

How to configure zoho into Ctax

Step 1: Login to your zoho Books Account: <https://accounts.zoho.com/signin>



Sign in
to access Accounts

Change

Sign in using email OTP

Forgot Password?



Enhanced sign-in security

Secure using only a password. To
Back in 2019, to ensure security of your accounts, we're
introducing additional verification for any
unusual sign-in attempt.

Learn more
Learn more

Step 2: Go to zoho books: <https://books.zoho.com/home>

The screenshot shows the Zoho Books dashboard. The left sidebar contains navigation options: Home, Items, Banking, Sales, Purchases, Accountant, Reports, and Documents. The main area displays several key metrics:

- Total Receivables:** Total Unpaid Invoices AED257,010.90. Breakdown: CURRENT AED0.00, OVERDUE AED257,010.90.
- Total Payables:** Total Unpaid Bills AED1,403,738.81. Breakdown: CURRENT AED525,021.53, OVERDUE AED878,717.28.
- Cash Flow:** This Fiscal Year. Cash as on 01 Jan 2023: AED20,700.25.

Step 3: Copy Organization ID from navigation panel

The screenshot shows the Zoho Books navigation panel. The 'My Organizations' section is visible, displaying the Organization ID: 660328225.

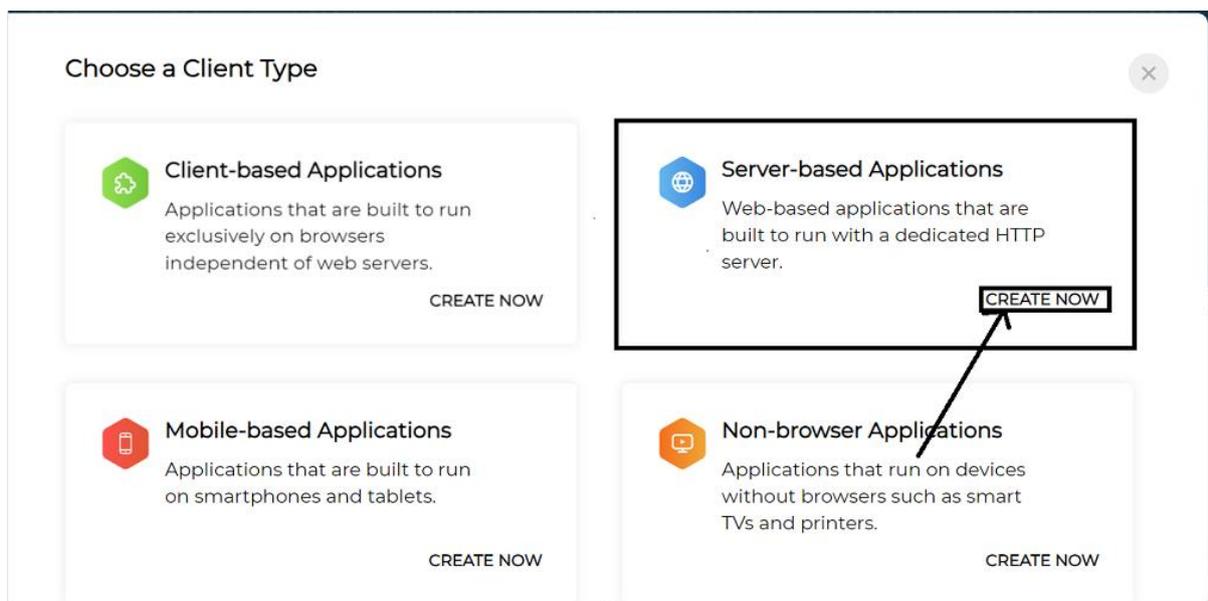
Step 4: Go to zoho api console: <https://api-console.zoho.com/>



Step 5: Click on ADD CLIENT button



Step 6: Select on server-based Application and click CREATE NOW



Step 7: Fill in the application details

Create New Client

Client Type

Server-based Applications

Client Name

CTAX

Homepage URL

<https://app.ctaxuae.com/login>

Authorized Redirect URIs

<https://app.ctaxuae.com/grant-token>

CREATE

Note: Homepage URL to be replaced with the current app url eg:

<https://app.ctaxuae.com/login>

Note: Authorized Redirect URL to be replaced with the current app /grant-token url eg:

<https://app.ctaxuae.com/grant-token>

Step 8: Click on CREATE button

Create New Client

Client Type

Server-based Applications

Client Name

CTAX

Homepage URL

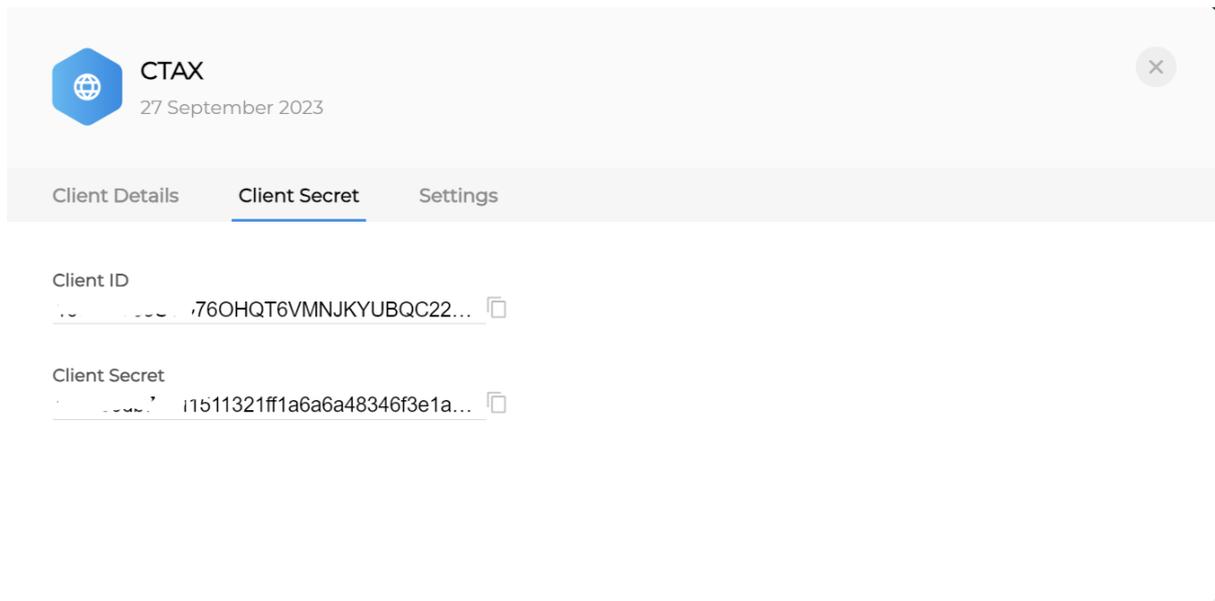
<https://app.ctaxuae.com/login>

Authorized Redirect URIs

<https://app.ctaxuae.com/grant-token>

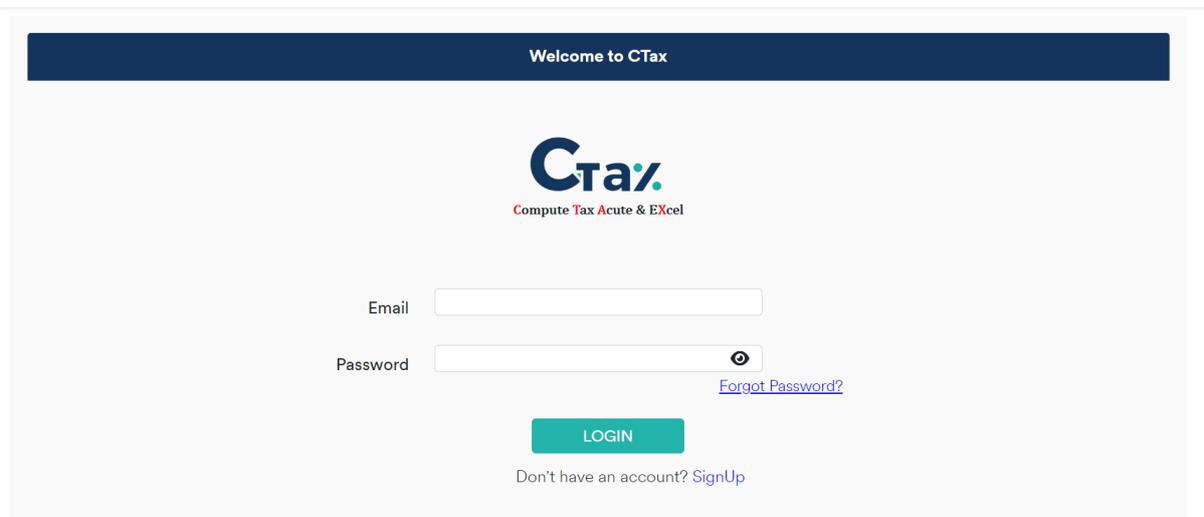
CREATE

Step 9: Copy Client ID & Client Secret



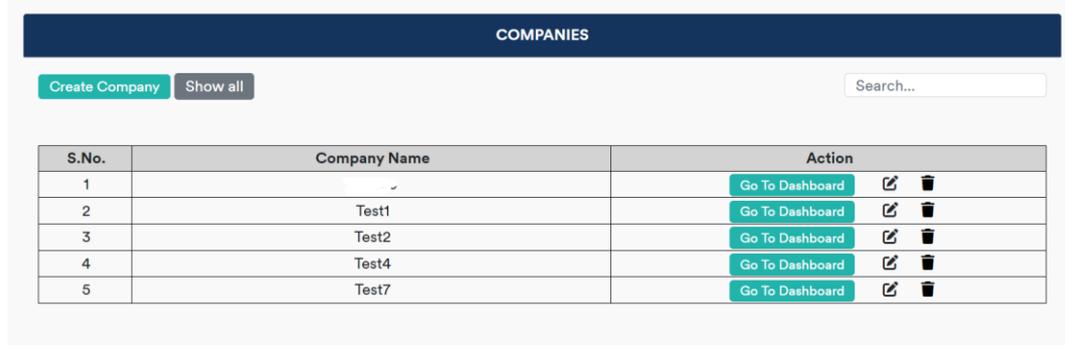
The screenshot shows a web interface for managing a client named "CTAX". At the top left is a blue hexagonal icon with a globe. To its right, the text "CTAX" is displayed, followed by the date "27 September 2023". A close button (X) is in the top right corner. Below this is a navigation bar with three tabs: "Client Details", "Client Secret" (which is selected and underlined), and "Settings". Under the "Client Secret" tab, there are two rows of information. The first row is labeled "Client ID" and shows a long alphanumeric string: "76OHQT6VMNJKYUBQC22...". The second row is labeled "Client Secret" and shows another long alphanumeric string: "11511321ff1a6a6a48346f3e1a...". Each string has a small copy icon to its right.

Step 10: Go to Ctax <https://app.ctaxuae.com/login> (Should be replaced by create software URL)



The screenshot shows the login page for "CTax". At the top, a dark blue banner contains the text "Welcome to CTax". Below the banner is the "CTax" logo, with the tagline "Compute Tax Acute & EXcel" underneath. The main content area contains two input fields: "Email" and "Password". The "Password" field has a toggle icon (an eye) to its right. Below the "Password" field is a blue link that says "Forgot Password?". At the bottom center is a green "LOGIN" button. Below the button is the text "Don't have an account? [SignUp](#)".

Step 11: Login to the application & Go to Home page / Company List



The screenshot shows the 'COMPANIES' page. At the top, there is a dark blue header with the word 'COMPANIES' in white. Below the header, there are two buttons: 'Create Company' (green) and 'Show all' (grey). To the right of these buttons is a search input field with the placeholder text 'Search...'. Below the search field is a table with the following data:

S.No.	Company Name	Action
1		Go To Dashboard  
2	Test1	Go To Dashboard  
3	Test2	Go To Dashboard  
4	Test4	Go To Dashboard  
5	Test7	Go To Dashboard  

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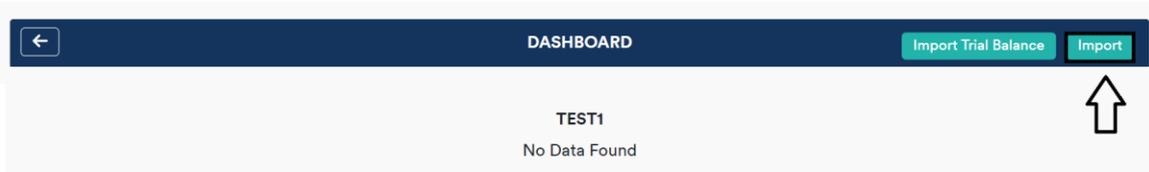
Step 12: Go to dashboard of the company for which you want to configure



The screenshot shows the 'DASHBOARD' page for company 'TEST1'. The header is dark blue with a back arrow on the left, the word 'DASHBOARD' in the center, and two buttons on the right: 'Import Trial Balance' (green) and 'Import' (green). Below the header, the text 'TEST1' and 'No Data Found' is displayed in the center.

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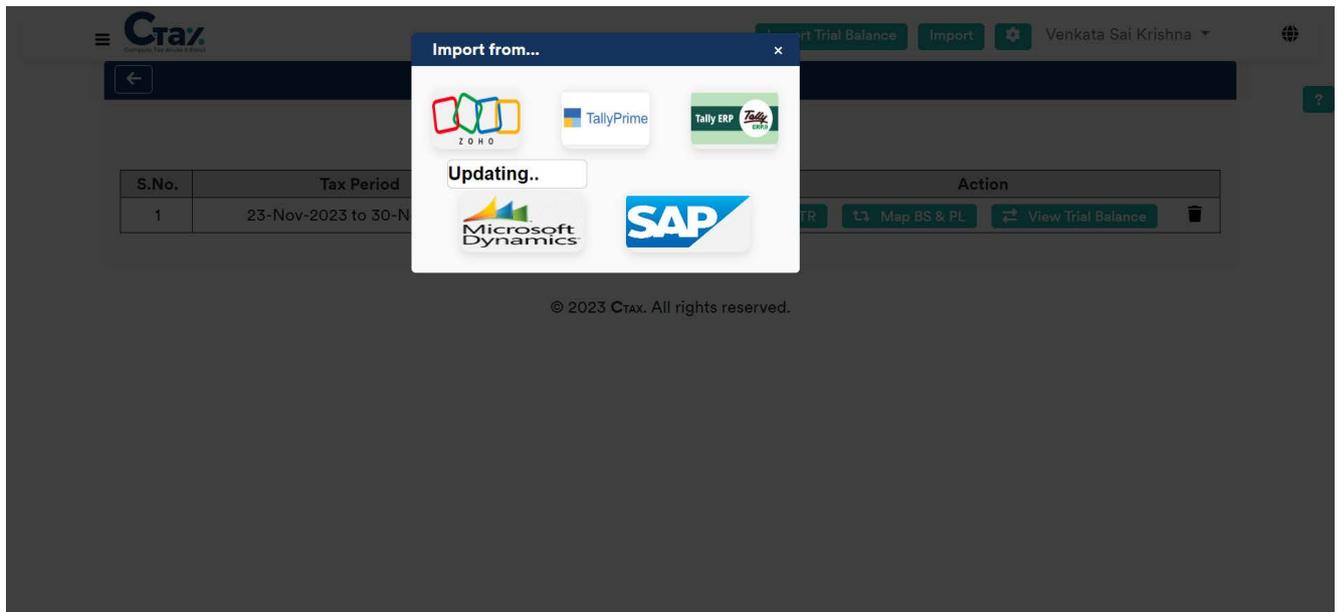
Step 13: Click on Import



This screenshot is identical to the previous one, but with a white arrow pointing upwards to the 'Import' button in the top right corner of the dashboard header.

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Step 14: Click on Zoho



Step 15: Setup Zoho cred

ZOHO CONFIGURATION

Client-ID	<input type="text"/>	Client secret key
Username	<input type="text"/>	Zoho User ID
Password	<input type="text"/>	Zoho account password
Organization ID	<input type="text"/>	Organization Id
Secret ID	<input type="text"/>	Client Scret

Note: Add the following details

Client ID = Client ID see "Step 9"

Username = your Zoho login email/username

password = Zoho login password

Organization ID = Origination Id see "Step 3"

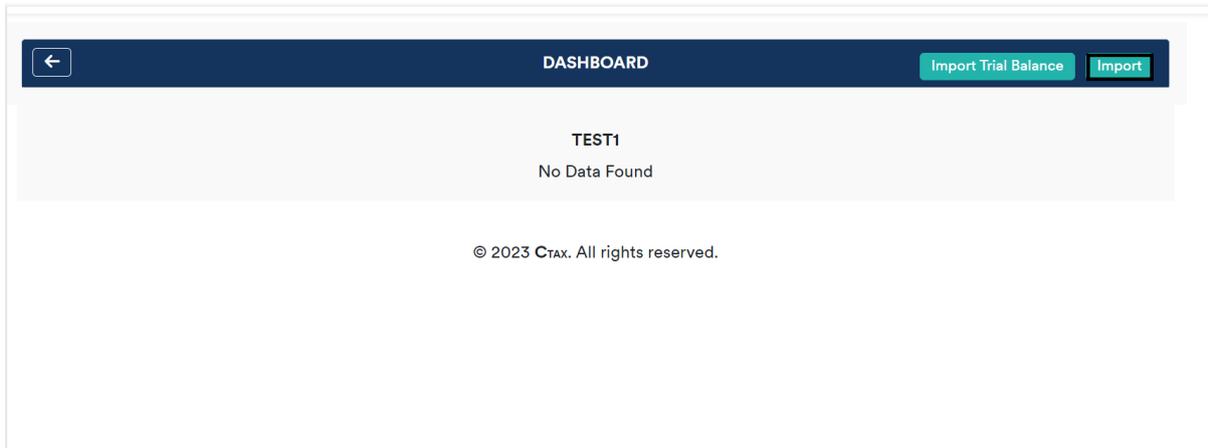
Client Secret = Client Secret Key see "Step 9"

Click submit

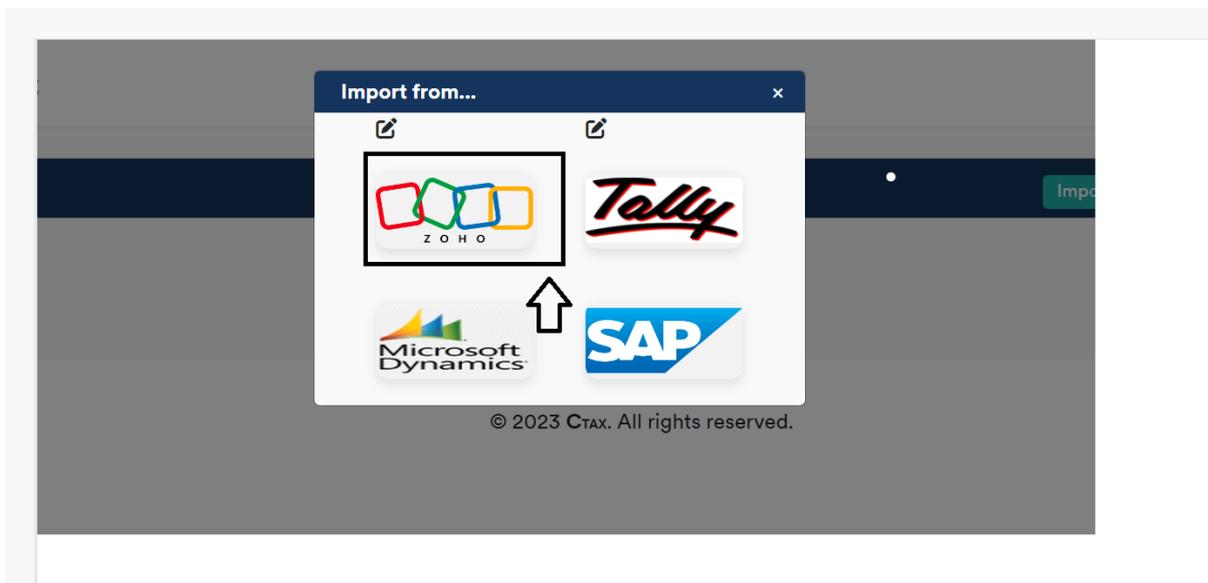
Configuration Done 😊

How to Import Zoho Data

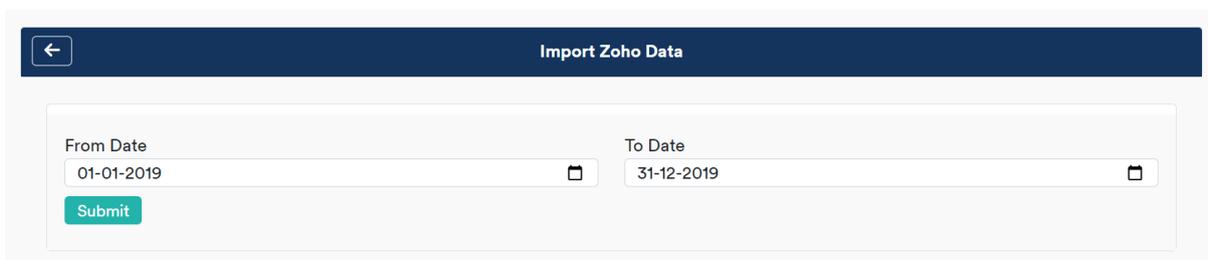
Step 1: Go to configured company dashboard & Click on Import



Step 2: Click on Zoho



Step 3: Add date range for selection of data



Step 4: Map all the un-selected ledger & click submit

←Zoho Mapping Data

#		
1	Operating Income	Income
2	Cost of Goods Sold	-- select category --
3	Operating Expense	Expense
4	Non Operating Expense	Expense
5	Assets	Assets
6	Liabilities & Equities	Liabilites
		Submit

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Step 5: Data Imported Successfully 😊

←DASHBOARD[Import Trial Balance](#) [Import](#)

TEST1

S.No.	Tax Period	Date	Action
1	01-Jan-2019 to 31-Dec-2019	2023-09-27 13:13:24	↔ Map BS & PL ↔ View Trial Balance

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