The Institute of Chartered Accountants of India
(Set up by Act of Parliament)

NETWORKING PORTAL FOR CAS

CA Setu

CA User Manual

CA Registration, Post Registration, Edit Profile, Dashboard and Settings



DOCUMENT
CA User Manual

PORTAL
CA Setu

INTENDED FOR
Chartered Accountants

ABOUT THIS MANUAL

This manual explains how a Chartered Accountant registers on the CA Setu portal, completes the CA Post Registration page, updates their profile through CA Edit Profile, uses the CA Dashboard, and manages account preferences through CA Settings.

Bold text marks buttons, fields and on-screen messages.

Fields marked with an asterisk (*) on screen are mandatory.

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SECTION 01

Steps to Fill CA Registration

1.1 Open the CA Registration Page

- Open the CA Setu portal.
- On the homepage, click the **Sign Up** button available at the top-right corner of the page.
- The CA registration process will open.



Figure 1 · CA Setu homepage – Sign Up button at the top-right corner

1.2 Create Your Account

After clicking **Sign Up**, the **Create Your Account** page will open.

- The Create Your Account page will display different account categories for registration.
- Select **For Chartered Accountants** to register as a CA.
- Under For Chartered Accountants, click the **Create Account** button.
- The system will open the CA registration process.

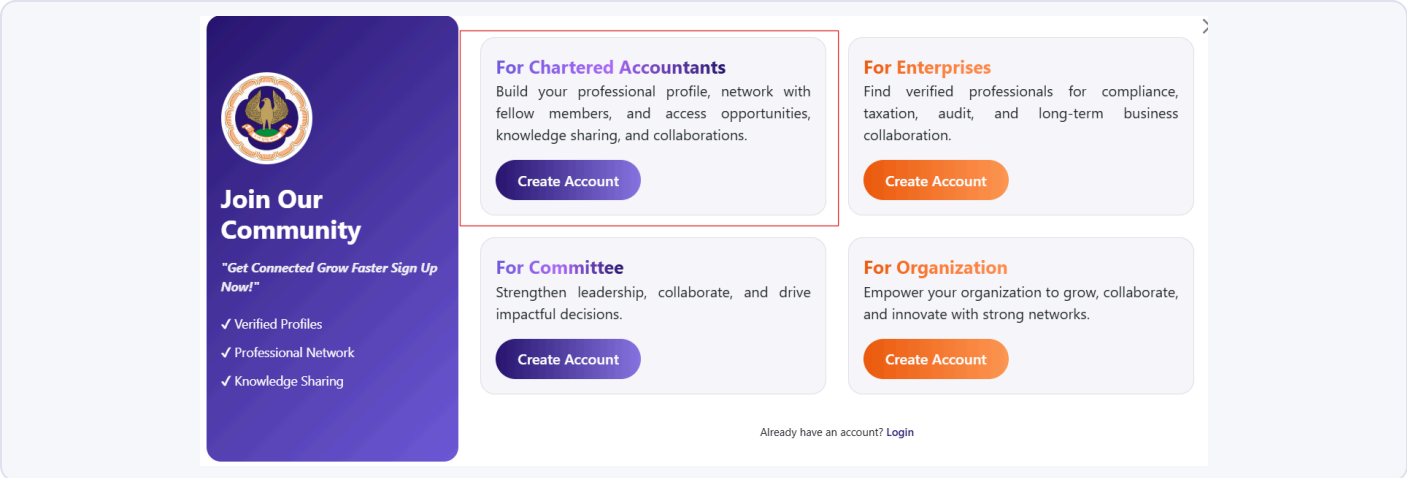


Figure 2 · Create Your Account page – For Chartered Accountants

REGISTRATION STEPS

STEP 1	STEP 2	STEP 3	STEP 4
SSP Verification	Create Credentials	Purpose	Area of Interest

1.3 Step 1: SSP Verification

- The registration process starts with Step 1 – SSP Verification.
- Enter your 6-digit ICAI Membership Number in the **Membership Number** field.
- Click **Verify & Continue**.
- The system will verify the membership number through SSP.
- After successful verification, proceed to Step 2 – Create Credentials.

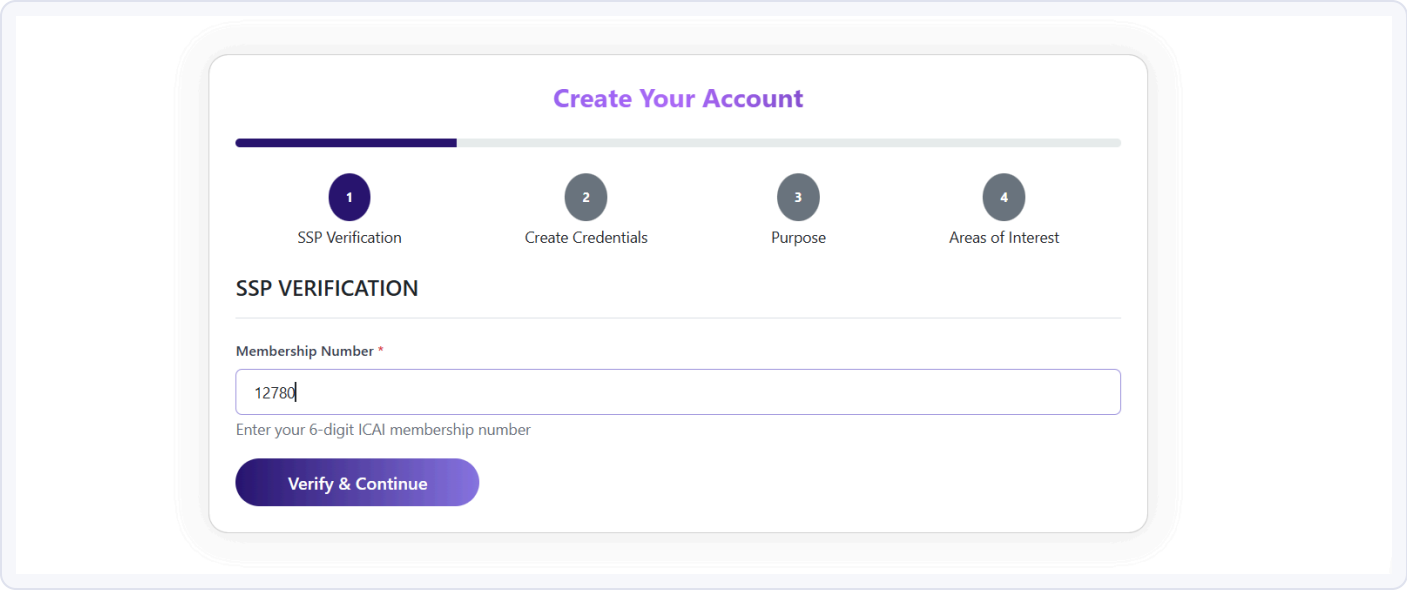


Figure 3 · Step 1 – SSP Verification

1.4 Step 2: Create Credentials

After successful SSP Verification, the user will proceed to Step 2 – Create Credentials.

- The **Create Credentials** screen will be displayed.
- A **"Verified Member Successfully"** message confirms that the ICAI membership has been successfully verified.
- The **Email ID** field will be displayed. Enter the registered email address.
- The **Mobile Number** will be automatically fetched from ICAI records.
- A 6-digit OTP will be sent to the registered email address.
- Enter the OTP in the **Enter OTP** field and click **Verify OTP**.
- After successful verification, an **"Email verified successfully"** message will be displayed.
- Enter a password in the **Password** field. The password must contain a minimum of 8 characters.
- Re-enter the same password in the **Confirm Password** field.
- Use the eye icon to show or hide the password, if required.
- Verify that both passwords match and proceed to the next step.

NOTE The password must contain a minimum of 8 characters, and the Password and Confirm Password entries must match.

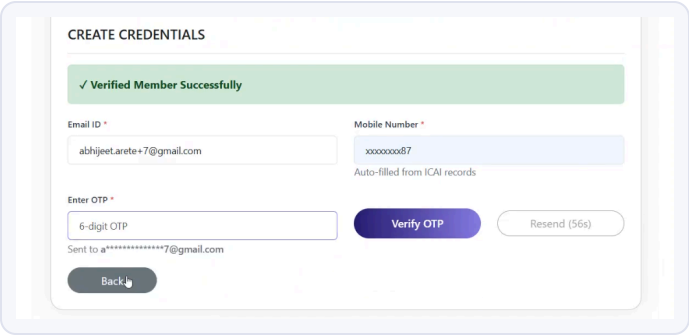


Figure 4 · Create Credentials – email OTP verification

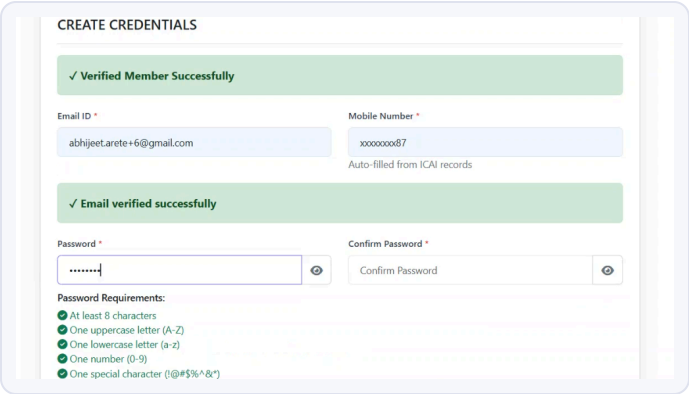


Figure 5 · Create Credentials – password

1.5 Step 3: Purpose

After completing Step 2 – Create Credentials, the user will proceed to Step 3 – Purpose.

- The **Purpose** section will be displayed.
- The user will be provided with a list of Purpose options.
- Select the appropriate purpose by clicking the corresponding checkbox.
- The user can select the purpose(s) applicable to their CA account.
- Ensure that the required checkbox is selected before proceeding.
- Review the selected purpose and click **Continue/Next** to proceed to Step 4 – Interests.

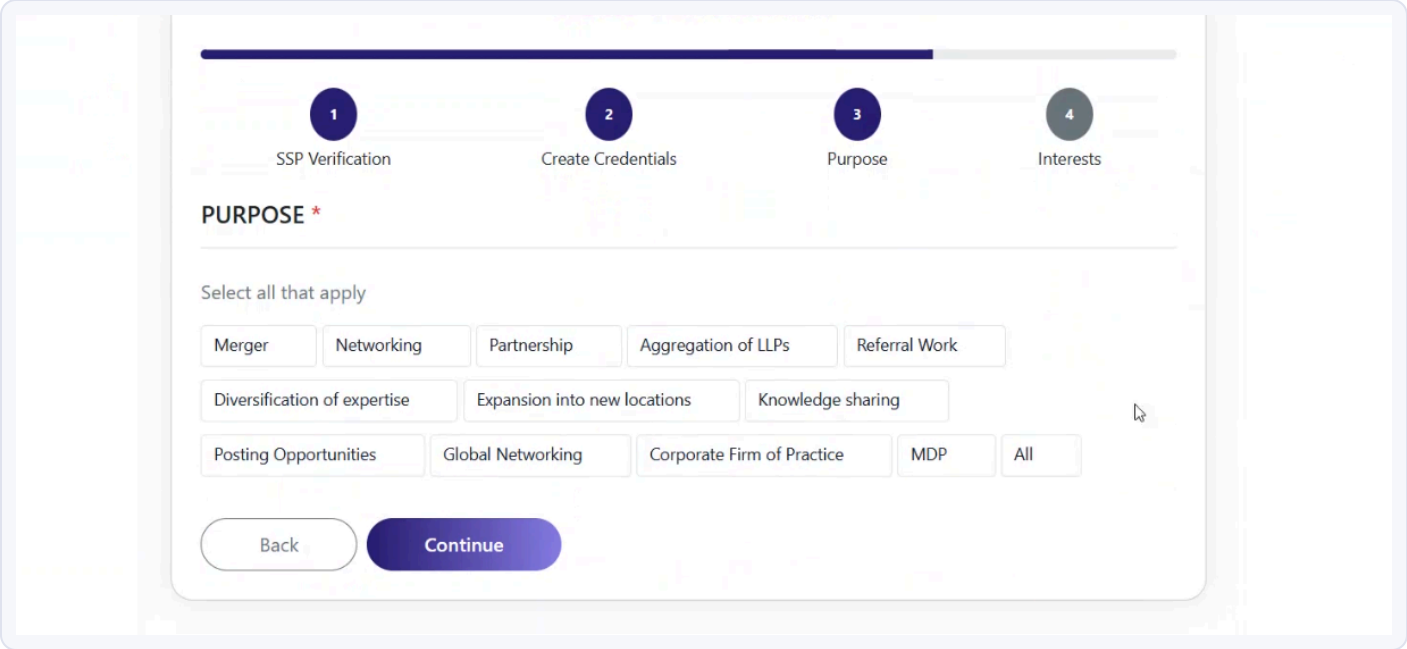


Figure 6 · Step 3 – Purpose

1.6 Step 4: Area of Interest

After completing Step 3 – Purpose, the user will proceed to Step 4 – Area of Interest.

- The **Area of Interest** section will be displayed.
- A list of available areas of interest will be provided.
- Select the relevant area(s) of interest by clicking the corresponding checkbox.
- The user can select the area(s) that match their professional interests or expertise.
- Review the selected interests carefully.
- Click **Submit registration** to complete the registration process.
- A **"Registration Successful"** message will be displayed.
- The user will be automatically redirected to the CA Post Registration page.

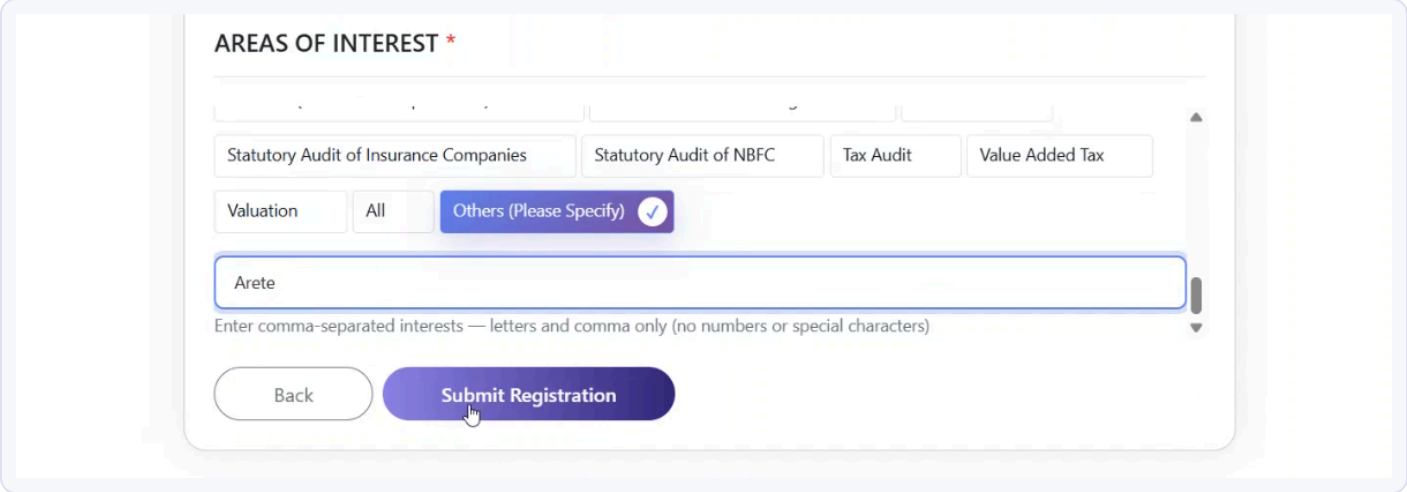


Figure 7 · Step 4 – Area of Interest

RESULT On successful submission, the "Registration Successful" message is displayed and the user is automatically redirected to the CA Post Registration page (Section 2).

SECTION 02

CA Post Registration Page

This page allows the user to complete and manage their professional profile information.

2.1 SSP Verified Information – Non-Editable Fields

The SSP Verified Information section is available on the CA Post Registration page. It displays information retrieved from the SSP (Self Service Portal). These details are system-generated and cannot be edited by the user.

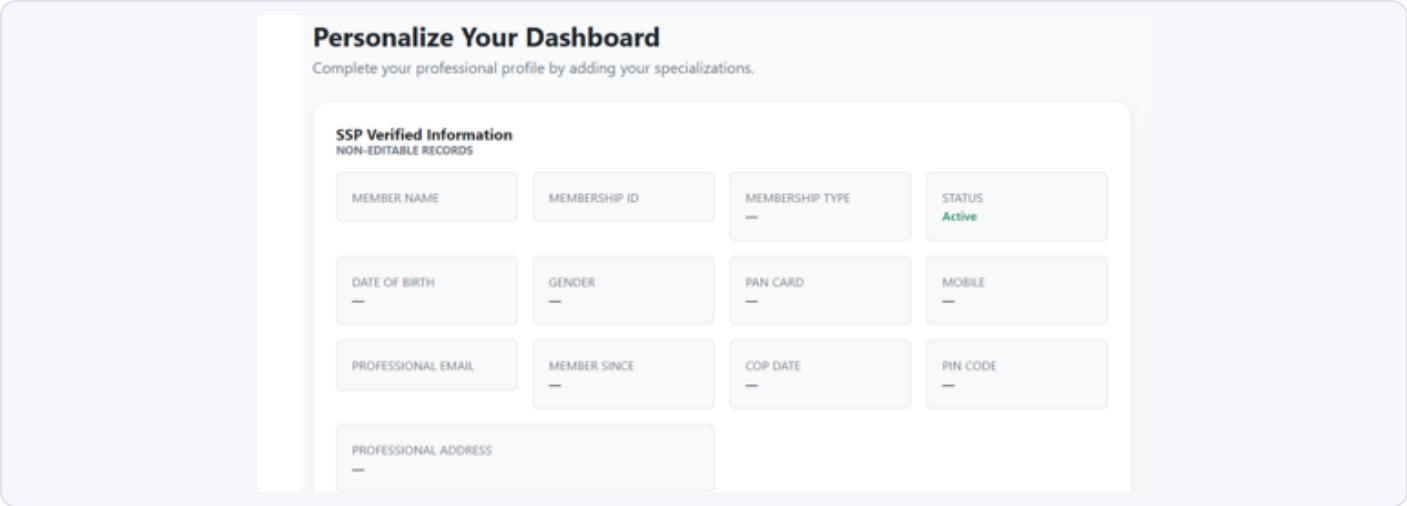


Figure 8 · SSP Verified Information (non-editable)

2.2 Profile Details – Editable Fields

The Profile Details section is available on the CA Post Registration page. This section allows the user to enter and update professional information that will be used to define their search visibility and networking opportunities.

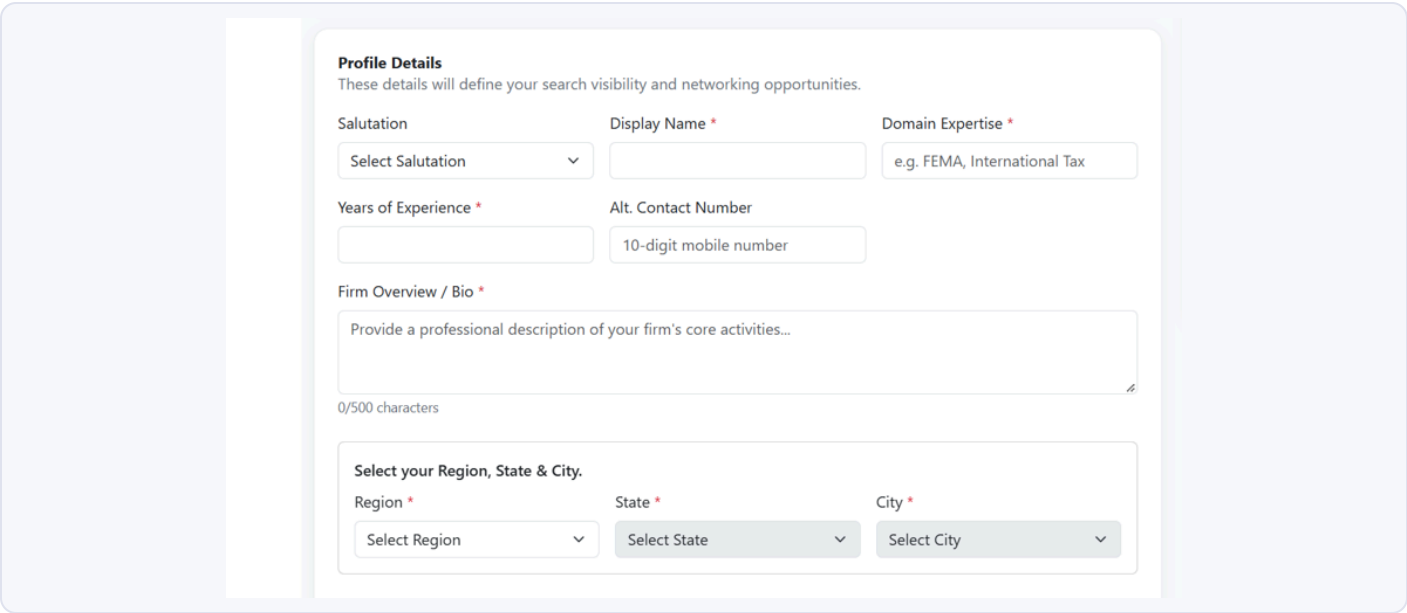


Figure 9 · Profile Details (editable)

2.3 Purpose of Registration and Areas of Interest

The Purpose of Registration and Areas of Interest sections are available on the CA Post Registration page. These sections allow the user to select options relevant to their professional requirements and expertise.

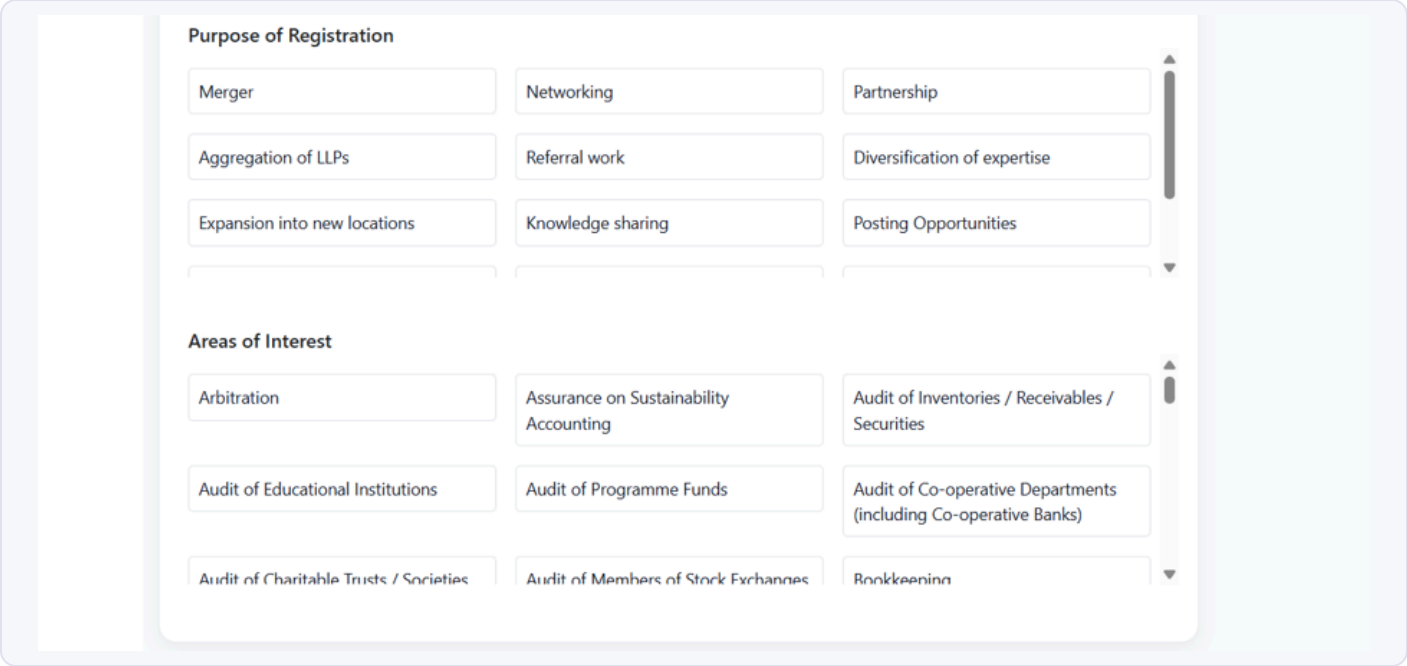


Figure 10 · Purpose of Registration and Areas of Interest

2.4 Academic Institutions

The Academic Institutions section is available on the CA Post Registration page. This section allows the user to add their academic and educational background to their professional profile.

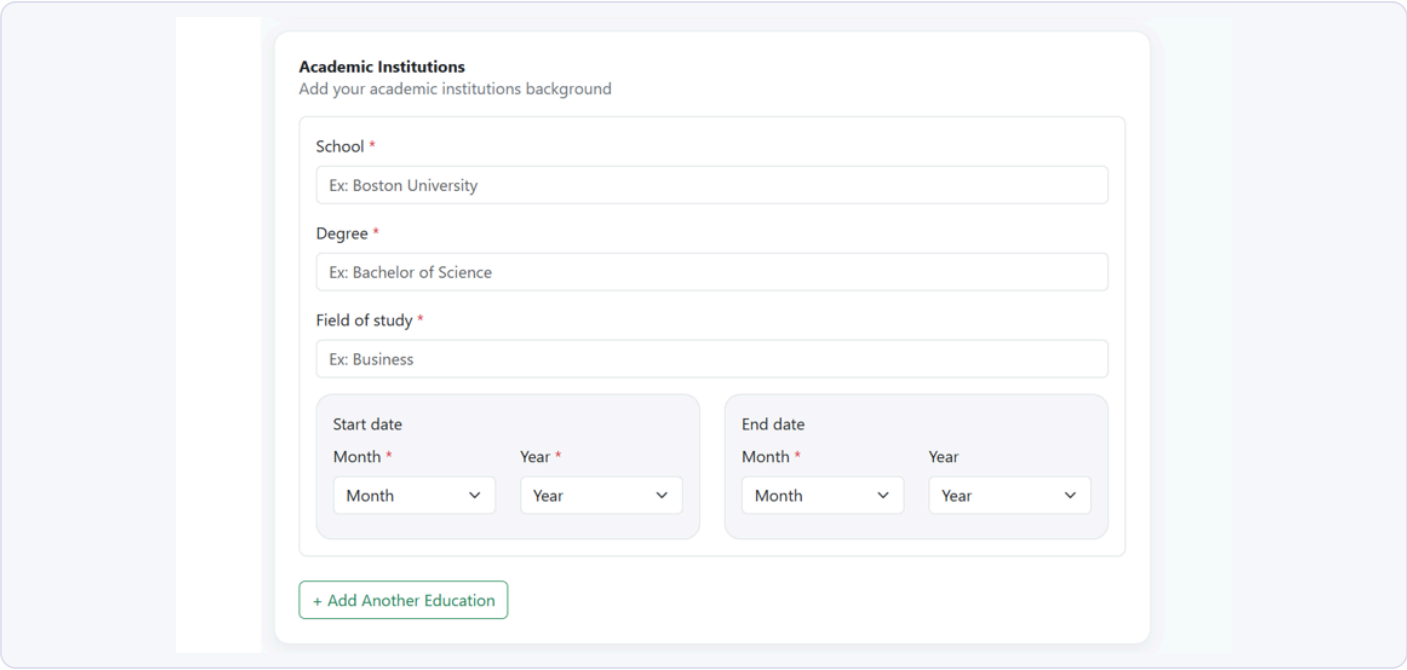


Figure 11 · Academic Institutions

2.5 Primary Firm Registration – Auto-Fetched Information

The firm-related information is automatically fetched from the system/SSP records.

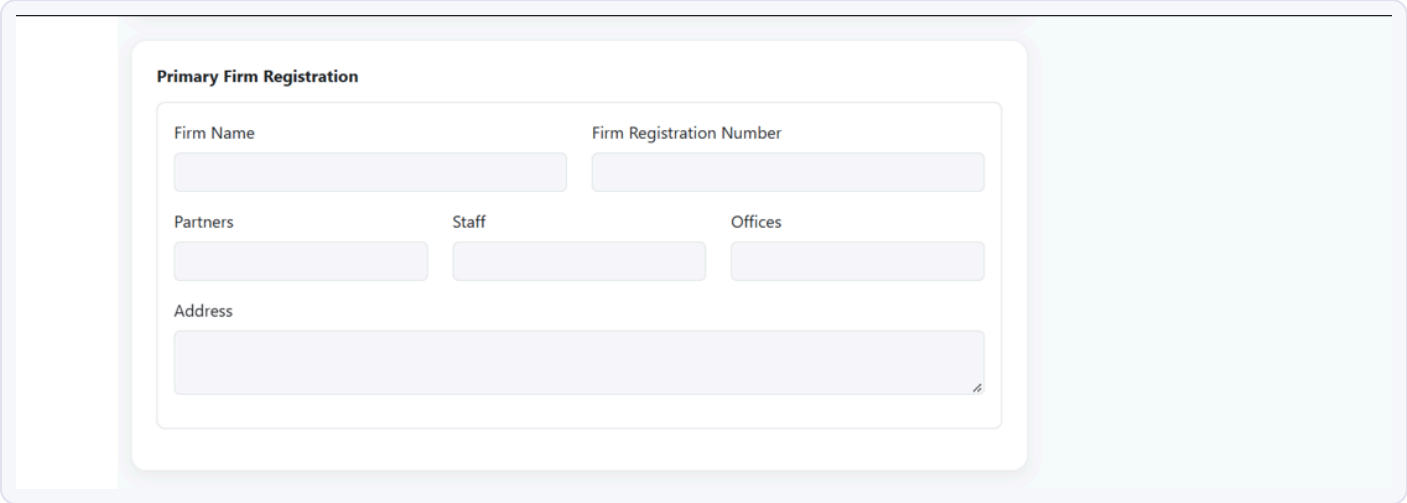


Figure 12 · Primary Firm Registration (auto-fetched)

2.6 Visibility Controls – Profile Privacy Settings

The Visibility Controls section is displayed on the right side of the CA Post Registration page. It allows the user to control which professional and personal information is visible to other users.

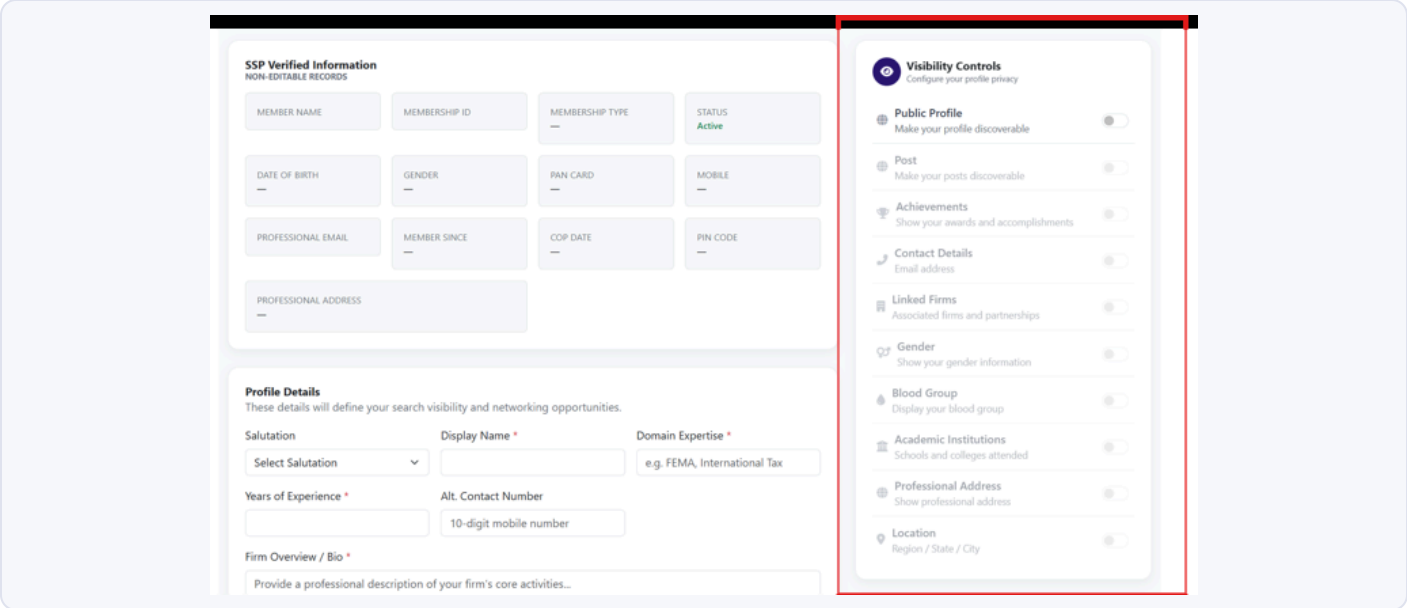


Figure 13 · Visibility Controls

2.7 Declaration and Acknowledgement

At the bottom of the CA Post Registration page, the Declaration and Acknowledgement section is provided before saving the profile.

2.8 Important Note

! IMPORTANT

The **SAVE PROFILE** button should be clicked only after:

- All required profile information has been completed.
- The selected Purpose of Registration and Areas of Interest have been reviewed.
- The Visibility Controls have been configured according to the user's preferences.
- The declarations and Terms and Conditions have been read and accepted.

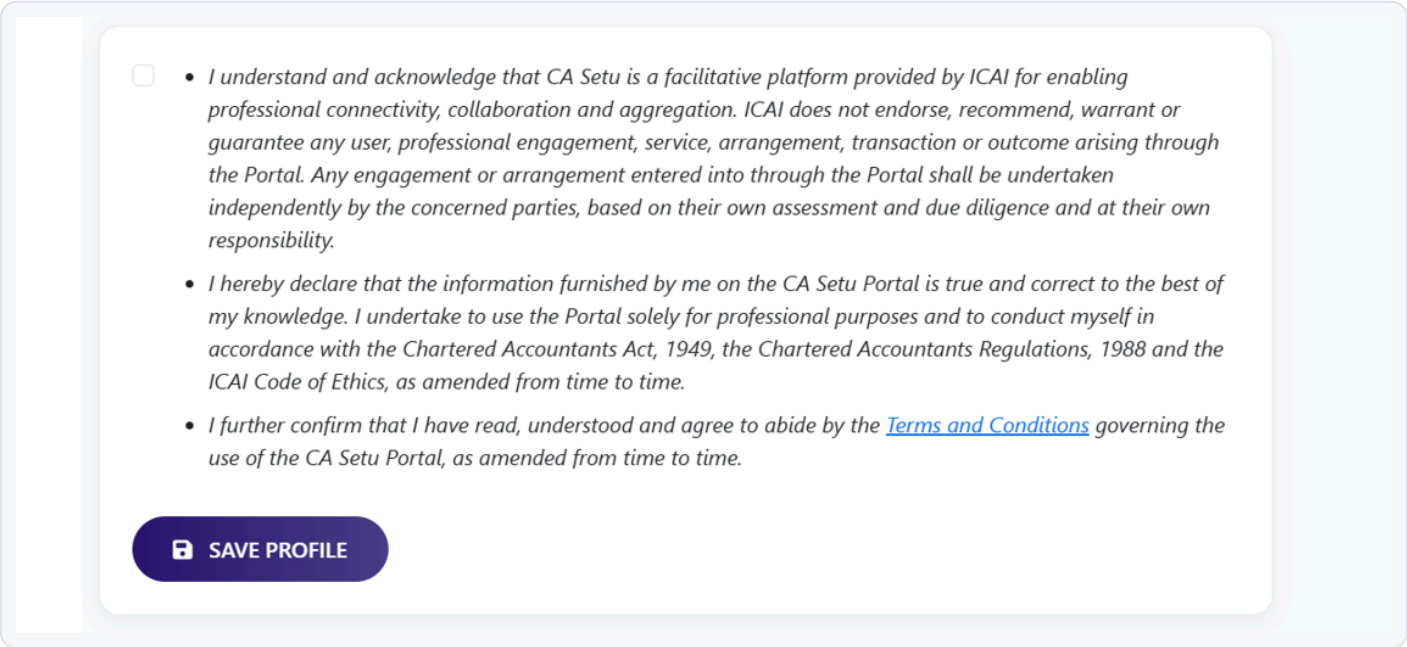


Figure 14 · Declaration and Acknowledgement – SAVE PROFILE

SECTION 03

CA Edit Profile – Fields and Details

3.1 Public Presentation

After opening the CA Edit Profile page, the user can update the Public Presentation section. The Public Presentation section will be displayed with the following fields:

Field	Status	Instruction
Salutation	Optional	Select a salutation from the available options.
Display Name	Required	Enter a display name with a maximum limit of 100 characters. If the Display Name field is empty, the registered Full Name will be displayed.
Professional Bio	Required	Enter a professional bio with a maximum limit of 500 characters.
Select Your Region, State & City – select the relevant location details.		
Region		Select the appropriate region from the available options: Central, Eastern, Northern, Southern, or Western.
State		Select the relevant state from the available options.
City		Select the appropriate city from the available options.
Review Details		Review the entered information to ensure all required details are correct.
Save Changes		Click the **Save** button to update the CA profile.

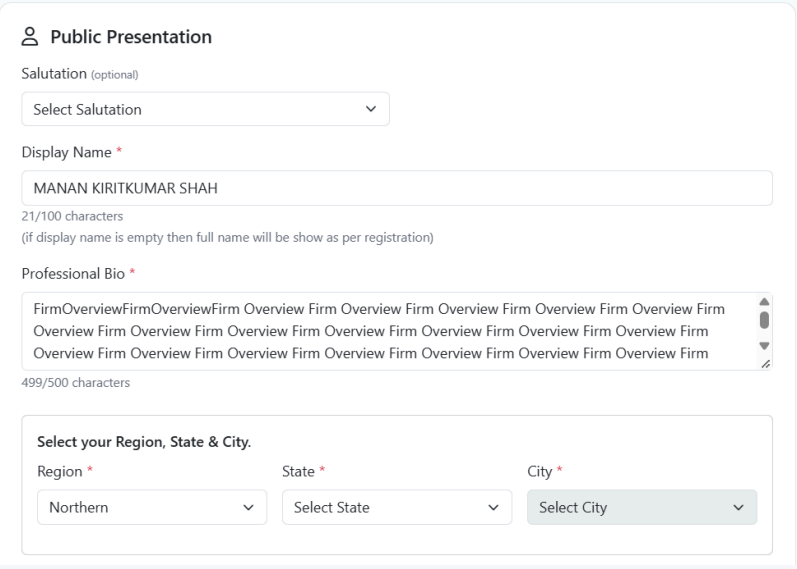


Figure 15 · CA Edit Profile – Public Presentation

3.2 Profile Details & Turnover

After completing the Public Presentation section, the user can update the Profile Details & Turnover section. These details help define the user's search visibility.

Field	Status	Instruction
Domain Expertise	Required	Enter the relevant domain expertise, such as Tax Expertise.
Years of Experience	Required	Enter or select the total years of professional experience.
Alternative Contact Number	Optional	Enter an alternative 10-digit mobile number, if available.
Firm Turnover	Optional	Enter the firm's turnover amount, if applicable.
Client Information	Optional	Enter the relevant client information, if required.
Blood Group	Optional	Select the appropriate blood group from the available dropdown options.
Purpose of Registration		Review or select the relevant purpose of registration, as available.
Areas of Interest		Select the relevant areas of professional interest from the available options.
Review Details		Verify that all entered information is correct and all mandatory fields marked with an asterisk (*) are completed.
Save Changes		Click the **Save** button to save the updated profile details.

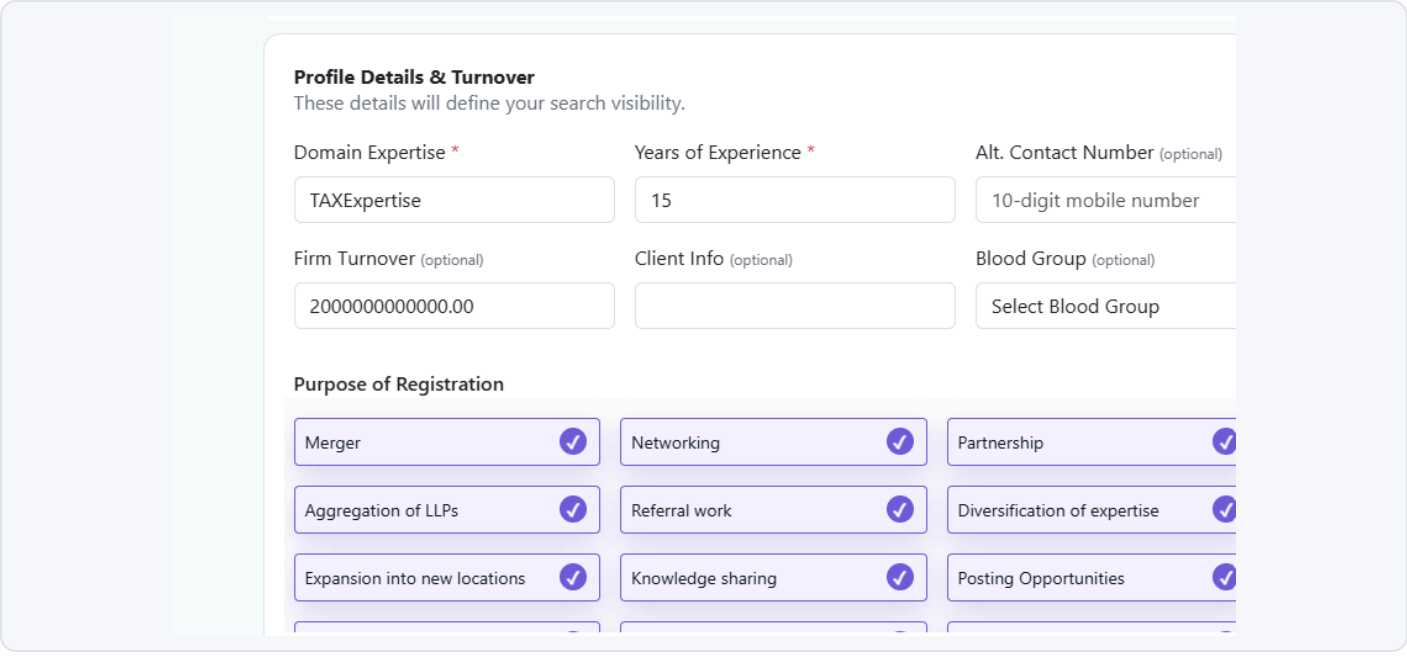


Figure 16 · CA Edit Profile – Profile Details & Turnover

3.3 Academic Institutions

After opening the Academic Institutions section, the user can add their academic background.

Field	Status	Instruction
School/Institution	Required	Enter the name of the school, college, or university. For example, ATS University.
Degree	Required	Enter the degree obtained or pursued, such as MCA.
Field of Study	Required	Enter the relevant field of study, such as Computer Application.
Start Date		Select the starting month and year of the academic course.
Month		Select the appropriate month, such as August.
Year		Select the starting year, such as 2026.
End Date		Select the ending month and year of the academic course, if applicable.
Month		Select the appropriate month, such as September.
Year		Select the ending year, such as 2026.
Review Details		Verify that all entered academic information is correct and that all mandatory fields are completed.
Save Details		Click the **Save** button to save the academic information, if available.
Add More Academic Details		Use the **Add More** option, if available, to add multiple academic qualifications or educational records.

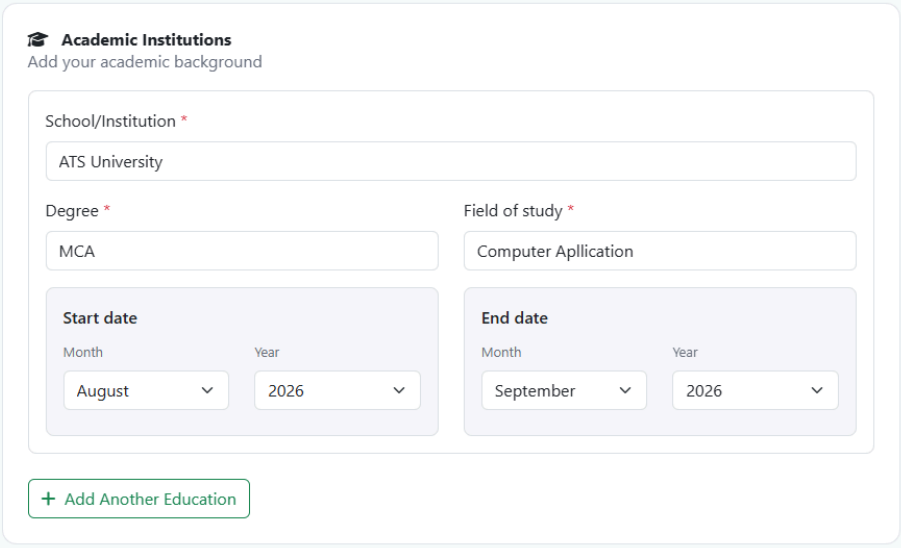


Figure 17 · CA Edit Profile – Academic Institutions

3.4 Primary Firm Registration

After opening the Primary Firm Registration section, the user can view the primary firm details. The details are automatically fetched from the system, and only the Partners, Staff, and Offices fields are editable.

Field	Status	Editable	Instruction
Firm Name	Required	No	The firm name will be automatically fetched from the system and displayed as a non-editable field.
Firm Registration Number	Required	No	The firm registration number will be automatically fetched from the system and displayed as a non-editable field.
Partners	Required	Yes	The partner details will be automatically fetched from the system. The field will be editable.
Staff	Required	Yes	The staff details will be automatically fetched from the system. The field will be editable.
Offices	Required	Yes	The office details will be automatically fetched from the system. The field will be editable.
Address	Required	No	The firm address will be automatically fetched from the system and displayed as a non-editable field.
Primary Firm			Select the checkbox to mark the firm as the primary firm, if applicable.
Review Details			Verify the displayed information and ensure that all mandatory fields marked with an asterisk (*) are completed.
Save Changes			Click the **Save** button to save the updated primary firm details, if available.

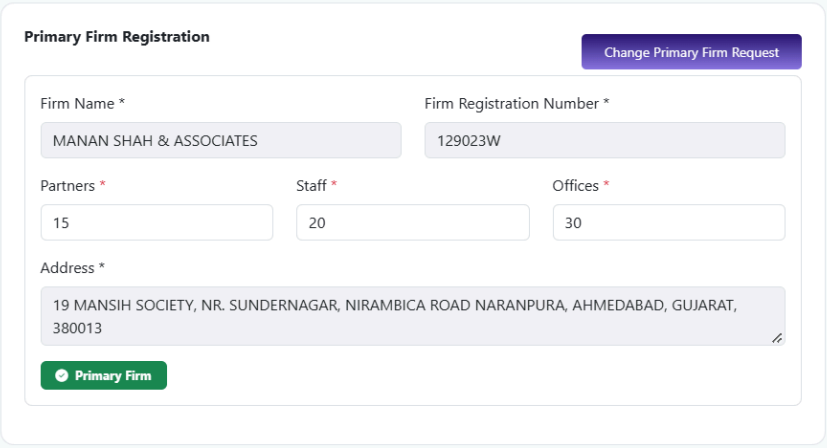


Figure 18 · CA Edit Profile – Primary Firm Registration

3.5 Professional Portfolio

Work Experience

After opening the Professional Portfolio section, the user can add their professional work experience.

Field	Status	Instruction
Add Experience		Click the **Add Experience** option to add a work experience record.
Designation	Required	Enter the job title or designation, such as Partner.
Organization	Required	Enter the name of the organization or firm, such as Sharma and Associates.
Start Date	Required	Select the starting month and year of employment.
Month		Select the appropriate starting month.
Year		Select the appropriate starting year.
End Date	Optional	Select the ending month and year of employment. Leave this field blank if you are currently working in the organization.
Month		Select the appropriate ending month.
Year		Select the appropriate ending year.
Description		Enter a brief description of the work experience, responsibilities, or professional expertise, such as Audit & Assurance.
Add More Experience		Use the **Add Experience** option to add multiple work experience records, if required.
Review Details		Verify that all entered information is correct and that all mandatory fields marked with an asterisk (*) are completed.
Save Changes		Click the **Save** button to save the professional work experience details, if available.

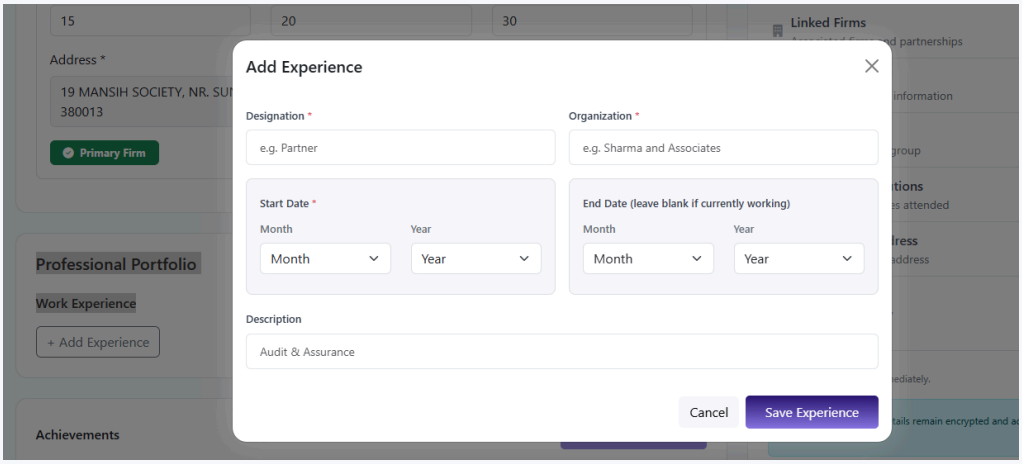


Figure 19 · CA Edit Profile – Professional Portfolio: Work Experience

3.6 Achievements

After opening the Achievements section, the user can add their professional achievements and recognitions.

Field	Status	Instruction
Achievement Type	Required	Select the appropriate achievement type from the dropdown list: Awards, Certification, or Significant Recognitions.
Award Name	Required	Enter the name or title of the award, certification, or recognition.
Description	Required	Enter a brief description of the achievement, including relevant details.
Upload Image/Certificate	Optional	Upload the supporting image or certificate in JPG, PNG, or PDF format. The maximum file size is 5 MB.
Review Details		Verify that all entered information is correct and that all mandatory fields marked with an asterisk (*) are completed.
Save Changes		Click the **Save** button to save the achievement details, if available.
Add More Achievements		Use the **Add More** option, if available, to add multiple achievements, certifications, or recognitions.

DECLARATION

Read and acknowledge the declaration confirming that the information provided under the Achievements section is true, accurate, and professional in nature and complies with the Chartered Accountants Act, 1949, the Chartered Accountants Regulations, 1988, and the ICAI Code of Ethics, as amended from time to time. Confirm that the information does not contain false, misleading, promotional, or otherwise non-compliant material.

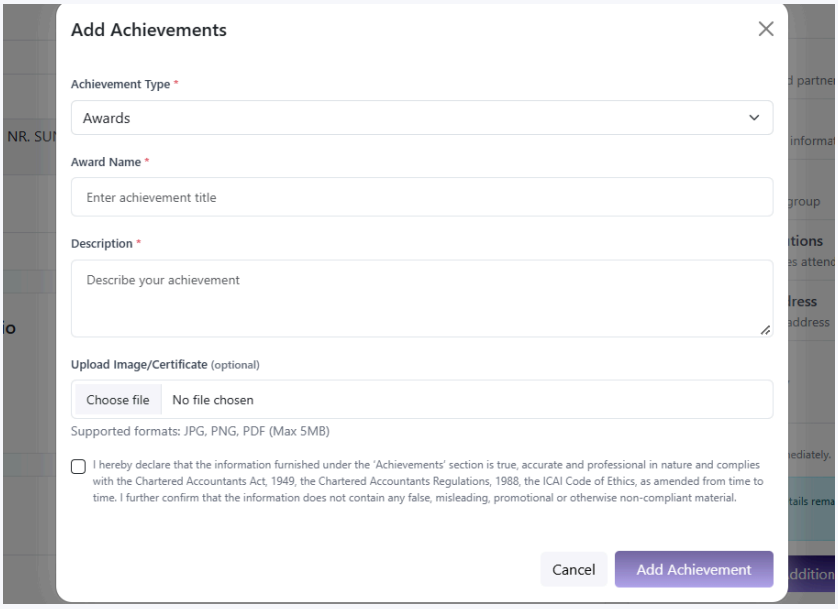


Figure 20 · CA Edit Profile – Achievements

3.7 Share Additional Information

- Click the **Share Additional Information** button to share additional information, if required.
- Sensitive financial details remain encrypted and accessible only to the user.

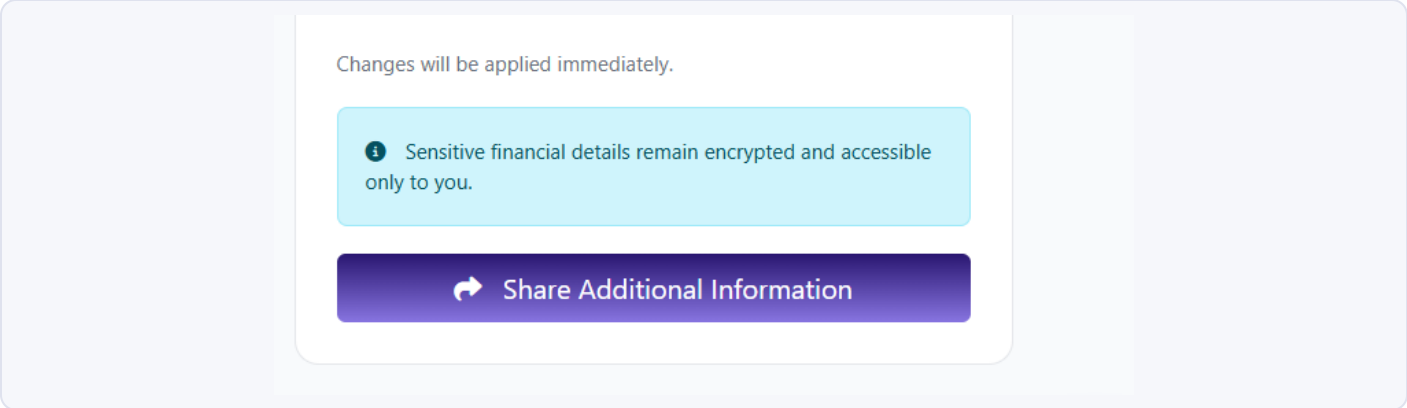


Figure 21 · CA Edit Profile – Share Additional Information

3.8 Visibility Controls

The Visibility Controls section allows the user to manage the privacy and visibility of profile information.

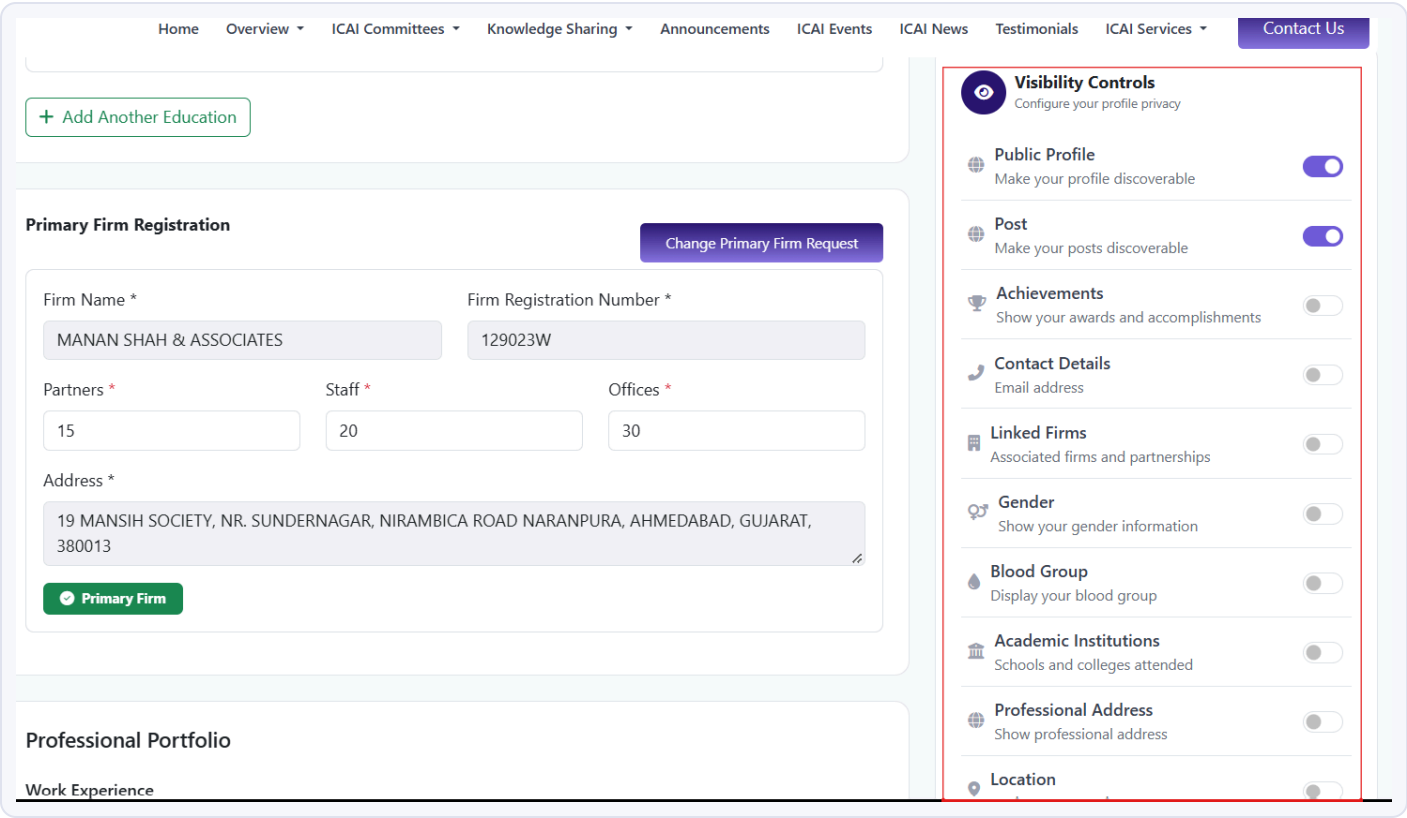


Figure 22 · CA Edit Profile – Visibility Controls

SECTION 04

CA Dashboard – Fields and Details

After logging in to the CA Setu portal, the user will be redirected to the **CA Dashboard**, where they can manage their profile, create posts, view engagement details, and access various dashboard features.

4.1 Profile Overview

Item	Description
Profile Picture	Displays the user's profile picture.
Name	Displays the registered or public display name.
Edit Profile	Click to update profile details.
Share	Click to share the profile with others.

4.2 Profile Statistics

The dashboard displays the following statistics:

Statistic	Description
Posts	Total number of posts published by the user.
Followers	Number of users following the profile.
Following	Number of users the profile follows.
Connections	Total number of connections.

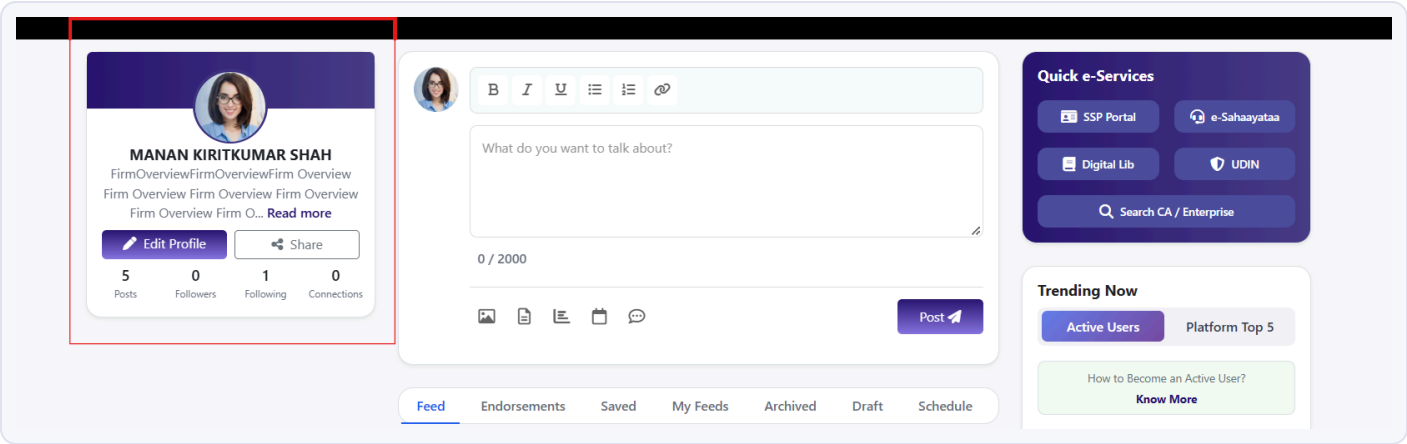


Figure 23 · CA Dashboard – Profile Overview and Statistics

4.3 Create a Post

The user can create a post by entering content and completing the required post details.

Field	Instruction
Post Description	Enter the content in the text area provided. The maximum limit is 2,000 characters.
Text Formatting	Use the available options for bold, italic, underline, lists, and links to format the post content.
Add Image	Upload or attach an image to the post, if required.
Add Document	Attach a document to the post, if required.
Additional Post Options	Use the available icons to access other post-related features, such as scheduling or comments, if applicable.
Select Areas of Interest	Select the relevant areas of interest associated with the post.
Post Category	Select the appropriate category, such as **Regulatory Updates or Best Practices**.
Scope	Select the scope of the post as **Domestic** or **International**.
Select State(s)/UT(s)	For domestic posts, select the relevant state or Union Territory.
Select City(s)/District(s)	Select the relevant city or district based on the selected state.
Region	The region will be automatically detected based on the selected location.
Declaration	Select the checkbox to confirm that the posted content complies with the Chartered Accountants Act, 1949, the Chartered Accountants Regulations, 1988, and the ICAI Code of Ethics, as amended from time to time. The user must accept responsibility for the posted content.
Save Draft	Click **Save Draft** to save the post without publishing it.
Post	Click the **Post** button to publish the content.

NOTE The Declaration checkbox must be selected before the post can be published.

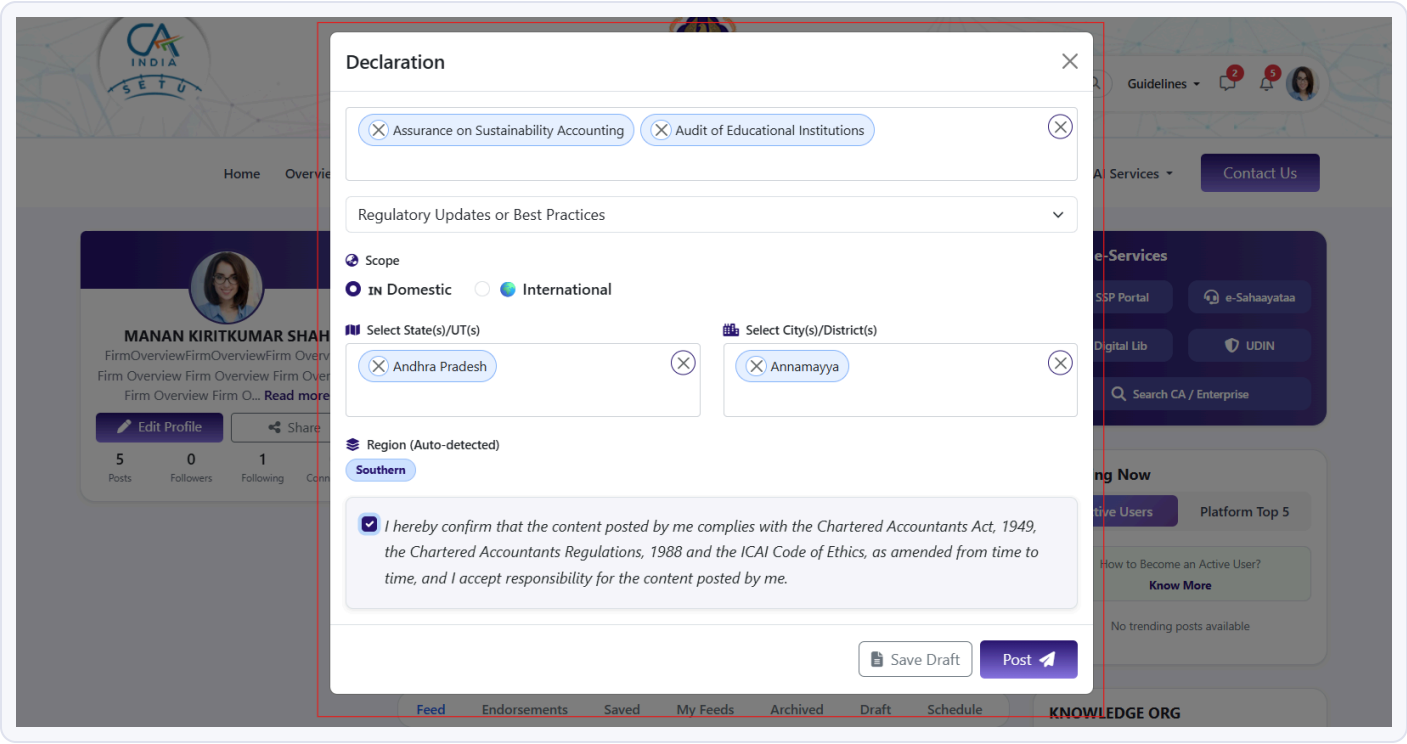


Figure 24 · Create a Post – Areas of Interest, Category, Scope and Declaration

4.4 Quick e-Services

The Quick e-Services section provides access to the following services. Click the relevant option to access the corresponding service.

SSP Portal | e-Sahaayataa | Digital Lib | UDIN | Search CA / Enterprise

4.5 Trending Now

The Trending Now section provides two options:

- **Active Users** – view information about active users.
- **Platform Top 5** – view the platform's top five users, as available.
- Click **Know More** to view additional information about becoming an active user.

4.6 Dashboard Navigation Tabs

The dashboard provides the following tabs to manage posts and feeds:

Tab	Description
Feed	View posts available in the user's feed.
Endorsements	Add/View endorsements, if available.
Saved	View posts saved for later.
My Feeds	Access the user's feeds.
Archived	View archived posts.
Draft	View saved draft posts.
Schedule	View scheduled posts.

4.7 Knowledge Org

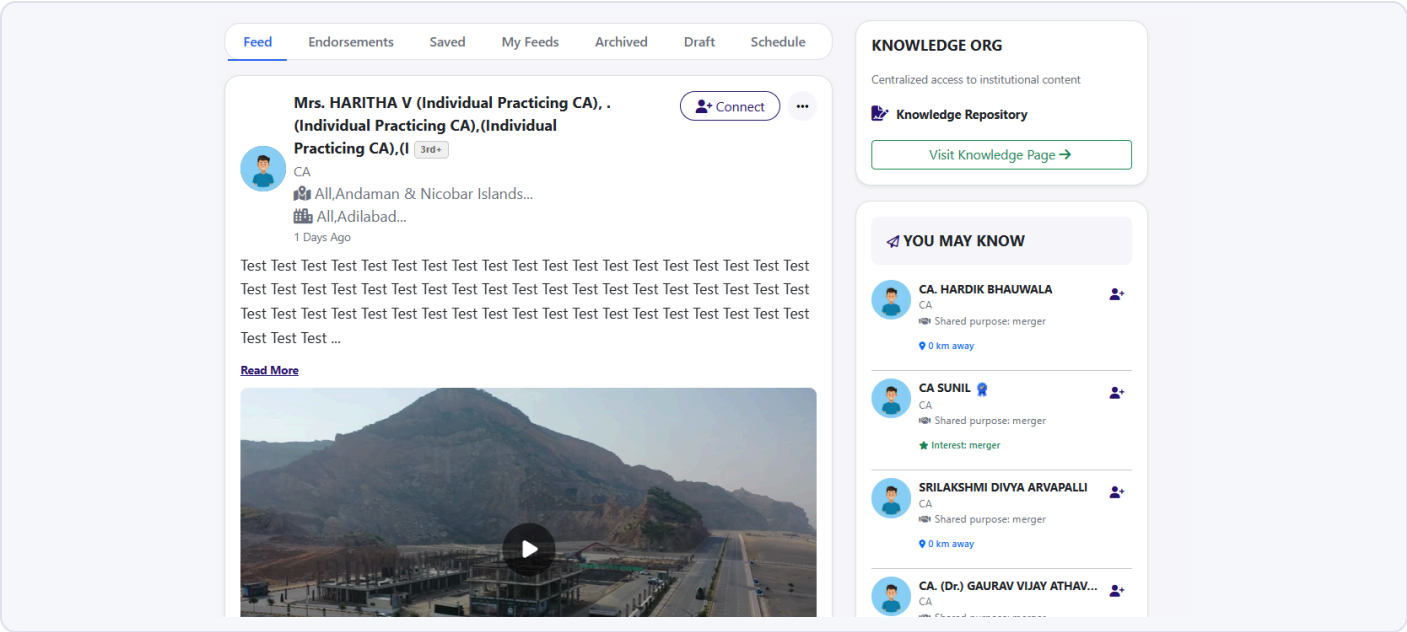
The Knowledge Org section provides centralized access to institutional content.

- **Knowledge Repository** – click to access the available knowledge resources and institutional content.

4.8 You May Know

The **You May Know** section displays suggested users whom the user may know or wish to connect with on the CA Setu platform.

- **Suggested Users** – view the recommended user profiles.
- **Connect / Follow** – use the available options to connect with or follow suggested users, if applicable.


Feed
Endorsements
Saved
My Feeds
Archived
Draft
Schedule
Mrs. HARITHA V (Individual Practicing CA), . (Individual Practicing CA),(Individual Practicing CA),(I
3rd+
Connect
CA
All,Andaman & Nicobar Islands...
All,Adilabad...
1 Days Ago
Test Test Test

SECTION 05

CA Settings – Fields and Details

The CA Settings section allows users to manage their account preferences, profile settings, privacy controls, and other available configuration options on the CA Setu portal.

5.1 Password and Security

The Password and Security section contains two sections: **Login & Recovery** and **Security Checks**.

Option	Description
Login & Recovery – manage account sign-in credentials.	
Change Password	Allows the user to change their account password. If the password has never been changed, the message "Password has never been changed." will be displayed.
Security Checks – monitor account access and alerts.	
Where You're Logged In	Displays the devices and browsers currently logged in to the user's account, showing the device type, browser, location, and session status. Example: Desktop · Google Chrome · New Delhi, National Capital Territory of Delhi, India (Active).
Active Session	Displays the number of active sessions and provides a **See All** option to view login sessions.
Login Alerts	Allows the user to receive notifications about unrecognized login attempts to help monitor account security.
Reminders	Allows the user to receive notifications for work anniversaries and birthday reminders.

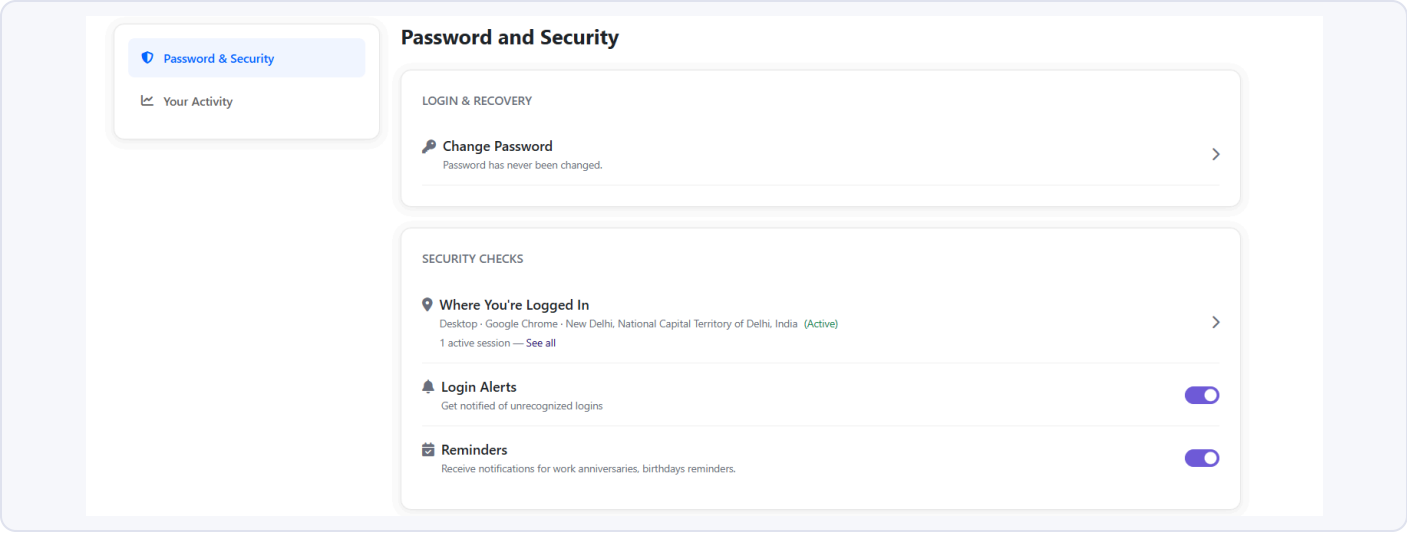


Figure 26 · CA Settings – Password and Security

5.2 Your Activity

The **Your Activity** section allows users to view and manage their account activity.

Option	Description
Likes	View posts liked by the user.
Comments	View comments made by the user.
Tags	View posts in which the user has been tagged.
Recently Deleted	View and manage recently deleted content.
Time Spent	Check the time spent on the platform.
Account History	View the history of account activities and changes.
Recent Searches	View recent search queries.
Archived	View archived posts and content.

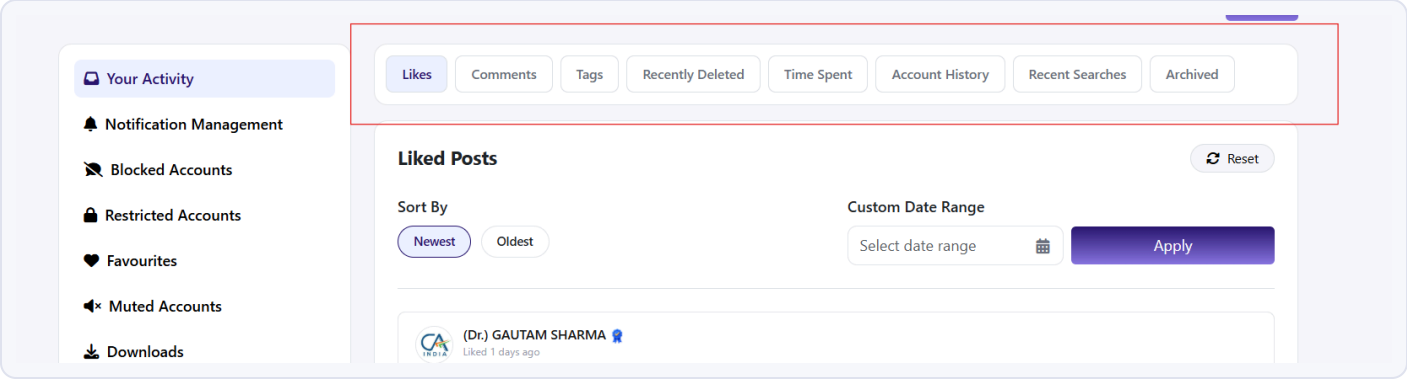


Figure 27 · CA Settings – Your Activity

5.3 Notification Management

The **Notification Management** section allows users to manage how and when they receive notifications.

1 · Push Notifications

Option	Description
Mute All Notifications	Allows users to temporarily stop all push notifications.
Likes	Manages notifications for likes on the user's posts. **Off**: do not receive notifications for likes. **People I Follow**: receive notifications for likes from people the user follows or is connected with. **From Everyone**: receive notifications whenever anyone likes the user's posts.
Comments	Manages notifications when someone comments on a post. **Off**: do not receive comment notifications. **People I Follow**: receive notifications for comments from people the user follows or is connected with. **From Everyone**: receive notifications whenever anyone comments on the user's posts.
Comment Likes	Manages notifications when someone likes the user's comment.
Messages	Allows users to receive notifications when they get new messages.
Reminders	Allows users to receive notifications for work anniversaries and other important reminders.

2 · Mute Specific Accounts

Option	Description
Mute a Specific Account	Allows users to stop receiving notifications from a particular account.
Search Account to Mute	Allows users to search for an account they want to mute.
No Muted Accounts	Displays a message when the user has not muted any accounts. Accounts muted by the user will appear in this section.

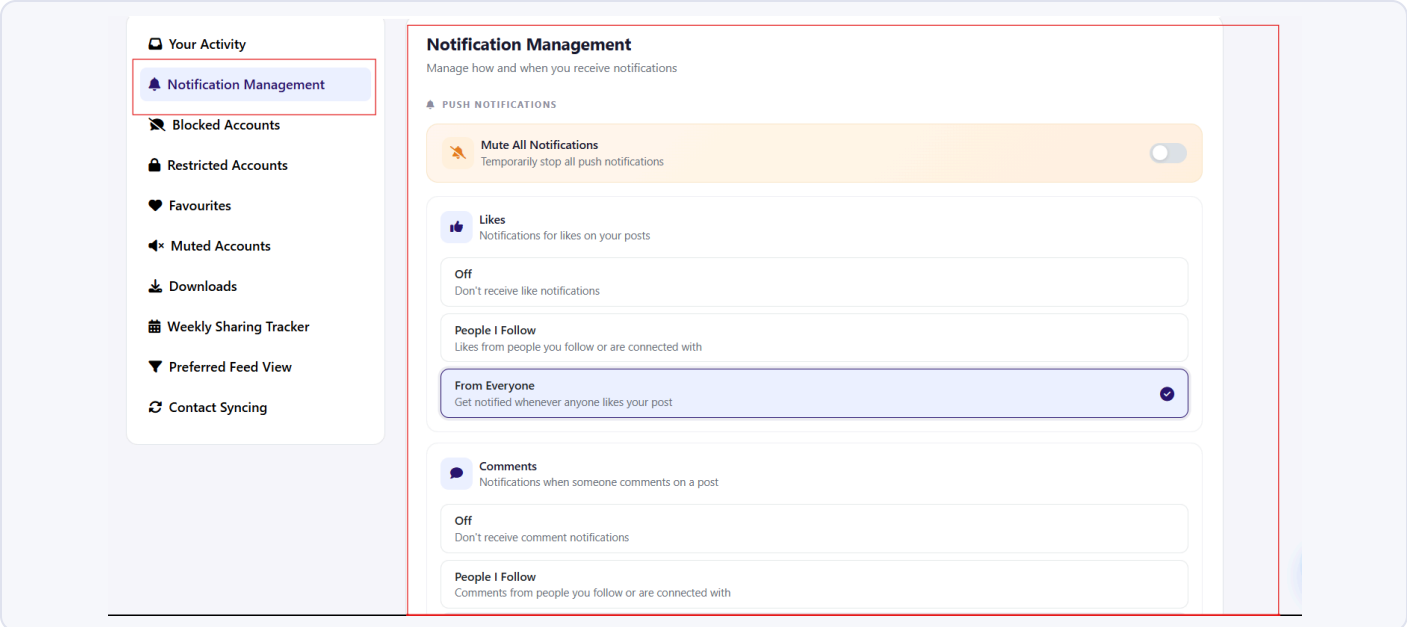


Figure 28 · CA Settings – Notification Management

5.4 Blocked Accounts

The **Blocked Accounts** section allows users to manage accounts they have blocked.

Option	Description
Blocked Account Details – information shown for each blocked account.	
Account Name	Displays the name of the blocked account.
Profile Picture	Displays the profile picture of the blocked account.
Reason	Displays the reason provided for blocking the account.
Blocked On	Displays the date on which the account was blocked.
Comments Blocking – control who can comment on the user's posts.	
Block Comments From	Allows users to select specific accounts whose comments they want to block on their posts.
Block Comments from a Specific Account	Allows users to select or search for a particular account to prevent it from commenting on their posts.

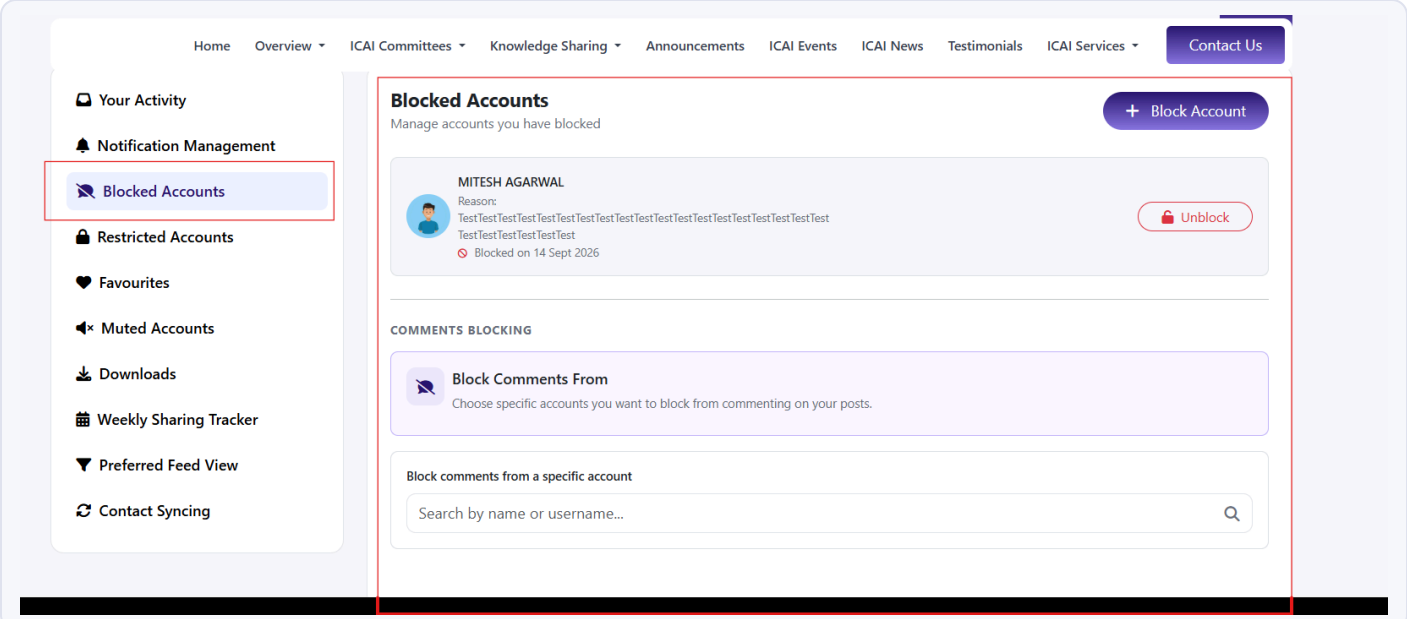


Figure 29 · CA Settings – Blocked Accounts

5.5 Restricted Accounts

The **Restricted Accounts** section allows users to limit interactions with specific accounts without blocking or unfollowing them. When a user restricts an account, the restricted person is not notified. Their interactions are limited without explicitly informing them.

What Restriction Does	Description
Review Comments	Only the user and the restricted account can see new comments posted by the restricted account. The user can approve these comments to make them visible to others.
Hide Activity Status	The restricted account cannot see the user's online status or message read receipts.
Move to Message Requests	Messages from the restricted account are moved to the Message Requests section. The restricted account is not notified that it has been restricted.
Restricted Accounts	Displays the accounts that the user has restricted and allows users to review and manage them.

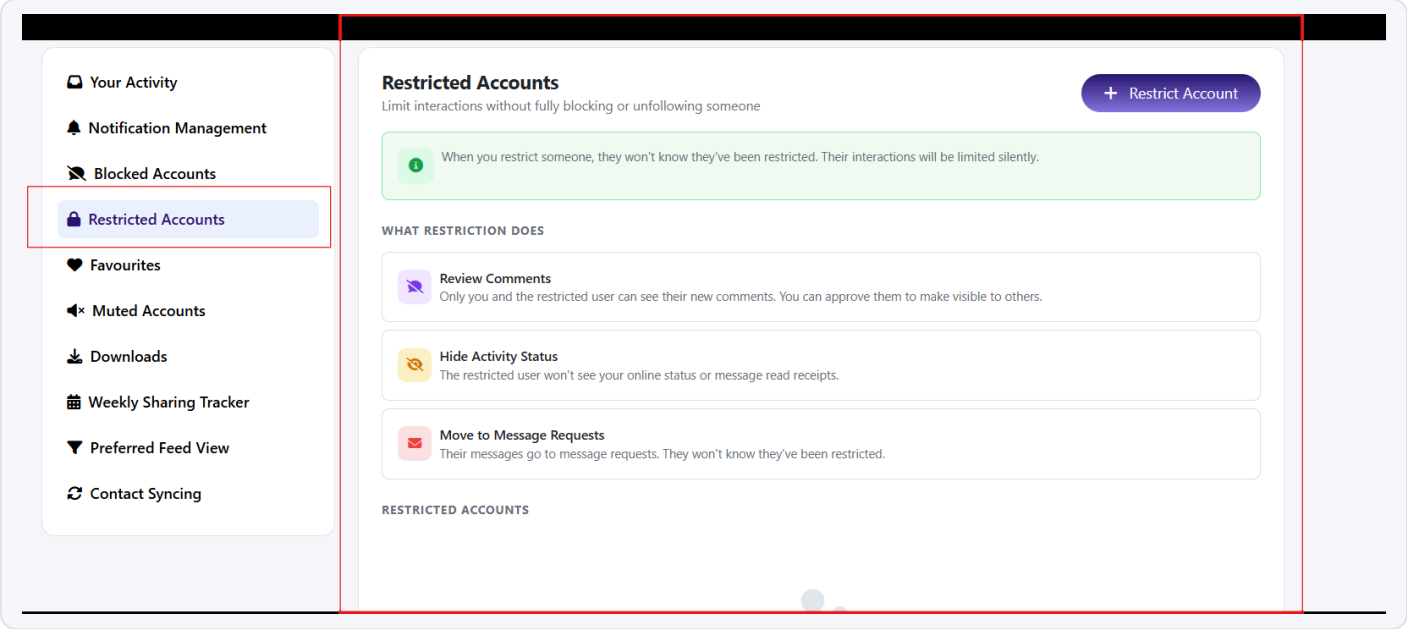


Figure 30 · CA Settings – Restricted Accounts

NOTE The restricted account is not notified at any stage that it has been restricted.

5.6 Favourites

The **Favourites** section allows users to prioritize posts from their favourite accounts in their feed.

- Posts from favourite accounts are displayed higher in the user's feed.
- Users can add accounts they follow or are connected with to their favourites.
- Users will not receive notifications when they edit their favourites list.
- If the user has not added any favourite accounts, a **No favourites yet** message is displayed.

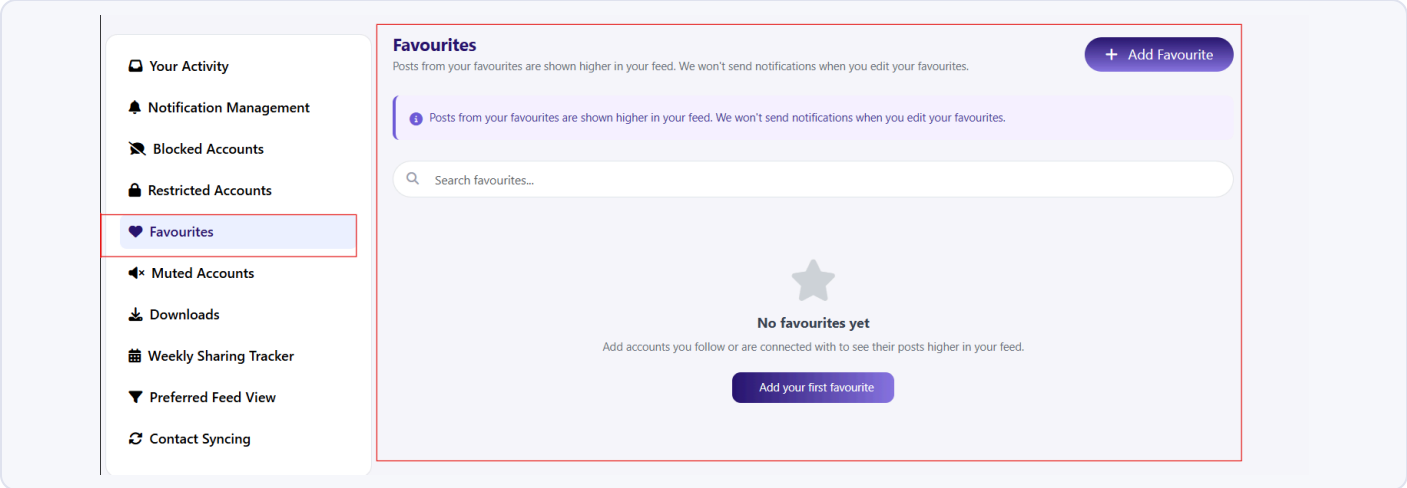


Figure 31 · CA Settings – Favourites

5.7 Muted Accounts

The **Muted Accounts** section displays all accounts that the user has muted.

- **View Muted Accounts** – displays a list of all muted accounts.
- **Unmute Accounts** – allows users to unmute an account at any time.

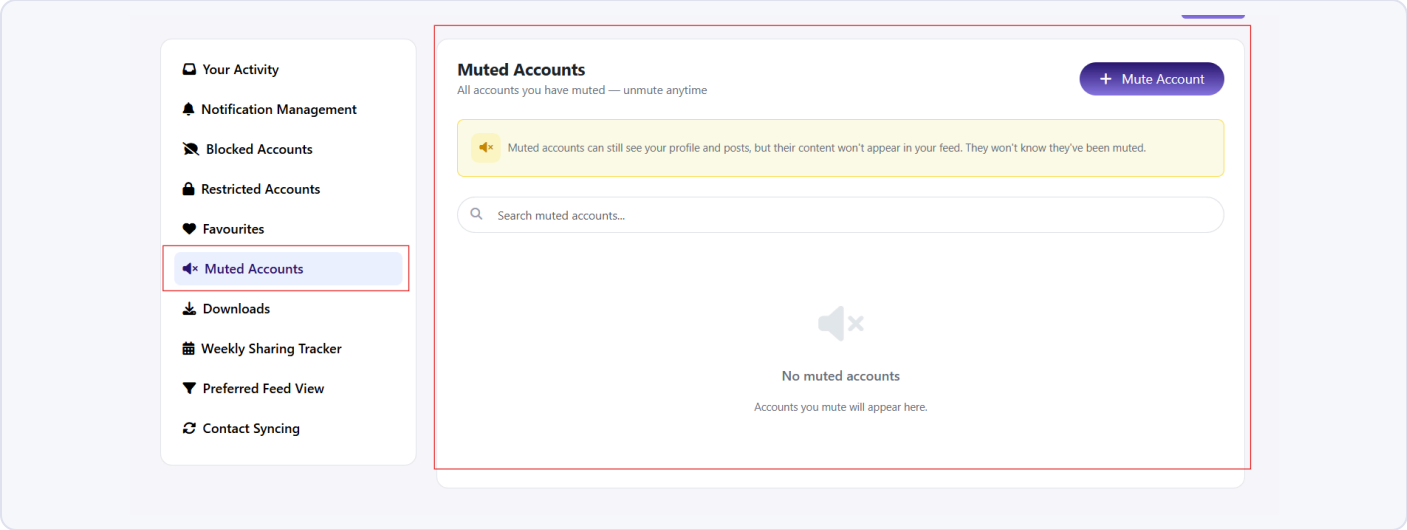


Figure 32 · CA Settings – Muted Accounts

5.8 Downloads

The **Downloads** section allows users to view files, documents, images, and videos saved to their device.

Category	Description
All	Displays all downloaded files.
Documents	Displays downloaded documents.
Images	Displays downloaded images.
Videos	Displays downloaded videos.

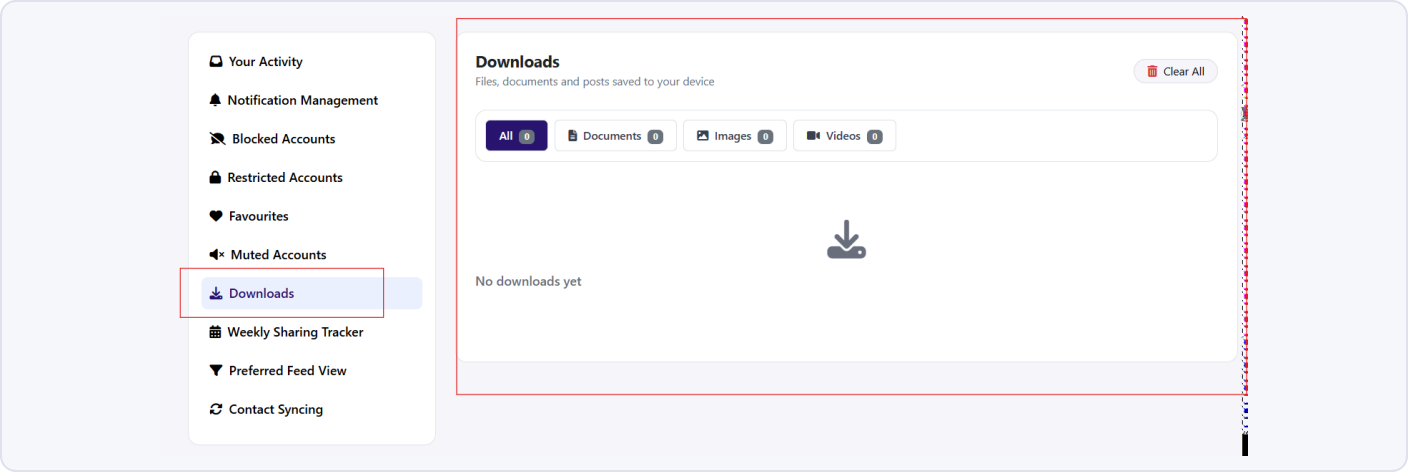


Figure 33 · CA Settings – Downloads

5.9 Weekly Sharing Tracker

The Weekly Sharing Tracker allows users to track and improve their engagement on the platform each week by posting content and commenting on posts. Users are encouraged to increase their visibility by posting new content and engaging with other users.

WEEKLY GOAL Complete 3 actions every week. Both posts and comments count towards the weekly goal.

Item	Description
Weekly Progress	Shows the actions completed for the week — for example, 3 of 3 actions completed (Posts: 0, Comments: 4).
Completion Message	“Excellent! You've completed this week's goal!” is displayed once the goal is met.
Post New Content	Allows users to share insights, achievements, or industry updates. Status: Pending.
Comment on Posts	Encourages users to engage with other users by commenting on their posts. Status: 4 comments made this week — Done.

The tracker displays the user's weekly progress and the completion status of recommended engagement activities.

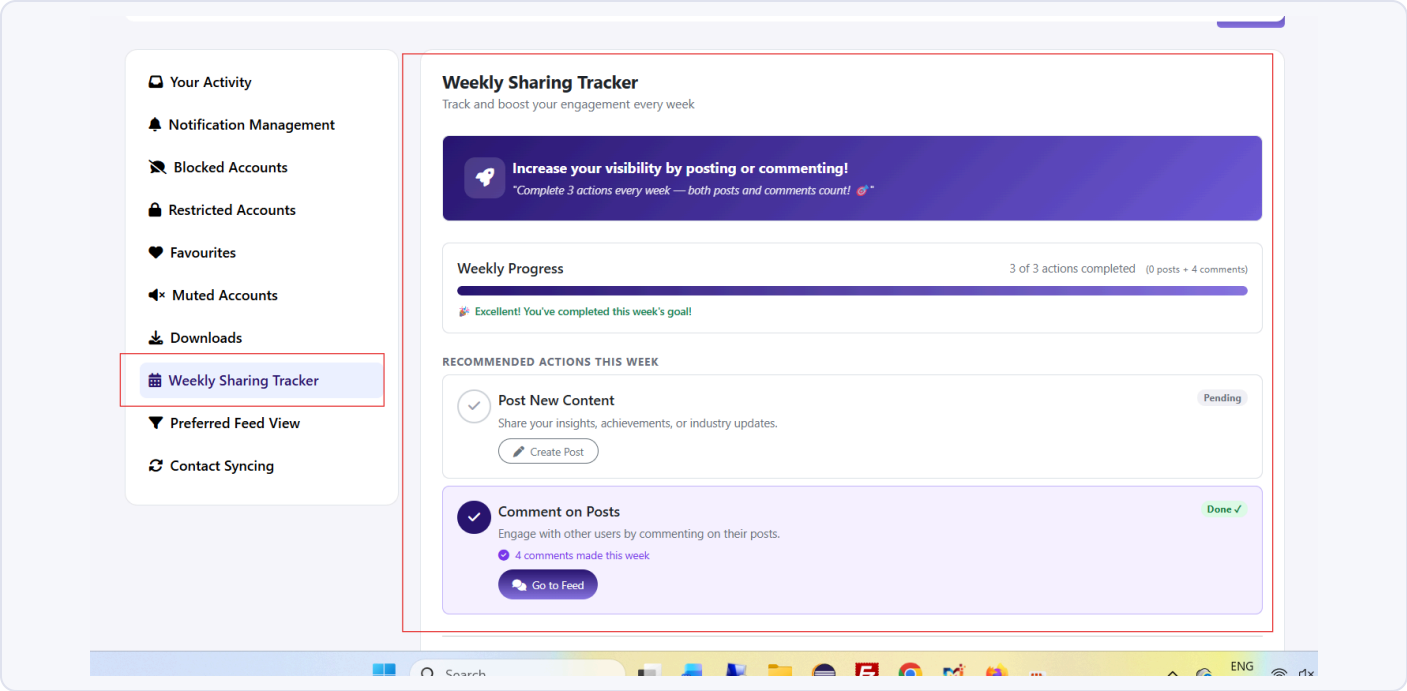


Figure 34 · CA Settings – Weekly Sharing Tracker

5.10 Preferred Feed View

The **Preferred Feed View** section allows users to customize how content appears in their feed, prioritizing knowledge-based content according to their preferences.

Feed View	Description
Most Relevant	Displays content aligned with the user's preferences, based on their profile and interactions.
Recommended	Displays content recommended to the user based on their interests and platform activity.
Most Recent	Displays the latest updates from subscribed pages, with the newest content shown first.
By Source	Prioritizes content from selected committees and organizations.
Based on Recent Searches	Displays content influenced by the user's recent searches, highlighting relevant posts.

Select the preferred option and click **Save Preference**.

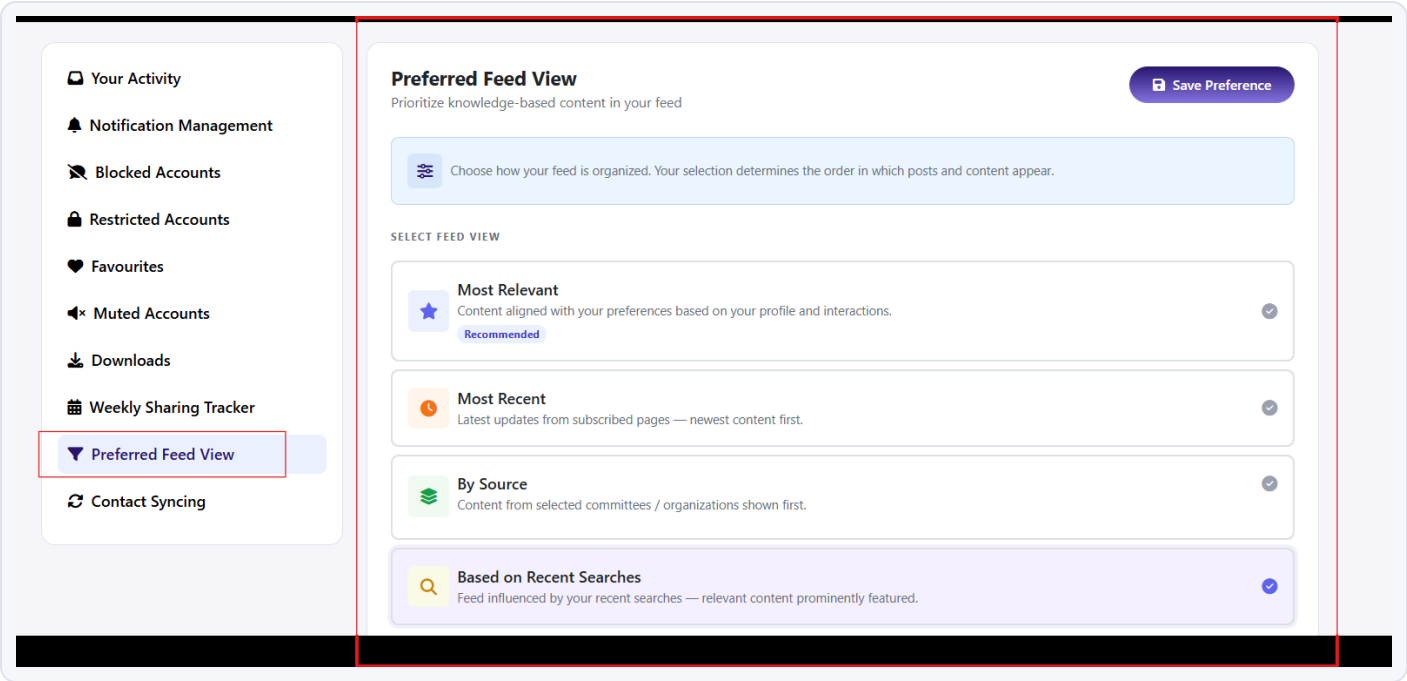


Figure 35 · CA Settings – Preferred Feed View

5.11 Contact Syncing

The **Contact Syncing** section allows users to upload their contacts and automatically match them with existing portal members.

Upload Contacts File	Details
Supported Format	vCard (.vcf).
Contact Capacity	Supports files containing 5,000 or more contacts.
Matching Criteria	Matches contacts using phone numbers and email addresses.
Supported Account Types	CA, Enterprise, Organization, and Committee accounts.

Upload Instructions

- Click **"Click to browse"** to select a contacts file from the device, or drag and drop the .vcf file into the designated upload area.
- Verify that the selected file is in the supported vCard (.vcf) format.
- The selected file name will be displayed after the file is chosen.
- Click **Upload & Sync** to match the contacts with portal members.

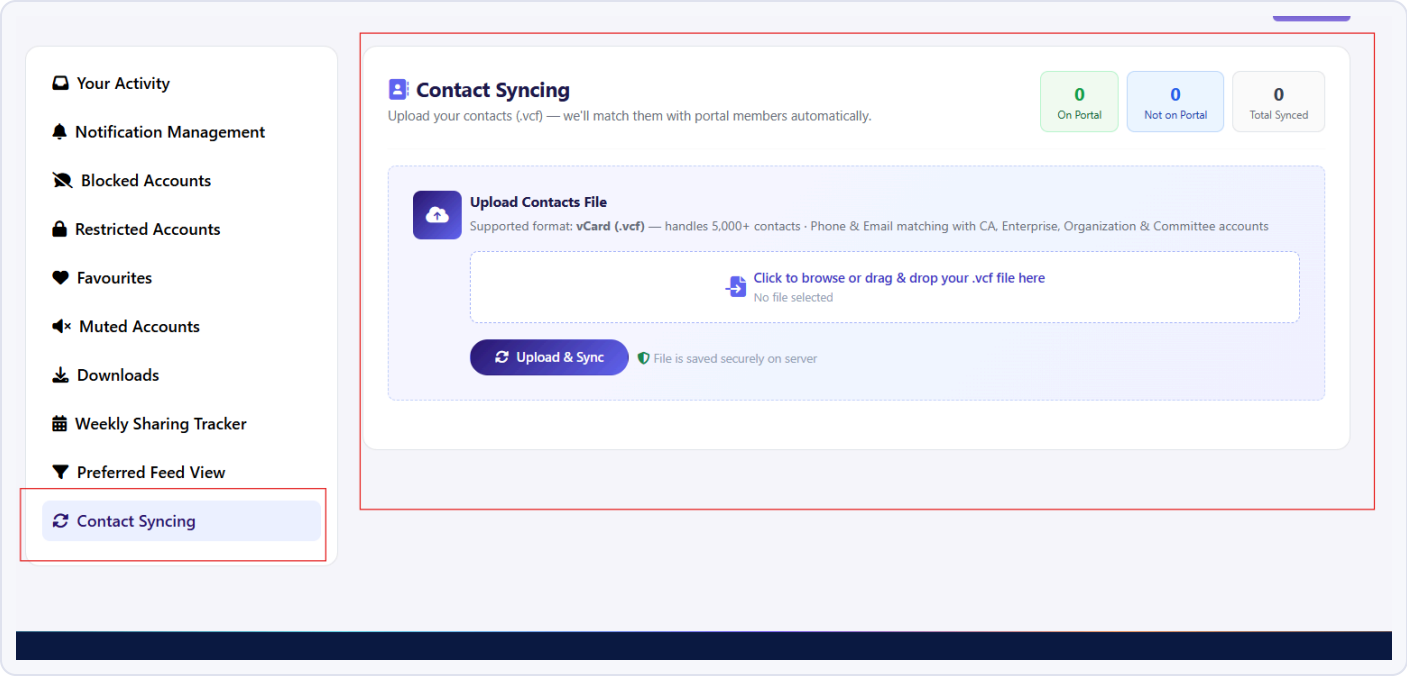


Figure 36 · CA Settings – Contact Syncing

APPENDIX A

Troubleshooting

Quick checks based on the field rules described in this manual.

Situation	What to check	Ref.
Cannot proceed from Step 1	Enter your 6-digit ICAI Membership Number in the Membership Number field and click Verify & Continue. The number is verified through SSP.	1.3
Mobile Number cannot be entered	The Mobile Number is automatically fetched from ICAI records.	1.4
Where is the OTP sent?	A 6-digit OTP is sent to the registered email address entered in the Email ID field.	1.4
Password not accepted	The password must contain a minimum of 8 characters, and Password and Confirm Password must match. Use the eye icon to show the password and check it.	1.4
Cannot proceed from Step 3	Ensure that the required Purpose checkbox is selected before clicking Continue/Next.	1.5
SSP Verified Information cannot be edited	These details are retrieved from the SSP (Self Service Portal), are system-generated, and cannot be edited by the user.	2.1
Changes cannot be saved	Complete all mandatory fields marked with an asterisk (*). On the CA Post Registration page, read and accept the declarations and Terms and Conditions before clicking SAVE PROFILE.	2.8
Full Name shows instead of Display Name	If the Display Name field is empty, the registered Full Name is displayed. Display Name allows a maximum of 100 characters; Professional Bio allows a maximum of 500 characters.	3.1
Firm Name, Registration Number or Address cannot be edited	These fields are automatically fetched and non-editable. Only Partners, Staff and Offices are editable.	3.4
Certificate upload not accepted	Upload a JPG, PNG, or PDF file. The maximum file size is 5 MB.	3.6
Post cannot be published	Keep the Post Description within 2,000 characters and select the Declaration checkbox before clicking Post.	4.3
Too many notifications	Use Mute All Notifications, set Likes/Comments to Off or People I Follow, or mute a specific account.	5.3
Contacts file not accepted	Upload the contacts in vCard (.vcf) format only.	5.11

APPENDIX B

Glossary

CA	Chartered Accountant.
CA Setu	The networking portal for CAs described in this manual.
ICAI	The Institute of Chartered Accountants of India.
Membership Number	The 6-digit ICAI Membership Number entered during Step 1 – SSP Verification.
SSP	Self Service Portal. The source used to verify the membership number and to retrieve the SSP Verified Information and firm details.
OTP	One-Time Password. A 6-digit code sent to the registered email address during Step 2 – Create Credentials.
Purpose of Registration	The purpose(s) applicable to the user's CA account, selected by checkbox.
Area of Interest	The area(s) that match the user's professional interests or expertise, selected by checkbox.
Primary Firm	The firm marked by checkbox as the user's primary firm in Primary Firm Registration.
Visibility Controls	Profile privacy settings that control which professional and personal information is visible to other users.
Scope	Whether a post is Domestic or International; domestic posts are tagged to State(s)/UT(s) and City(s)/District(s).
Restricted Account	An account whose interactions are limited without blocking or unfollowing it; the account is not notified.
Muted Account	An account whose content no longer appears in the user's feed; it is not told it has been muted and can be unmuted at any time.
Favourites	Accounts whose posts are shown higher in the user's feed.
Weekly Sharing Tracker	Tracks the weekly goal of 3 actions (posts and comments).
vCard (.vcf)	The contacts file format supported by Contact Syncing.
Mandatory field (*)	A field marked with an asterisk that must be completed before saving.

APPENDIX C

Contact & Support

For queries about the CA Setu portal, contact The Institute of Chartered Accountants of India.

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EMAIL

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