WELCOME ABOARD

Your first 30 minutes

Paanch step — aur aapka poora office digital.

Your firm is live on Prime Practice. Everything below takes about half an hour, once. After that, your office runs from one screen.

YOUR FIRM'S PORTAL

`primepractice.in / your-firm-name`

Sign in with the email and password you chose during setup. Bookmark it, and install it as an app on your phone.

Step 1 — Sign in and complete your firm profile

Open your portal address and sign in. Go to **Firm Profile** and fill in your firm name, PAN, GSTIN, address and logo — these appear on every invoice and report you generate.

Step 2 — Add your team

Open **Staff Setup**, add each staff member with their mobile number and a 4–6 digit PIN. Then tick only the rights they need — client edit, finance, reports, passwords. Staff log in with their mobile number and PIN; they see only what you allow.

Step 3 — Bring in your clients

Two ways, both fine:

1. **One by one** — Client Master → Add Client. Good for a handful.
2. **From Excel** — Bulk Operations → Smart Import. Upload your existing client list; columns are matched automatically, errors are shown in red and can be fixed on screen. 500 clients in minutes.

Step 4 — Map compliances

While adding or importing clients, tick the recurring compliances each client is liable for — GSTR-1, GSTR-3B, TDS, ITR, ROC and so on. Prime Practice then creates the recurring tasks and due dates for you, month after month, without being asked.

Step 5 — Invite clients to their portal

Open **Client Portal** → **Invite** on any client. Enter their email and a temporary password, and Prime Practice sends them a branded welcome email in your firm's name — with their login, step-by-step instructions and a flyer. Your client then sees their documents, deadlines, work status and bills, 24×7.

EVERY DAY

Where everything lives

Sidebar ka chhota sa naksha — kaam kis menu me milega.

Menu	What you do there
Dashboard	Live picture of the firm — billing, collections, pending work, staff performance
Client Master	Every client with PAN, GSTIN, contacts, group and mapped compliances
Task Dashboard	Assign work, track status, chat with staff, mark complete
Recurring Tasks	Monthly / quarterly work that creates itself — GSTR-1, 3B and the rest
Compliance Setup	27 ready-made compliances, plus any you add yourself
Calendar	The whole month's deadlines on one grid
Finance	Invoices, receipts, ledgers, outstanding and UPI collection
Reports	Any transaction type, any period — export to Excel or PDF
Bulk Operations	Import clients from Excel, assign compliances in bulk
Templates	WhatsApp and email messages with auto-filled client details
Client Portal	Create client logins and send their welcome email
My Diary / CA Diary	Day-wise work diary, to-do list and a private notepad
Team Diary	Read any staff member's diary for any date range (Admin only)
Vault	Encrypted portal passwords and the MCA company master
GST Status	Who has filed GSTR-1 / 3B and who has not
Audit Trail	Every critical action, with who did it and when (Admin only)

Three things worth knowing

1. **Your data is yours.** It lives in your firm's own Google Firebase project. Prime Practice cannot read your client list — that is by design, not by promise.
2. **Updates are automatic.** When a new version is ready, a small banner appears at the top of the screen. Click it and you are on the latest version. No installs, no extra cost.
3. **Forgot your password?** Click "Forgot password?" on the login screen — a reset link comes to your registered email.

NEED A HAND?

Simply reply to your welcome email.

It reaches the Prime Practice team directly — we will help you import your client list, map compliances, or go live with your first client portal. The complete 44-page user manual, with screenshots of every screen, is at primepractice.in/manual