Q4 — Product Configuration Manual

This manual is written for the business administrator. It covers every step that must be completed after a successful installation (Q3) before the business can start using VSMS Connect for day-to-day fiscalisation. Each section names the user role required to perform the action.

1. Creating the first administrator account

Required role: none — this step bootstraps the system.

Open VSMS Connect in a browser. The welcome screen offers a Get Started button which begins the registration flow.

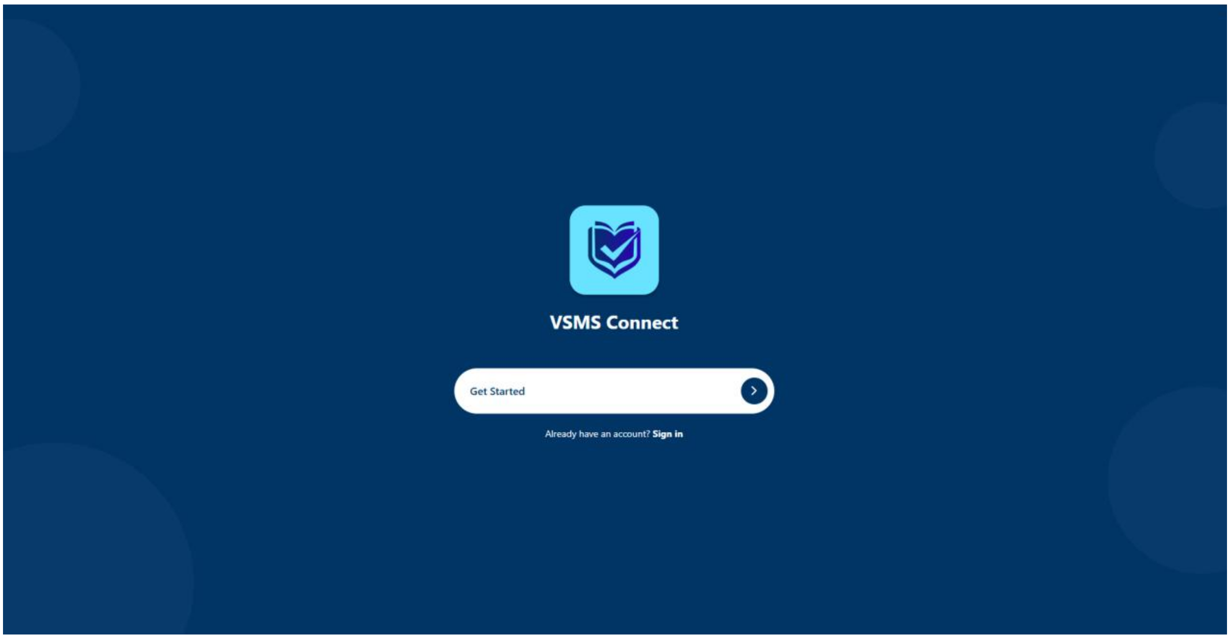

Figure 1 — Welcome screen.

Press Get Started, fill in your first name, last name, username, email, and password (twice), and press Create Account.

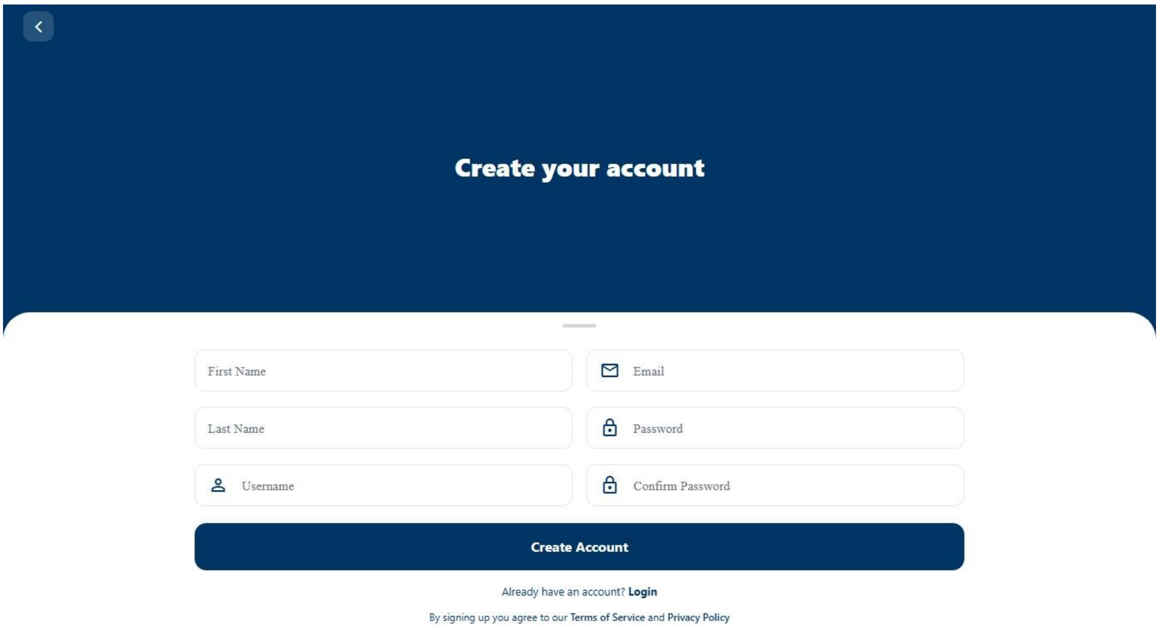

Figure 2 — Registration form for the first administrator.

Registration is locked after the first user — any additional users must be invited from inside the application (see section 5 below).

2. Registering the business

Required role: any user (this is the onboarding step).

After the first login, the app routes you to the Register Business wizard. The wizard has two steps: Business Details followed by TaxCore Configuration.

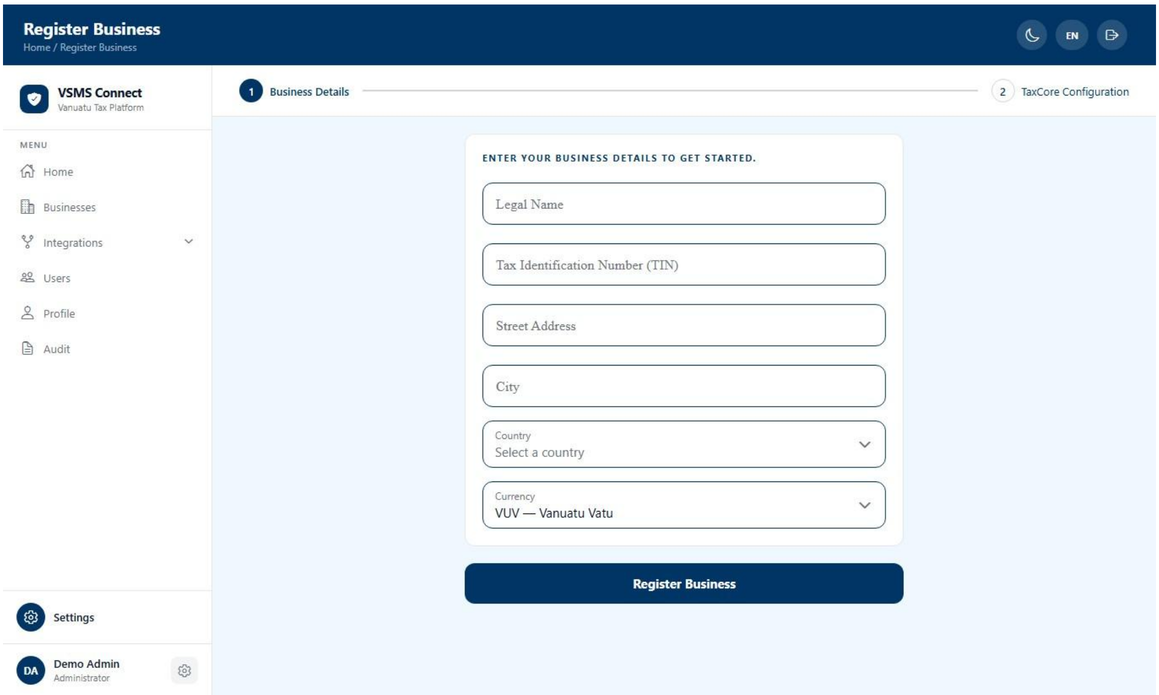

Figure 3 — Step 1 of the Register Business wizard.

Enter the legal business name, the Tax Identification Number (TIN), street address, city, country (use the ISO 3166-1 alpha-2 code, e.g. VU for Vanuatu), and the reporting currency (defaults to VUV). Press Next to advance to step 2.

3. Entering TaxCore credentials

Required role: administrator (or update_taxcore_credentials).

Step 2 of the wizard collects the V-SDC credentials issued by TaxCore. You will need four items from your TaxCore onboarding package:

Field	What it is	Where you find it
V-SDC certificate (.pfx)	The mTLS client certificate issued by TaxCore.	In the onboarding email from TaxCore.
PFX passphrase	The passphrase that decrypts the .pfx file. Treat as a secret.	Provided alongside the .pfx file.
PAC	Eight-character pairing code printed on the V-SDC label.	On the physical V-SDC sticker or the onboarding letter.
Business UID	Eight-character uppercase alphanumeric ID; must match the certificate.	On the onboarding letter; rejected at save time if it does not match.

After you submit step 2, VSMS Connect validates the PAC against the V-SDC (a /status call), confirms the certificate and UID align, then persists the credentials with AES-256-GCM encryption. If the PAC or UID is wrong you will see an inline error — correct the field and try again.

> ***After registration*** *— Once both steps complete the wizard exits to the Businesses screen. The business card shows your registered business with TIN, country, currency, and a Certificate status of either Uploaded (green) or Not uploaded (red).*

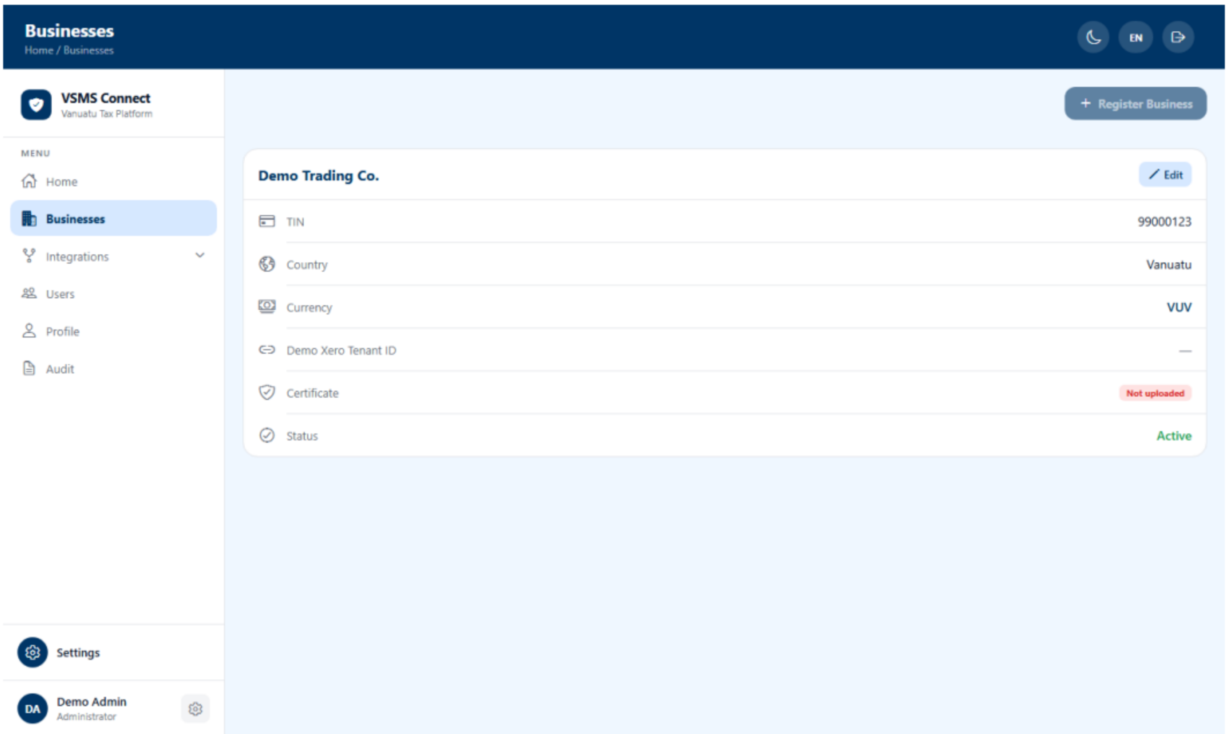

Figure 4 — Businesses screen after registration, with the new business card visible.

4. The administrator dashboard

Once the business is registered the Home screen becomes available. It is empty until the first invoice arrives via an accounting provider sync or CSV import.

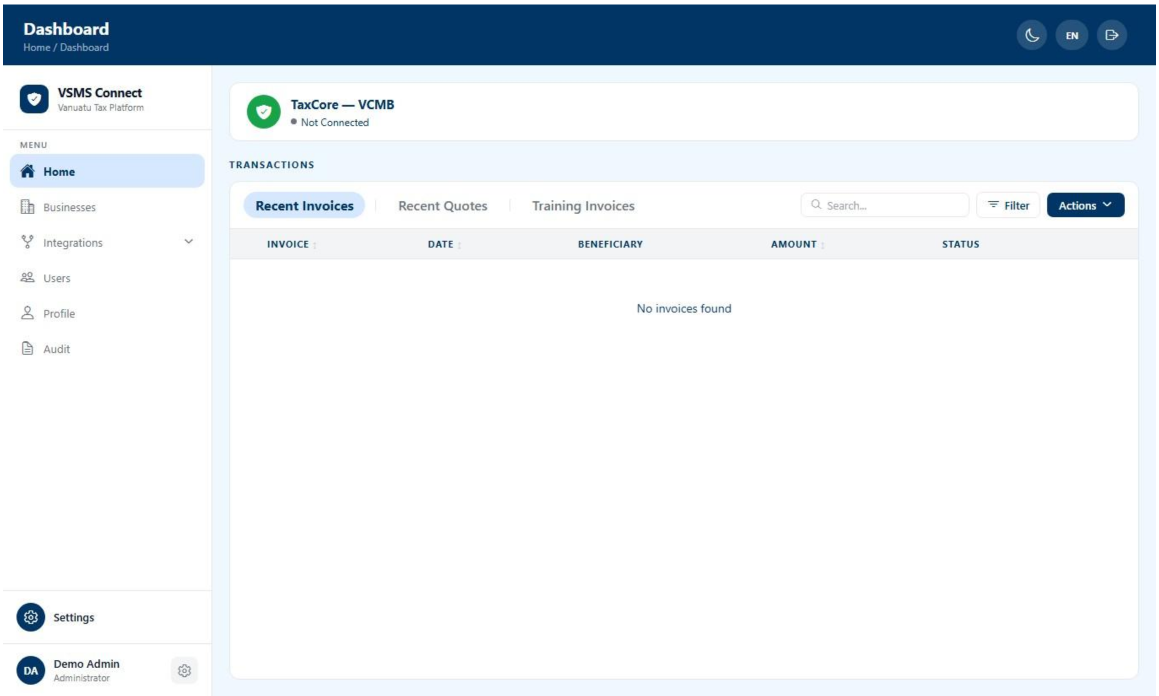

Figure 5 — Home dashboard immediately after onboarding, before the first sync.

5. Inviting and managing users

Required role: manage_users (or administrator).

Open the Users screen from the sidebar. The screen lists every user attached to the business and offers an Invite button.

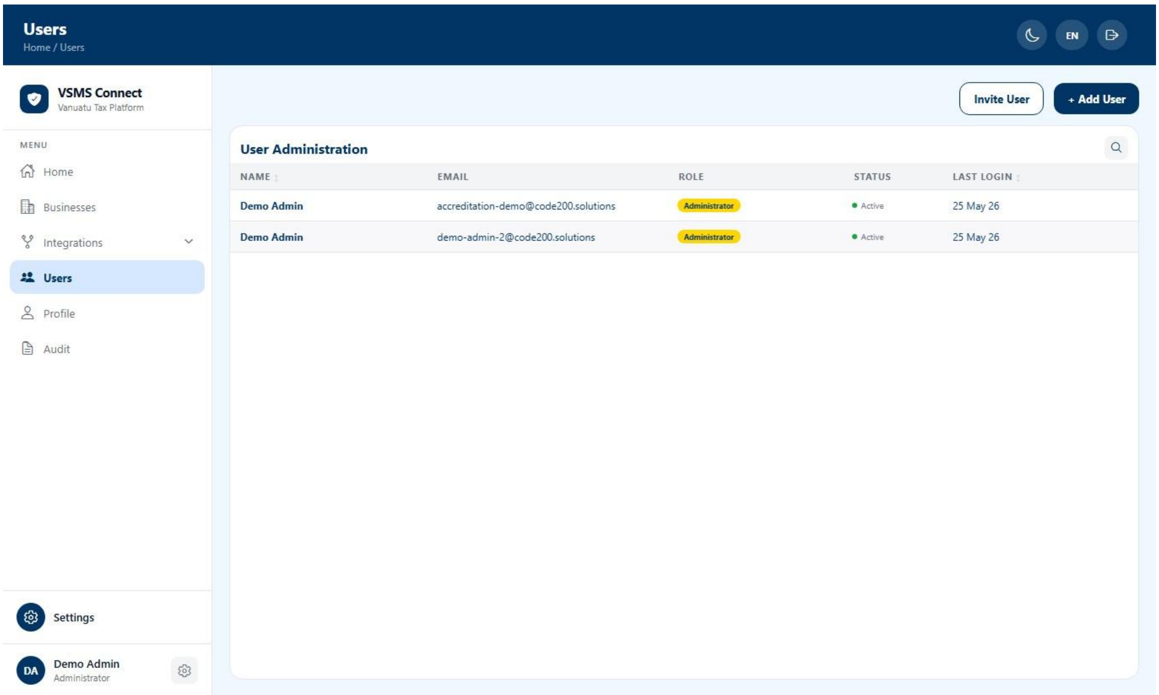

Figure 6 — Users screen. The administrator who registered the business is the only user until invites are sent.

Press Invite, enter the new teammate's email, and select one or more roles. VSMS Connect sends an invitation email containing a one-time tokenised link valid for 72 hours. When the invitee clicks the link, they complete a short registration form (first name, last name, username, password) and are automatically linked to your business with the roles you assigned.

If an invitation link expires (after 72 hours), the administrator must resend the invitation from the Users screen. The expired link cannot be reused.

Available roles

Role	Capabilities
administrator	Implies every other role. Required to connect accounting providers, manage tax mappings, and modify the auto-fiscalise toggle.
manage_users	Invite and edit users; create the business if not already created.
view_invoices	Read-only access to the home dashboard and invoice detail screens.
submit_invoices	Includes view_invoices, plus the ability to import CSVs and trigger fiscalisation.
update_business_settings	Edit business name, address, currency.
update_taxcore_credentials	Edit the V-SDC certificate, passphrase, PAC, and UID.
view_audit	Open the Audit screen and read the activity log. Administrators also bypass this guard via isAdmin.

6. Connecting an accounting provider

Required role: administrator.

VSMS Connect supports three cloud accounting providers (Xero, Sage Business Cloud, MYOB) plus on-premise providers (Amicus, Sage 100, Sage 200 Evolution, Sage 300, Atrex). Each one is set up from its dedicated integration screen under the Integrations group in the sidebar. The setup flow is the same for all cloud providers: press Connect, authorise VSMS Connect in the provider's OAuth consent screen, and return to the app.

6.1 Xero

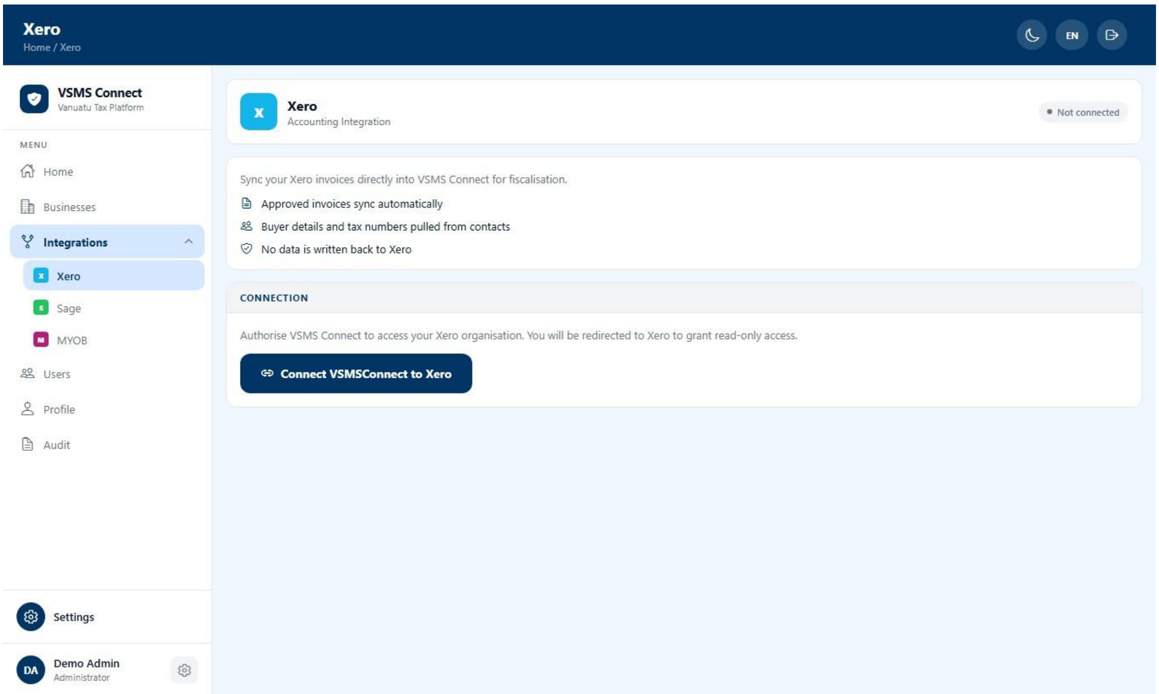

Figure 7 — Xero integration screen before connecting.

1. Press Connect VSMSConnect to Xero. The platform opens the Xero OAuth consentscreen in a new browser tab (web) or the system browser (mobile).
2. Sign in with the Xero account that owns the organisation you want to connect. Tick theconsent checkboxes and press Allow.
3. You are redirected back to VSMS Connect. The integration card now shows the activetenant name and a green Connected badge.
4. After connecting, the Tax Rate Mappings section becomes available. See section 7.

6.2 Sage

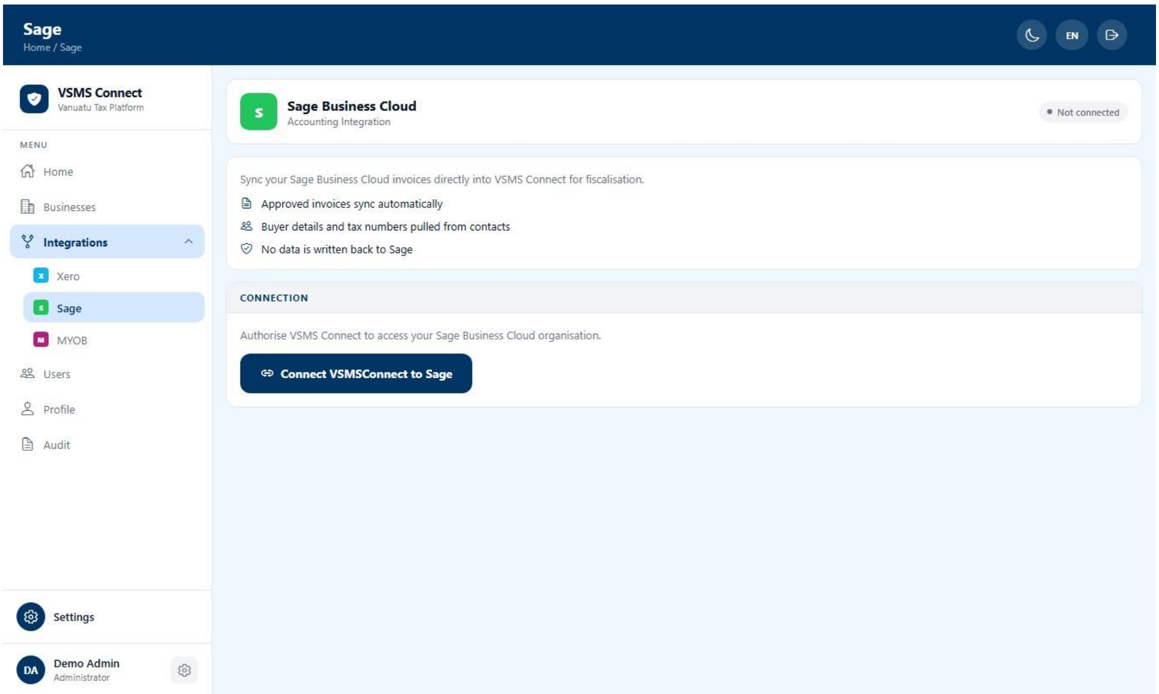

Figure 8 — Sage integration screen.

Sage Business Cloud follows the same OAuth flow as Xero. Sage accounts are scoped to a single business per OAuth token, so there is no tenant selector after connection.

6.3 MYOB

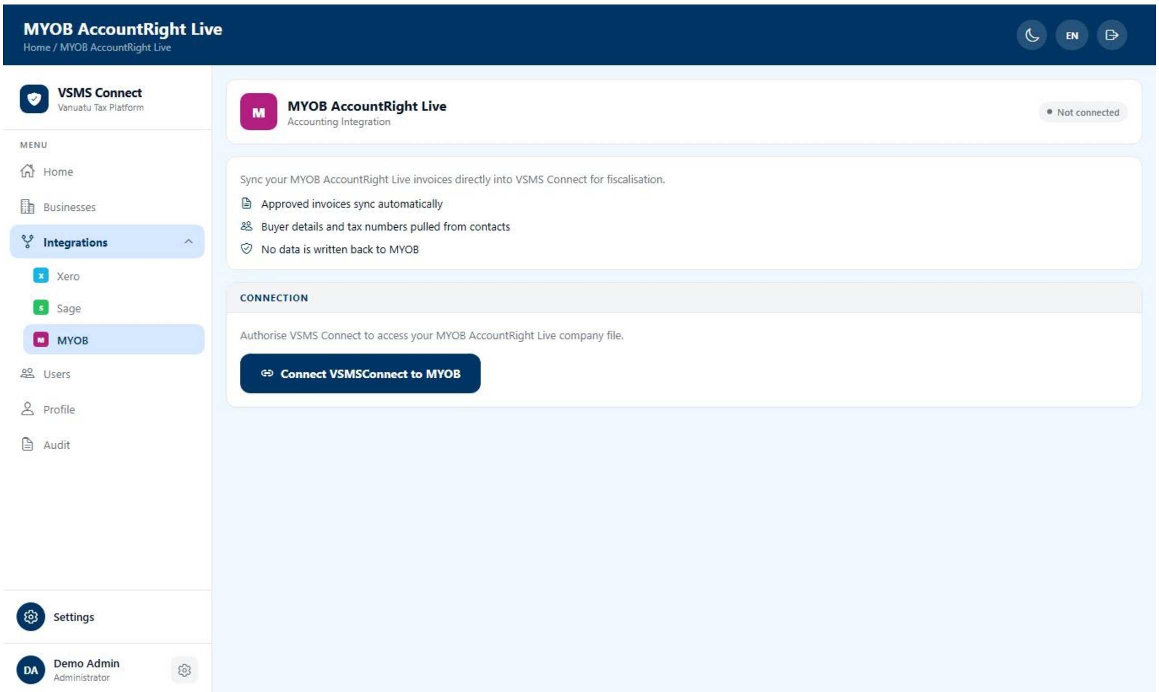

Figure 9 — MYOB integration screen.

MYOB AccountRight Live exposes one OAuth token per business that grants access to one or more company files. After connecting you will see a list of company files; pick the file you want to fiscalise from and press Activate.

6.4 On-Premises Providers

On-premises providers connect via a Data Collection Agent installed on the computer running the local accounting software. Unlike cloud providers, there is no OAuth flow — instead, you generate an API Key in VSMS Connect and enter it into the agent setup wizard.

Supported on-premises systems: AMICUS, Sage 100, Sage 200 Evolution, Sage 300, Atrex.

6.5 Setting Up an On-Premises Provider

1. In the VSMS Connect app, open Businesses then Integrations then select the provider's name.
2. Press Create API Key. Give it a name and optionally assign it to a specific location.
3. Copy the API Key — it is shown only once.
4. On the computer running the accounting software, run the Sales Agent installer (download from the app or from /api/v1/agents/ on the backend).
5. In the setup wizard, select your provider, enter the database connection details, and paste the Backend URL, Business ID, and API Key.
6. The agent installs as a background service and begins syncing invoices automatically.

7. Configuring tax-rate mappings

Required role: administrator.

Each connected provider has its own Tax Rate Mappings panel directly beneath the connection card on the integration screen. Mappings tell VSMS Connect which V-SDC label (F, N, P, E, T, A, B, C, or D) to use for each tax code arriving from the provider.

1. Press Sync tax rates from <provider> to fetch every active rate configured in the provider and run auto-map. VSMS Connect returns a set of suggestions, one per provider tax code.
2. Review each suggestion. Confirm the unambiguous matches; review the ambiguous ones (rows flagged Needs review — usually 0% codes that could be N, B, C, or D depending on context).
3. Press Confirm to persist the mapping. Any invoices that were blocked forMISSING_TAX_MAPPING and now resolve unlock immediately and auto-fiscalise if the toggle is on.

Auto-Map Feature (Sage 200 Evolution only): Tap Auto-Map Tax Rates, provide your Sage database connection credentials, and VSMS Connect will read your Sage tax rate table directly and suggest mappings automatically. Review and confirm the suggestions to complete the process.

After saving your mappings, use the **Reprocess Unmapped** button on the invoice list to re-evaluate all invoices that were blocked due to missing tax mappings and release them for fiscalisation.

Tax Rate Synchronisation: When TaxCore updates its tax rates, VSMS Connect detects the change automatically and records a TAX_MAPPING_RATE_DRIFTED event in the audit log. Administrators can manually re-sync tax mappings on demand from the Tax Rate Mappings screen at any time.

Mappings are soft-deleted by default — pressing Delete on a row sets it inactive but keeps the history. Use Restore to re-activate.

8. Adjusting the auto-fiscalise toggle

Required role: administrator.

On any connected integration screen, the Auto-fiscalise new invoices switch controls whether newly paid invoices arriving via sync, webhook, or the scheduled poll are sent to TaxCore automatically. The default is on. Switch it off if your business prefers to review every invoice manually before fiscalising.

> ***Manual fiscalisation always works*** *— Switching the toggle off does not disable manual fiscalisation. Users with submit_invoices or administrator can still trigger any eligible invoice from the home table or the detail screen.*

9. Managing Locations

Required role: administrator.

VSMS Connect supports multi-location businesses. Each location can have its own V-SDC certificate, API keys for on-premise agents, and receipt printers. To add a location: open Businesses then Locations then Add Location. Enter the name, address, and type. The first location (Headquarters) is created automatically during business registration. To set a location as default: open the location and press Set as Default. To delete a location: open the location and press Delete — you cannot delete the default location.

10. Managing Certificates

Required role: administrator (or update_taxcore_credentials).

Each location can have its own V-SDC certificate for businesses operating multiple sites registered separately with TaxCore. To upload a certificate: open Businesses then Locations then select a location then Certificates then Upload Certificate. Upload the .pfx file and enter its passphrase. Press Set as Default to make it the active certificate for that location. If a location has no certificate assigned, VSMS Connect falls back to the Headquarters certificate and shows a warning.

11. Managing API Keys

Required role: administrator.

API Keys authenticate the on-premise Sales Agents. Each key is scoped to a provider type and optionally to a specific location. To create an API Key: open Businesses then Integrations then select the provider then API Keys then Create. Set a name, select the provider scope, and optionally assign it to a location. Copy the key immediately — it cannot be retrieved after creation. To revoke a key: press Revoke on the key row. The agent using that key will stop syncing immediately.

12. Setting Up Receipt Printers

Required role: administrator.

Each receipt printer is registered as a Till. When an invoice is fiscalised, the signed receipt is automatically routed to the till associated with that invoice. To pair a new printer: open Businesses then Receipt Printers then New Printer then Generate Setup Token. A one-time token is shown (valid for 24 hours). On the computer connected to the printer, run the Print Agent installer, enter the Backend URL and the Setup Token when prompted, and enter a name for this till. Once the agent claims the token, the till appears in the Receipt Printers list as Online. To test a printer: press Test Print. To re-pair a printer: press Revoke Setup Token, then Generate Setup Token again.

Fiscalised receipts can also be shared electronically. From the invoice detail screen, tap **Print / Share** to export the signed receipt as a PDF for sharing via email or other platforms. Alternatively, tap **Email Receipt** to share a TaxCore verification link directly.

13. MCP Tokens

Required role: administrator.

VSMS Connect includes a built-in MCP (Model Context Protocol) server that lets AI assistants like Claude interact with your invoice and fiscalisation data. To create an MCP token: open Businesses then Agents and MCP then Create Token, enter a name (e.g. “Claude Desktop”), and copy the token and the MCP server URL shown — the token is shown only once. In Claude Desktop, open Settings then Developer then Add MCP Server and paste the server URL and token. Tokens are valid for 90 days. To revoke a token, press Revoke on the token row.

Audit access

Required role: view_audit (administrators bypass automatically).

The Audit screen is the canonical record of every action taken in the system. It is the primary surface for both local and remote compliance inspections; see Q2 sections 8 and 9 for the operator-facing view of the same screen.

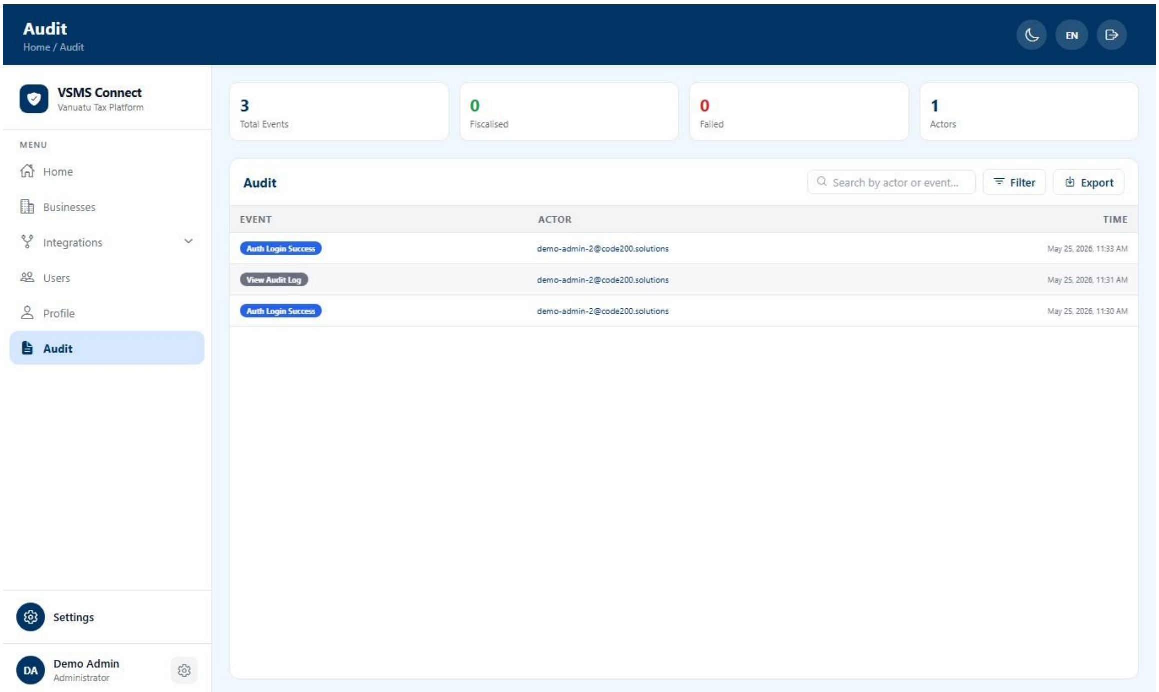

Figure 10 — Audit screen, available to administrators and any user with view_audit.

Final Configuration Checklist

- First administrator registered (Get Started → Sign Up).
- Business registered with legal name, TIN, address, currency.
- TaxCore credentials uploaded — certificate green-ticked.
- At least one accounting provider connected.
- Tax-rate mappings reviewed and confirmed.
- Teammates invited with the right roles.
- Auto-fiscalise toggle set to match the customer's policy.
- Audit screen reachable and showing recent events.
- At least one location created (or Headquarters confirmed).
- Certificates uploaded and green-ticked for each active location.
- API Keys created for any on-premises agents.
- Receipt printers paired and showing Online (if using on-premises vprinting).
- On-premises provider integrations showing Connected with first invoices appearing.
- Electronic receipt sharing tested (Print / Share or Email Receipt).

When every item is ticked the system is ready for production use. Hand the Q2 (User Manual) over to the end users so they know how to sign in, find invoices, fiscalise, and resolve blocked or failed submissions.