

THE INSTITUTE OF CHARTERED ACCOUNTANTS OF INDIA
(Set up by an Act of Parliament)

CA SETU

Post-Registration Profile Setup

USER MANUAL FOR MEMBERS

Step 2 of 2 — Post-Registration Configuration

Version 1.0

Contents

1. About this manual
 - 1.1 Before you begin
 - 1.2 How the page is laid out
2. SSP Verified Information (non-editable)
3. Profile Details
 - 3.1 Region, State and City
 - 3.2 Purpose of Registration
 - 3.3 Areas of Interest
4. Academic Institutions
5. Primary Firm Registration
6. Visibility Controls
7. Declaration and saving the page
8. Mandatory field checklist
9. Troubleshooting
10. Frequently asked questions

1. About this manual

This manual explains the CA Setu Post-Registration Configuration page — the screen titled "Personalize Your Dashboard" that opens immediately after your registration on the portal is completed and verified.

Every field shown in this manual appears on that page. You are required to complete it once, in a single sitting, before your CA Setu dashboard becomes available. Please read each section below and fill the corresponding fields on the page exactly as described.

Important: The page will not save until all fields marked with a red asterisk (*) are filled and the declaration checkbox is ticked. Fill the form completely and then click SAVE PROFILE at the bottom.

1.1 Before you begin

Keep the following ready so that you can complete the page in one go:

- Your ICAI membership details (these are fetched automatically — you only need them to cross-check).
- Your firm name, Firm Registration Number (FRN) and firm address, if you are in practice.
- Your academic details — school/university name, degree, field of study, and start and end dates.
- A short professional description of your firm or your practice (up to 500 characters).
- An alternate 10-digit mobile number, if you wish to add one.

1.2 How the page is laid out

The page is divided into two columns. The left column contains all the information you have to fill. The right column contains the Visibility Controls, which decide what other members can see on your public profile.



Figure 1 — Page header. "STEP 2 OF 2" confirms you are on the Post-Registration Configuration page.

The left column contains, in order: SSP Verified Information, Profile Details (including Region/State/City, Purpose of Registration and Areas of Interest), Academic Institutions, Primary Firm Registration, and finally the Declaration with the SAVE PROFILE button.

2. SSP Verified Information (non-editable)

This is the first card on the page. The details here are pulled directly from ICAI's Self Service Portal (SSP) records against your membership number. They are displayed for your confirmation only — you cannot type into or change these boxes.

The image shows a screenshot of the 'SSP Verified Information' card. The card has a title 'SSP Verified Information' and a subtitle 'NON-EDITABLE RECORDS'. It contains several input fields, each with a label and a placeholder line. The fields are arranged in a grid: MEMBER NAME, MEMBERSHIP ID, MEMBERSHIP TYPE, STATUS (with the value 'Active' in green), DATE OF BIRTH, GENDER, PAN CARD, MOBILE, PROFESSIONAL EMAIL, MEMBER SINCE, COP DATE, PIN CODE, and PROFESSIONAL ADDRESS. All fields are read-only.

SSP Verified Information NON-EDITABLE RECORDS			
MEMBER NAME	MEMBERSHIP ID	MEMBERSHIP TYPE	STATUS Active
DATE OF BIRTH	GENDER	PAN CARD	MOBILE
PROFESSIONAL EMAIL	MEMBER SINCE	COP DATE	PIN CODE
PROFESSIONAL ADDRESS			

Figure 2 — SSP Verified Information card. All boxes are read-only.

The card displays: Member Name, Membership ID, Membership Type, Status, Date of Birth, Gender, PAN Card, Mobile, Professional Email, Member Since, COP Date, PIN Code and Professional Address.

Action required from you: read through these values and confirm they are correct.

If something is wrong here: These values cannot be corrected on CA Setu. Please get them updated in your ICAI SSP profile first. Once SSP is updated, the corrected values will reflect on CA Setu.

3. Profile Details

This is the section that decides how you appear in search results and to other members who visit your profile. Fill it carefully.

Profile Details

These details will define your search visibility and networking opportunities.

Salutation

Display Name *

Domain Expertise *

Select Salutation ▼

e.g. FEMA, International Tax

Years of Experience *

Alt. Contact Number

10-digit mobile number

Firm Overview / Bio *

Provide a professional description of your firm's core activities...

0/500 characters

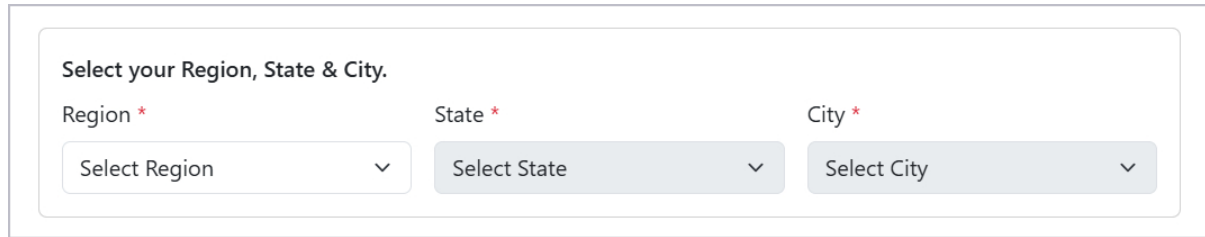
Figure 3 — Profile Details card.

Field	Mandatory	What to enter
Salutation	No	Select CA, Mr., Ms., Dr. or similar from the dropdown. If you choose "Other", a small text box appears — type your preferred salutation there.
Display Name	Yes	The name shown on your profile, posts and in search results. Enter your full professional name. Do not include the salutation here — it is added separately.
Domain Expertise	Yes	Your core areas of professional expertise, for example: FEMA, International Tax, GST, Statutory Audit. Separate multiple entries with commas.
Years of Experience	Yes	Enter a number only, for example 12. Do not type the word "years".
Alt. Contact Number	No	A 10-digit Indian mobile number, digits only, without +91 or spaces. Leave blank if you do not wish to share one.
Firm Overview / Bio	Yes	A professional description of your firm's core activities or your own practice. Maximum 500 characters — the counter below the box shows how many you have used.

Tip: Domain Expertise and Firm Overview are the two fields most used by other members when they search for a professional. Write them in plain, searchable language rather than abbreviations only.

3.1 Region, State and City

Immediately below the bio, select where you are located. These three dropdowns are linked — you must select them in order, from left to right.



Select your Region, State & City.

Region * State * City *

Select Region Select State Select City

Figure 4 — Region, State & City selection.

1. Select your Region first (for example, Northern Region).
2. The State dropdown will then load only the states belonging to that region. Select your state.
3. The City dropdown will then load the cities of that state. Select your city.

All three are mandatory. If you change the Region later, the State and City will reset and must be selected again.

3.2 Purpose of Registration

This tells other members what you are looking for on the portal. Click on a tile to select it; click again to deselect. You may select more than one. Scroll inside the box to see all available options.

Purpose of Registration

Merger	Networking	Partnership
Aggregation of LLPs	Referral work	Diversification of expertise
Expansion into new locations	Knowledge sharing	Posting Opportunities

Figure 5 — Purpose of Registration tiles. Selected tiles are highlighted.

Options include Merger, Networking, Partnership, Aggregation of LLPs, Referral work, Diversification of expertise, Expansion into new locations, Knowledge sharing, Posting Opportunities and more.

3.3 Areas of Interest

This is the list of professional services and subject areas you work in or wish to be approached for. Select all that apply by clicking the tiles. The list is long — use the scrollbar on the right of the box to move through it.

Areas of Interest

Arbitration	Assurance on Sustainability Accounting	Audit of Inventories / Receivables / Securities
Audit of Educational Institutions	Audit of Programme Funds	Audit of Co-operative Departments (including Co-operative Banks)
Audit of Charitable Trusts / Societies	Audit of Members of Stock Exchanges	Bookkeeping

Figure 6 — Areas of Interest tiles.

Examples of available options: Arbitration, Assurance on Sustainability Accounting, Audit of Inventories / Receivables / Securities, Audit of Educational Institutions, Audit of Programme Funds, Audit of Co-operative Departments, Audit of Charitable Trusts / Societies, Bookkeeping, and many others.

Why this matters: Purpose of Registration and Areas of Interest are used to match you with other members and to filter you into search results. Selecting them accurately improves the quality of the connections you receive.

4. Academic Institutions

Add the schools, colleges and universities you have attended. At least one complete entry is required.

Academic Institutions
Add your academic institutions background

School *
Ex: Boston University

Degree *
Ex: Bachelor of Science

Field of study *
Ex: Business

Start date
Month * Year *
Month Year

End date
Month * Year
Month Year

+ Add Another Education

Figure 7 — Academic Institutions card with the "+ Add Another Education" button.

Field	Mandatory	What to enter
School	Yes	Name of the institution or university, for example: University of Delhi.
Degree	Yes	The qualification obtained, for example: Bachelor of Commerce.
Field of study	Yes	The specialisation, for example: Accounting and Finance.
Start date — Month	Yes	Month in which the course began.
Start date — Year	Yes	Year in which the course began.
End date — Month	Yes	Month in which the course was completed.
End date — Year	No	Year of completion. Leave blank only if the course is still ongoing.

To add a second qualification, click "+ Add Another Education". A fresh set of blank fields will appear below the existing one. Repeat for each qualification you wish to list.

Date rule: The end date must be later than the start date. If it is not, the page will show an error on save and will scroll back to the affected entry.

5. Primary Firm Registration

This card shows the firm you will represent on the portal. Where ICAI records already hold your firm details, the fields are filled automatically and locked — hovering over a locked field shows a tooltip confirming it cannot be edited here.

Primary Firm Registration
Select the specific FRN you wish to represent on the portal.

Firm Name	Firm Registration Number	
Partners	Staff	Offices
Address		

Figure 8 — Primary Firm Registration card.

Field	Mandatory	What to enter
Firm Name	As applicable	The registered name of your firm as per ICAI records.
Firm Registration Number	As applicable	Your FRN as allotted by ICAI.
Partners	As applicable	Total number of partners in the firm — digits only.
Staff	As applicable	Total number of staff members — digits only.
Offices	As applicable	Number of offices or branches — digits only.
Address	As applicable	The full address of the firm's principal office.

If you hold more than one FRN, select the specific FRN you wish to represent on the portal. This is the firm that will be shown against your name across CA Setu.

If the card is blank or greyed out: It means no firm record was received against your membership number. Members not in practice may proceed without it. If you are in practice and the details are missing or wrong, update them in ICAI SSP and they will be picked up on CA Setu.

6. Visibility Controls

This panel sits in the right-hand column and stays visible as you scroll. It controls what other members can see on your profile. Each row is a toggle: switched ON (coloured) means the item is visible to others; switched OFF (grey) means it is hidden.

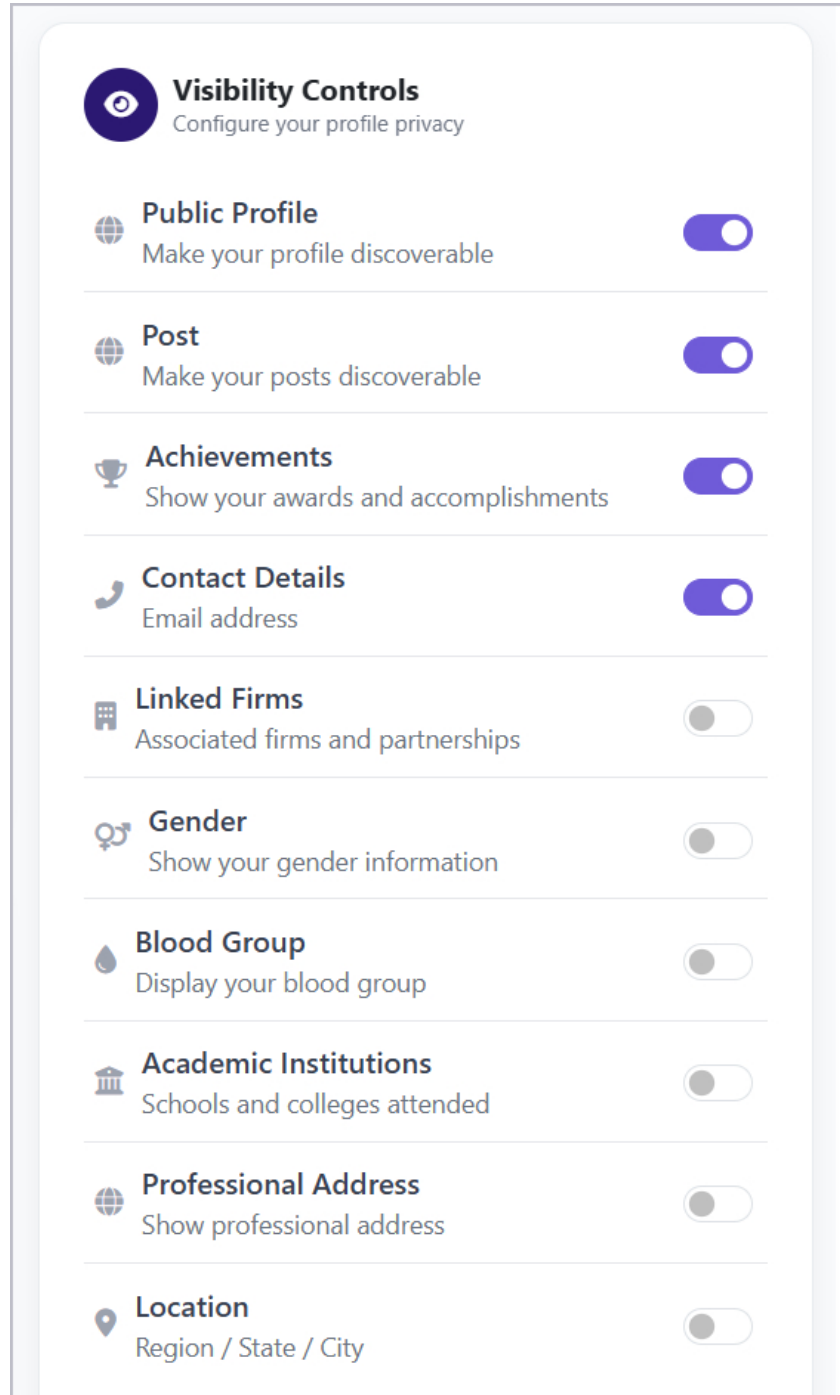


Figure 9 — Visibility Controls panel with default settings.

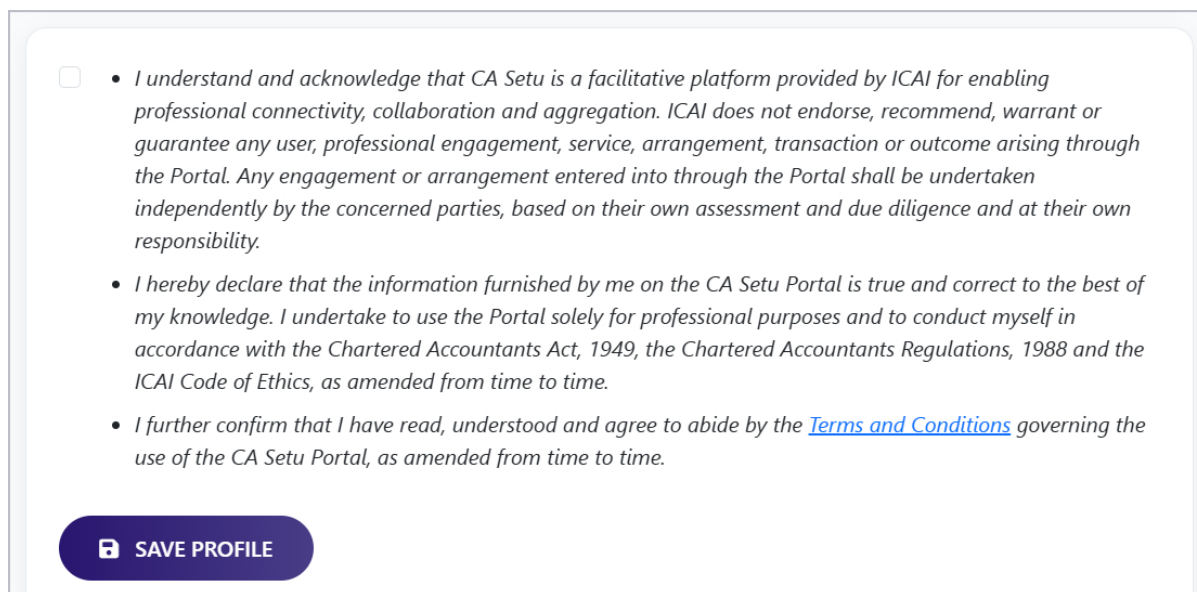
Control	Default	What it does when switched ON
Public Profile	ON	Makes your profile discoverable to other members.

Control	Default	What it does when switched ON
Post	ON	Makes the posts you publish discoverable.
Achievements	ON	Shows your awards and accomplishments on your profile.
Contact Details	ON	Shows your email address to other members.
Linked Firms	OFF	Shows associated firms and partnerships.
Gender	OFF	Shows your gender information.
Blood Group	OFF	Displays your blood group.
Academic Institutions	OFF	Shows the schools and colleges you attended.
Professional Address	OFF	Shows your professional address.
Location	OFF	Shows your Region / State / City.

Remember: Switching a toggle ON means "show this". Switching it OFF means "hide this". You can change any of these later from your profile settings — nothing here is permanent.

7. Declaration and saving the page

At the bottom of the page is a declaration. Read all three points, then tick the checkbox on the left to accept them.



☐ • I understand and acknowledge that CA Setu is a facilitative platform provided by ICAI for enabling professional connectivity, collaboration and aggregation. ICAI does not endorse, recommend, warrant or guarantee any user, professional engagement, service, arrangement, transaction or outcome arising through the Portal. Any engagement or arrangement entered into through the Portal shall be undertaken independently by the concerned parties, based on their own assessment and due diligence and at their own responsibility.

• I hereby declare that the information furnished by me on the CA Setu Portal is true and correct to the best of my knowledge. I undertake to use the Portal solely for professional purposes and to conduct myself in accordance with the Chartered Accountants Act, 1949, the Chartered Accountants Regulations, 1988 and the ICAI Code of Ethics, as amended from time to time.

• I further confirm that I 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.

 **SAVE PROFILE**

Figure 10 — Declaration checkbox and the SAVE PROFILE button.

By ticking the box you confirm that:

- You understand CA Setu is a facilitative platform provided by ICAI for professional connectivity, collaboration and aggregation, and that ICAI does not endorse, recommend, warrant or guarantee any user, engagement, service or outcome arising through the portal.
- The information you have furnished is true and correct to the best of your knowledge, and you will use the portal solely for professional purposes in accordance with the Chartered Accountants Act, 1949, the Chartered Accountants Regulations, 1988, and the ICAI Code of Ethics.
- You have read and agree to abide by the Terms and Conditions governing the use of the portal — these open in a new window when you click the link.

Once the checkbox is ticked, click SAVE PROFILE. On success you will be taken to your CA Setu dashboard.

8. Mandatory field checklist

Run through this list before clicking SAVE PROFILE. Every item below is mandatory.

Section	Mandatory items
Profile Details	Display Name, Domain Expertise, Years of Experience, Firm Overview / Bio
Location	Region, State, City
Academic Institutions	School, Degree, Field of study, Start Month, Start Year, End Month
Declaration	Checkbox ticked

9. Troubleshooting

What you see	What to do
The page does not save and a field is highlighted	A mandatory field is empty or invalid. The page scrolls automatically to the first problem field and flashes it — correct that field and click SAVE PROFILE again.
The State or City dropdown is empty	Select the Region first, then the State. Each dropdown loads only after the one before it is chosen.
My name, PAN or email in the first card is wrong	These come from ICAI SSP and cannot be edited on CA Setu. Update them in SSP; the corrected values will then appear here.
The character counter under the bio has stopped	You have reached the 500-character limit. Shorten the text to continue typing.
Years of Experience will not accept my entry	Enter digits only, with no letters, spaces or symbols.
The alternate mobile number is rejected	Enter exactly 10 digits, without +91, spaces or dashes.
I ticked the declaration but SAVE PROFILE does nothing	Scroll up and check for a highlighted mandatory field elsewhere on the page — the declaration is only the last of the required items.

10. Frequently asked questions

Can I change these details later?

Yes. Everything you enter here, including the visibility toggles, can be edited afterwards from your profile settings on the dashboard.

Do I have to finish the page in one sitting?

Yes. The page saves as a whole when you click SAVE PROFILE, so keep your details ready before you start.

I am not in practice and have no firm. Can I continue?

Yes. The Primary Firm Registration card applies only to members holding a firm registration. If no firm record exists against your membership number, leave it as it is and proceed.

Will my personal details be visible to everyone?

Only the items whose toggles are switched ON in Visibility Controls are shown to other members. Gender, blood group, academic institutions, professional address and location are OFF by default.

Can I add more than one qualification?

Yes. Use the "+ Add Another Education" button to add as many entries as you need.

For assistance, use the Contact Us option in the top navigation bar of the portal.