

## Zoho ) CADASHBOARD Invoice Help Documentation

1) After Login to CADASHBOARD click on Master -> Settings -> Zoho settings (Tab). We have to do one time master setup.

& CADASHBOARD	≡	FAQ		👸 AR PRO BY CADAS-BOARD 🍳 Orgpro Softwares (Mahesh)	- 11
(ORG ADMIN)	>	₩ Master > Settings			i
<ul> <li>Home</li> <li>Dashboard</li> <li>Task</li> </ul>	<	Q Email Settings         Q Invoice Q Invoice Q A Proforma Invoice         Q SMS / WhatsApp Template         Q Ta           Q Zoho Settings         Q AR Reminder Settings         O Zoho Configuration         You need to register for Zoho. (Click here to register)	ssk 🗘 SMS Settir Scope:- Zoho	gs Q.Alert Q.Quotation Q.Copy To Next Financial Year Q.Compliance Books.fullaccess.all Description :- Scope	
🗁 Document		Client ID * Client Id C	Client Secret *	Client Secret	
Financial	<	Code * Code Z	Zoho Org ID *	Organisation ID	
Manage	<	Refresh Token Refresh Token		Save	Cancel
Master      Master      Master      Compliance      Task Template      Clent Group      Financial Year      Branch      Department      Role	¢				
Settings  A Holiday  A Allocate Leave  Employee Designation	on				

2) After that Click on "Click here to register" link and you will be redirected to Zoho API Console Website.

	) =	FAQ Startesteen to on	gpro Softwares (Mahesh) 👻 🔟			
(ORG ADMIN)	>	₩ Master > Settings	i			
<ul> <li>Home</li> <li>Dashboard</li> <li>Task</li> </ul>	<	Otmail Settings         Almoites & S. AProforma Invoice         SMS / WhatsApp Template         ATask         SMS Settings         Alter         Aquestion         Acception Rest Financial Year         Accompliance         ALogin           O Zoho Settings         Alter         You need to register for Zoho. (Click here to register)         Scope:- ZohoBooks.fullaccess.all         Description :- Scope				
🗁 Document		Client ID* Client Id Client Secret * Client Secret	-			
₹ Financial	<	Code * Code Zoho Org ID * Organisation ID				
Manage	<	Refresh Token Refresh Token	Save Cancel			
Master	۲					
Employee Client Compliance Compliance Task Template Client Group Financial Year Branch Department Role Client Settings Holiday Holiday						
Allocate Leave Employee Designation	on					

3) Login to Zoho and click on "Get Started" then click on "Self Client" then click on "Create".



4) You will see below screen.

YE da Yeda YE da YEda YE da YEda YE	da Yala Yala Yala Yala Yala
Self Client 15 May 2023	×
Generate Code Client Secret	
Client ID Infel a succession of a succession of a succession of the succession of the succession of the succession of the	
Client Secret	

5) Copy above Client ID and Client secret ID to CADASHBOARD settings page.

& CADASHBOARD	FAQ				gpro Softwares (Mahesh)	- 11
(ORG ADMIN)	Master > Set	lings				i
# Home	C Email Settings	Ω Invoice Ω Invoice S & S Ω Proforma Invoice Ω SMS / WhatsApp Template Ω Ω AR Reminder Settings	Task 🗘 SMS Settir	ngs ⊕Alert ⊕Quotation ⊕CopyToNextFina	incial Year 🗘 Compliance	<b>⇔</b> Login
III Dashboard <	O Zoho Configura	tion You need to register for Zoho. (Click here to register)	Scope:- Zoho	DBooks.fullaccess.all Description :- Sc	ope	
🗁 Document	Client ID *	Client Id	Client Secret *	Client Secret	_	
₹ Financial <	Code *	Code	Zoho Org ID *	Organisation ID		
📰 Manage <	Refresh Token	Refresh Token			Save	Cancel
🗘 Master <						
😁 Employee						
Client						
₹ Service						
Compliance						
<b>T</b> ask Template						
🛗 Client Group						
🛗 Financial Year						
Branch						
🚠 Department						
管 Role						
Settings						
🖈 Holiday						
Allocate Leave						
Employee Designation						



6) After that click on "Generate Code" on zoho api website, fill the details and click on create.

Self Client		0
15 May 202		
Generate Code Client Secret		
Scope ZohoBooks.fullaccess.all		
Time Duration		
10 minutes		
Scope Description		
Scope		
	6	
CREATE		

7) After click on create you will see below generated code. Copy that code to CADASHBOARD settings page.

Applications	Self Client 15 May 2023	(2
Self Client 15 May 2023	Generated Code X	
	Scope Name: ZohoBooks/ullaccess.all This code for the above scope is valid for only 10 minutes ZohoBook	
	Time Durat To minute COPY DOWNLOAD	
	Scope Des	
	Scope	
	CREATE	



8) Also add your zoho organisation id to to CADASHBOARD settings page which is available to your zoho books account.

Books	C Q - Search in Customers (/)		Trial expires in 1 days. Subscribe	音   🎗 🗘 🛞   OrgPro Softwares 🗸 🌔 🏢	
Home	Dashboard 🛛 🚸 Fiscal Year-End Tasks 🔹	z 🔨 🔨 ×			
습 Items 긆 Banking 및 Sales	Looking for a product overview? Join our daily webinar and get all your question	Register Now	MAHESH User IC TEXT CONTROL OF CO		
Purchases     Time Tracking     e-Way Bills	Migrating From QuickBooks Online? Connect your Zoho Books organisation with your QBO accour your data using our Direct Migration tool.	nt directly and fetch all	C Enable Migration	My Account   Sign Out	
GST Filing	Total Receivables 💿 🔹 💿	ew Total Payables 💿		OrgPro Softwares     Organization ID:      KKOTTEKZET (A 1174	
<u>II</u> Reports	Total Unpaid Invoices #53,040.00	Total Unpaid Bills #0.00			
Documents	CURRENT OVEROUE ₹280.00 ₹52,760.00 ▼	CURRENT ₹0.00	overdue ₹0.00 ¥		
	Cash Flow ③		This	FI	
	50 K 40 K		Cash as on 01/	o I	
<	30 K		₹56,8	0	

- 9) Here we have finished with our Master settings.
- 10) Now go to Financial -> Account Receivable and click on "Sync with Zoho" and all your invoices will be imported from ZOHO and you will see all the account receivable details on CADASHBOARD.

💩 CADASHBOARD 🗏	FAQ	🛞 🗛 Raveo 🍕 Orgpro Softwares (Mahesh) 🗸 🗃
(ORG ADMIN)	# Financial > Account Receivable	2023-24 * All (Internal & Clients) *
# Home	🛗 Dashboard Details 🗠 Graph	
dil Dashboard <	Sr No. A Currency Total Invoice Amount Total Received Amount	Total Outstanding Amount Total Overdue Outstanding Amount
🕼 Task	1 INR 7,344.00 2,134.00	5,210.00 5210
🗁 Document	Overdue Invoices All Invoices India - Indian Rupee (INR)	Zoho Sync Logs Sync With ZOHO Advance Search 🔀 🕅
₹ Financial <		Last Sync: 03/04/23 01:35 PM By Mahesh Kadam
Account Receivable	10 v Records/Page	Search
🔮 Quotation	Sr Client Name Invoice No Currency Invoice Received Balance	Over Next Communication Actions Invoice
Proforma Invoice	No Amount Amount Amount	Due Followup History Created From Days Date
Proforma Receipt	1 Virat Pvt Ltd Test 1 INR 1,180.00 500.00 680.00	265 Add Followup 🔤 on 04-Apr-23 🤻 😒 💆 👁 CADASHBOARD
Receipt	2 Umesh PVT LTD Test 2 INR 590.00 100.00 490.00	257 Add Followup 📓 on 04-Apr-23 🔻 🛇 📓 🗩 👁 CADASHBOARD
₹ Advance	3 Mahesh PVT LTD Test Invoice 1 INR 1,180.00 0.00 1,180.00	177 Add Followup 📓 on 04-Apr-23 🤻 😒 📓 🗩 👁 CADASHBOARD
Credit Note	4 Mahesh PVT LTD Test 4 INR 106.20 0.00 106.20	139 Add Followup 📓 on 04-Apr-23 🤻 😒 📓 🗭 👁 CADASHBOARD
₹ Expense	5 Mahesh PVT LTD Branch 1 &1 INR 1,456.12 0.00 1,456.12	112 Add Followup 📓 on 04-Apr-23 🤻 😒 📓 🗭 👁 CADASHBOARD
📰 Manage <	6 Mahesh PVT LTD Test 6 INR 118.00 0.00 118.00	87 Add Followup 📓 on 04-Apr-23 🤻 🔊 🖾 🗩 👁 CADASHBOARD
🗘 Master <	7 Mahesh PVT LTD Test 7 INR 236.00 0.00 236.00	87 Add Followup 🔤 on 04-Apr-23 🔻 🚫 🔤 🗩 © CADASHBOARD
Reports (	8 Mahesh PVT LTD Test 8 INR 590.00 0.00 590.00	87 Add Followup 📓 on 04-Apr-23 🔻 🛇 📓 🗩 👁 CADASHBOARD
	9 Mahesh PVT LTD Test 9 INR 118.00 0.00 118.00	84 Add Followup 📓 on 04-Apr-23 🤻 🛇 📓 🗩 👁 CADASHBOARD
	10 Mahesh PVT LTD Test 10 INR 118.00 0.00 118.00	738654 Add Followup 📓 on 04-Apr-23 🤻 🛇 📓 🗩 👁 CADASHBOARD
	Showing 1 to 10 of 11 records	