Click **Register**.

Registering an item

> **Tip:** Not sure which unit or category to pick? Open **Reference** to browse the lists URA uses. See Branch and reference data.

The **Registered goods** table shows each item's code, name, unit and when it was registered.

Recording stock coming in

When goods arrive, tell URA, so the stock you sell is backed by stock you've recorded.

1. Find **Record stock-in**.
2. Enter the item's **Goods code** and the **Quantity** that arrived.
3. Click **Record stock-in** and confirm. This updates your stock record with URA and can't be undone.

Current stock shows the **Qty on hand** for every item.

> **Note:** URA may refuse an invoice for an item you have none of. If you see *Inventory shortage*, record the stock coming in first, then issue the invoice again.

Choosing item codes

The code is how URA, your invoices and your stock recognise an item, so choose it with care:

- Keep it **short and stable**, for example *WATER-20L*. Use the same code your accounting or sales software uses, so the two always agree.
- Make it **unique**. Never reuse a code for a different item, even years later.
- Avoid spaces and unusual symbols. Letters, numbers and dashes are safest.
- Type it **exactly the same way** on invoices as when you registered the item. A single wrong letter means URA doesn't recognise the item and refuses the invoice.

Keeping stock right

URA keeps a stock count for each item, and checks it when you invoice. Record stock coming in **before** you sell it, so the invoice isn't refused for lack of stock. If you see an *Inventory shortage* message, the fix is always the same: record the stock that arrived, then issue the invoice again. Check **Current stock** regularly against what is really on your shelves.

Buyers

Open **Buyers**. Enter a buyer's **Buyer TIN** (and their NIN or BRN if you have it) and click **Look up**. Taxlane asks URA and shows the buyer's legal name, business name, TIN, email, phone and address.

Looking up a buyer

Do this **before** you invoice a new business customer, so the invoice carries the right tax number. A customer who isn't registered for tax is a **walk-in customer**: just type a name when you issue the invoice.

If URA finds no match, check the number for typing mistakes before you try again.

Branch and reference data

Branch

Open **Branch** to see your default branch exactly as URA has it registered. **All your registered branches** lists every branch if you have more than one. If your details have changed with URA, click **Refresh from URA** to bring them up to date.

Your branch details

Reference data

Open **Reference** to browse the lists URA uses: units of measure, currencies, payment methods and the product category tree. Use it to find the right **unit** or **category** when you register goods or write an invoice line. You can search categories by name, for example "water".

The Reference page

If a list says nothing is cached yet, ask your Taxlane contact to load it.

Your team OWNERS

Owners only. Open **Team** to see everyone who can sign in for your company, with their role, status and last sign-in.

The Team page

Adding a person

1. Enter their **Email** and **Name**, and choose a **Role**: **member** (the usual choice) or **owner**.
2. Click **Add team member**.
3. Taxlane shows a **temporary password once**. Copy it and give it to them privately. They'll choose their own password the first time they sign in.

> **Tip:** Anyone who forgets their password can use **Forgot your password?** on the sign-in page, so you won't need to reset it for them every time.

Changing what someone can do

- **Make owner** / **Make member**: change a person's role. Owners can manage the team, keys and webhooks.
- **Reset password**: signs the person out immediately and gives them a new temporary password.
- **Deactivate**: signs the person out at once and stops them signing in. Nothing they did is lost. **Activate** switches them back on.

Rules worth knowing

- Every company must keep **at least one owner**. You can't demote or deactivate the last one.
- Give the **owner** role to as few people as you can. Owners can create API keys that connect to your company's data.
- When someone leaves your company, deactivate them the same day.

Who should be an owner

- Have **at least two owners** if you can, so one person being away or leaving never blocks you from managing the team or API keys.
- Make the people who handle your accounts and your IT owners. Make everyone who simply issues invoices a **member**.

- Review **Team** every few months and deactivate anyone who no longer needs access.

When a colleague joins

1. Add them in **Team** with their work email and the role they need.
2. Give them the temporary password privately (not in a group chat).
3. Ask them to sign in, choose their own password, and read the **Quick start** in this guide.

When a colleague leaves

1. Open **Team** and click **Deactivate** next to their name the same day. They're signed out at once.
2. If they knew an API key, open **API keys**, **Rotate** it, and give the new key to your developers.
3. If they were the only owner, make someone else an owner first. The portal won't let you deactivate the last owner.

Connecting your own software OWNERS

Owners and your developers. If your company uses its own accounting, sales or stock software, it can send invoices to Taxlane automatically, so nobody types them in twice.

API keys

Open **API keys**. A key is a long secret code your software uses to prove it's yours.



1. Under **Label (what will use this key?)** type a name, for example "Accounting system", and click **Create API key**.
2. The key is shown **once**. Copy it and give it to your developers straight away. You can't see it again.
3. Use **one key per system**, so you can switch off one without affecting the others.

Keys list their **Label**, **Status**, when they were **Created** and when they were **Last used**.

- **Rotate** makes a fresh key and leaves the old one working for a few days (seven by default), so nothing stops while your developers switch over.
- **Revoke** switches a key off immediately. Anything still using it stops working.

You can have up to **ten active keys** at a time.

> **Warning:** Treat a key like a password. Never put it in an email, a chat message or a shared document. If you think someone else has seen it, revoke it and make a new one.

Keys that start with the label *client-ui login* belong to an older way of signing in to the portal and aren't used for it any more. Revoke them if nothing else uses them.

Webhooks

Instead of your software repeatedly asking "has anything happened?", Taxlane can tell it. Open **Webhooks**.



1. Click **+ Register webhook**.
2. Enter the **Callback URL**, the web address of your system that will receive the message.

3. Choose the **Events** you want to hear about: **Invoice issued** and **Credit note submitted** (the list shows them as *invoice.issued* and *creditnote.submitted*).
4. Taxlane shows a **secret** once. Give it to your developers so they can check each message really came from Taxlane.

Only owners can register or deactivate webhooks. The address must start with *https* and can't point to a private network. If your system is down, Taxlane tries again several times with growing gaps between attempts.

For your developers

Almost everything the portal does for invoices, credit notes, items and stock can be done by software. Your developers can send invoices, credit notes, items and stock, and read everything back, using one secret key in plain JSON. Safe to retry: sending the same reference number twice returns the original invoice. Ask us for the technical API guide at taxlane@dfts.cloud.

Activity record

Open **Activity** to see the permanent record of everything sent and received on your behalf. Click a row to see its full detail.

URA activity: every request Taxlane sent to URA for you, with the answer and how long it took

- **URA activity** shows every request Taxlane sent to URA for you: what it was, the answer code, how long it took and when.
- **Gateway activity**, below it, has the same layout for every request your own software sent to Taxlane: which function, whether it worked and when.

Nothing in this record can be changed or deleted afterwards. If there is ever a question about what was filed and when, this is your proof. The names and details of Taxlane staff are not shown to you, which keeps their details private.

Security and privacy

- **Your records are private to your company.** Other companies can't see them, and you can't see theirs. This is enforced on every request.
- **Passwords are never stored in a readable form.** Nobody at Taxlane can see your password.
- **Taxlane staff sign in with their own accounts**, and every change to your account is recorded against a named person.
- **A permanent record** shows what was sent to URA and when.
- **Sign-in protections**: sign-in pauses after repeated wrong passwords, you're signed out after an hour of inactivity, and a password reset signs you out everywhere else.
- **Emails from Taxlane** only ever contain a one-time link to choose a password. We will never email you asking for your password. If you receive one that does, don't answer it. Tell us.

What to do if something leaks

- **A password**: choose a new one with **Forgot your password?**, and tell us.
- **An API key**: revoke it in **API keys** (owners) and create a new one.
- **A lost laptop or phone**: sign in from another device and change your password, which signs the lost device out. Tell your owner.

A day with Taxlane

This is an example of how a typical finance desk uses Taxlane, so you can see how the pieces fit together. The names are made up.

Monday morning: goods arrive. Amina receives 200 jerrycans of spring water. She opens **Goods & stock**, finds **Record stock-in**, types the item's code and 200, and confirms. **Current stock** now shows the new total.

A new business customer. A school wants to buy in bulk. Before invoicing, Amina opens **Buyers**, types the school's TIN and clicks **Look up**. URA confirms the legal name. She then opens **Invoices**, clicks **+ New invoice**, clicks **Look up by TIN instead** under **Buyer**, and enters the same TIN. She adds the line (the item, 50 units, the unit price), clicks **Issue invoice** and confirms. A few seconds later the invoice is in her list with its number and QR code. She opens it, clicks **Download PDF**, and emails it to the school.

A walk-in sale. A passer-by buys two jerrycans. Amina clicks **+ New invoice**, leaves **Buyer** as *Walk-in customer*, adds one line, and issues it. She prints the invoice from its page.

Sales from the till. The shop's till software is connected to Taxlane, so those invoices appear in the list by themselves, marked *issued here*.

A customer returns goods. Later in the week the school returns 5 jerrycans. Amina opens **Credit notes**, clicks the school's invoice under **Eligible invoices**, changes the quantity to 5, chooses the reason *Return of products due to expiry or damage*, and submits. The credit note is **pending**. The next day it shows **approved**, and the original invoice is marked **Credited**.

Month end. The owner, Joseph, opens **Invoices** and clicks **Sync from URA** for the whole month, to be sure nothing issued elsewhere is missing. He searches the list, downloads the PDFs his accountant needs, and glances at **Activity** to check that nothing was refused.

A new colleague. A new cashier joins. Joseph opens **Team**, adds her as a **member**, and gives her the temporary password. She signs in, chooses her own, and reads the Quick start.

Troubleshooting

WHAT YOU SEE	WHAT IT MEANS	WHAT TO DO
Invalid email or password	The email or password is wrong, or sign-in is paused	Check for typos and Caps Lock. After several wrong tries sign-in pauses for a short time; wait, or use **Forgot your password?**
This link is invalid or has expired	Reset and invitation links work once and expire (1 hour for resets, 7 days for invitations)	Ask for a new one with **Forgot your password?**, or ask your owner
The Set password button is greyed out	The new password is shorter than 15 characters, or the two boxes don't match	Use a longer password, such as four unrelated words
Password change required	You're using a temporary password	Choose your own password first; nothing else works until then
An invoice is missing from the list	It was issued somewhere other than Taxlane	An owner can bring it in with **Sync from URA**
URA rejected an invoice and shows a reason and code	URA's own validation refused it	Read the reason. Common ones: an item isn't registered, there isn't enough stock recorded (*Inventory shortage*), or an amount doesn't add up. Fix the cause and issue the invoice again
A credit note is still pending	URA hasn't approved it yet	Wait. If it has been a long time, email us the invoice number
No taxpayer found for this TIN	URA has no business with that number	Check the digits and try again

WHAT YOU SEE	WHAT IT MEANS	WHAT TO DO
No units or categories cached	The reference lists haven't been loaded yet	Ask your Taxlane contact to load them
A menu item or button is missing	It's for owners only	Ask the owner of your account
You were signed out suddenly	An hour with no activity, 12 hours since sign-in, or someone reset or deactivated your account	Sign in again
No email arrived	It's in spam, or the address isn't the one your account was created with	Check spam; ask your owner to check the address
"Could not reach the server"	Your internet connection dropped, or Taxlane is briefly unavailable	Check your connection and try again in a minute. If you were issuing an invoice, look in **Invoices** before you retry, in case it went through
"Device … has no active signing key registered"	Your connection to URA isn't fully set up yet	Don't try to issue anything yet. Email us and we'll finish the setup
A table is empty or keeps loading	The page couldn't get its data	Refresh the page. If it persists, email us with the page name
An item doesn't appear when I search for a category or unit	The reference lists use different words	Try a shorter or different word, or browse **Reference**

FAQ

Do I need to install anything? No. The portal runs in your web browser.

Which browsers work? Current versions of Edge, Chrome, Firefox and Safari.

Can several people use the portal at once? Yes. Each person signs in with their own email and password.

Can I edit or delete an invoice after it's issued? No. It's a tax document held by URA. Raise a credit note and issue a corrected invoice.

What's the difference between an invoice and a credit note? An invoice records a sale. A credit note reduces or cancels an invoice that was already issued.

What if I issue the same invoice twice by accident? If you use the same **Reference No** both times, Taxlane returns the original and files nothing new. With different references they are two separate invoices, so raise a credit note for the extra one.

Does the unit price include tax? Yes. Enter what the customer pays for one unit. Taxlane works out the net amount and the tax.

Which currency and tax rate does the portal use? Ugandan shillings and the standard 18% VAT on every line. See *What the portal doesn't do yet* under Invoices.

Why did URA reject my invoice? The portal shows URA's reason. The most common causes are an unregistered item, not enough recorded stock, or amounts that don't add up. See Troubleshooting.

How do I get a copy of an invoice for my customer? Open the invoice and click **Download PDF**, then email it.

Can my customer check that an invoice is real? Yes. Anyone can scan the QR code on it to confirm it on URA's site.

I forgot my password. Do I need to ask someone? No. Use **Forgot your password?** on the sign-in page.

Who can see my invoices? People you've added to your company's account, and nobody from other companies. Taxlane staff can help with setup and support but can't issue invoices for you.

How do I add a colleague? Owners: **Team**, then add their email and role. See Your team.

How do I connect my accounting software? Owners: create a key in **API keys** and give it to your developers. See Connecting your own software.

What does it mean when a credit note is pending? URA hasn't approved it yet. It gets its number once approved.

How do I go from test to live? Ask your Taxlane contact. It only happens when you say you're ready.

How long are my records kept? Your invoices and the activity record stay in Taxlane. Ask your Taxlane contact if you have specific retention needs.

Can I use Taxlane on my phone? The portal is built for a computer or tablet. Many pages work on a phone, but forms are easier on a larger screen.

What if my internet drops while I'm issuing an invoice? Look in **Invoices** before you try again. If the invoice is there, it was filed. If it isn't, issue it again with the **same Reference No**. Taxlane checks first, so you never end up with two.

What's the difference between Reference No and Invoice No? The **Reference No** is yours: your order number, or one Taxlane suggests. The **Invoice No** is URA's: it's assigned when URA accepts the invoice, and it's the number that identifies the invoice on its QR code.

Can I choose my own invoice numbers? No. URA assigns them. Use the **Reference No** for your own numbering.

Can I see invoices from before I started using Taxlane? Yes, if URA holds them for your tax number. An owner clicks **Sync from URA** and brings in up to a year at a time.

Why do some amounts have cents? Taxlane works out the tax on each line to two decimal places. See *The numbers on an invoice*.

Which branch do my invoices use? Your default branch, shown in **Branch**.

Can two people issue invoices at the same time? Yes. Each person signs in separately and everything is recorded.

How do I know a webhook message really came from Taxlane? Every message is signed with the secret shown when you registered the webhook. Your developers check the signature before trusting it.

Should I keep paper copies? Ask your tax adviser. Taxlane keeps your invoices and you can download a PDF of any of them at any time.

Is there a phone number for support? Not at the moment. Email taxlane@dfts.cloud.

Words you'll hear

- **EFRIS**: URA's electronic fiscal receipting and invoicing system, where every sale has to be reported.
- **URA**: Uganda Revenue Authority.
- **TIN**: Taxpayer Identification Number, the tax number of a business or person.
- **NIN**: National Identification Number, used to identify a person.
- **BRN**: Business Registration Number.
- **Tax invoice**: the document you give a buyer for a sale. With EFRIS, URA gives each one a unique number and a QR code.
- **Invoice number** (also called the fiscal document number): the unique number URA gives an invoice.
- **Verification code** (also called the antifake code): a code on the invoice that proves URA issued its number.
- **QR code**: the square barcode on an invoice. Scanning it checks the invoice with URA.
- **Credit note**: a document that corrects or reduces an invoice that was already issued.
- **Debit note**: a document that increases an invoice. The portal doesn't issue these.
- **Reference number**: your own number for a sale or credit note, used so the same one is never filed twice.
- **Gross, net and tax**: gross is the total the customer pays, net is the amount before tax, and tax is the VAT included in the gross.
- **VAT**: value added tax, 18% at the standard rate.
- **Walk-in customer**: a buyer with no tax number.
- **Item** (or goods): something you sell, registered with URA.
- **Unit**: how an item is counted, such as a piece, kilogram or litre.
- **Category**: the group URA files a product under, which decides its tax treatment.
- **Stock-in**: recording goods you've received.
- **Test setup** (sometimes called the *sandbox*): URA's practice system, where nothing is real.
- **Live** (sometimes called *production*): the real system, where invoices are real tax documents.
- **Device**: your registered connection to URA. Your Taxlane contact manages this.
- **Digital certificate**: the secure identity that signs your invoices. Your Taxlane contact manages this.
- **API key**: a secret code that lets your software talk to Taxlane.
- **Webhook**: a message Taxlane sends to your software when something happens.
- **Sync**: bringing invoices from URA into Taxlane.
- **Owner / member**: the two roles for people at your company.

Getting help

Email us at **taxlane@dfts.cloud**. To help us answer quickly, include:

- your company name,
- the invoice or credit note number, if there is one,
- what you were trying to do and what you saw (a screenshot helps),
- your email address.

Please never send passwords or API keys by email, even to us. We'll never ask.