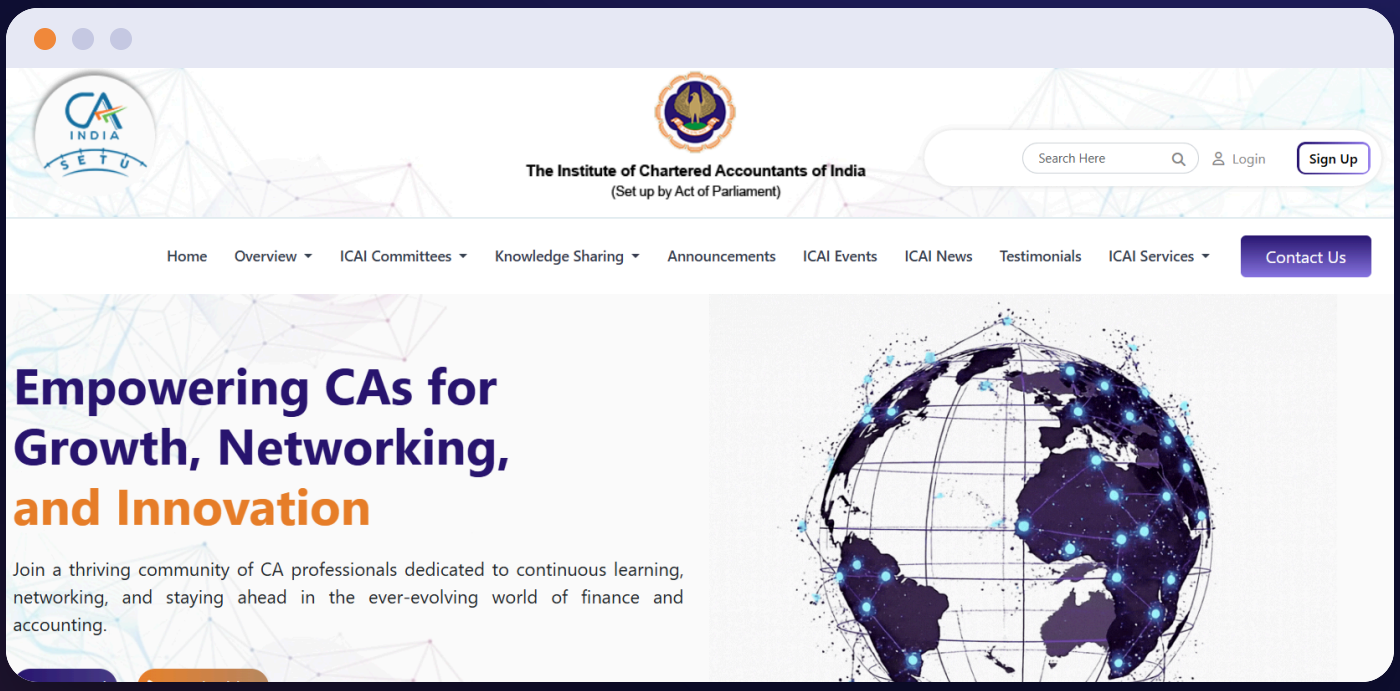
The Institute of Chartered Accountants of India
(Set up by Act of Parliament)

NETWORKING PORTAL FOR CA

CA Setu
Organization User Manual

Registration, Dashboard, Edit Profile, Settings, Affiliate and Analytics



DOCUMENT
Organization User Manual

PORTAL
CA Setu

INTENDED FOR
Organizations

ABOUT THIS MANUAL

This manual explains how an Organization registers on the CA Setu portal, uses the Organization Dashboard, updates its profile through Edit Organization Profile, manages account preferences and affiliate details through Organization Settings, and tracks post performance through Organization Analytics.

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 Organization Registration

This guide explains how to register an Organization account on the CA Setu portal.

1.1 Open the 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.

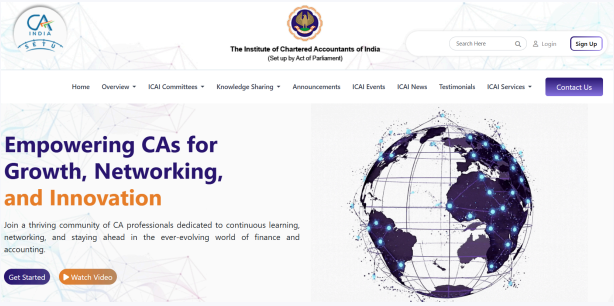


Figure 1 · CA Setu homepage – Sign Up button at the top-right corner

1.2 Create Your Account

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

- The page displays the account categories available for registration, along with the **Join Our Community** panel (Verified Profiles, Professional Network, Knowledge Sharing).
- Select **For Organization** – "Empower your organization to grow, collaborate, and innovate with strong networks."
- Under **For Organization**, click the **Create Account** button.
- The system will open the **Create Account for Organization** registration form.
- If you already have an account, click **Login** at the bottom of the page instead.

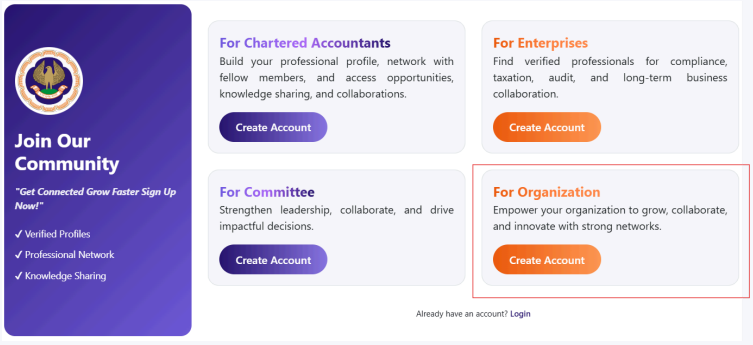


Figure 2 · Create Your Account page – For Organization

1.3 Organization Registration Form

The **Create Account for Organization** form collects the organization's details and security information. Fields marked with an asterisk (*) are mandatory.

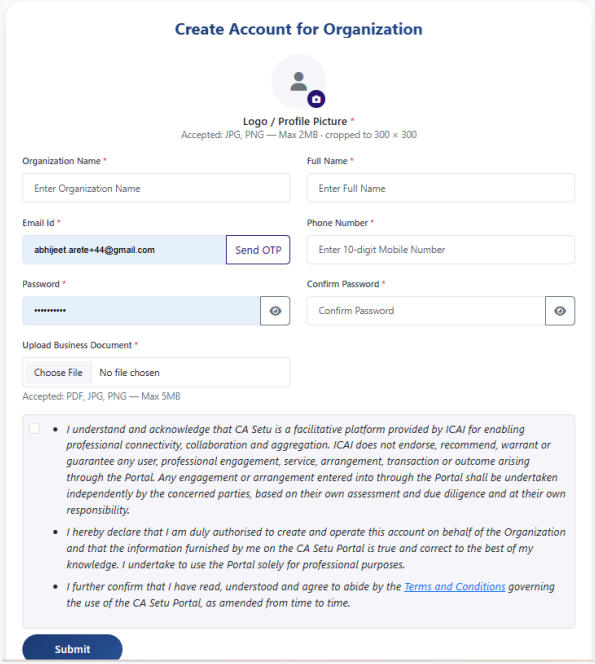


Figure 3 · Create Account for Organization form

Field	Description
Logo / Profile Picture *	Click the camera icon to upload the logo or profile picture. Accepted formats are JPG and PNG, with a maximum size of **2 MB**. The image is cropped to 300 × 300.
Organization Name *	Enter the name of the organization.
Full Name *	Enter the full name of the person creating the account.
Email Id *	Enter the email address and click **Send OTP** to verify it.
Phone Number *	Enter a 10-digit mobile number.
Password * / Confirm Password *	Create a password and re-enter it in **Confirm Password**. Use the **eye icon** to show or hide the password.
Upload Business Document *	Click **Choose File** and select the document. Accepted formats are PDF, JPG and PNG, with a maximum size of **5 MB**.

1.4 Declaration and Acknowledgement

Before submitting, the user must select the declaration checkbox shown at the bottom of the form. By selecting it, the user confirms that:

- CA Setu is a facilitative platform provided by ICAI for enabling professional connectivity, collaboration and aggregation, and ICAI does not endorse, recommend, warrant or guarantee any user, professional engagement, service, arrangement, transaction or outcome arising through the Portal.
- They are duly authorised to create and operate the account on behalf of the Organization, the information furnished is true and correct to the best of their knowledge, and the Portal will be used solely for professional purposes.
- They have read, understood and agree to abide by the **Terms and Conditions** governing the use of the CA Setu Portal, as amended from time to time.

1.5 Important Note

! IMPORTANT

The **Submit** button should be clicked only after:

- All required fields marked with an asterisk (*) have been completed.
- The business document has been uploaded.
- The password and confirm password match.
- The declaration has been read and the checkbox selected.

SECTION 02

Organization Dashboard – Fields and Details

After logging in to the CA Setu portal, the organization user is taken to the **Organization Dashboard**, where they can manage the organization profile, create posts, browse feeds and access quick services.

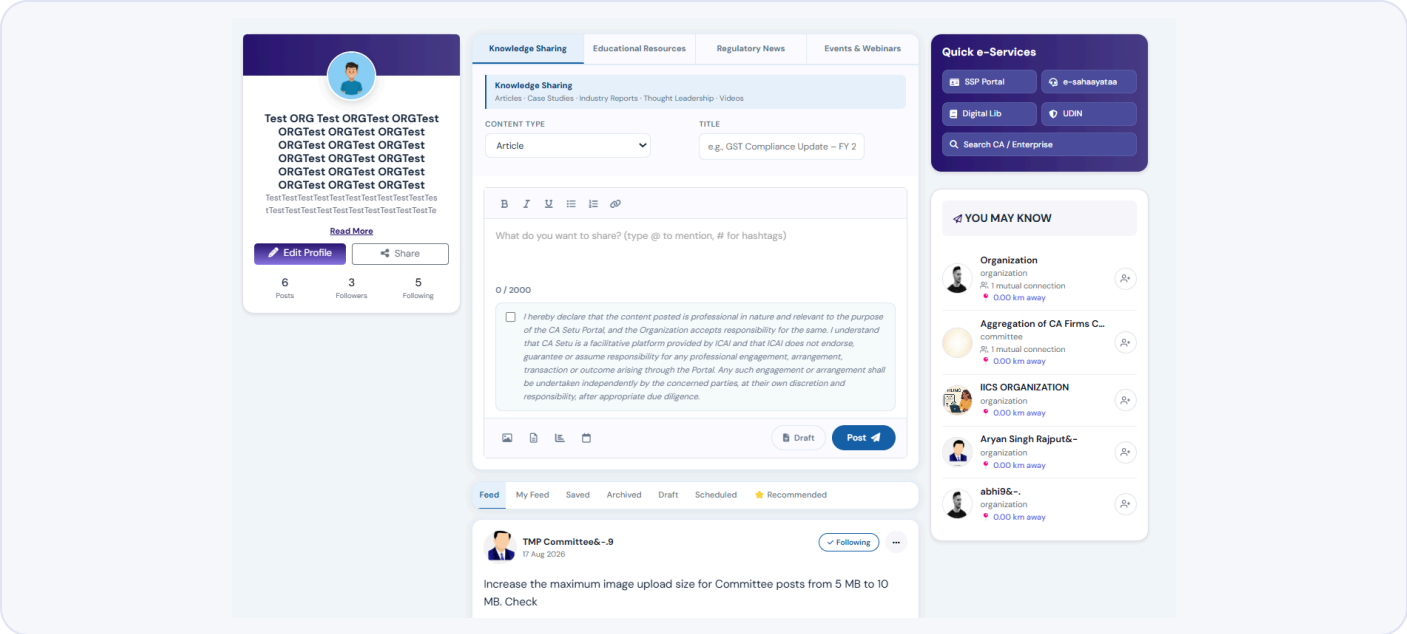


Figure 4 · Organization Dashboard

2.1 Profile Overview

Option	Description
Profile Picture	Displays the organization's profile picture.
Organization Name	Displays the registered organization name.
Short description	Displays a short description of the organization. Click **Read More** to view the full text.
Edit Profile	Click to update the organization profile details (see Section 3).
Share	Click to share the organization profile with others.

2.2 Profile Statistics

The profile card displays the following statistics:

Option	Description
Posts	Total number of posts published by the organization.
Followers	Number of users following the organization profile.
Following	Number of users the organization profile follows.

2.3 Create a Post

The organization can create a post from the post box at the top of the dashboard.

Field	Description
Post category tabs	Choose a category: **Knowledge Sharing**, **Educational Resources**, **Regulatory News** or **Events & Webinars**. The selected category shows its content types (for Knowledge Sharing: Articles, Case Studies, Industry Reports, Thought Leadership, Videos).
Content Type	Select the type of content from the dropdown (for example, **Article**).
Title	Enter a title for the post.
Post Description	Enter the content in the text area labelled “What do you want to share? (type @ to mention, # for hashtags)”. The limit is **2,000 characters**; a counter below the text area (for example, 0 / 2000) shows the characters used.
Text Formatting	Use the toolbar to apply bold, italic, underline, bulleted lists, numbered lists and links.
Declaration	Read the declaration shown below the text area and select its checkbox. It confirms that the content posted is professional in nature and that CA Setu is a facilitative platform provided by ICAI.
Attachments	Use the icons at the bottom of the post box to add an image, a document, a poll or a schedule.
Draft / Post	Click **Draft** to save the post for later, or **Post** to publish it.

2.4 Quick e-Services

The **Quick e-Services** panel provides access to the following services:

- SSP Portal
- e-sahaayataa
- Digital Lib
- UDIN
- Search CA / Enterprise

Click the relevant option to access the corresponding service.

2.5 Dashboard Navigation Tabs

The tabs below the post box are used to browse and manage posts and feeds:

Tab	Description
Feed	View posts available in the feed. Each post shows the profile name, date, a **Following** button and a menu (three dots) with further options.
My Feed	Access the organization's own posts.
Saved	View posts saved for later.
Archived	View archived posts.
Draft	View saved draft posts.
Scheduled	View scheduled posts.
Recommended	View recommended posts.

2.6 You May Know

The **You May Know** panel suggests profiles that the organization may wish to connect with.

Option	Description
Suggested Profiles	View the recommended profiles, including their name, type (for example, organization or committee), mutual connections and distance (for example, 0.00 km away).
Connect	Use the add-person icon beside a suggested profile to connect with it.

SECTION 03

Edit Organization Profile – Fields and Details

Click **Edit Profile** on the Organization Dashboard to open the **Edit Organization Profile** page, where the organization can update its picture, details and testimonials.

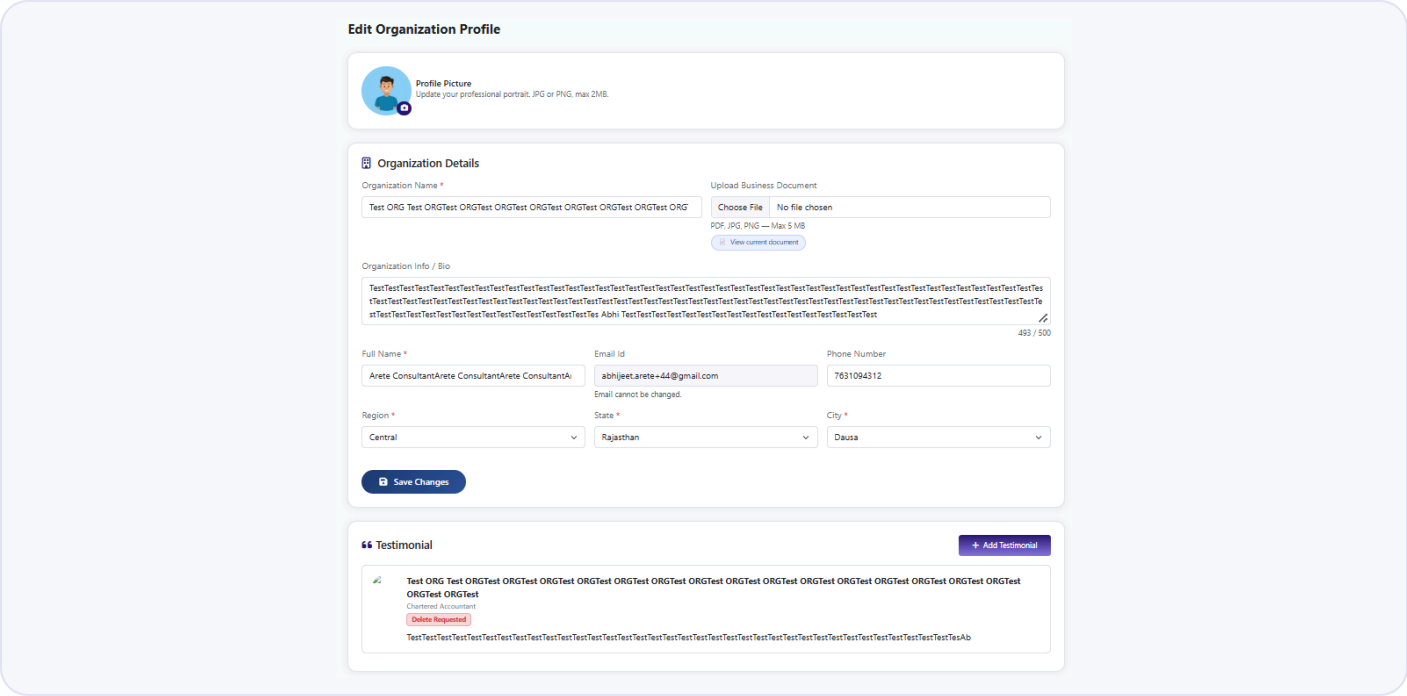


Figure 5 · Edit Organization Profile page

3.1 Profile Picture

- Click the **camera icon** on the picture to upload a new profile picture.
- Accepted formats are **JPG and PNG**, with a maximum size of **2 MB**.

3.2 Organization Details

Fields marked with an asterisk (*) are mandatory.

Field	Description
Organization Name *	Enter or update the name of the organization.
Upload Business Document	Click **Choose File** to upload a business document. Accepted formats are PDF, JPG and PNG, with a maximum size of **5 MB**. Click **View current document** to see the file already uploaded.
Organization Info / Bio *	Describe the organization. The counter below the field shows the characters used out of **500**.
Full Name *	Enter the name of the person managing the account.
Email Id	Displays the registered email address. This field cannot be changed.
Phone Number	Enter or update the contact phone number.
Region *, State *, City *	Select the region, state and city of the organization from the dropdowns.
Save Changes	Review the details and click **Save Changes** to update the profile.

3.3 Testimonials

The **Testimonial** section appears at the bottom of the Edit Organization Profile page.

Option	Description
Add Testimonial	Click to add a new testimonial.
Testimonial card	Each testimonial shows the name, designation and text, together with a status label (for example, **Delete Requested**).

SECTION 04

Organization Settings – Fields and Details

The Settings section allows the organization to manage account security, activity, notifications, blocked accounts and affiliate details. The left-hand menu lists **Password & Security**, **Analytics**, **Your Activity** and **Affiliate**; the activity pages also list **Notification Management** and **Blocked Accounts**.

4.1 Password and Security

The **Password and Security** page contains two sections: **LOGIN & RECOVERY** and **SECURITY CHECKS**.

Option	Description
Login & Recovery – manage account sign-in credentials.	
Change Password	Allows the organization to change the account password. The page shows when the password was last changed (for example, “Last changed 3 weeks ago”).
Security Checks – monitor account access and alerts.	
Where You’re Logged In	Displays the devices and networks currently logged in to the account, with the session status (for example, Windows PC · Local Network · Active).
Login Alerts	Use the toggle to get notified of unrecognized logins.

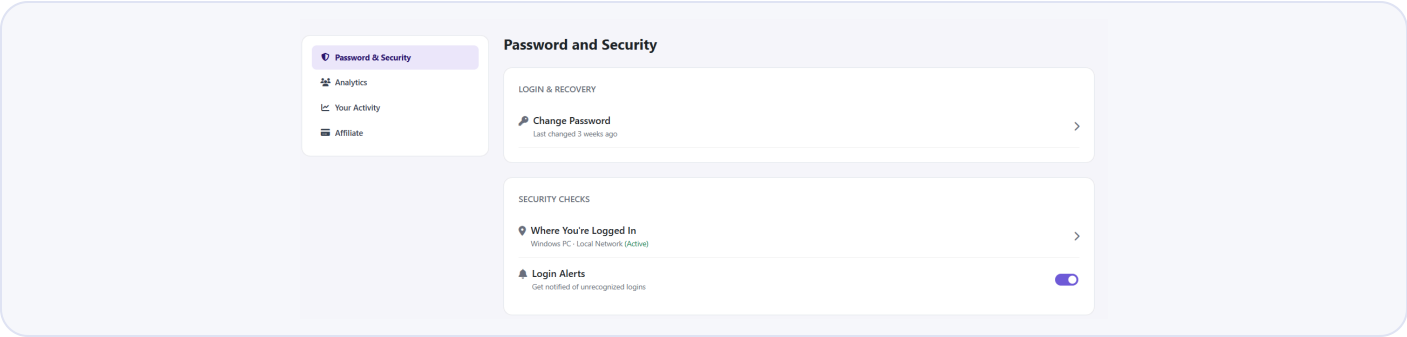


Figure 6 · Organization Settings – Password and Security

4.2 Your Activity

The **Your Activity** section allows the organization to view and manage its account activity. It contains the following tabs:

Tab	Description
Likes	View posts liked by the organization.
Comments	View comments made by the organization.
Tags	View posts in which the organization has been tagged.
Recently Deleted	View and manage recently deleted content.
Account History	View the history of account activities and changes.
Recent Searches	View recent search queries.

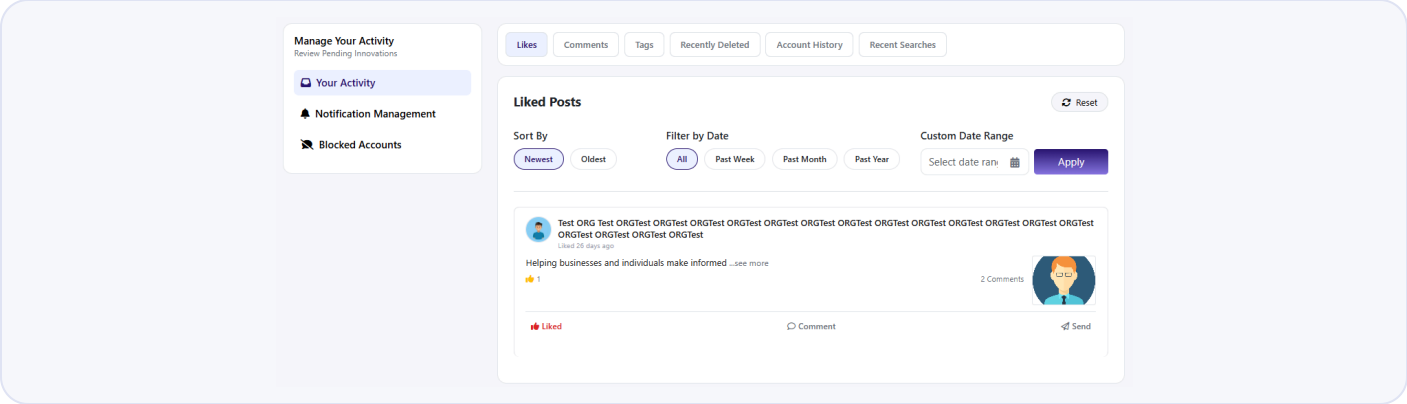


Figure 7 · Organization Settings – Your Activity (Liked Posts)

On the **Liked Posts** page, the following options are available:

Option	Description
Sort By	Choose **Newest** or **Oldest**.
Filter by Date	Choose **All**, **Past Week**, **Past Month** or **Past Year**.
Custom Date Range	Select a date range and click **Apply**.
Reset	Click to clear the selected filters.
Liked post	Each liked post shows the author, when it was liked, its content and the **Liked**, **Comment** and **Send** actions.

4.3 Notification Management

The **Notification Management** section allows the organization to manage how and when it receives push notifications.

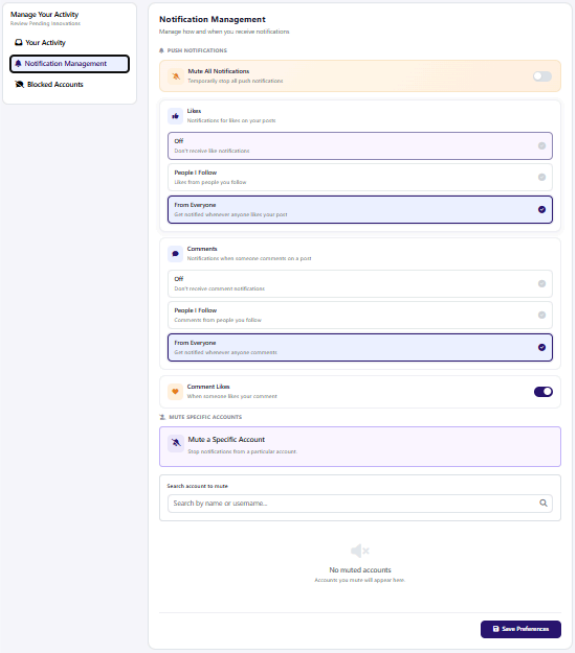


Figure 8 · Organization Settings – Notification Management

Option	Description
Mute All Notifications	Use the toggle to temporarily stop all push notifications.
Likes – notifications for likes on the organization's posts.	
Off	Do not receive like notifications.
People I Follow	Receive notifications for likes from people the organization follows.
From Everyone	Get notified whenever anyone likes a post.
Comments – notifications when someone comments on a post, with the same three options.	
Comment Likes	Use the toggle to be notified when someone likes a comment.
Mute Specific Accounts – stop notifications from a particular account.	
Mute a Specific Account	Search for the account by name or username to mute it. "No muted accounts" is shown when the list is empty.
Save Preferences	Click to save the notification settings.

4.4 Blocked Accounts

The **Blocked Accounts** section allows the organization to manage accounts it has blocked.

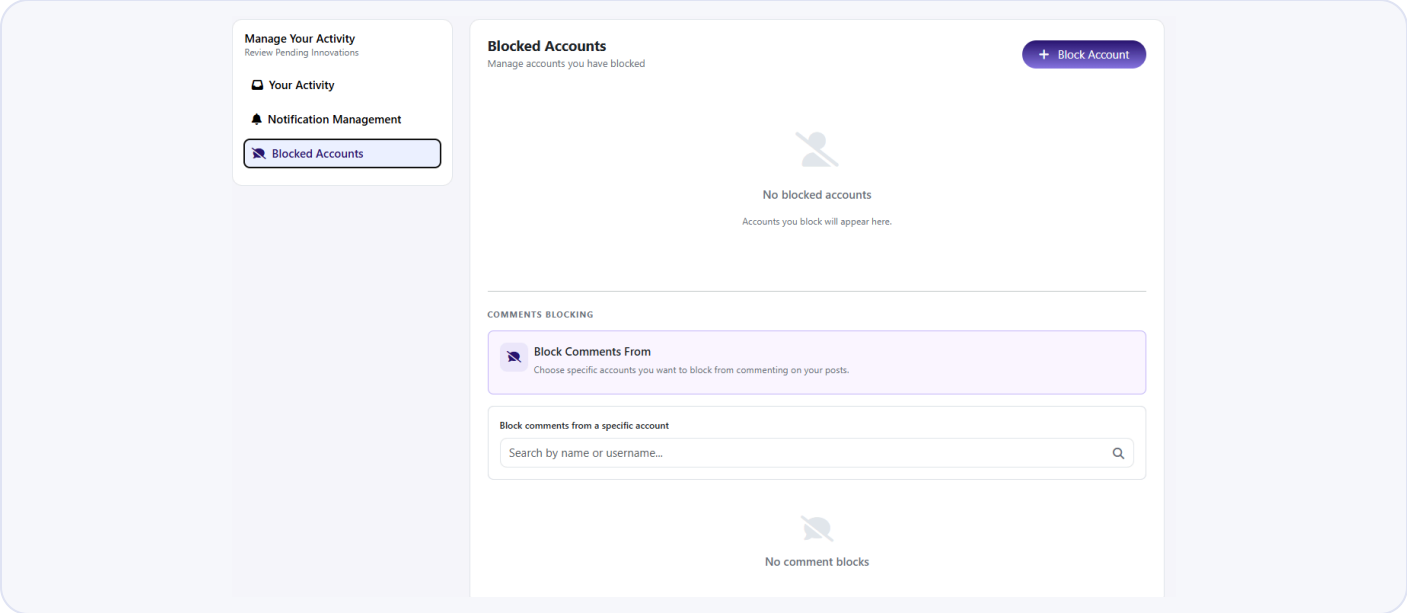


Figure 9 · Organization Settings – Blocked Accounts

Option	Description
Block Account	Click to block an account.
No blocked accounts	This message is displayed when no accounts have been blocked. Accounts you block will appear here.
Comments Blocking – block comments on the organization's posts.	
Block Comments From	Choose specific accounts you want to block from commenting on your posts.
Search by name or username	Search for the account to block comments from.
No comment blocks	This message is displayed when no accounts have been blocked from commenting.

4.5 Affiliate

The **Affiliate** page (**Affiliate Profile**) lets the organization configure its business information and services.

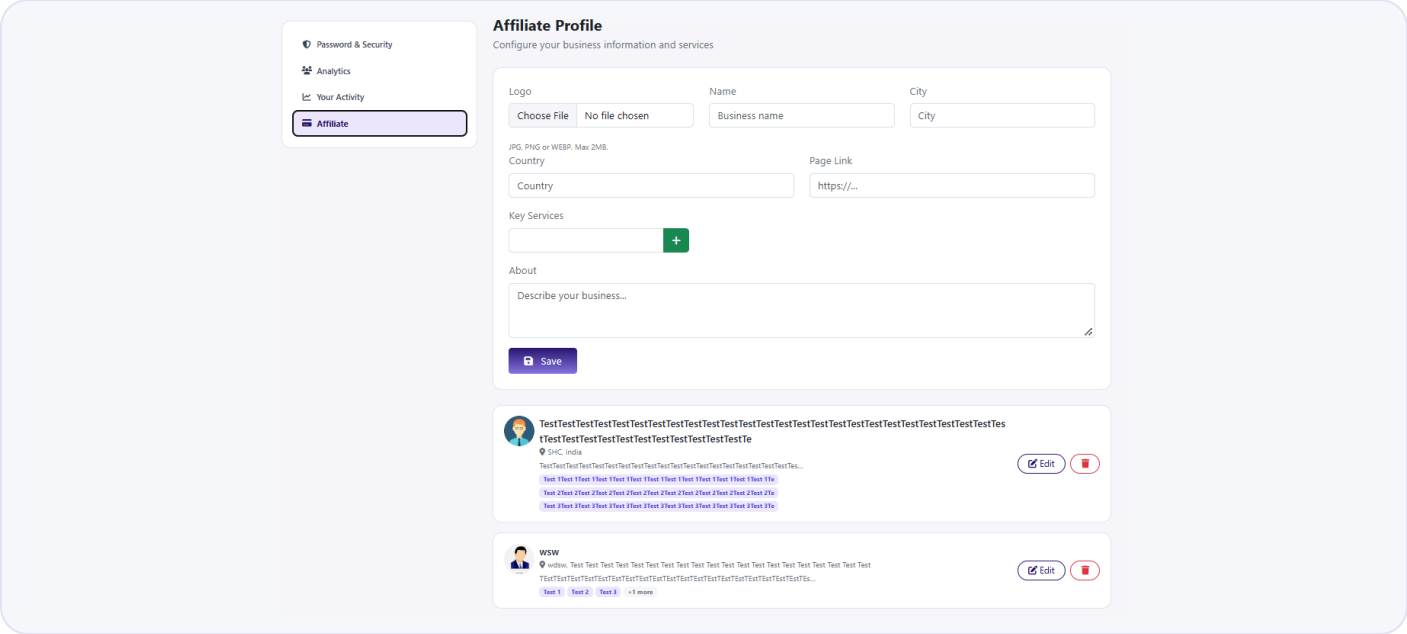


Figure 10 · Organization Settings – Affiliate Profile

Field	Description
Logo	Click **Choose File** to upload a logo. Accepted formats are JPG, PNG or WEBP, with a maximum size of **2 MB**.
Name, City, Country	Enter the business name, city and country.
Page Link	Enter the web address of the business page (https://...).
Key Services	Type a service and click the green **+** button to add it. Added services appear as tags.
About	Describe the business.
Save	Click **Save** to add the affiliate profile.
Saved entries	Saved affiliate profiles are listed below the form with their logo, name, location, description and service tags. Use **Edit** to change an entry or the red delete icon to remove it.

SECTION 05

Organization Analytics – Fields and Details

The **Analytics** section helps the organization track the performance of its posts. It has four tabs: **Basic Analytics**, **Post Insights**, **Audience Insights** and **Export Reports**.

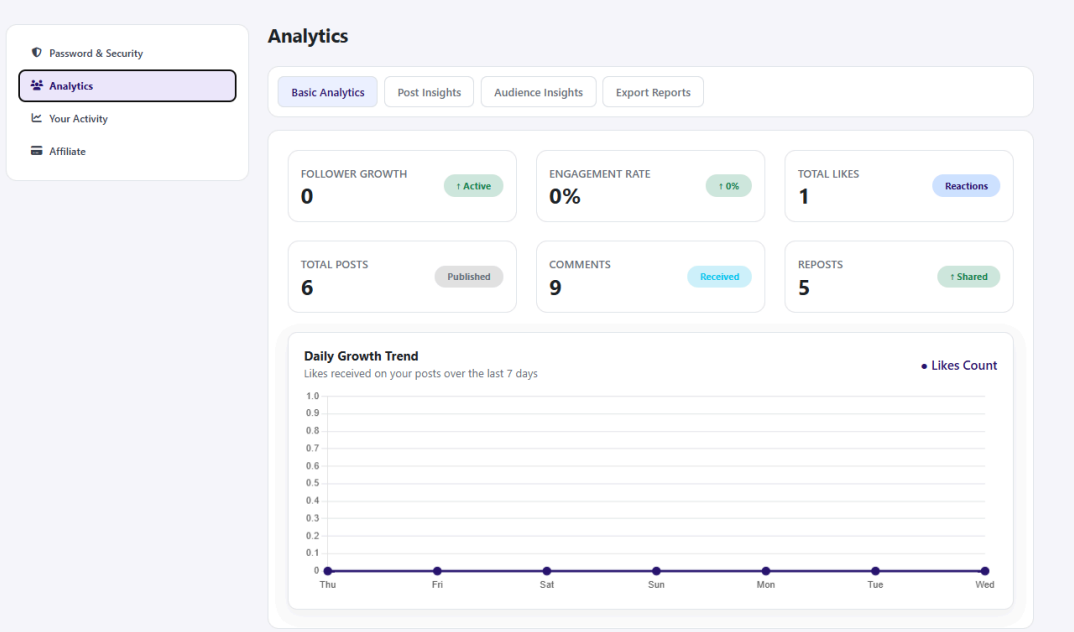


Figure 11 · Organization Analytics – Basic Analytics

5.1 Basic Analytics

Item	Description
Follower Growth	Shows follower growth for the organization.
Engagement Rate	Shows the engagement rate.
Total Likes	Shows the total likes received (Reactions).
Total Posts	Shows the total posts published.
Comments	Shows the comments received.
Reposts	Shows the posts shared (reposted).
Daily Growth Trend	The chart shows the likes received on your posts over the last 7 days (Likes Count), plotted day by day.

APPENDIX A

Troubleshooting

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

Situation	What to check	Ref.
Which account category to select?	On the Create Your Account page, select For Organization and click Create Account.	1.2
Account cannot be submitted	Complete all mandatory fields marked with an asterisk (*), upload the business document, make sure the passwords match, and select the declaration checkbox before clicking Submit.	1.3, 1.5
Already have an account	Click Login at the bottom of the Create Your Account page.	1.2
Profile picture not accepted	Use a JPG or PNG file with a maximum size of 2 MB.	1.3, 3.1
Business document not accepted	Upload a PDF, JPG or PNG file with a maximum size of 5 MB.	1.3, 3.2
Email cannot be changed	The registered Email Id is displayed on Edit Organization Profile and cannot be changed.	3.2
Changes cannot be saved	Complete all mandatory fields marked with an asterisk (*), then click Save Changes.	3.2
Post cannot be published	Keep the Post Description within 2,000 characters; the counter below the text area shows the characters used. Read the declaration and select its checkbox.	2.3
Too many notifications	Use Mute All Notifications, or set Likes and Comments to Off or People I Follow.	4.3
Logo not accepted (Affiliate)	Upload a JPG, PNG or WEBP file with a maximum size of 2 MB.	4.5

APPENDIX B

Glossary

CA Setu	The networking portal on which the organization registers and manages its account.
ICAI	The Institute of Chartered Accountants of India.
Organization	The account category selected through For Organization on the Create Your Account page.
Organization Dashboard	The page shown after login, used to manage the profile, create posts and browse feeds.
Quick e-Services	Shortcuts to SSP Portal, e-sahaayataa, Digital Lib, UDIN and Search CA / Enterprise.
You May Know	Suggested profiles the organization may wish to connect with.
Feed, My Feed, Saved, Archived, Draft, Scheduled, Recommended	The dashboard tabs used to browse and manage posts.
Declaration	The acknowledgement that must be selected before clicking Submit on the registration form.
Business Document	A PDF, JPG or PNG file (maximum 5 MB) uploaded on the Edit Organization Profile page.
Testimonial	A statement added from the Testimonial section of Edit Organization Profile.
Mute All Notifications	A toggle that temporarily stops all push notifications.
Comments Blocking	Allows the organization to block comments from specific accounts on its posts.
Affiliate Profile	Business information and key services configured under Settings → Affiliate.
Basic Analytics	Shows follower growth, engagement rate, likes, posts, comments and reposts, with a daily growth trend chart.
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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