

# How to configure zoho into Ctax

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



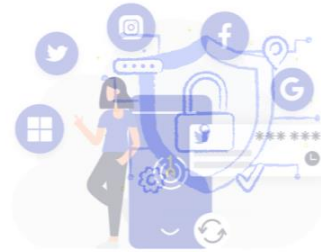
**Sign in**  
to access Accounts

[Change](#)

[Sign in using email OTP](#)

[Forgot Password?](#)

**Sign in**



## Enhanced sign-in security

Secure using only a password. To sign in to Zoho Books, we've introduced 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 (selected), Items, Banking, Sales, Purchases, Accountant, Reports, and Documents. The main area displays a dashboard with sections for 'Total Receivables' and 'Total Payables'. 'Total Receivables' shows 'Total Unpaid Invoices AED257,010.90' with a bar chart and a breakdown into 'CURRENT AED0.00' and 'OVERDUE AED257,010.90'. 'Total Payables' shows 'Total Unpaid Bills AED1,403,738.81' with a bar chart and a breakdown into 'CURRENT AED525,021.53' and 'OVERDUE AED878,717.28'. Below these is a 'Cash Flow' section for 'This Fiscal Year' showing 'Cash as on 01 Jan 2023 AED230,700.35'. The top header includes a search bar, user profile, and various icons.

**Step 3:** Copy Organization ID from navigation panel

This screenshot shows the same Zoho Books dashboard as before, but with the 'My Organizations' panel open on the right side. The panel displays the organization's name, 'Organization ID: 860328225', and a 'Manage' link. The background dashboard content is dimmed.

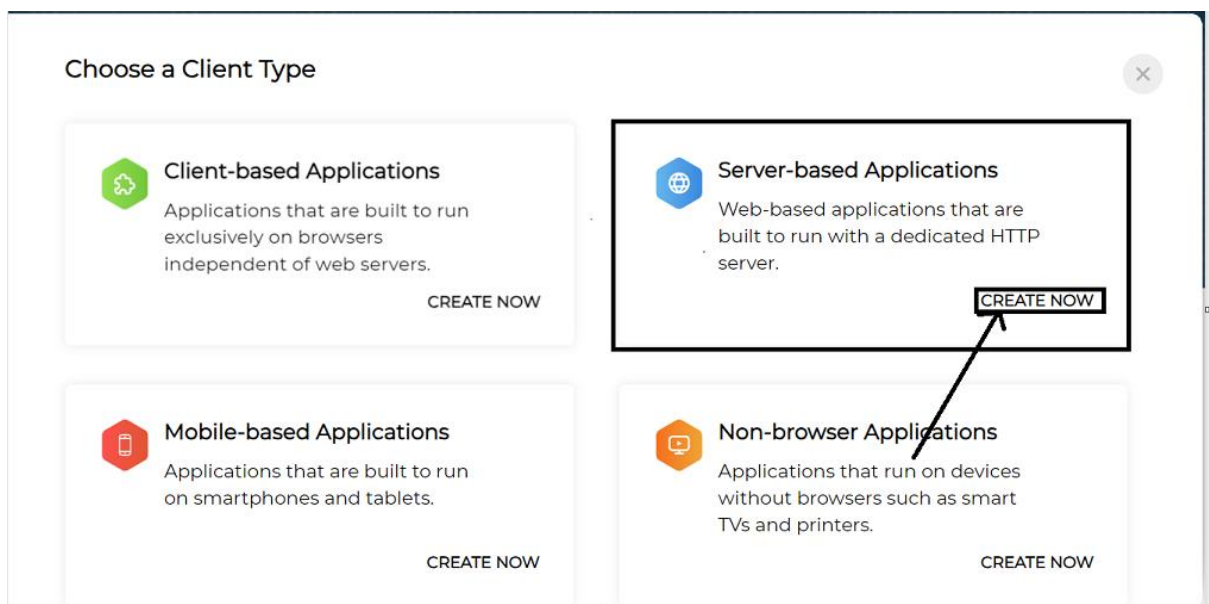
**Step 4:** Go to zoho api console: <https://api-console.zoho.com/>



**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

 **CTAX**  
27 September 2023

Client Details

**Client Secret**


Settings

Client ID  
76OHQT6VMNJKYUBQC22...

Client Secret  
11511321ff1a6a6a48346f3e1a...

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

Welcome to CTax

  
Compute Tax Acute & EXcel

Email

Password

[Forgot Password?](#)

LOGIN

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		<div>Go To Dashboard</div> <div></div> <div></div>
2	Test1	<div>Go To Dashboard</div> <div></div> <div></div>
3	Test2	<div>Go To Dashboard</div> <div></div> <div></div>
4	Test4	<div>Go To Dashboard</div> <div></div> <div></div>
5	Test7	<div>Go To Dashboard</div> <div></div> <div></div>

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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

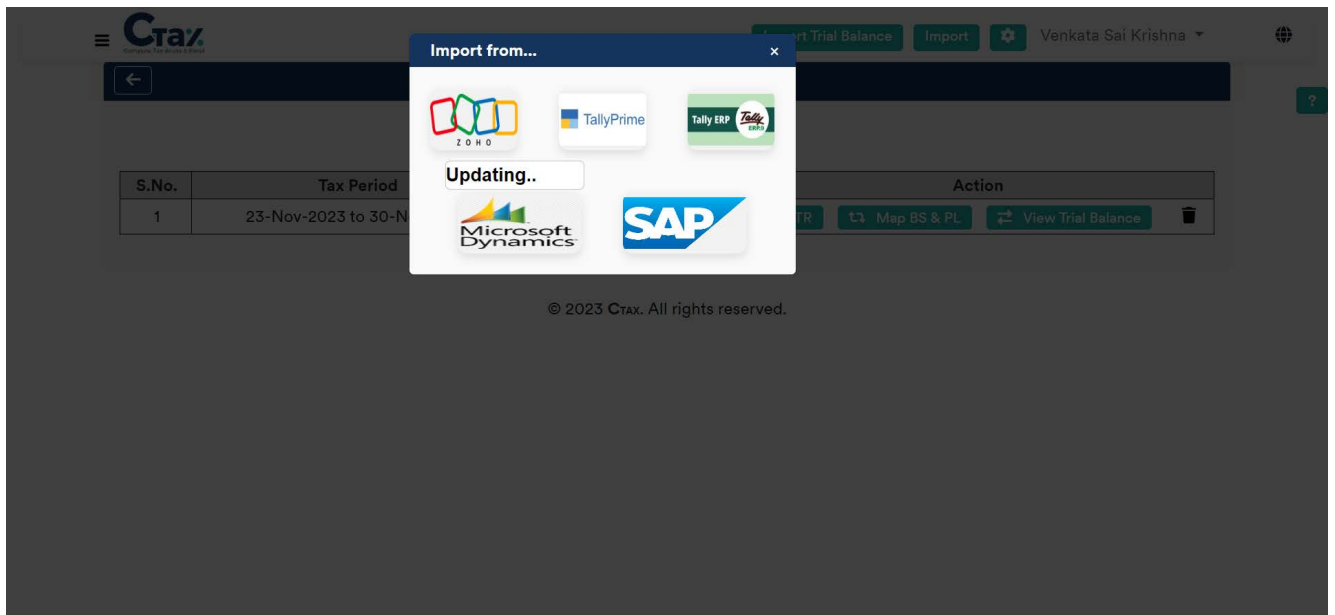
Import

TEST1

No Data Found

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**Step 14:** Click on Zoho



### Step 15: Setup Zoho cred

ZOHO CONFIGURATION

Client-ID

Client secret key

Username

Zoho User ID

Password

Zoho account password

Organization ID

Organization Id

Secret ID

Client Scret

Submit

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”

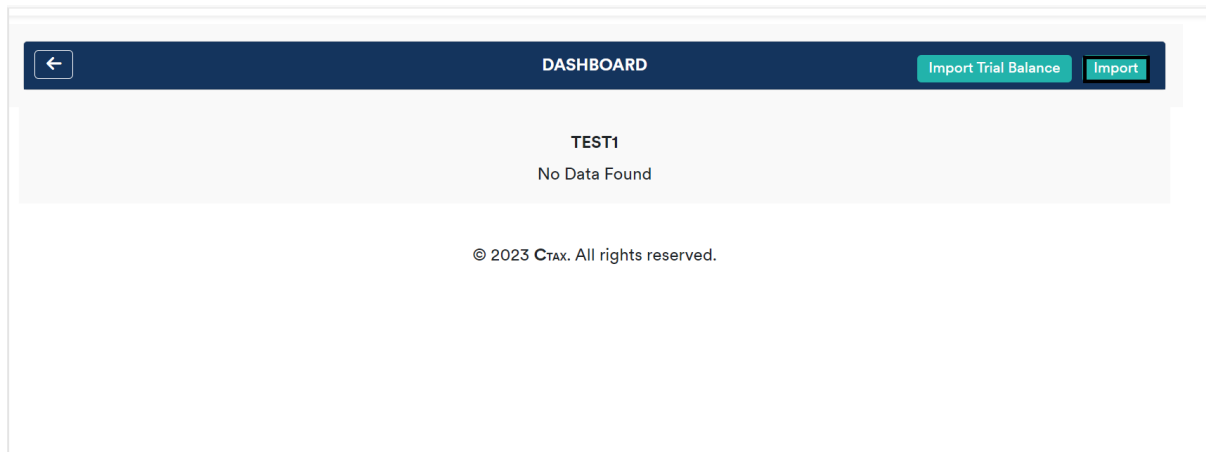
Client Secret = Client Secret Key see “Step 9”

Click submit

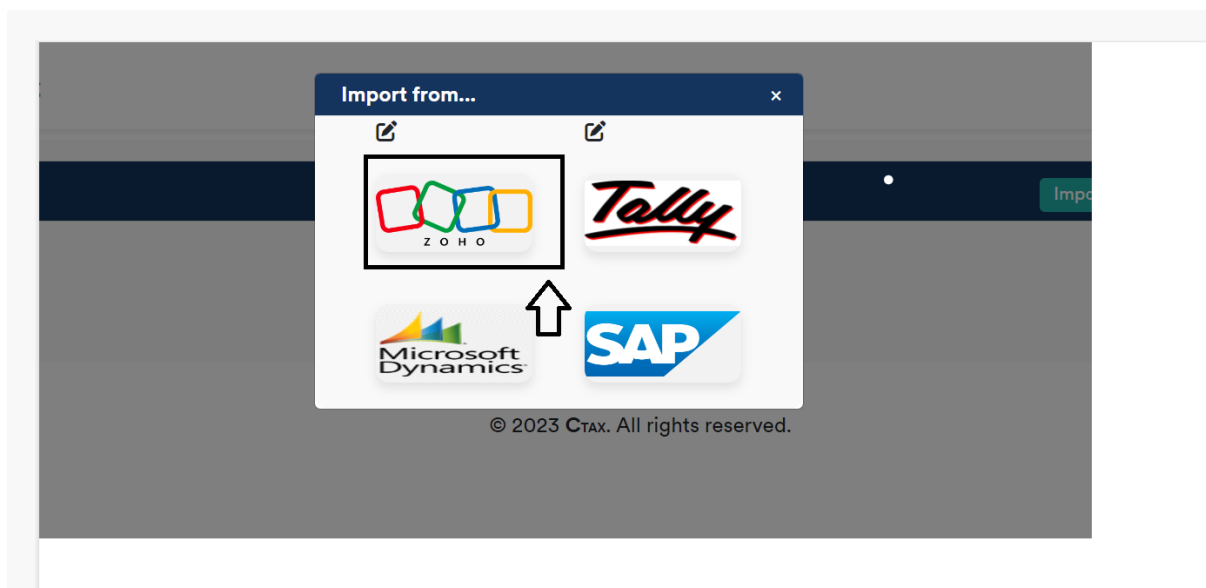
Configuration Done 😊

# How to Import Zoho Data

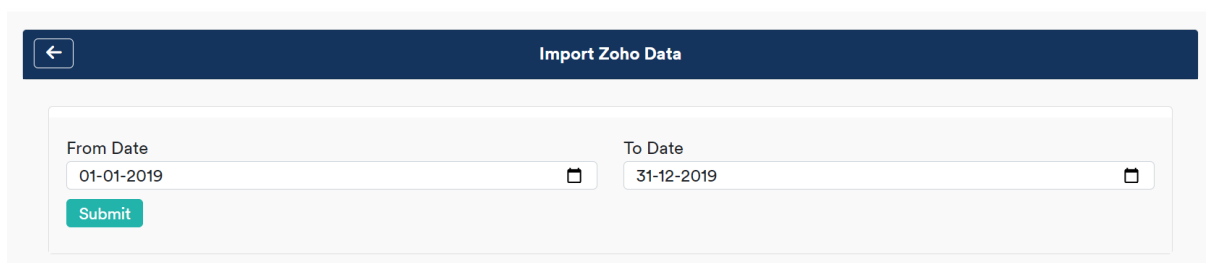
**Step 1:** Go to configured company dashboard & Click on Import



**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
		<div>Submit</div>

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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	<div><div>↔ Map BS &amp; PL</div><div>↔ View Trial Balance</div><div></div></div>

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