

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 Q1, 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. On the left is a navigation menu with 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 expanded, showing the Organization ID: 660326225. The ID is highlighted in yellow, and there are 'Manage' and 'Close' buttons next to it.

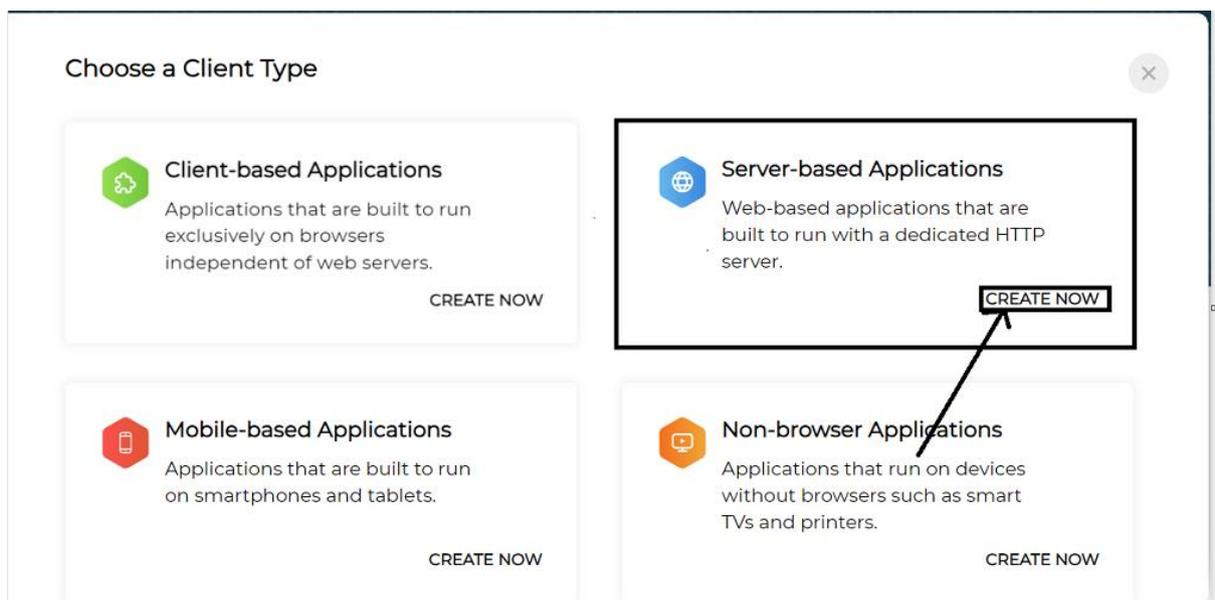
Step 4: Go to zoho api console: <https://api-console.zoho.com/>



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

http://172.105.52.7/report_gen/public/

Authorized Redirect URIs

http://172.105.52.7/report_gen/public/grant-token

CREATE

Note: Homepage URL to be replaced with the current app url eg: <http://ctax.com>

Note: Authorized Redirect URL to be replaced with the current app /grant-token url eg: <http://ctax.com/grant-token>

Step 8: Click on CREATE button

Create New Client

Client Type

Server-based Applications

Client Name

CTAX

Homepage URL

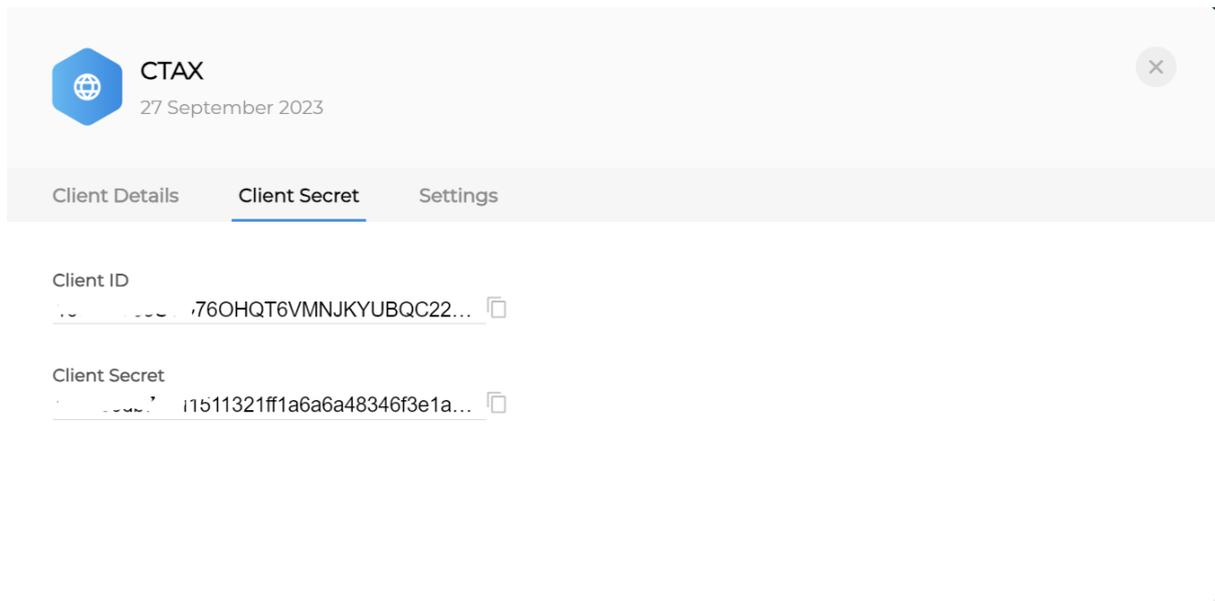
http://172.105.52.7/report_gen/public/

Authorized Redirect URIs

http://172.105.52.7/report_gen/public/grant-token

CREATE

Step 9: Copy Client ID & Client Secret

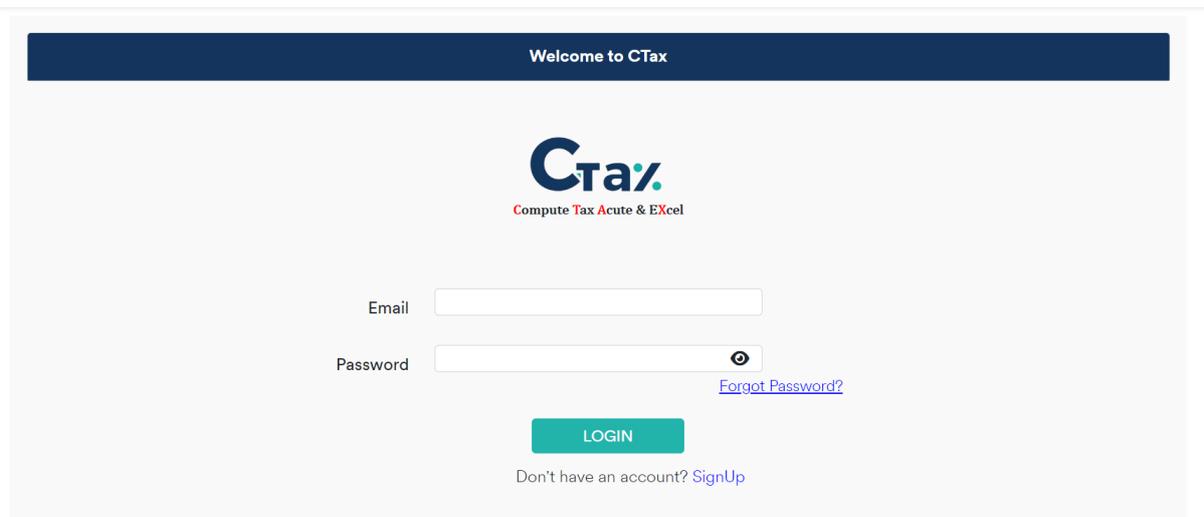


The screenshot shows a web interface for managing a client named "CTAX". At the top left is a blue hexagonal icon with a globe. To its right, the text "CTAX" is displayed, followed by the date "27 September 2023". A close button (an 'x' in a circle) is in the top right corner. Below this header is a navigation bar with three tabs: "Client Details", "Client Secret" (which is underlined and highlighted), and "Settings".

Under the "Client Secret" tab, there are two sections:

- Client ID:** A text field containing a long alphanumeric string: "76OHQT6VMNJKYUBQC22...". To the right of the text is a small square icon with a document symbol, indicating a copy function.
- Client Secret:** A text field containing another long alphanumeric string: "1511321ff1a6a6a48346f3e1a...". To the right of the text is a small square icon with a document symbol, indicating a copy function.

Step 10: Go to Ctax http://172.105.52.7/report_gen/public/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 features a login form with two input fields: "Email" and "Password". The "Password" field has a small eye icon to its right, which is currently closed. Below the "Password" field is a blue link that says "Forgot Password?". At the bottom of the form is a green button labeled "LOGIN". Below the button, there is a link that says "Don't have an account? SignUp".

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

COMPANIES

Create Company Show all Search...

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

DASHBOARD Import Trial Balance Import

TEST1
No Data Found

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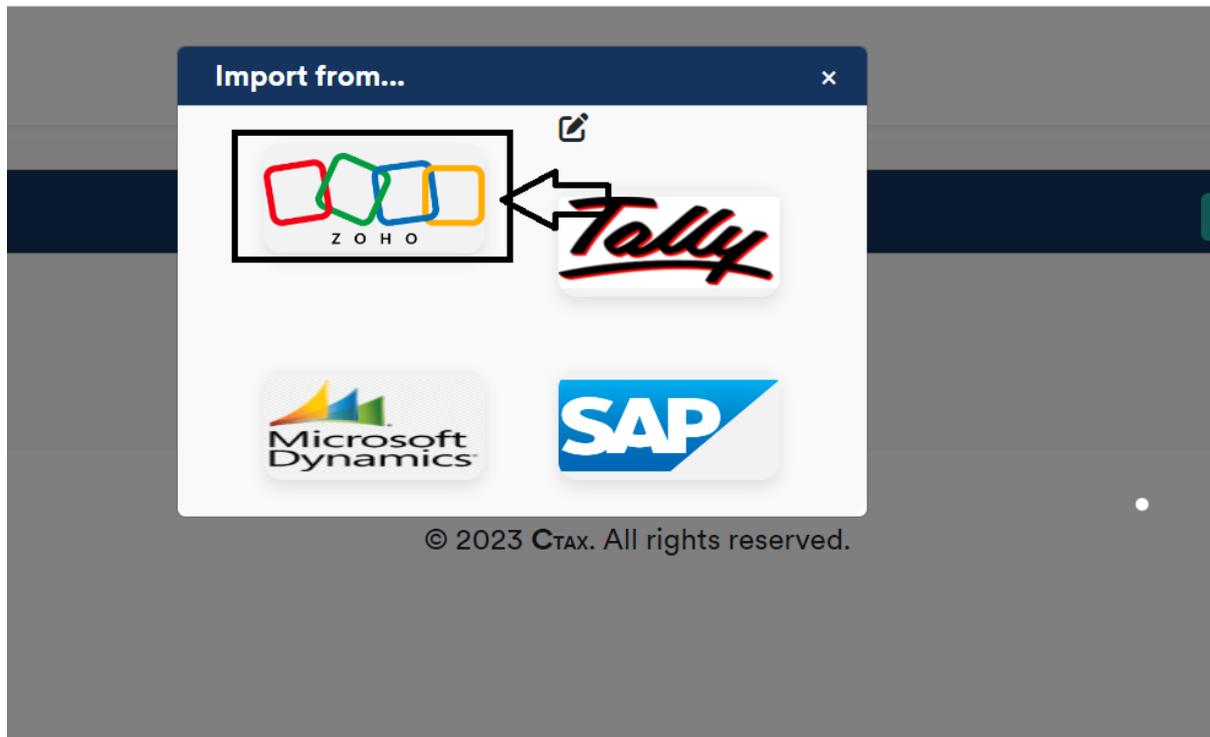
Step 13: Click on Import

DASHBOARD Import Trial Balance Import

TEST1
No Data Found

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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

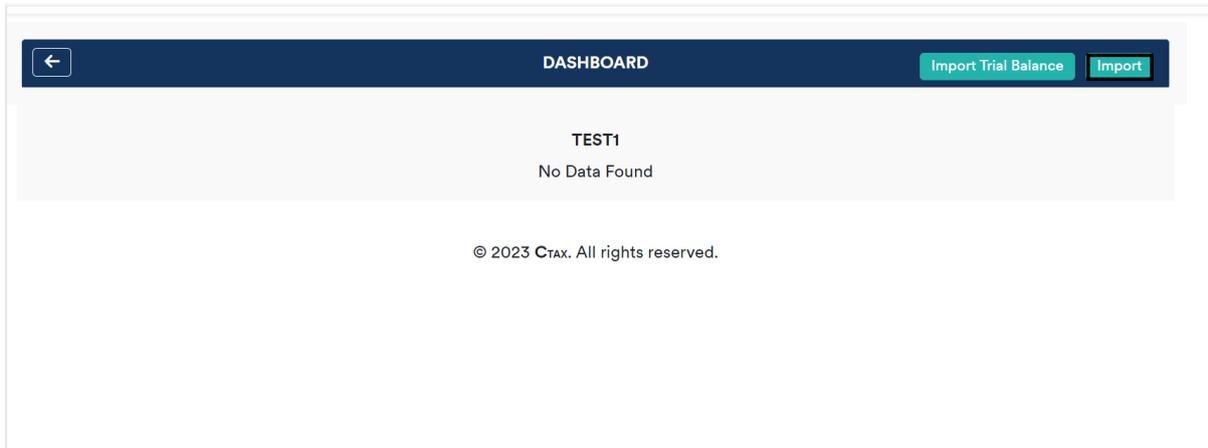
Organization ID = Origination Id see "Step 3"
Client Secret = Client Secret Key see "Step 9"

Click submit

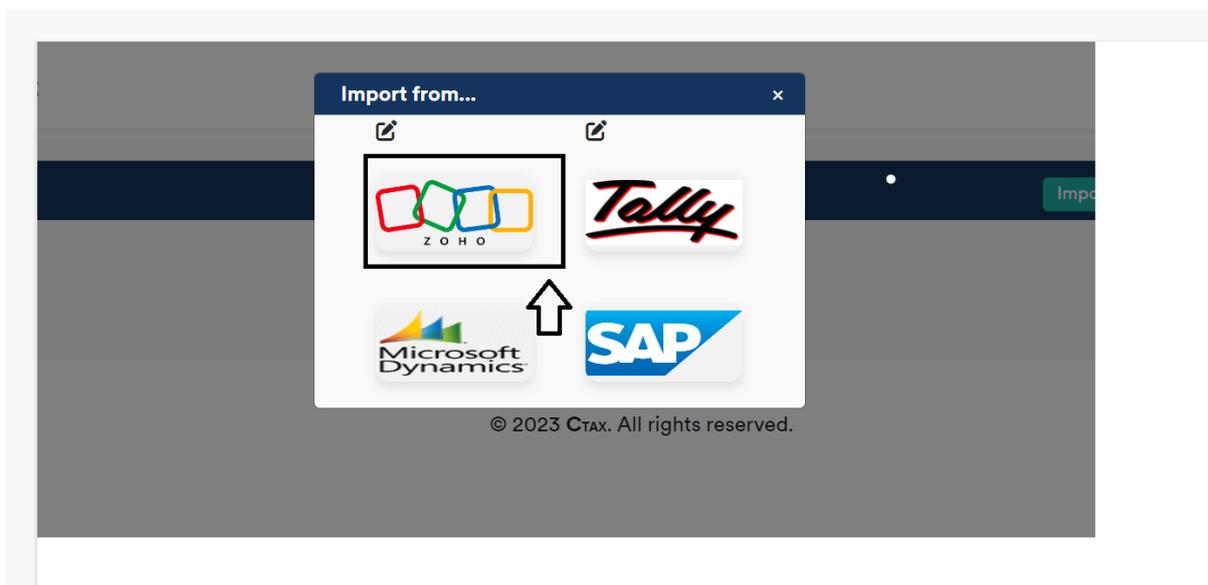
Configuration Done 😊

How to Import Zoho Data

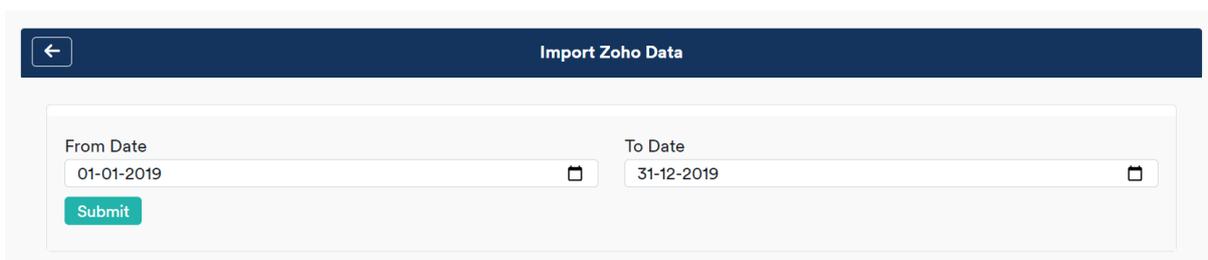
Step 1: Go to configured company dashboard & Click on Import



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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