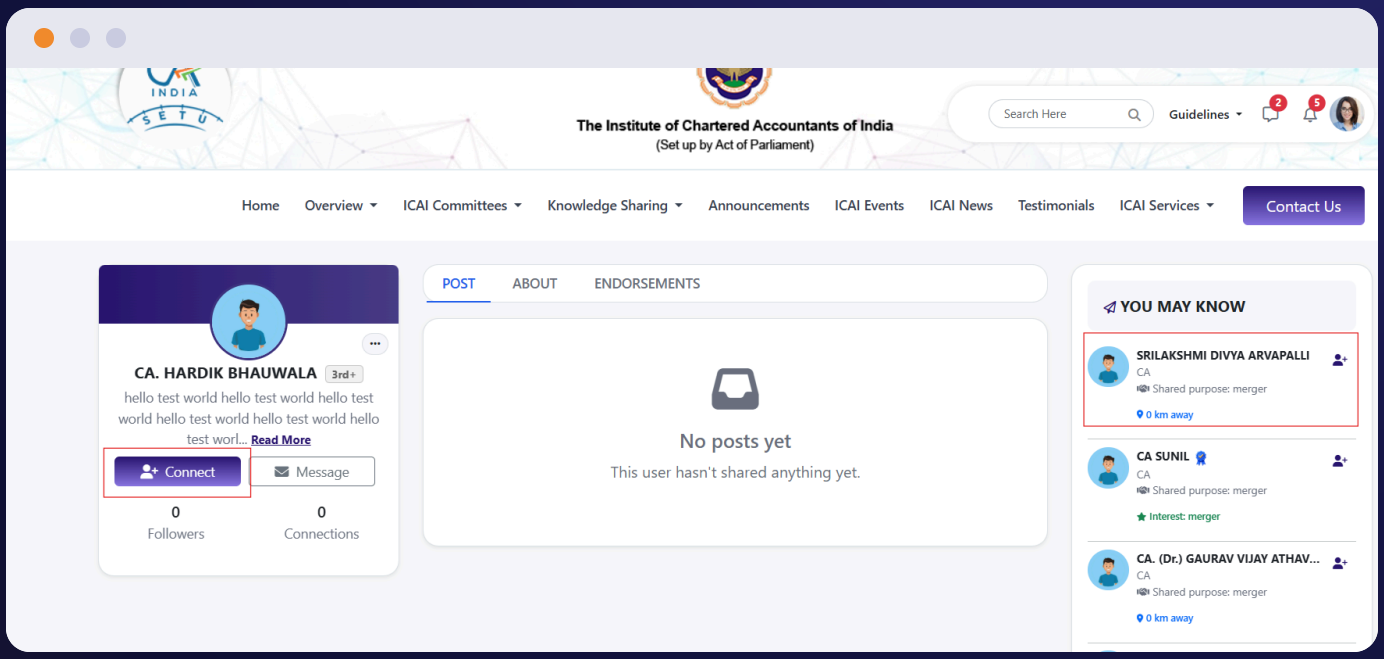
The Institute of Chartered Accountants of India
(Set up by Act of Parliament)

NETWORKING PORTAL FOR CAS

CA Setu

Connections & Messaging

User Connections and Following, and the Send Message Process



DOCUMENT
CA User Manual

PORTAL
CA Setu

INTENDED FOR
Chartered Accountants

ABOUT THIS MANUAL

This manual explains how a user finds other users on the CA Setu portal, connects with or follows them, and sends and manages messages.

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

Options shown as “if available” depend on the user’s relationship with the other profile.

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SECTION 01

User Connections and Following

The user can search for other users, view their profiles, and access additional actions through the three-dot menu.

1.1 User Profile

- The profile card displays the user's **profile picture**, **name**, **designation**, and **profile description**.
- Click the user's profile or profile picture to view their public profile details.
- Click **Read More** to view the complete profile description.

1.2 Profile Actions

Option	Instruction
Connect	Send a connection request to the selected user, if available.
Follow	Select **Follow** to follow the user's profile.
Followers	View the number of followers and click the count to see the followers list.

1.3 Three-Dot Menu

Click the three-dot menu on a user's profile to access the following options:

Option	Instruction
Follow	Follow the selected user's profile.
Share Profile	Share the user's profile with others.
Report	Report the profile if inappropriate content or suspicious activity is identified.
Block User	Block the user to restrict further interaction, according to the platform's functionality.

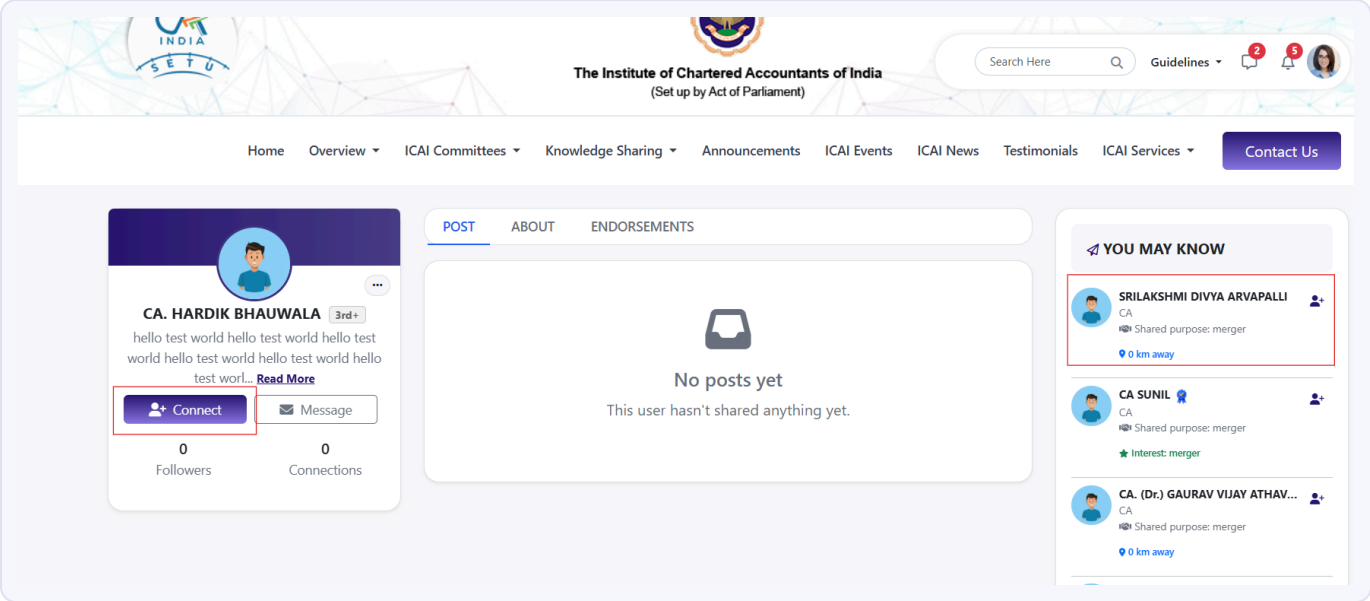


Figure 1 · User profile – Connect option and You May Know suggestions

1.4 Search Users

- Use the search bar to find users by name or other available search criteria.
- Filter the results using the tabs: **All**, **Posts**, **CA**, **Enterprise**, **Organization** and **Committee**.
- Each result shows the user's name, description, expertise tag, location and years of experience.
- Click **Connect** to send a connection request, or **View** to open the profile.

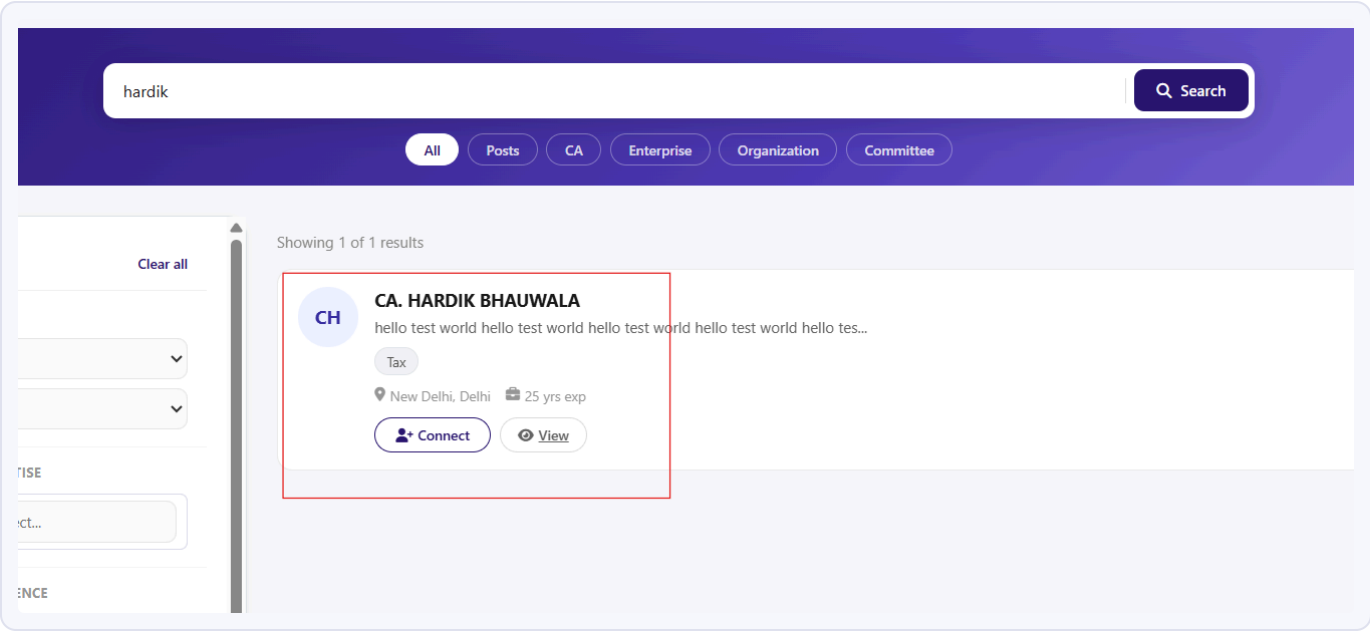


Figure 2 · Search results – Connect and View options

SECTION 02

User Send Message Process

2.1 Send a Message

- Open another user's profile and click the **Message** option to start a conversation.
- To share a post through Messages, click **Share** on the post and select the message icon.

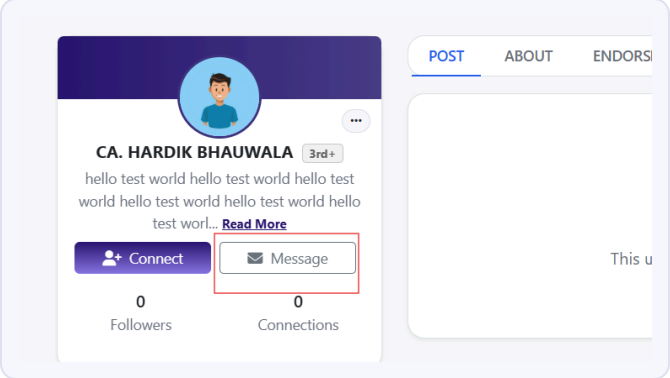


Figure 3 · Message option on a user profile

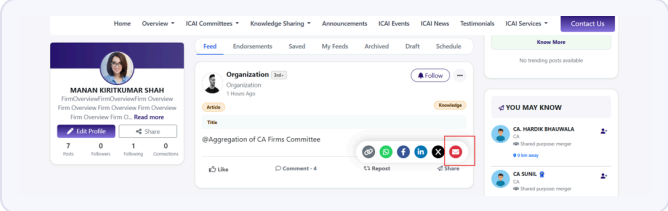


Figure 4 · Share a post through Messages

2.2 First-Time Messaging

- When a CA user sends a message for the first time through another user's profile, they must select the **Purpose of Message** before sending it.
- The selected purpose is shown with the message, for example **[Purpose: Referral Work Proposal]**.

NOTE The Purpose of Message is required only for the first message sent through another user's profile.

2.3 Inbox – Primary and Requests

Users can view and manage their conversations and message requests from the **Messages** section. Use the **Search users or messages** field to find a conversation.

TAB 1
Primary

TAB 2
Requests

2.4 Non-Connected Users

- Messages from non-connected users appear in the **Requests** section.
- The recipient can **Accept**, **Delete**, or **Block** the message request, where applicable.
- If accepted, the sender can see information such as activity status and when messages have been read.

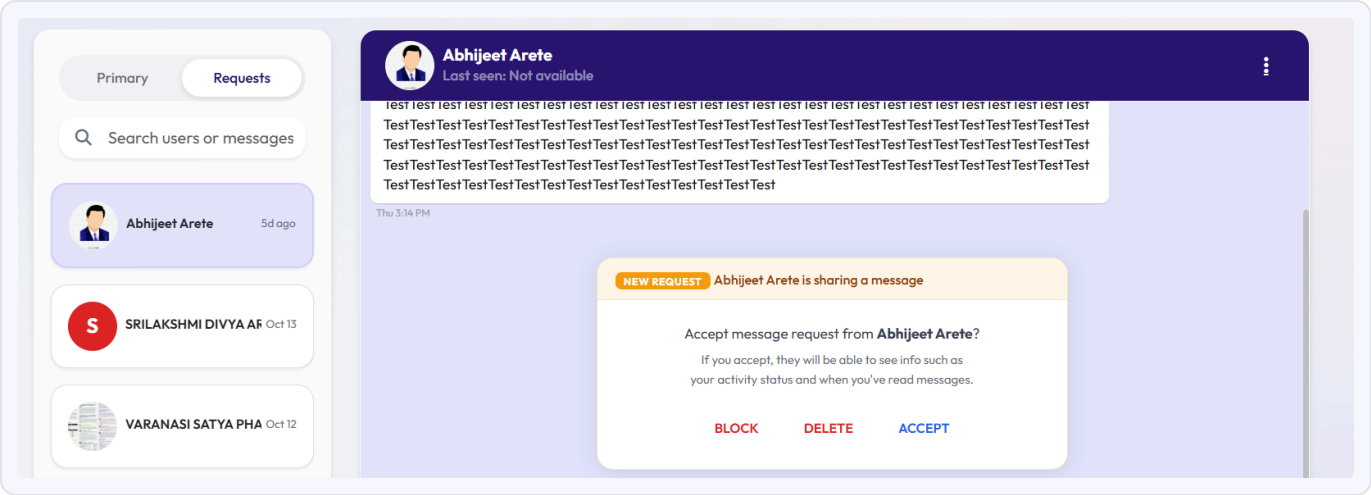


Figure 5 · Requests – Accept, Delete or Block a message request

2.5 Connected Users

- Messages sent to connected users appear directly in the **Primary** inbox, where users can view and continue their conversations.

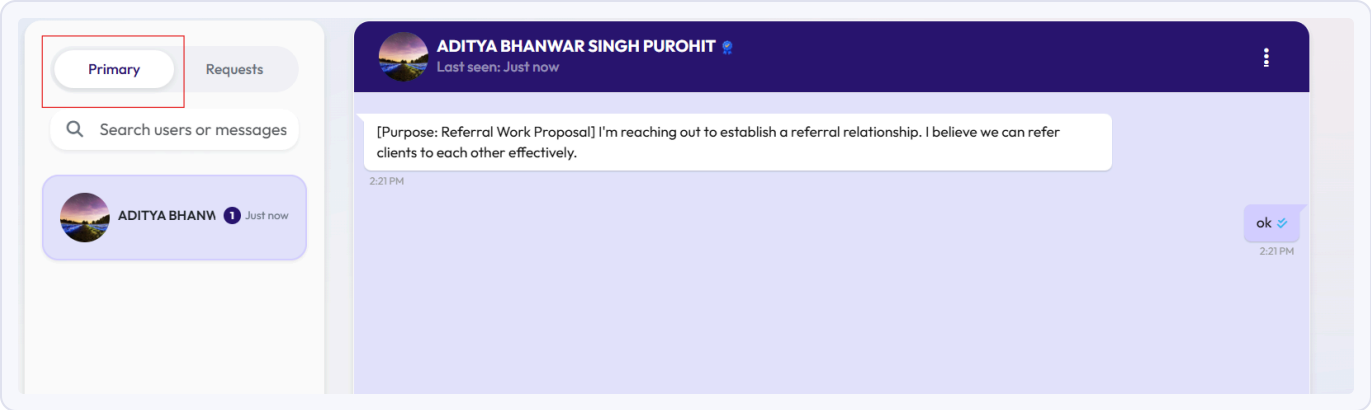


Figure 6 · Primary inbox – conversation with a connected user

2.6 Restricted Users

IMPORTANT If a user is restricted from sending direct messages, their messages appear in the recipient's **Requests** section instead of the Primary inbox.

APPENDIX A

Troubleshooting

Quick checks based on the rules described in this manual.

Situation	What to check	Ref.
Connect option is not shown	The Connect option appears only if available for the selected user.	1.2
Cannot find a user	Search by name or other criteria and use the result tabs (All, CA, Enterprise, Organization, Committee) to narrow the list.	1.4
Message cannot be sent the first time	Select the Purpose of Message before sending the first message through a user's profile.	2.2
A message is not in the Primary inbox	Messages from non-connected or restricted users appear in the Requests section.	2.4, 2.6
Sent message is not visible to the recipient in Primary	If you are not connected, your message reaches the recipient's Requests section and must be accepted.	2.4
Want to stop a user from contacting you	Block the message request, or use Block User in the profile's three-dot menu.	1.3, 2.4