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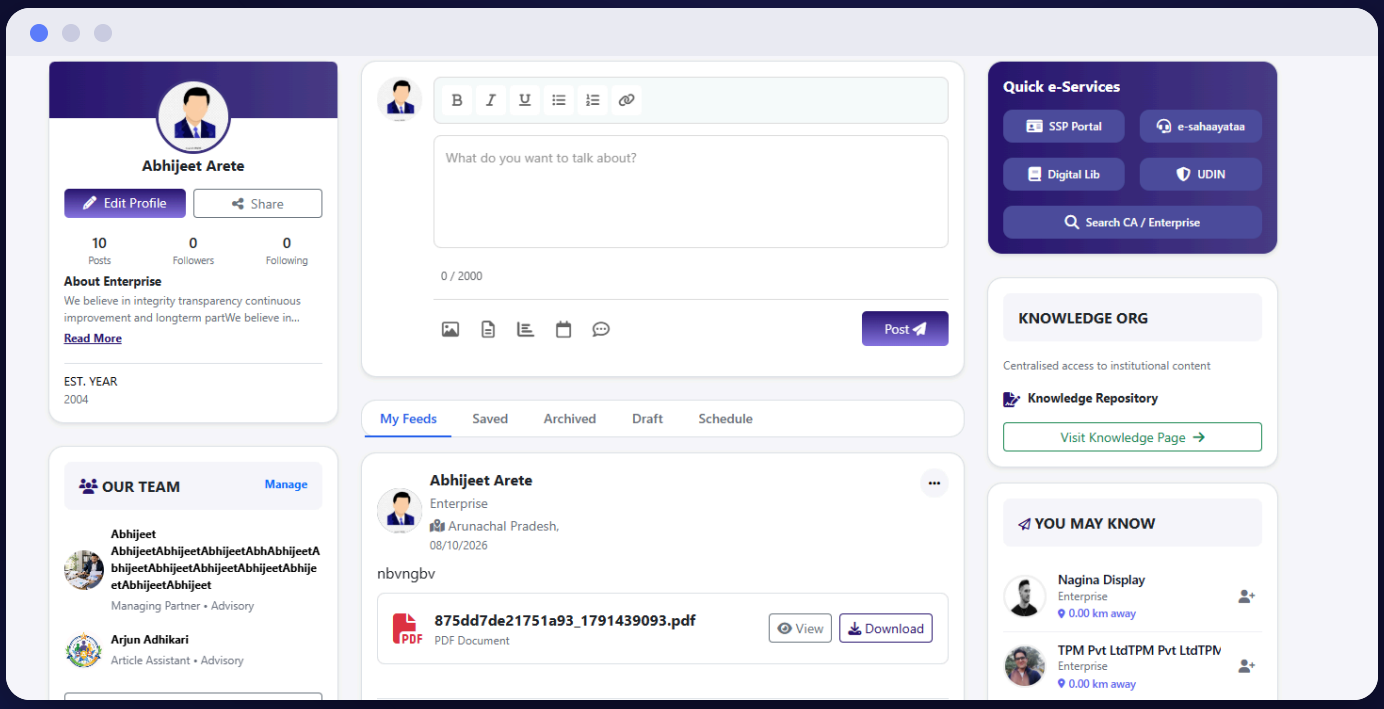
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NETWORKING PORTAL FOR CAS

CA Setu

Enterprise User Manual

Enterprise Registration, Edit Profile, Dashboard and Settings



DOCUMENT

Enterprise User Manual

PORTAL

CA Setu

INTENDED FOR

Enterprises

ABOUT THIS MANUAL

This manual explains how an enterprise registers on the CA Setu portal, updates its profile through Enterprise Edit Profile, uses the Enterprise Dashboard and manages account 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 Enterprise Registration

1.1 Open the Enterprise 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 **Create Your Account** page will open.

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 Enterprises** to register as an enterprise.
- Under For Enterprises, click the **Create Account** button.
- The **Create Account for Enterprises** form will be displayed.

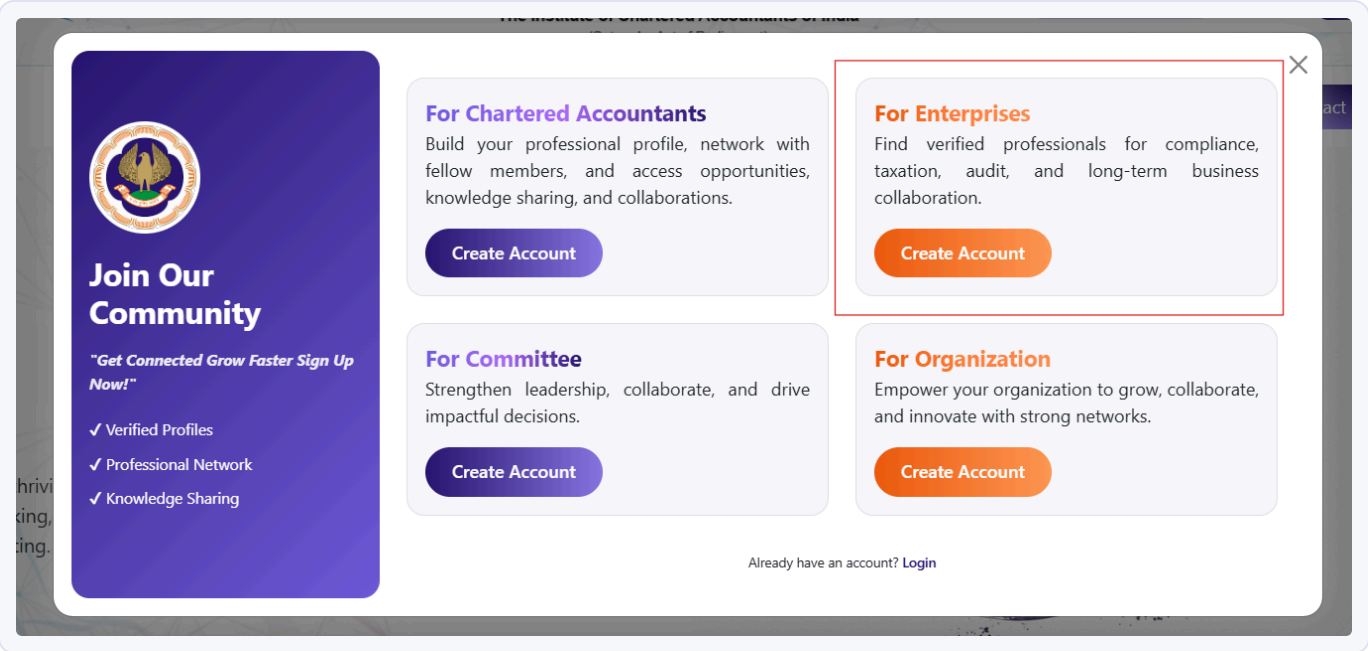


Figure 1 · Create Your Account page – For Enterprises

REGISTRATION STEPS

STEP 1	STEP 2	STEP 3	STEP 4
Basic Information	Contact Person Details	Purpose	Areas of Interest

1.3 Step 1: Basic Information

After opening the Enterprise Registration page, complete the **Basic Information** section with the following fields:

Field	Status	Instruction
Company Name	Required	Enter the official name of the company or enterprise.
Company Email ID	Required	Enter the official company email address. Use **Send OTP** to verify the email address.
Business Category	Required	Select the appropriate business category from the dropdown list.
Short Profile	Required	Enter a brief description of the company or enterprise.
Legal Entity Type	Required	Select the appropriate legal entity type.
Year of Establishment	Required	Select the year in which the company or enterprise was established.
PAN Number	Required	Enter the valid PAN of the company or enterprise (format: AAAAA9999A).
Upload PAN Card	Required	Upload the required PAN card document.
GSTIN	Required	Enter the GST Identification Number (GSTIN), if applicable or required.
Upload GST Certificate	Required	Upload the GST certificate, if applicable or required.
Company Registration Number / CIN / LLPIN	Required	Enter the applicable company registration number, Corporate Identification Number (CIN) or Limited Liability Partnership Identification Number (LLPIN).
Upload Business Registration Document	Required	Upload the required business registration document.
Registered Address	Required	Enter the official registered address of the company or enterprise.
PIN Code	Required	Enter the 6-digit PIN code corresponding to the registered address.
No. of Offices	Required	Enter the total number of offices operated by the company or enterprise.

Field	Status	Instruction
Password	Required	Create a password that meets the specified password requirements.
Confirm Password	Required	Re-enter the password to confirm it. Use the eye icon to show or hide the password.
Review Information		Verify all entered details and ensure that all mandatory fields marked with an asterisk (*) are completed.
Next		Click **Next** to proceed to Step 2 – Contact Person Details.

NOTE All fields marked with an asterisk (*) are mandatory. The Password and Confirm Password entries must match before you can proceed.

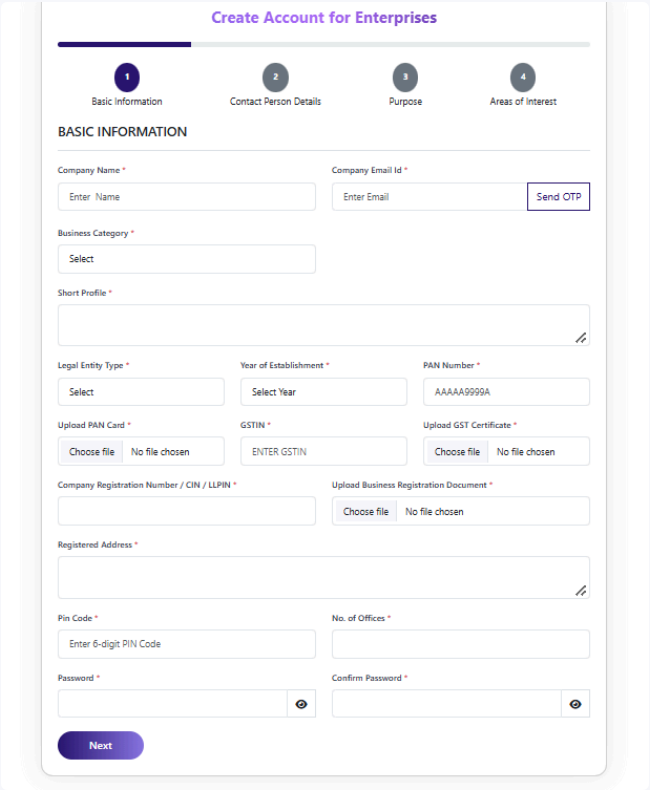


Figure 2 · Step 1 – Basic Information

1.4 Step 2: Contact Person Details

After completing Step 1 – Basic Information, the user will proceed to Step 2 – Contact Person Details.

Field	Status	Instruction
Company Logo	Required	Upload the company logo in JPG or PNG format. The maximum file size is 2 MB.
Name	Required	Enter the full name of the contact person representing the company or enterprise.
Designation	Required	Enter the designation or job title of the contact person.
Mobile Number	Required	Enter an active 10-digit mobile number for communication.
Email ID	Required	Enter the valid email address of the contact person and click **Send OTP** to verify it.
Website URL	Optional	Enter the official website URL of the company or enterprise, if available.
Review Details		Verify that all entered information is correct and all mandatory fields marked with an asterisk (*) are completed.
Next		Click **Next** to proceed to Step 3 – Purpose. Click **Back** to return to Step 1.

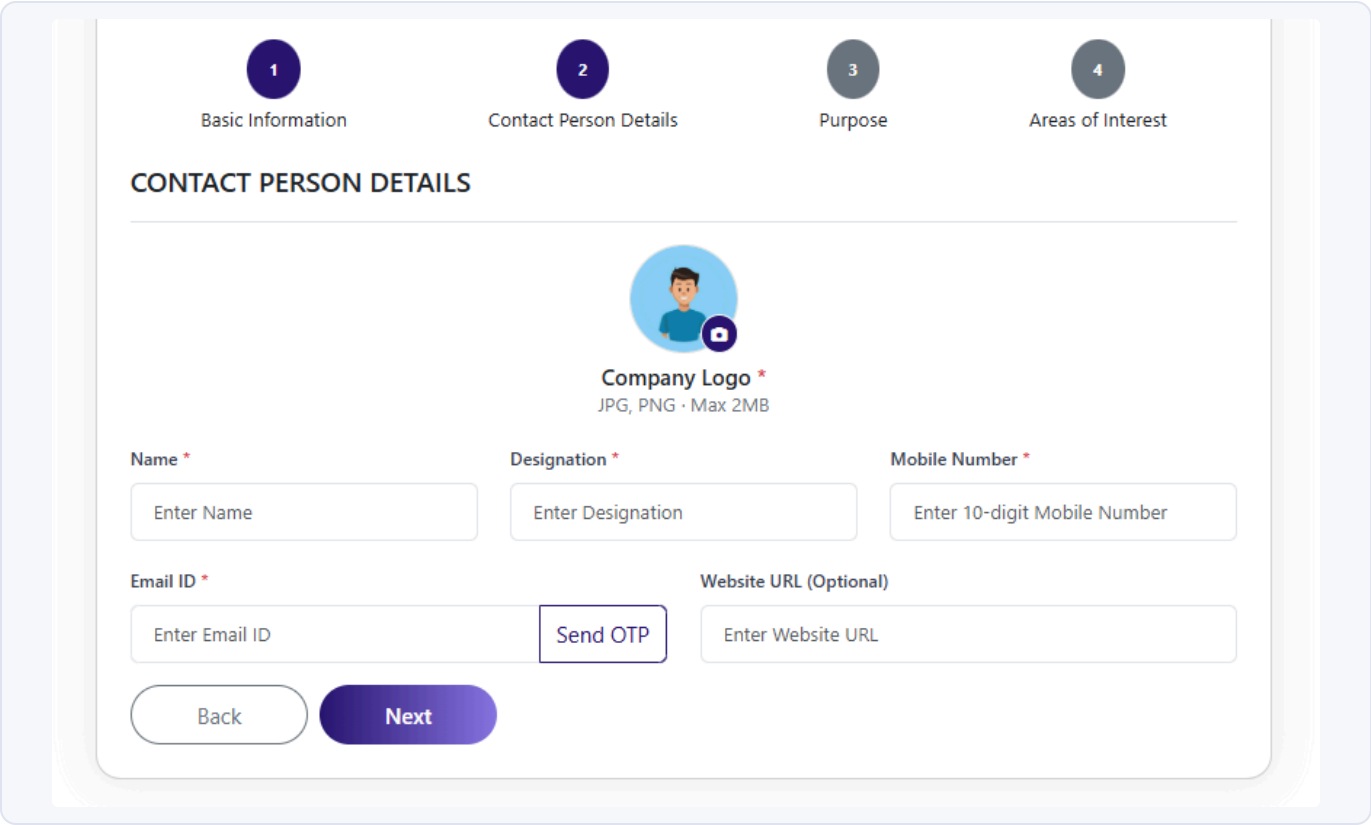


Figure 3 · Step 2 – Contact Person Details

1.5 Step 3: Purpose

After completing Step 2 – Contact Person Details, the user will proceed to Step 3 – Purpose.

- The **Purpose** section will be displayed with two options: **Work Opportunities** and **Knowledge Sharing**.
- Select the relevant purpose by clicking the corresponding checkbox.
- The user can select one or both options, as applicable.
- Review the selected purpose(s) to ensure they reflect the organization's objectives.
- Click **Continue** to proceed to Step 4 – Areas of Interest.

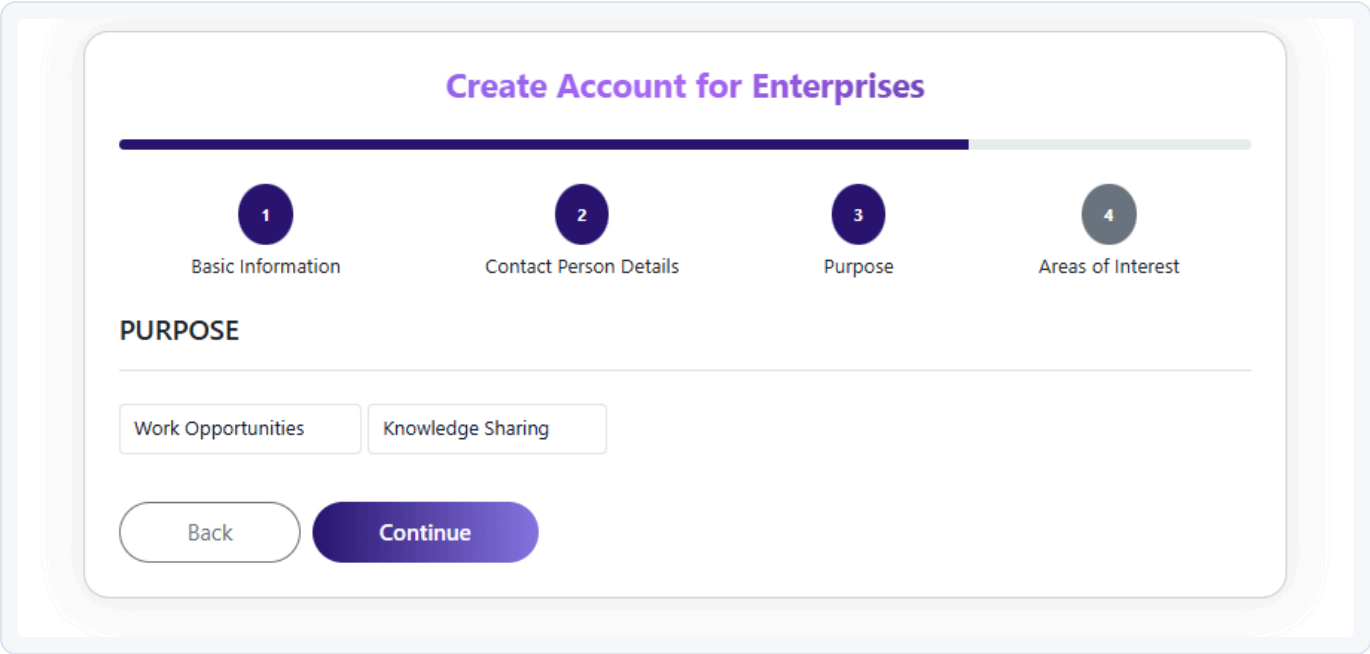


Figure 4 · Step 3 – Purpose

1.6 Step 4: Areas of Interest

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

- The **Areas of Interest** section will be displayed with a list of available professional areas.
- Select the relevant area(s) of interest by clicking the corresponding checkbox.
- Select **All** if the organization wishes to indicate all available areas of interest.
- If **Others, please specify** is selected, enter the relevant area of interest when prompted.

Before submitting, read and accept the declarations by selecting the checkbox:

Item	Instruction
Platform Declaration	Acknowledge that CA Setu is a facilitative platform provided by ICAI for professional connectivity, collaboration and aggregation. ICAI does not endorse or guarantee users, engagements, services, transactions or outcomes, and any engagement is undertaken independently by the concerned parties at their own responsibility.
Information Declaration	Confirm that the information provided on the CA Setu Portal is true and correct to the best of your knowledge and that the Portal will be used solely for professional purposes.
Terms and Conditions	Read and agree to the CA Setu Portal **Terms and Conditions**.
Review Details	Verify the selected areas of interest and ensure that all mandatory fields and declarations are completed.

Item	Instruction
Submit	Click **Submit** to submit the Enterprise Registration form.

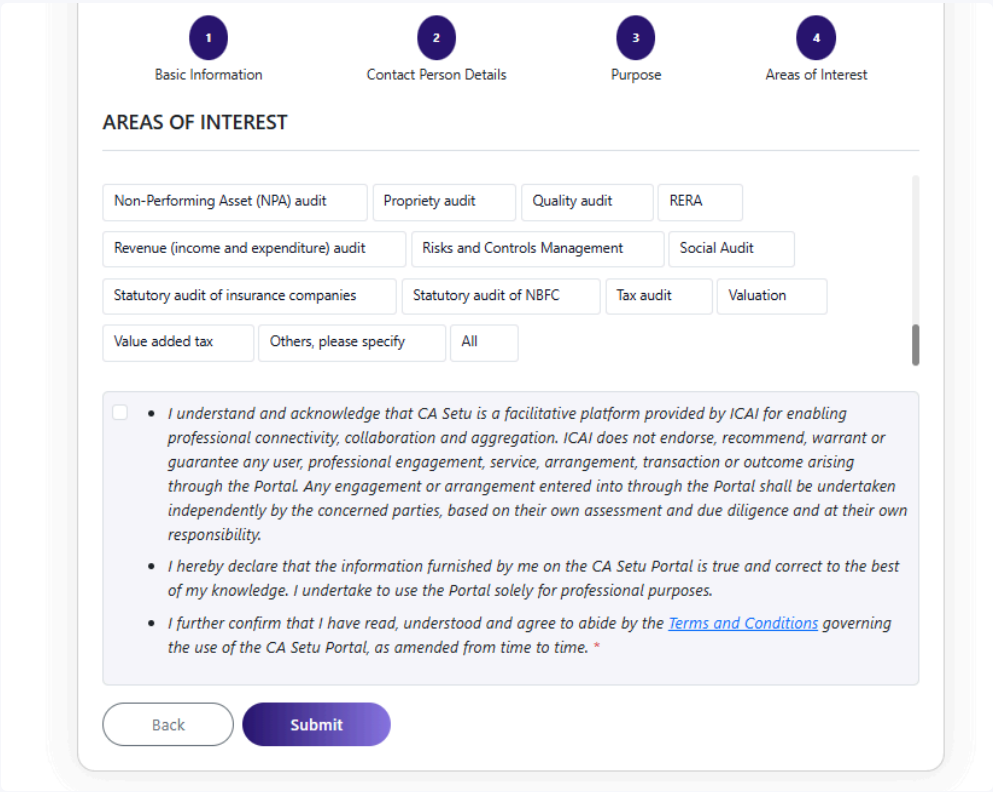


Figure 5 · Step 4 – Areas of Interest and Declaration

RESULT On successful submission, a registration confirmation message is displayed. Follow any further instructions shown on the screen.

SECTION 02

Enterprise Edit Profile – Fields and Details

2.1 Enterprise Profile

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

Field	Status	Instruction
Company Logo		Upload or update the company logo. Accepted formats: JPG and PNG, maximum file size 2 MB. Use **Remove** to delete the current logo.
Display Name	Required	Enter the display name of the enterprise.
Company Overview	Required	Enter an overview describing the enterprise.
Number of Employees	Required	Enter the total number of employees in the enterprise.
Number of Offices	Required	Enter the total number of offices.
LinkedIn URL	Optional	Enter the LinkedIn profile URL.
Twitter / X	Optional	Enter the Twitter / X profile URL.
Additional Website Links	Optional	Click **+ Add Website Link** to add up to three additional website links.
Additional Contact Details	Optional	Enter the relevant contact details.
Services Offered / Engagement Domains	Required	Enter the services offered or relevant engagement domains.
Select Your Region, State & City – select the relevant location details.		
Region	Required	Select the appropriate region from the available options.
State	Required	Select the relevant state based on the selected region.
City	Required	Select the appropriate city based on the selected state.
Visibility Settings		Enable or disable the **Achievements** and **Email** toggles to control what appears on the public profile.
Review Details		Review the entered details to ensure all required information is correct.

Field	Status	Instruction
Save Changes		Save the changes to update the Enterprise Profile.

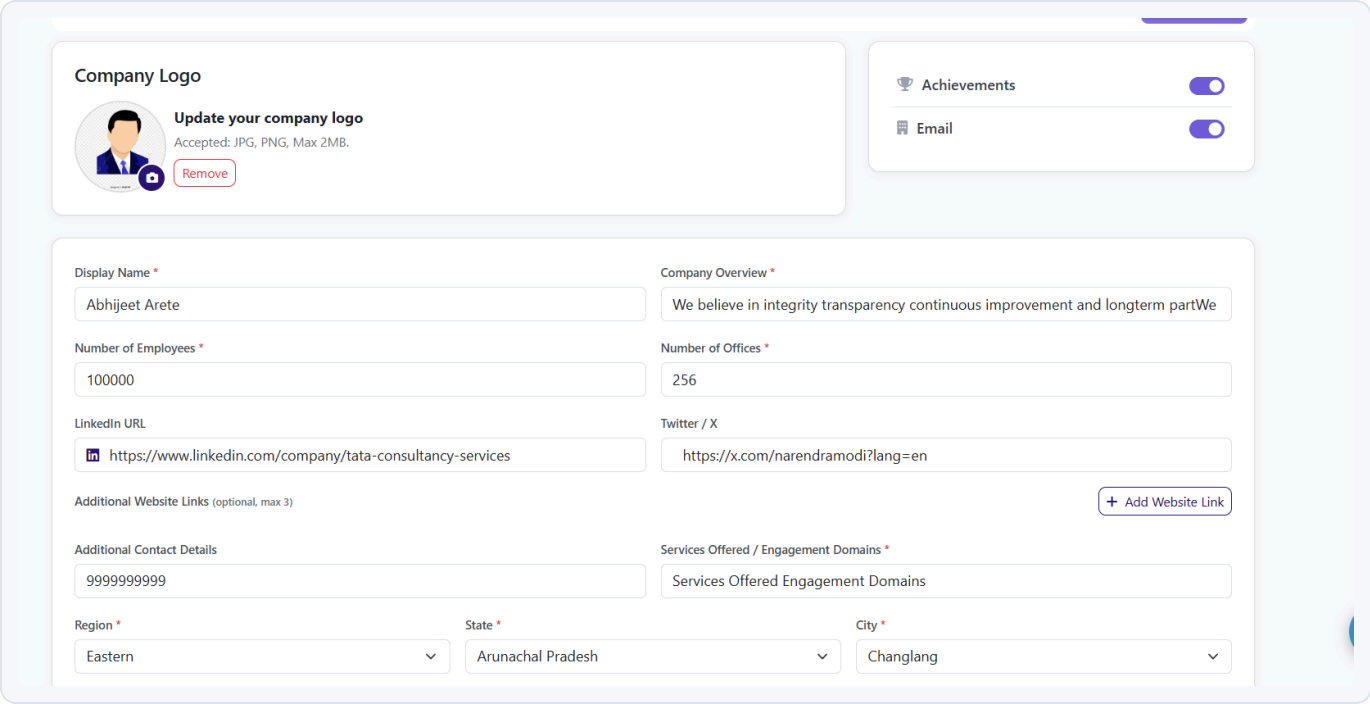


Figure 6 · Enterprise Edit Profile – Enterprise Profile

2.2 Purpose and Areas of Interest

The Purpose of Registration and Areas of Interest selected during registration can be reviewed and updated here.

Field	Status	Instruction
Purpose of Registration	Required	Select **Work Opportunities**, **Knowledge Sharing**, or both, by clicking the corresponding checkbox.
Areas of Interest	Required	Select the relevant areas of interest. Multiple options can be selected; the number selected is shown at the top right.
Search Areas of Interest		Type in the search field to find a specific interest area.
All		Select **All** to select all available areas of interest, if applicable.
Other Area of Interest	Required	If **Other** is selected, enter the details in the **Please specify other area of interest** field.
Review Details		Review the selected purposes and areas of interest to ensure they reflect the enterprise's objectives.

Field	Status	Instruction
Save Changes		Click **Save Changes** to save the updated information.
Reset		Click **Reset** to discard the changes, if required.

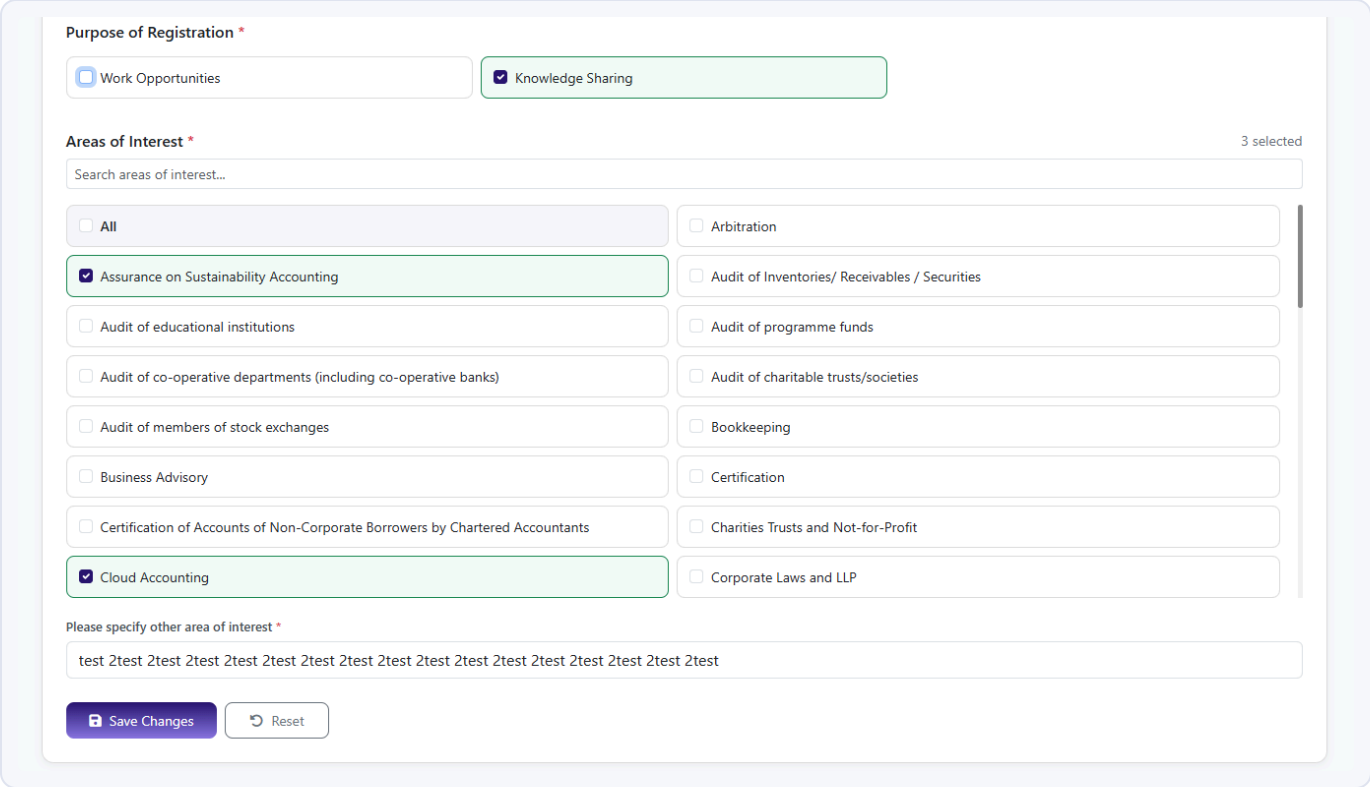


Figure 7 · Enterprise Edit Profile – Purpose and Areas of Interest

2.3 Registration Details – Non-Editable Fields

This section displays the information provided during registration. These details cannot be modified from the Edit Profile page; contact support to update them.

Group	Fields Displayed
Company Information	Company Name, Company Email, Business Category, Legal Entity Type, Year of Establishment, Permanent Account Number (PAN), GSTIN, Company Registration Number / CIN / LLPIN and Registered Address.
Uploaded Documents	PAN Card, GST Certificate and Business Registration Document, each marked **Uploaded**. Click **View** to open a document.
Contact Person Details	Name, Designation, Mobile Number, Email ID and Website URL of the primary contact. These cannot be modified.

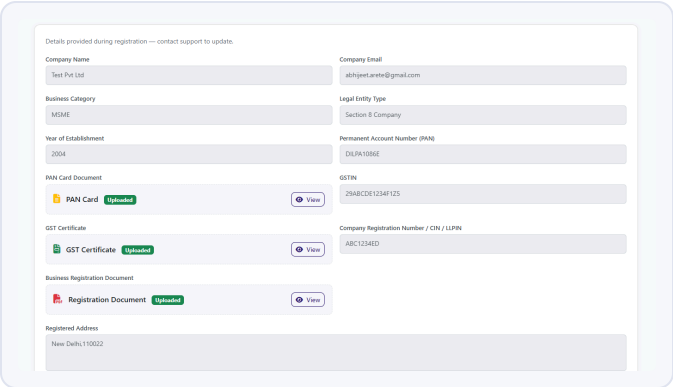


Figure 8 · Registration details (non-editable)

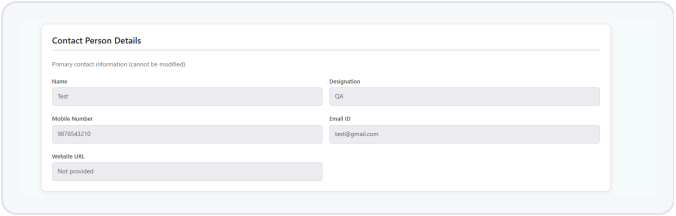


Figure 9 · Contact Person Details (non-editable)

2.4 Testimonials and Achievements

In the Edit Profile page, the user can add new testimonials or achievements using the respective options.

Option	Instruction
Add Testimonial	Click **+ Add Testimonial** to add a testimonial. If none exist, the message **No testimonial added yet** is displayed.
Add Achievement	Click **+ Add Achievement** to add an achievement or recognition.
Edit / Delete	Use **Edit** or **Delete** on an achievement card to update or remove it.

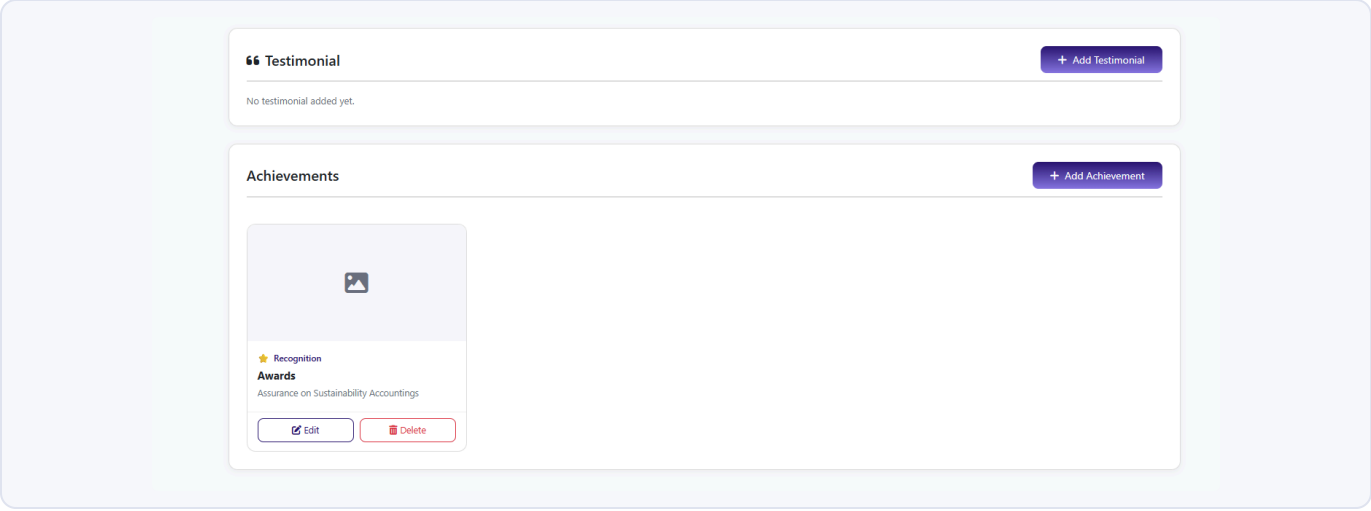


Figure 10 · Enterprise Edit Profile – Testimonials and Achievements

SECTION 03

Enterprise Dashboard – Fields and Details

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

3.1 Profile Overview

Element	Description
Profile Picture	Displays the enterprise's profile picture.
Name	Displays the registered or public display name.
About Enterprise	Displays a short overview with a **Read More** link, and the year of establishment (**EST. YEAR**).
Edit Profile	Click to update profile details (see Section 2).
Share	Click to share the profile with others.

3.2 Profile 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.

3.3 Our Team

The **Our Team** section displays the team members associated with the enterprise.

Option	Description
Manage	Click **Manage** to add new team members, edit existing members or manage team details.
Team Member Profile	Displays the team member's photograph, name and designation.
Add Employees	Click **+ Add Employees** to add a team member.

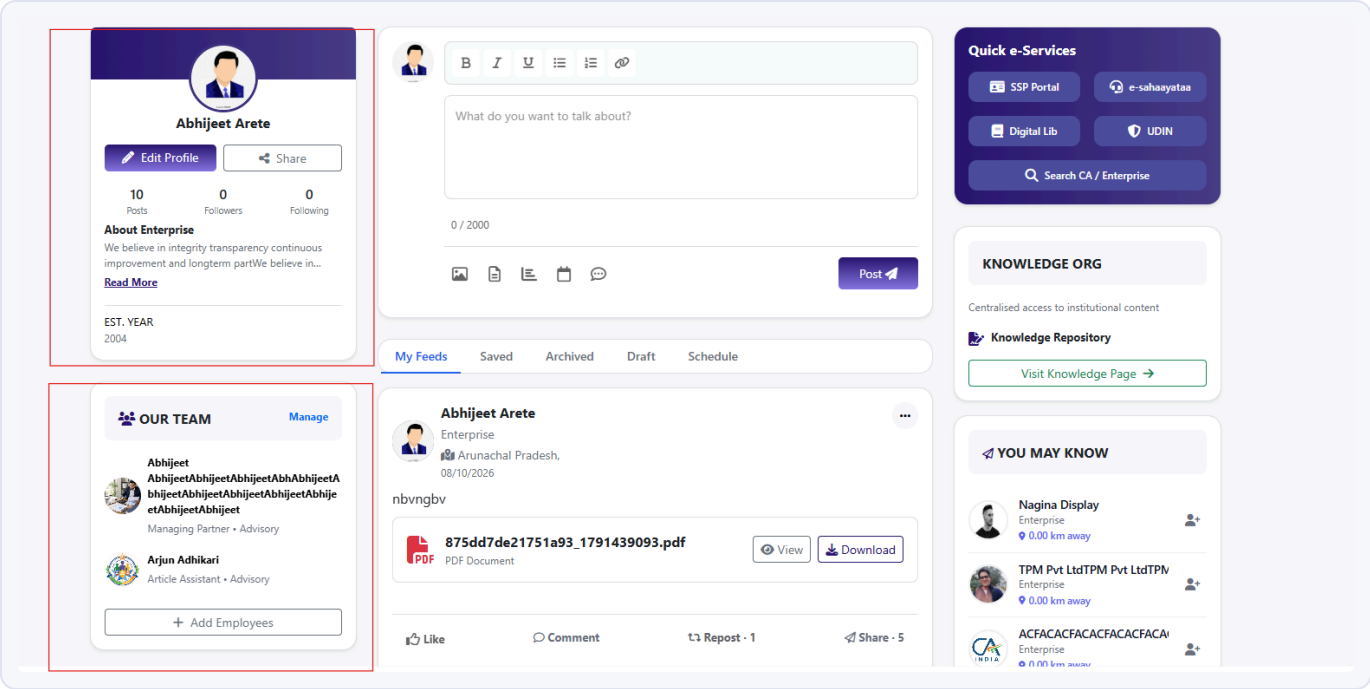


Figure 11 · Enterprise Dashboard – Profile Overview and Our Team

3.4 Create a Post

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

Field	Status	Instruction
Post Description	Required	Enter the content in the text area. The maximum limit is 2,000 characters.
Text Formatting		Use bold, italic, underline, lists and links to format the post content.
Add Image	Optional	Upload or attach an image to the post, if required.

Field	Status	Instruction
Add Document	Optional	Attach a document to the post, if required.
Additional Post Options		Use the available icons for other post features, such as scheduling or comments, if applicable.
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**.
State(s)/UT(s)		For domestic posts, select the relevant state or Union Territory.
City(s)/District(s)		Select the relevant city or district based on the selected state.
Region		The region is detected automatically based on the selected location.
Declaration	Required	Select the checkbox to confirm the declaration shown below.
Save Draft		Click **Save Draft** to save the post without publishing it.
Post		Click **Post** to publish the content.

DECLARATION

I hereby declare that the content posted by me is professional in nature and relevant to the purpose of the CA Setu Portal, and I accept responsibility for the same. I understand that CA Setu is a facilitative platform provided by ICAI and that ICAI does not endorse, guarantee or assume responsibility for any content, professional engagement, arrangement, transaction or outcome arising through the Portal. Any engagement or arrangement shall be undertaken independently by the concerned parties, at their own discretion and responsibility, after appropriate due diligence.

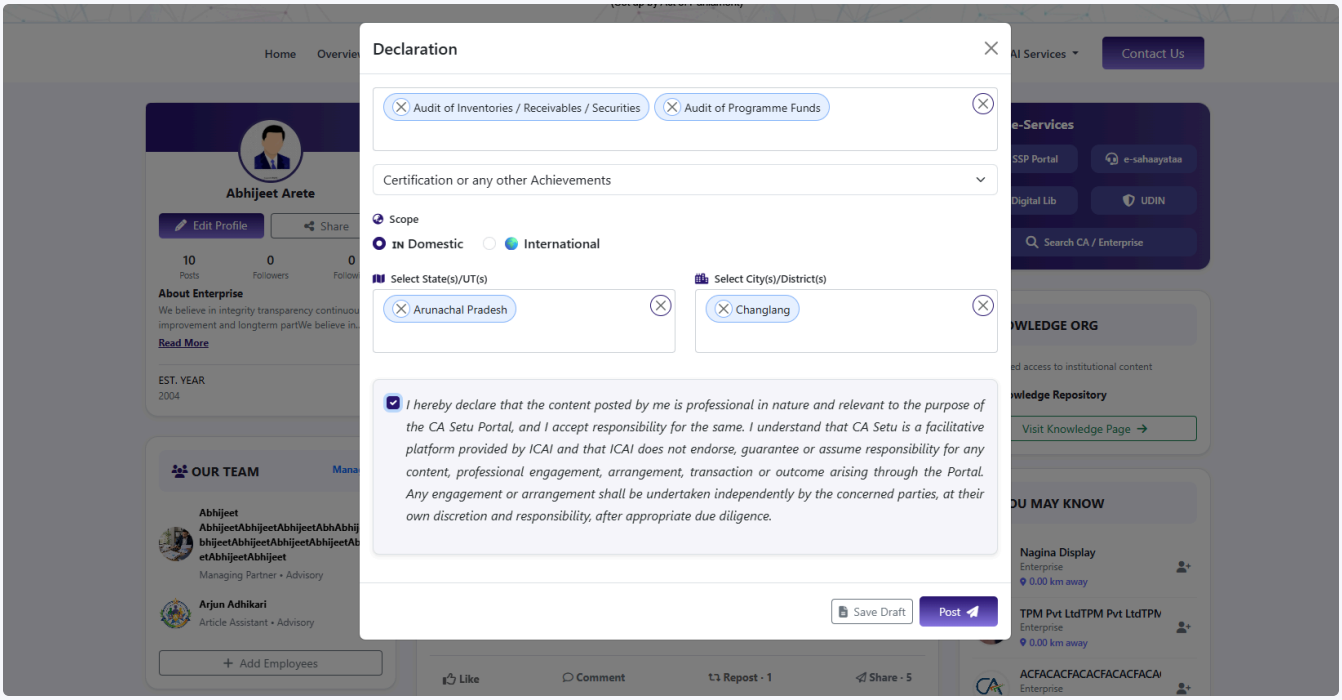


Figure 12 · Create a Post – Declaration

3.5 Quick e-Services

The Quick e-Services section provides direct access to the following services. Click the relevant option to open it.

Service	Description
SSP Portal	Access the SSP (Self Service Portal).
e-Sahaayataa	Access the e-Sahaayataa service.
Digital Lib	Access the Digital Library.
UDIN	Access the UDIN service.
Search CA / Enterprise	Search for CA and Enterprise profiles.

3.6 Trending Now

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

3.7 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 or view endorsements, if available.
Saved	View posts saved for later.
My Feeds	Access the user's own feeds.
Archived	View archived posts.
Draft	View saved draft posts.
Schedule	View scheduled posts.

3.8 Knowledge Org

The Knowledge Org section provides centralised access to institutional content.

Option	Description
Knowledge Repository	Access available knowledge resources and institutional content.
Visit Knowledge Page	Click to open the knowledge page.

3.9 You May Know

This section displays suggested users whom the enterprise may know or wish to connect with.

Option	Description
Suggested Users	View recommended user profiles with their type and distance.
Follow / Connect	Use the add icon next to a profile to connect with or follow that user, if applicable.

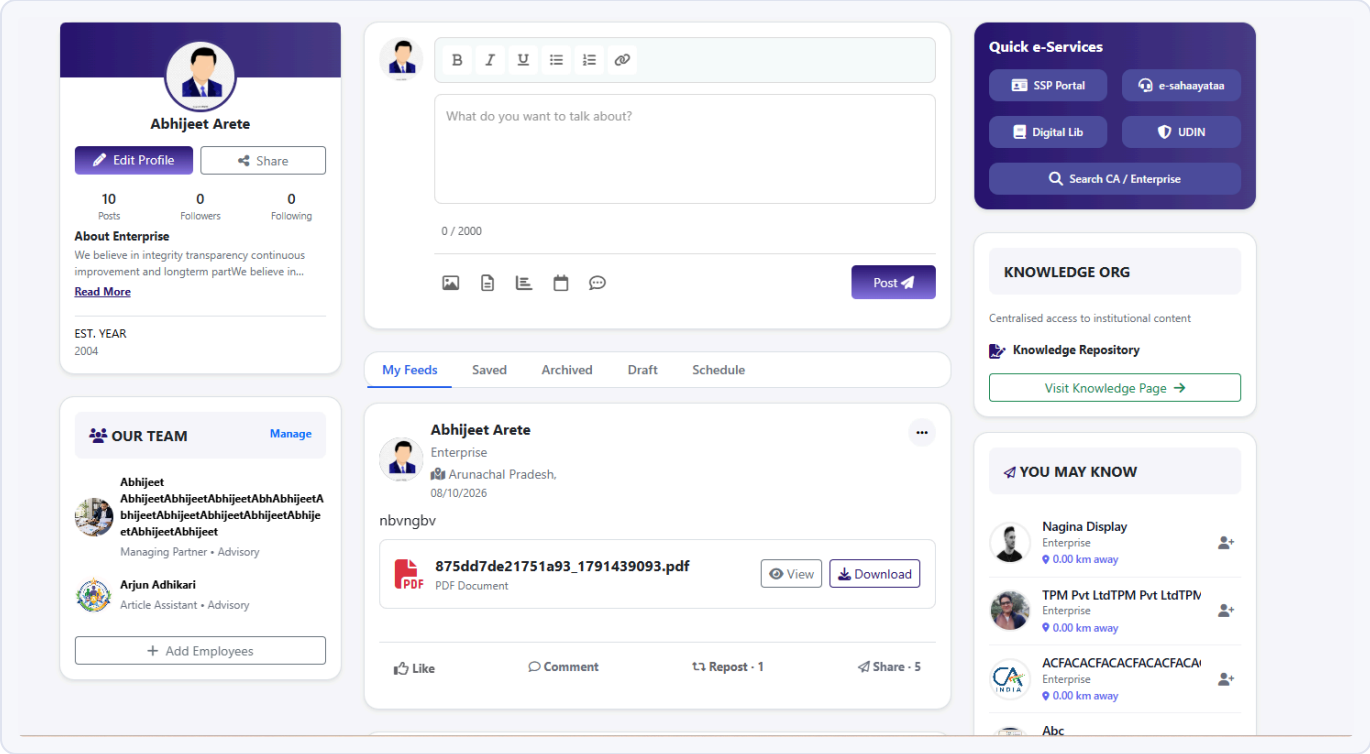


Figure 13 · Enterprise Dashboard – full view

SECTION 04

Enterprise Settings – Fields and Details

After logging in to the CA Setu portal, the user can open the **Settings** section to manage enterprise account preferences, profile visibility and other available settings. The settings menu on the left lists each section described below.

4.1 Password and Security

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

Option	Group	Description
Change Password	Login & Recovery	Change the account password. If it has never been changed, the message **Password has never been changed** is displayed.
Where You're Logged In	Security Checks	Displays the devices and browsers currently logged in, with device type, browser, location and session status – e.g. *Desktop · Google Chrome · New Delhi, National Capital Territory of Delhi, India (Active)*. Use **See All** to view all active sessions.
Login Alerts	Security Checks	Turn on to receive notifications about unrecognised login attempts.

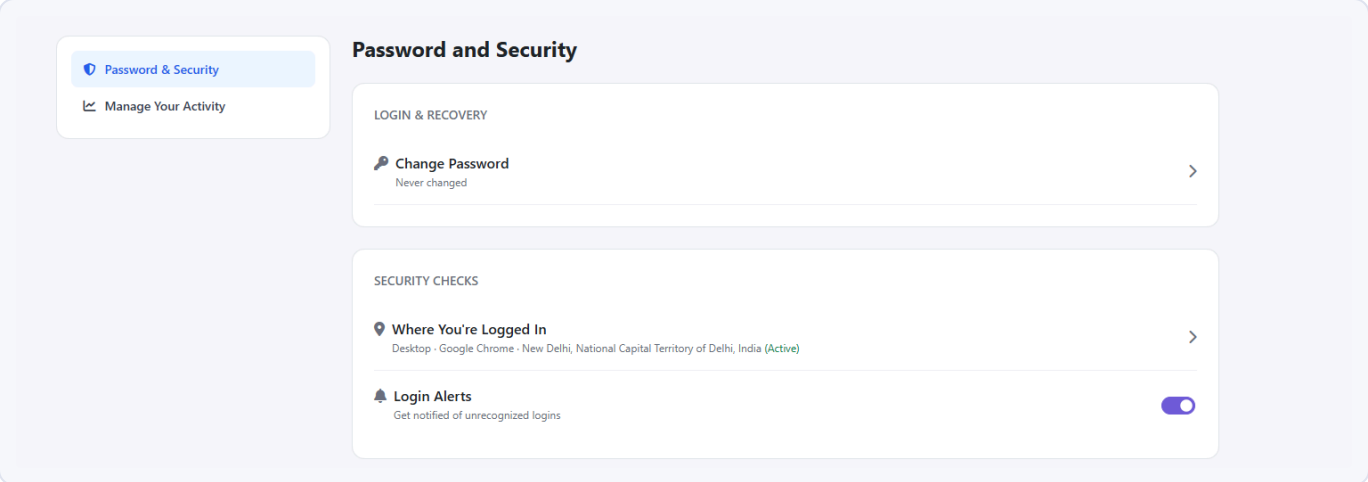


Figure 14 · Settings – Password and Security

4.2 Manage Your Activity

The Your Activity section allows users to view and manage their account activity through the following tabs:

Tab	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.

TIP Results can be sorted by **Newest** or **Oldest** and filtered by date (**All**, **Past Week**, **Past Month**, **Past Year**) or a custom date range. Click **Apply** to filter and **Reset** to clear.

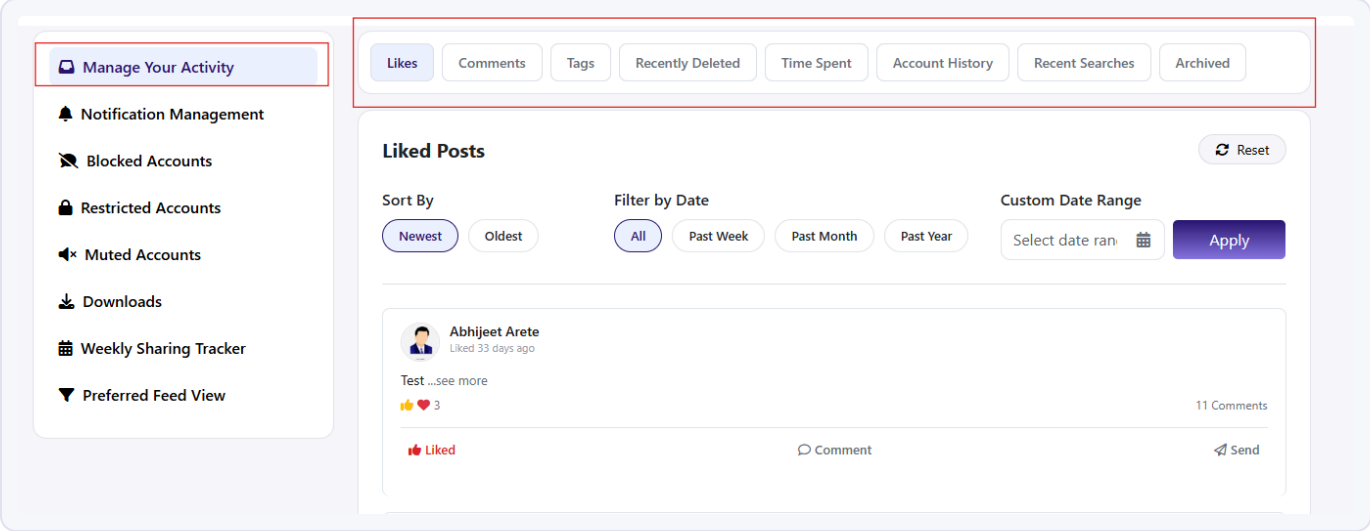


Figure 15 · Settings – Manage Your Activity

4.3 Notification Management

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

Push Notification	Description
Mute All Notifications	Temporarily stop all push notifications.
Likes	Notifications for likes on the user's posts.
Comments	Notifications when someone comments on a post.
Comment Likes	Notifications when someone likes the user's comment.
Messages	Notifications when the user receives new messages.

For **Likes** and **Comments**, choose one of the following options:

Option	Behaviour
Off	Do not receive these notifications.
People I Follow	Receive notifications only from people the user follows or is connected with.
From Everyone	Receive notifications whenever anyone likes or comments on the user's posts.

Under **Mute Specific Accounts**, search for an account to stop receiving notifications from it. If no accounts are muted, a **No Muted Accounts** message is displayed; muted accounts appear in this list.

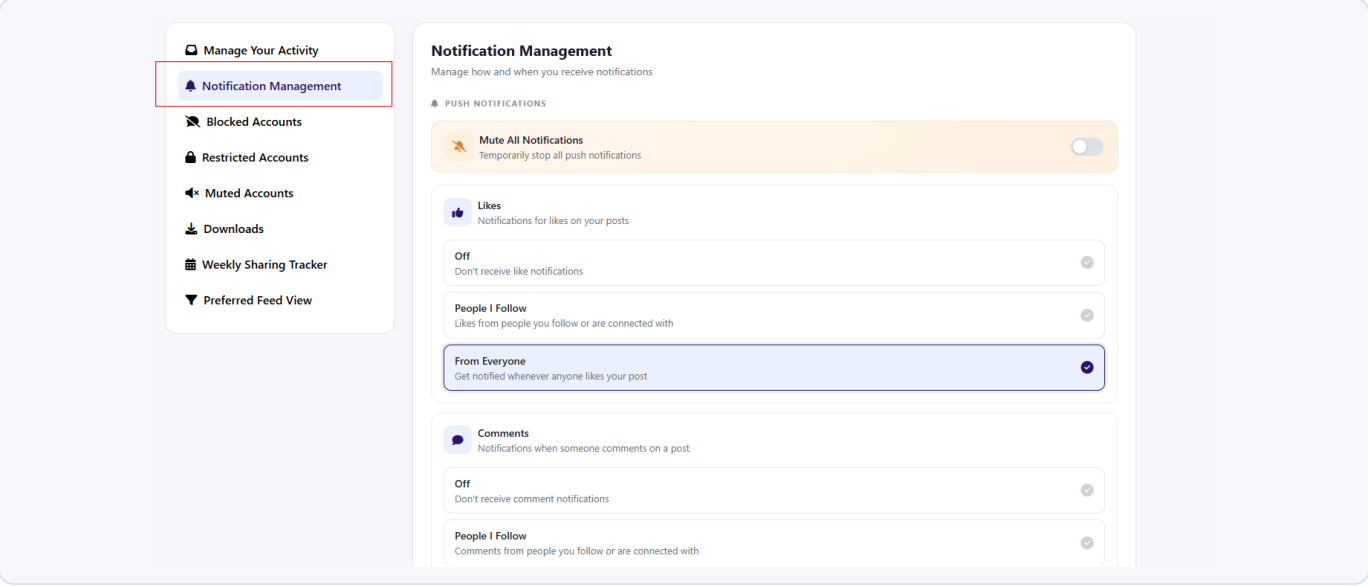


Figure 16 · Settings – Notification Management

4.4 Blocked Accounts

The Blocked Accounts section allows users to manage accounts they have blocked. Click **+ Block Account** to block an account.

Field / Option	Description
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.
Block Comments From	Choose specific accounts whose comments should be blocked on the user's posts.
Block Comments from a Specific Account	Search by name or username to prevent a particular account from commenting.

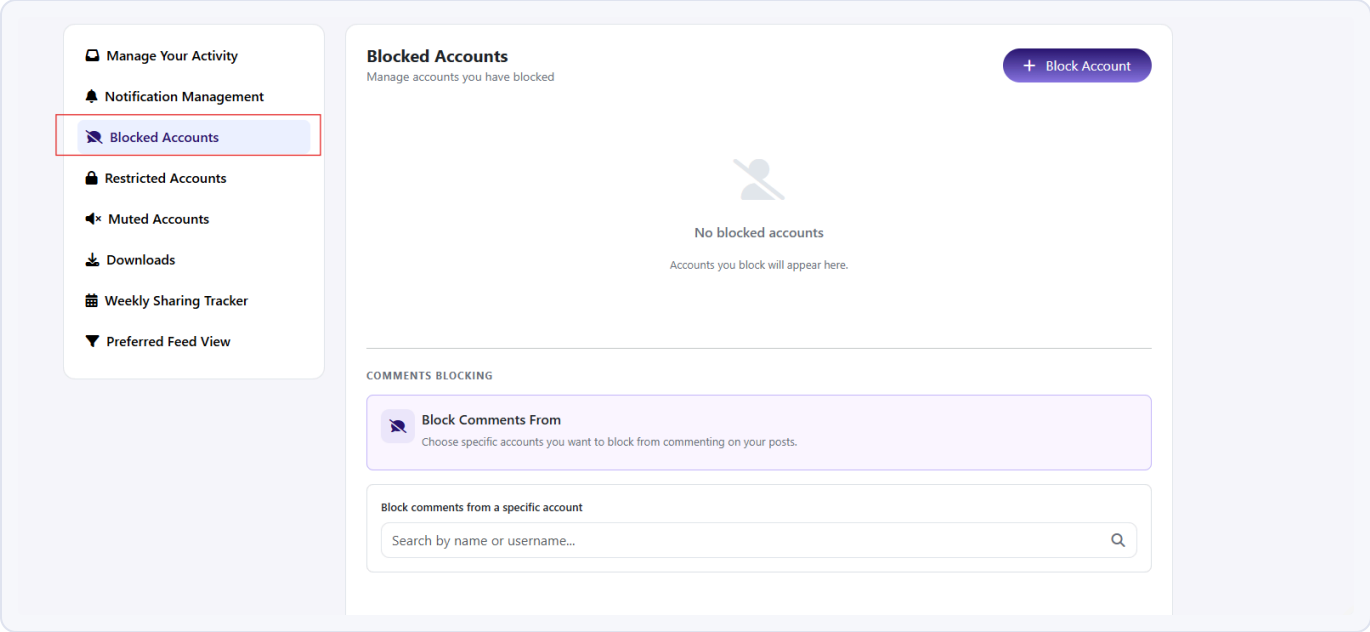


Figure 17 · Settings – Blocked Accounts

4.5 Restricted Accounts

The Restricted Accounts section allows users to limit interactions with specific accounts without blocking or unfollowing them. The restricted person is not notified.

What Restriction Does	Description
Review Comments	New comments from the restricted account are visible only to the user and that account. The user can approve them 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 Accounts** list shows every restricted account. Click **+ Restrict Account** to add one, **View Requests** to see its messages, **Unrestrict** to remove the restriction, and use the **Review Comments** toggle per account.

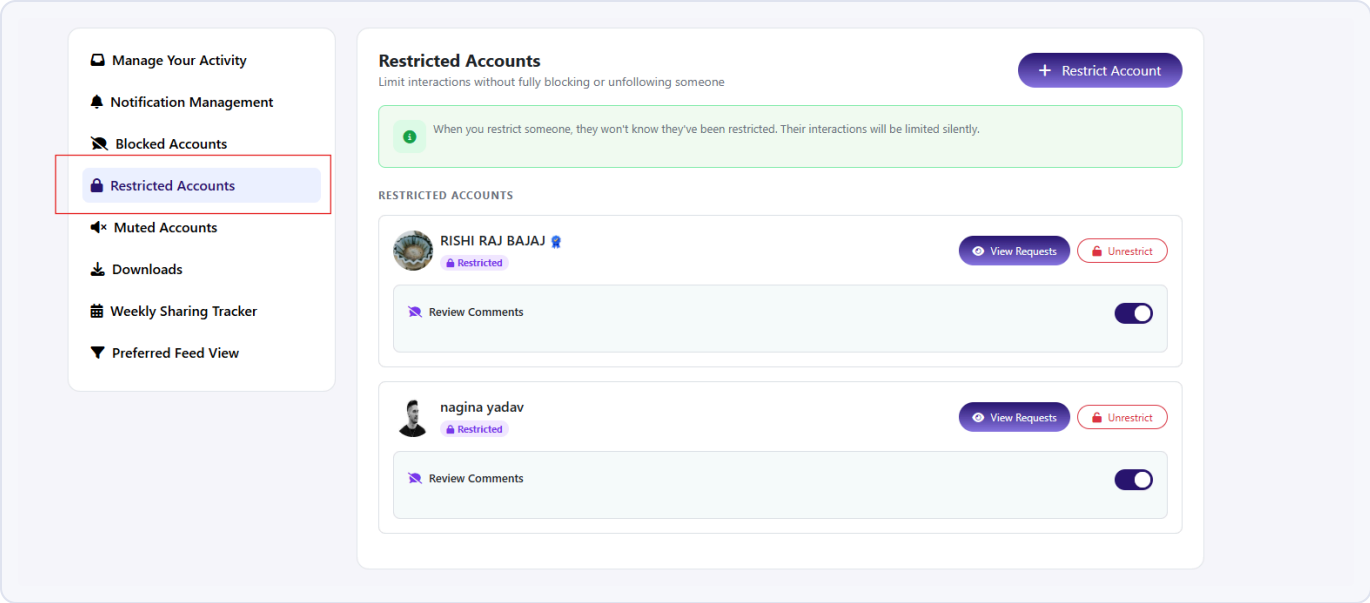


Figure 18 · Settings – Restricted Accounts

4.6 Muted Accounts

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

Option	Description
Mute Account	Click **+ Mute Account** to mute an account.
Search Muted Accounts	Search the list of muted accounts.
Unmute	Click **Unmute** to unmute an account at any time.

NOTE Muted accounts can still see your profile and posts, but their content won't appear in your feed. They are not told that they have been muted.

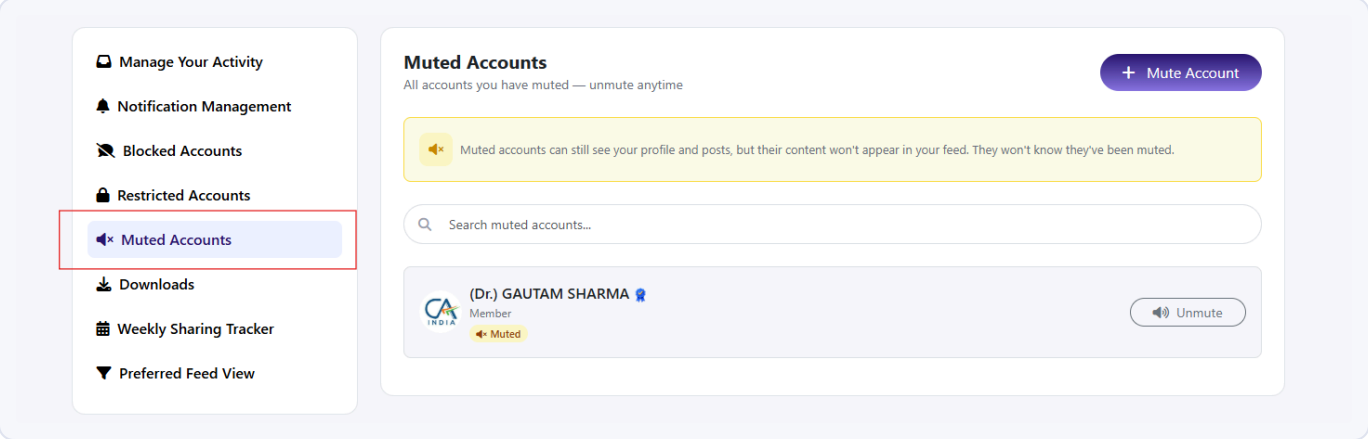


Figure 19 · Settings – Muted Accounts

4.7 Downloads

The Downloads section lists files, documents, images and videos saved to the user's device.

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

Each item shows the file name, size, date and source post. Use the open icon to view a file, the remove icon to delete it from the list, or **Clear All** to clear the list.

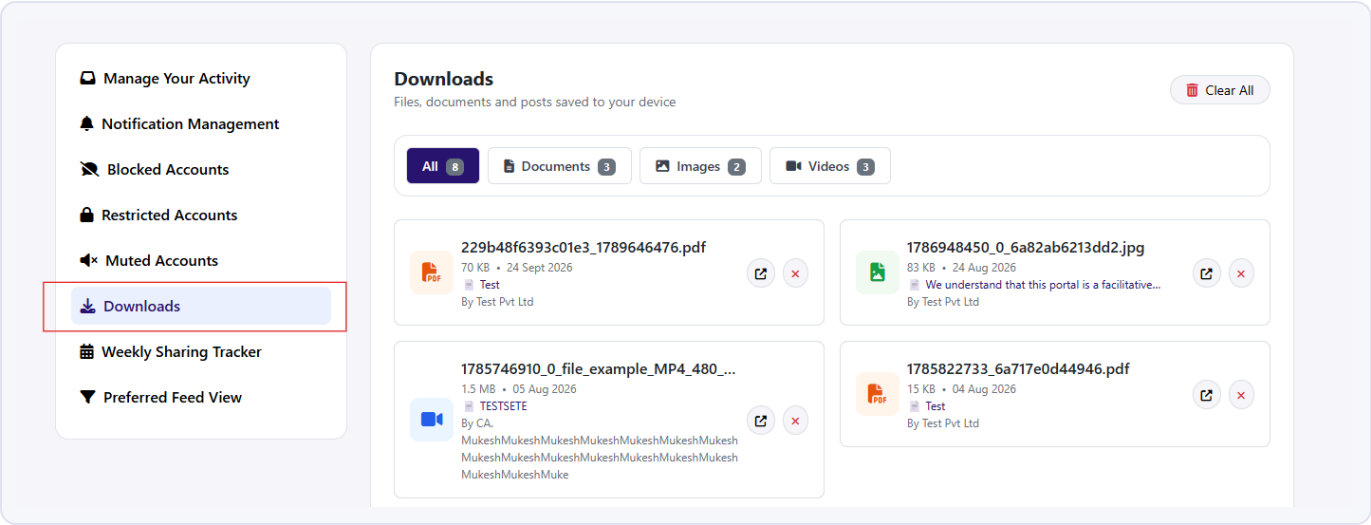


Figure 20 · Settings – Downloads

4.8 Weekly Sharing Tracker

The Weekly Sharing Tracker helps users track and improve their engagement each week by posting content and commenting on posts.

WEEKLY GOAL Complete **3 actions** every week. Both posts and comments count towards the goal. The **Weekly Progress** bar shows how many actions have been completed.

Recommended Action	Description
Post New Content	Share insights, achievements or industry updates. Click **Create Post** to start. Status shows **Pending** until completed.
Comment on Posts	Engage with other users by commenting on their posts. Click **Go to Feed** to start. Status changes to **Done** once completed and shows the number of comments made this week.

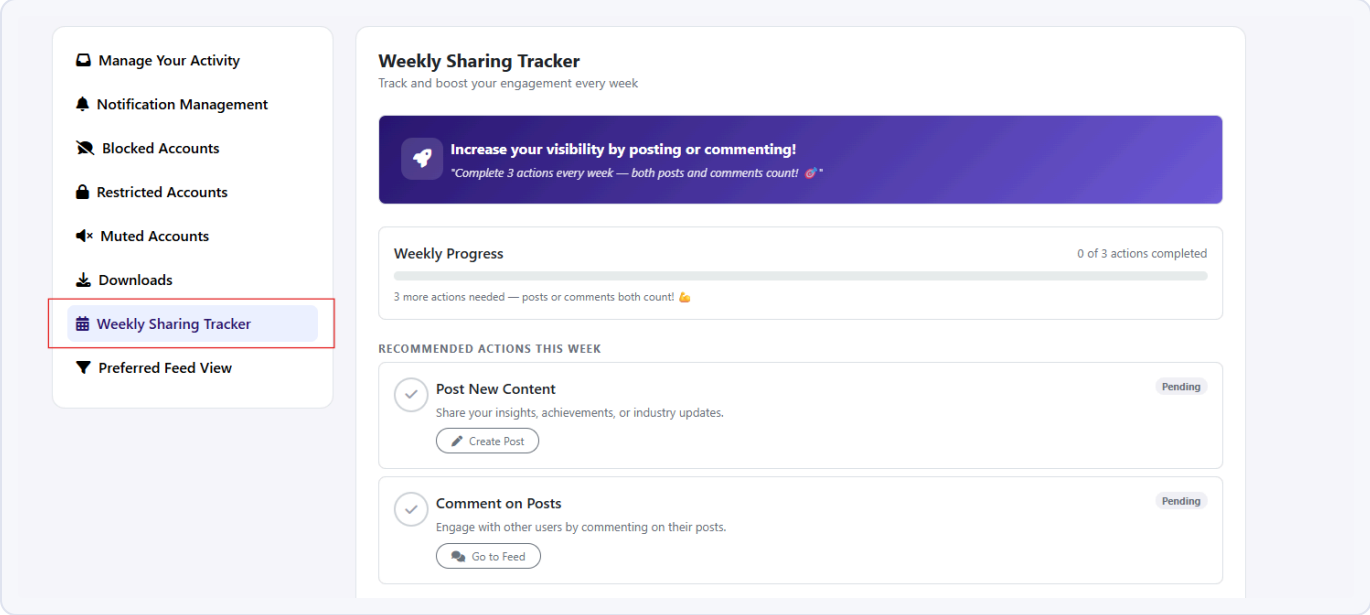


Figure 21 · Settings – Weekly Sharing Tracker

4.9 Preferred Feed View

The Preferred Feed View section allows users to customise how content appears in their feed, prioritising knowledge-based content.

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

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

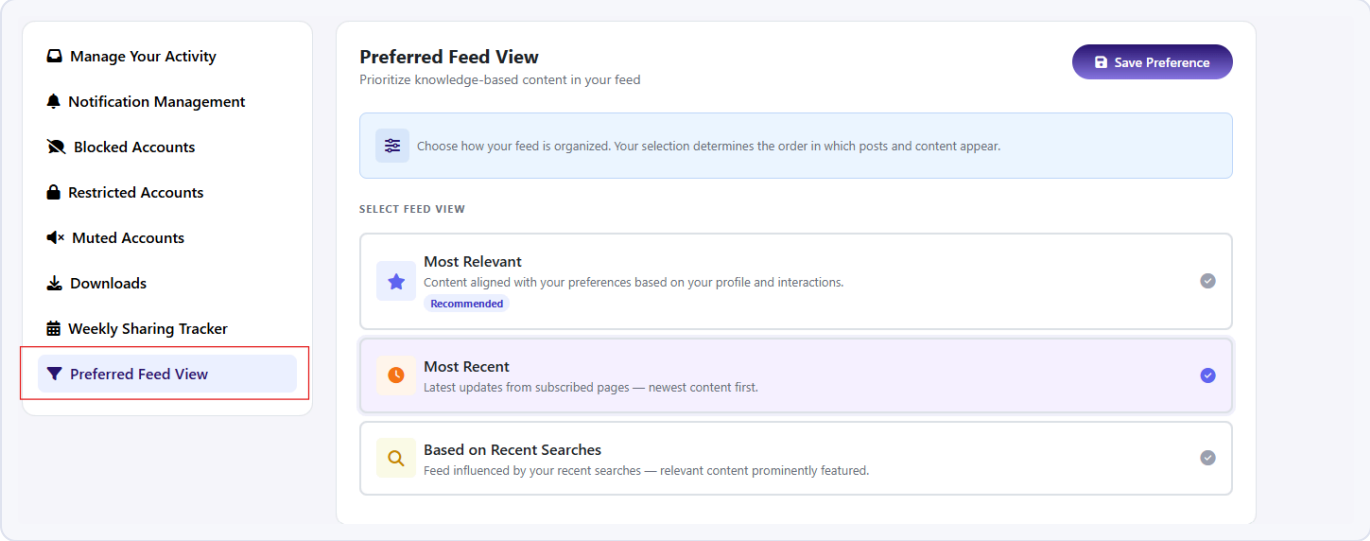


Figure 22 · Settings – Preferred Feed View

APPENDIX A

Troubleshooting

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

Situation	What to check	Ref.
Cannot proceed from Step 1	Complete every field marked with an asterisk (*), verify the company email with **Send OTP**, and make sure Password and Confirm Password match.	1.3
PAN or PIN Code not accepted	Enter the PAN in the format AAAAA9999A and a 6-digit PIN Code.	1.3
Company logo not accepted	Upload a JPG or PNG file with a maximum size of 2 MB.	1.4
Cannot proceed from Step 2	Enter a 10-digit mobile number and verify the contact person's Email ID with **Send OTP**.	1.4
Cannot proceed from Step 3	Select at least one Purpose – Work Opportunities, Knowledge Sharing, or both.	1.5
Submit does not work	Select the declaration checkbox to accept the declarations and Terms and Conditions.	1.6
State or City list is empty	Select the Region first, then the State, then the City.	2.1
Company Name, PAN, GSTIN or contact person cannot be edited	These registration details are non-editable from Edit Profile. Contact support to update them.	2.3
Post cannot be published	Keep the description within 2,000 characters and select the declaration checkbox before clicking **Post**.	3.4
Will a restricted or muted account be informed?	No. Restricted and muted accounts are not notified.	4.5

APPENDIX B

Glossary

CA Setu	The ICAI networking portal for Chartered Accountants, enterprises, committees and organizations.
ICAI	The Institute of Chartered Accountants of India.
Enterprise	A company or business registered on CA Setu to find verified professionals for compliance, taxation, audit and long-term collaboration.
PAN	Permanent Account Number of the company or enterprise.
GSTIN	Goods and Services Tax Identification Number.
CIN / LLPIN	Corporate Identification Number / Limited Liability Partnership Identification Number.
OTP	One-Time Password used to verify an email address.
Purpose of Registration	Work Opportunities and/or Knowledge Sharing, selected by checkbox.
Areas of Interest	Professional areas relevant to the enterprise, selected by checkbox.
SSP	Self Service Portal of ICAI, available under Quick e-Services.
UDIN	Unique Document Identification Number service, available under Quick e-Services.
Restricted account	An account whose interactions are limited silently, without blocking it.
Muted account	An account whose content no longer appears in the user's feed or notifications.
Mandatory field (*)	A field marked with an asterisk that must be completed before proceeding or saving.

APPENDIX C

Contact & Support

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

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