PRIME PRACTICE

Practice management, re-imagined for privacy-first professionals

COMPLETE USER MANUAL

Every module · Every flow · Step by step · With real screenshots

Built for Chartered Accountants, Company Secretaries, Advocates and Cost Accountants of India

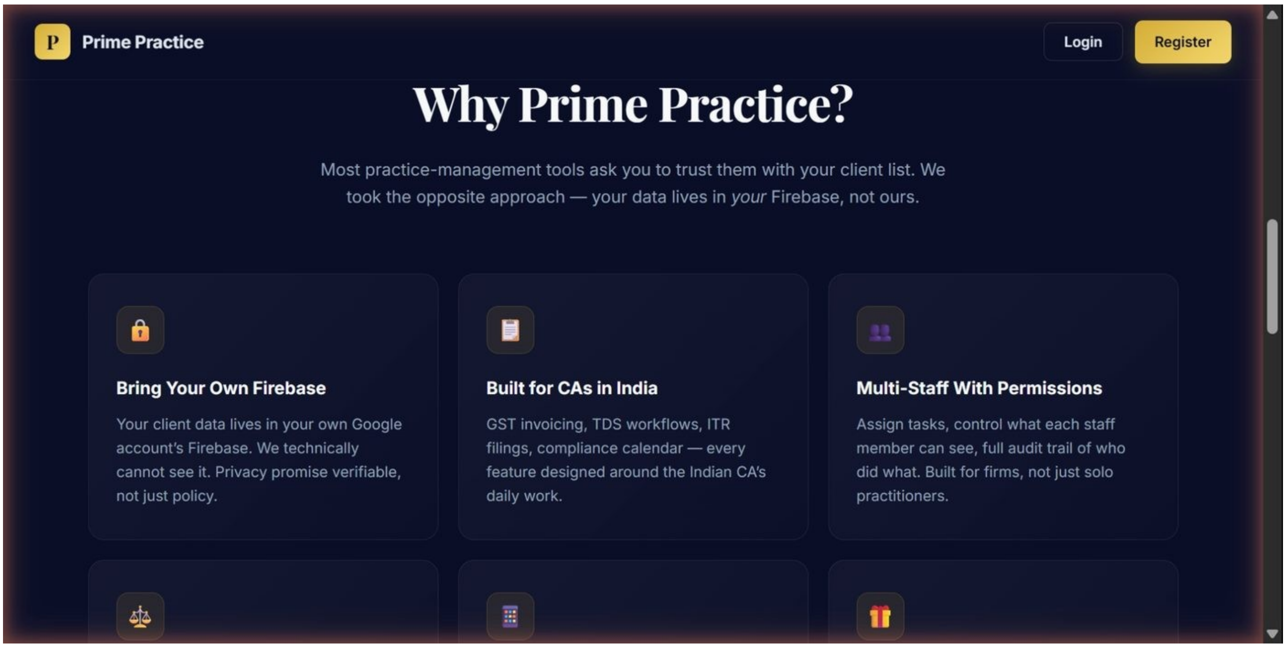
www.primepractice.in

Welcome to Prime Practice

Apka poora office — ek secure app me. (Your whole practice in one secure app.)

Prime Practice is a complete practice-management platform made for Indian CA offices. It manages your **clients, compliances, tasks, staff, money and client communication** from one clean screen — so that nothing is ever missed and every deadline is met.

Most software asks you to upload your client list to *their* server. Prime Practice takes the opposite approach — **your data lives in your own private Google Firebase account**. We technically cannot see it. Your client list stays yours. Always.



Why Prime Practice — your data, your cloud; built for CAs in India; multi-staff with permissions

What you get

Module	What it does for you
Dashboard	Live picture of your firm — billing, collections, pending tasks, staff performance
Client Master	All clients with PAN, GSTIN, contacts, groups and mapped compliances
Compliance Setup	27 ready-made compliances (GST, ITR, TDS, MCA, PF, ESIC…) + add your own
Task Dashboard	Assign work to staff, track status, chat in real time, never miss a due date
Recurring Tasks	GSTR-1, GSTR-3B type monthly work creates itself — automatically
Finance Module	GST invoices, receipts, payments, journals, client ledger and reports
Staff Setup	Staff logins with a PIN, module-wise rights, field-level privacy
Bulk Operations	Import 500 clients from any Excel in minutes; map compliances in bulk
Templates	Ready WhatsApp & Email messages with auto-filled client name and compliance

Module	What it does for you
Client Portal	Your clients see their deadlines, invoices and chat with you — free goodwill
Audit Trail	Every critical action recorded — who did what, and when

□ Quick Start — your first 30 minutes

1. **Register** your workspace (Chapter 1) → 2. **Add staff** with PINs (Chapter 7) → 3. **Import clients** from your old Excel (Chapter 10)

4. **Map compliances** in bulk (Chapter 10) → 5. **Assign tasks** (Chapter 6) → 6. **Invite clients** to the portal (Chapter 12)

Bas! Office digital ho gaya. Total setup time: about 30 minutes.

Contents

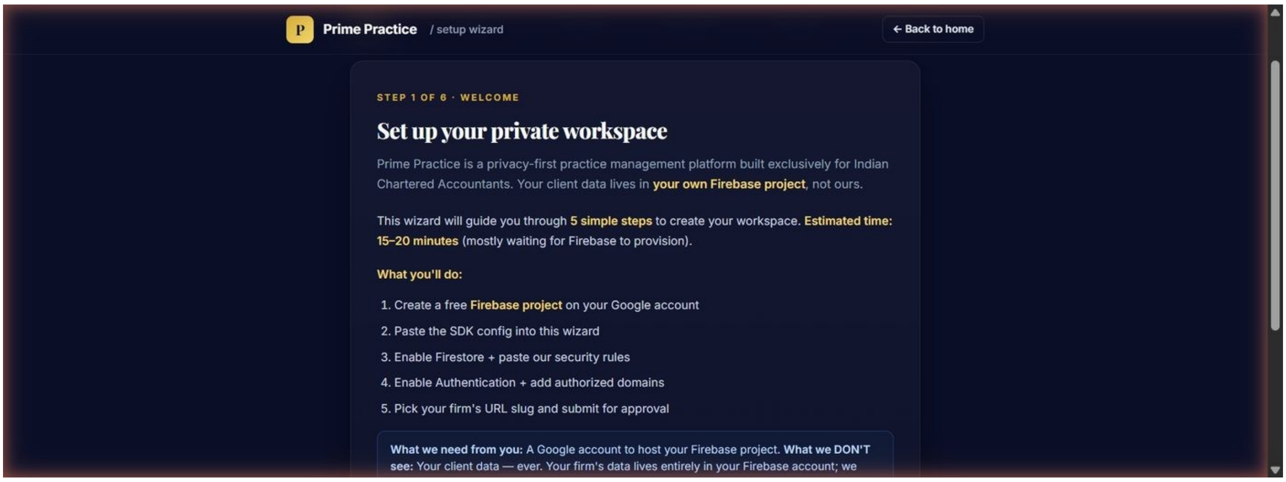
Tip: In Word, right-click this list and choose “Update Field” to refresh page numbers.

CHAPTER 1

Registration — Create Your Workspace

10–20 minutes, one time. No servers, no IT team needed.

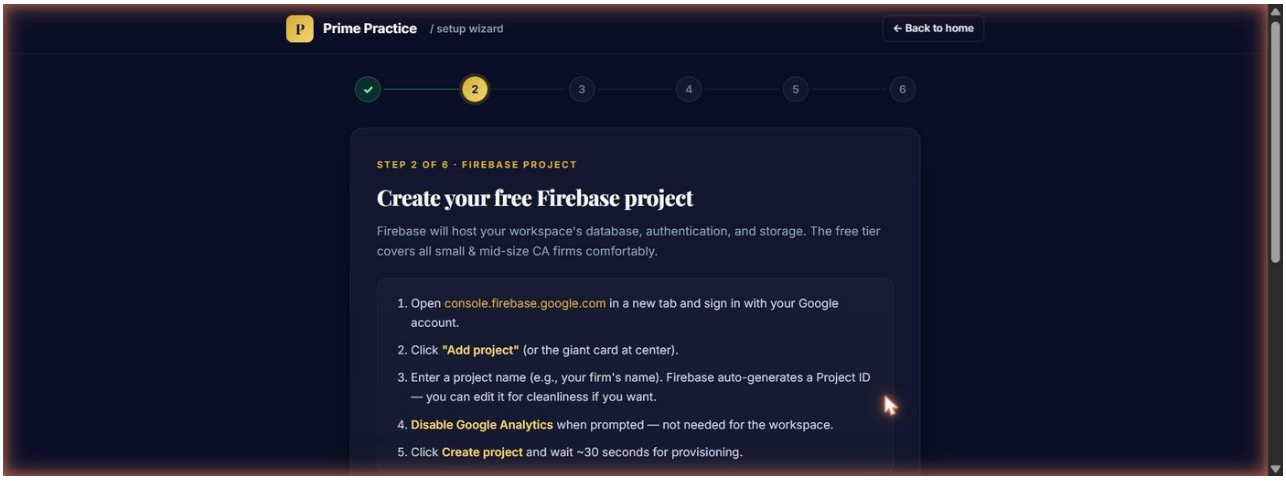
Go to **www.primepractice.in** and click the **Register** button (top-right). A friendly **6-step Setup Wizard** opens. It holds your hand through the whole process — every step has exact click-by-click instructions on screen.



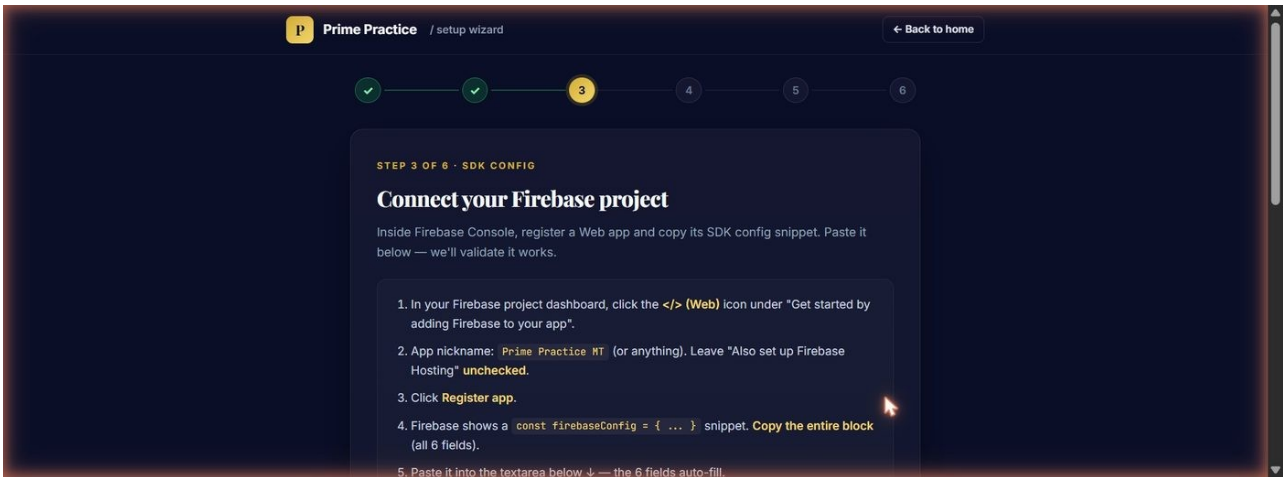
Setup Wizard — Step 1 of 6: what you will do, and what we never see

The 6 steps at a glance

1. **Welcome & overview —** read what the wizard will do. Estimated time 15–20 minutes.
2. **Create your free Firebase project —** open console.firebase.google.com with your own Google account, click “Add project”, give it your firm’s name. The wizard shows every click.
3. **Connect the project —** copy the small “SDK config” code block from Firebase and paste it into the wizard. It validates automatically — the wizard will not let you move ahead until everything is correct.
4. **Enable Firestore + paste security rules —** one copy-paste. These rules lock your data so only your firm can read it.
5. **Enable Authentication + authorized domains —** switch on Email/Password login and add the two domains the wizard shows.
6. **Pick your firm’s web address —** choose a short name (e.g. sharma-and-co) and submit for approval. You get your own corner of the internet: a private workspace page with your firm’s name on it.



Step 2 — exact instructions for creating your free Firebase project



Step 3 — paste the SDK config; the wizard validates it before letting you continue

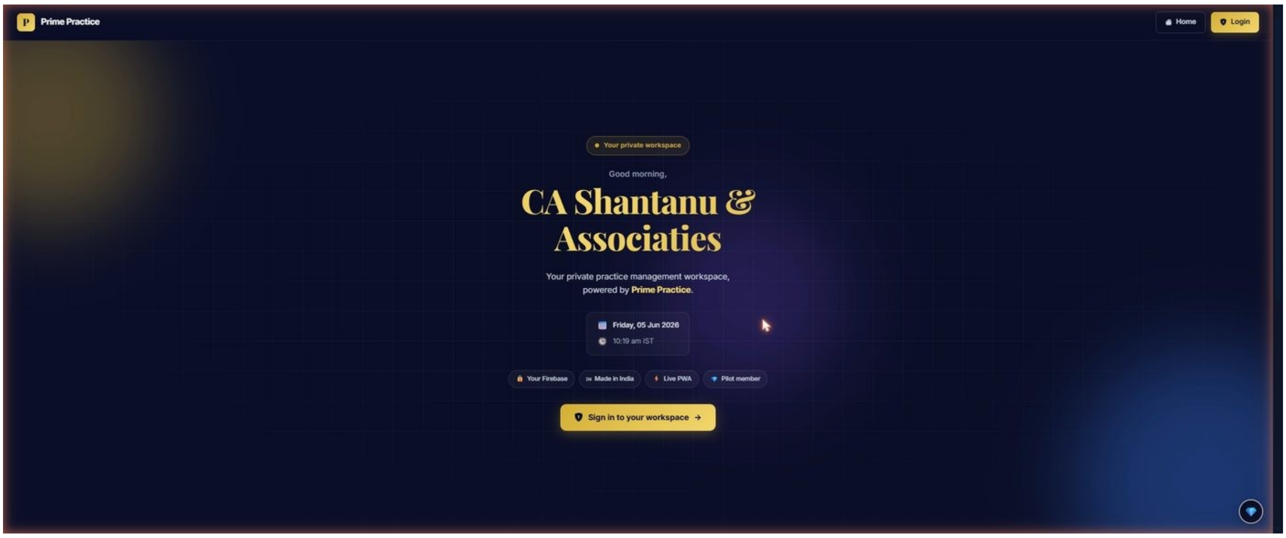
□ Why this design is special

Your client data is hosted in **your own Google account** — not on our server. Privacy promise that is verifiable, not just policy. Aligned with India's DPDP Act, 2023.

The free Firebase tier comfortably covers small and mid-size CA firms — so there is **no extra hosting bill**.

After approval — your own branded workspace

Once approved, your team opens a personal workspace address (like **primepractice.in/demo**) and sees a beautiful welcome page with your firm's name — your digital office reception.



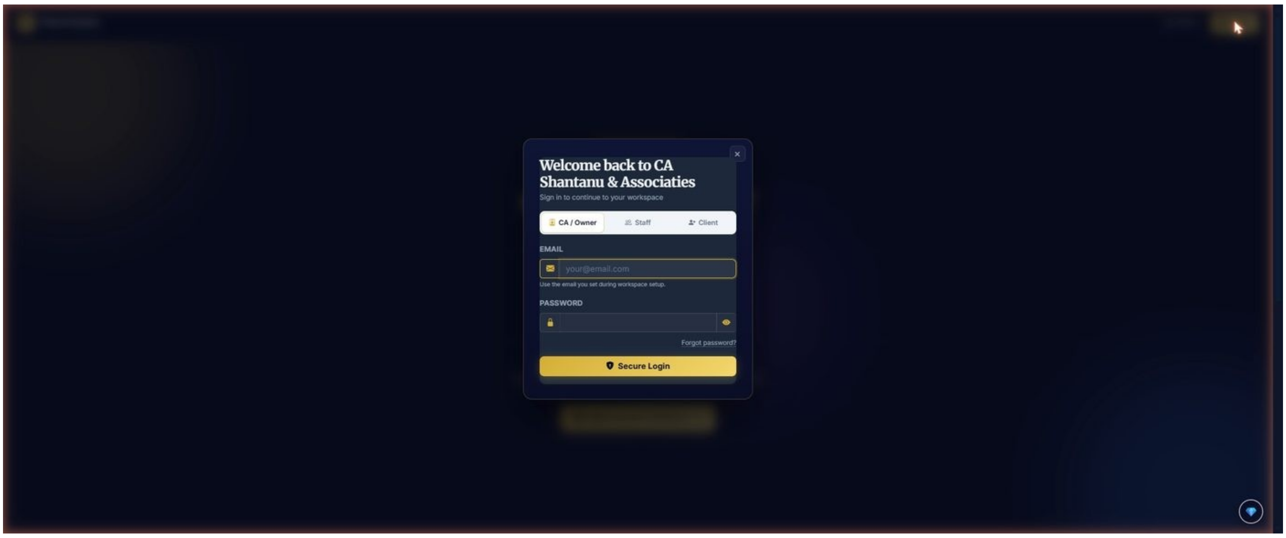
Your firm’s own workspace page — this is what your team and clients see

CHAPTER 2

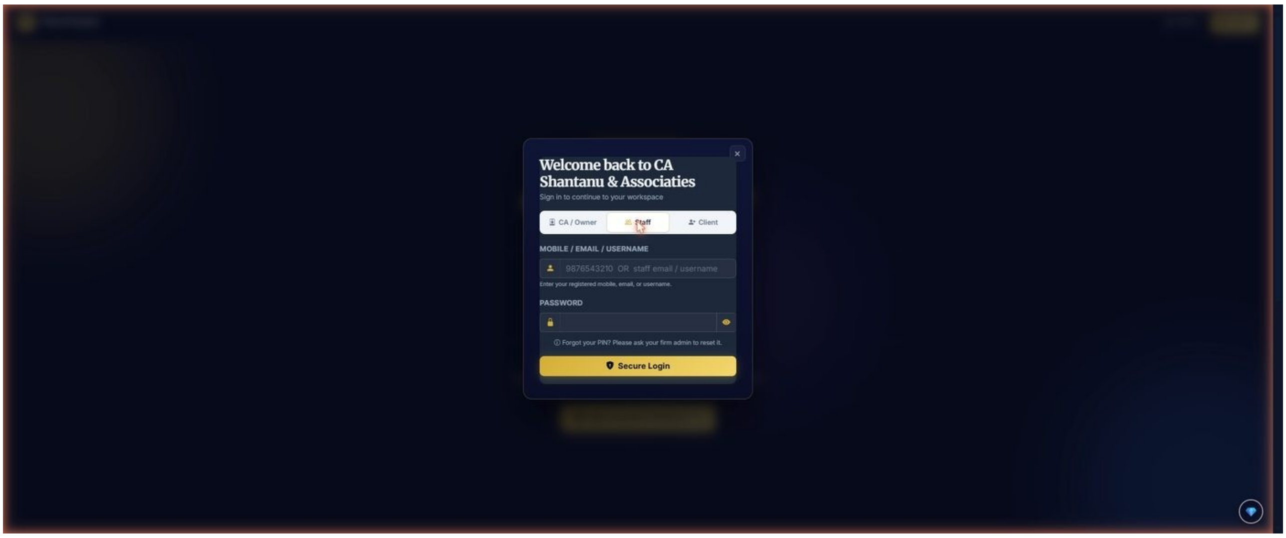
Login & User Roles

One door, three keys — CA, Staff and Client. Everyone sees only what they should.

Click **Login** on your workspace page. The login box has **three tabs** — pick who you are:



Login — CA / Owner tab: email + password



Login — Staff tab: mobile / email / username + PIN. Forgot PIN? Firm admin resets it.

Role	Logs in with	What they can do
CA / Owner (Admin)	Email + password	Everything — all modules, all settings, staff rights, audit trail
Staff	Mobile / email / username + PIN	Only their assigned tasks + only the modules you allow (Chapter 7)
Client	Email + password or Phone OTP	Their own portal — deadlines, tasks, invoices, documents, chat (Chapter 12)

□ Pro tip
The Client tab automatically takes your client to the Client Portal login — you never need to explain

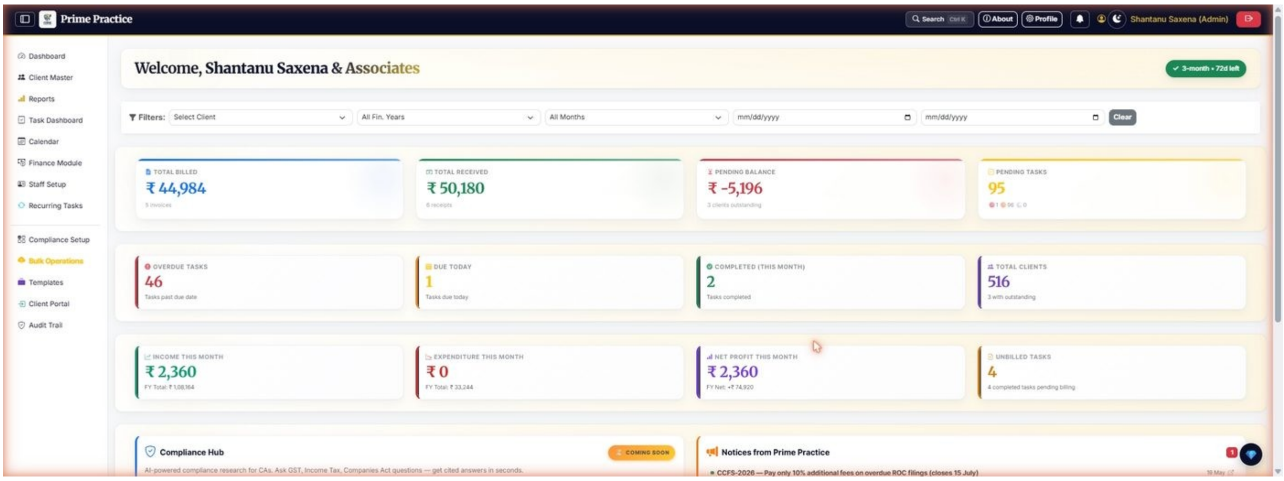
two websites. One address works for everyone.

CHAPTER 3

Dashboard — Your Firm at a Glance

Subah ki pehli nazar — the whole firm in 10 seconds.

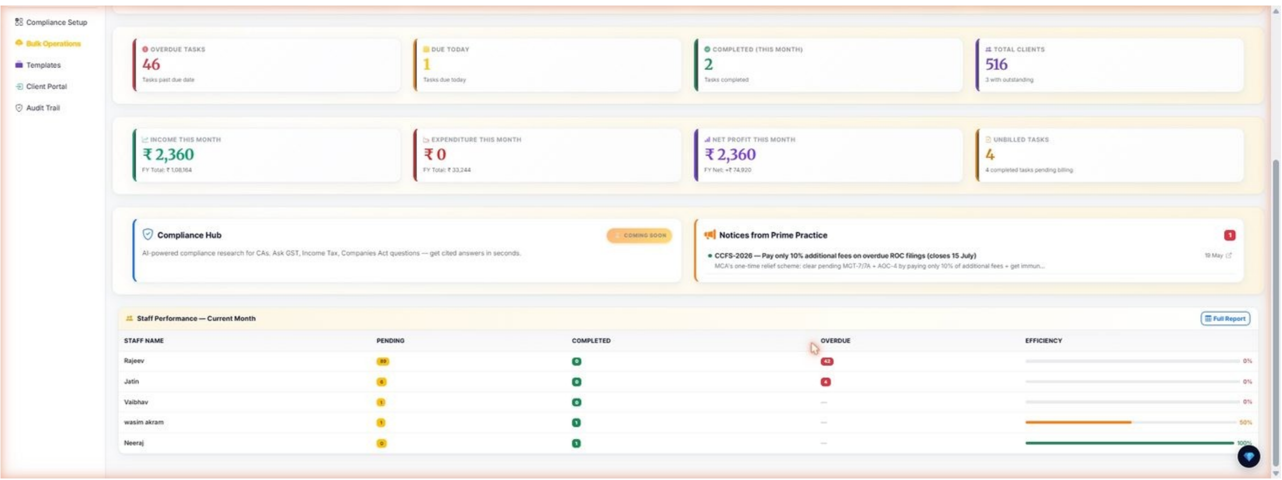
The moment you log in, the Dashboard answers the four questions every partner asks: **How much have we billed? How much has come in? What is pending? What is overdue?**



Dashboard — Total Billed, Total Received, Pending Balance and Pending Tasks, with filters on top

What the cards tell you

- **Total Billed / Total Received / Pending Balance —** live money position, with invoice and receipt counts.
- **Pending Tasks —** total open work, colour-coded by priority.
- **Overdue / Due Today / Completed / Total Clients —** your work radar for the day.
- **Income, Expenditure & Net Profit (this month) —** with full financial-year totals underneath.
- **Unbilled Tasks —** completed work you have not invoiced yet. Direct recovery of forgotten fees!
- **Staff Performance —** pending / completed / overdue per staff member, with efficiency bars.
- **Compliance Hub & Notices —** live compliance updates (like CCFS-2026) right inside your app.



Scroll down — monthly income/expense, Compliance Hub, Notices and Staff Performance

Pro tips

Use the **filter bar** (client, financial year, month, date range) — every card recalculates instantly.

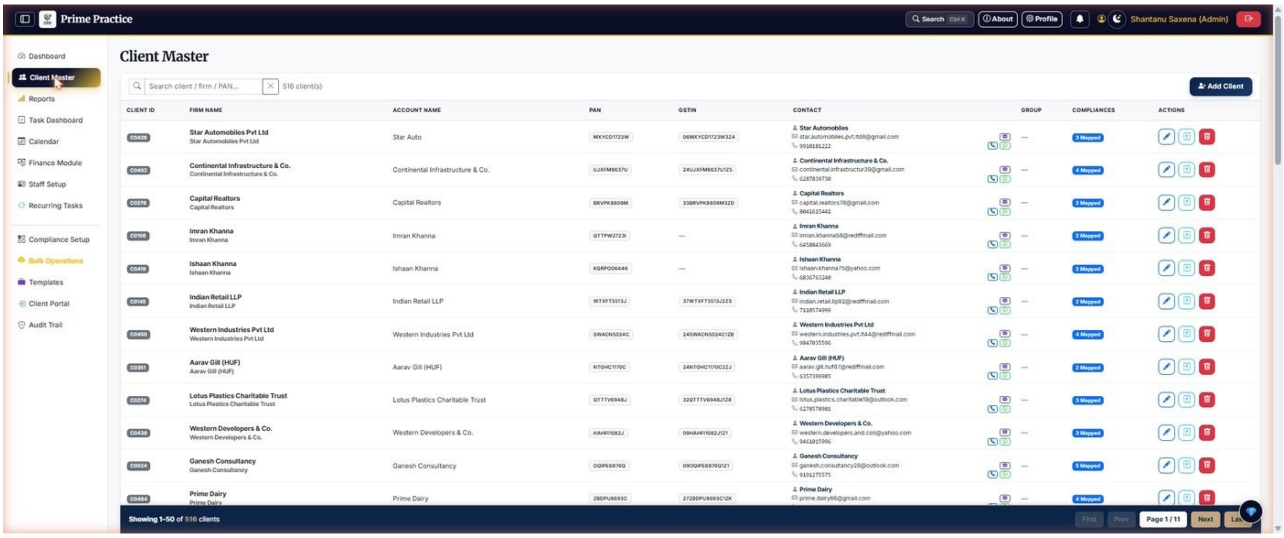
The yellow **backup reminder** appears until you take your first backup (Bulk Operations → Download JSON). Take one today!

Click **Install** on the bottom banner to add Prime Practice to your desktop / phone home screen like a real app.

CHAPTER 4

Client Master — All Clients, One Register

PAN, GSTIN, contacts, groups, compliances — sab kuch ek jagah.

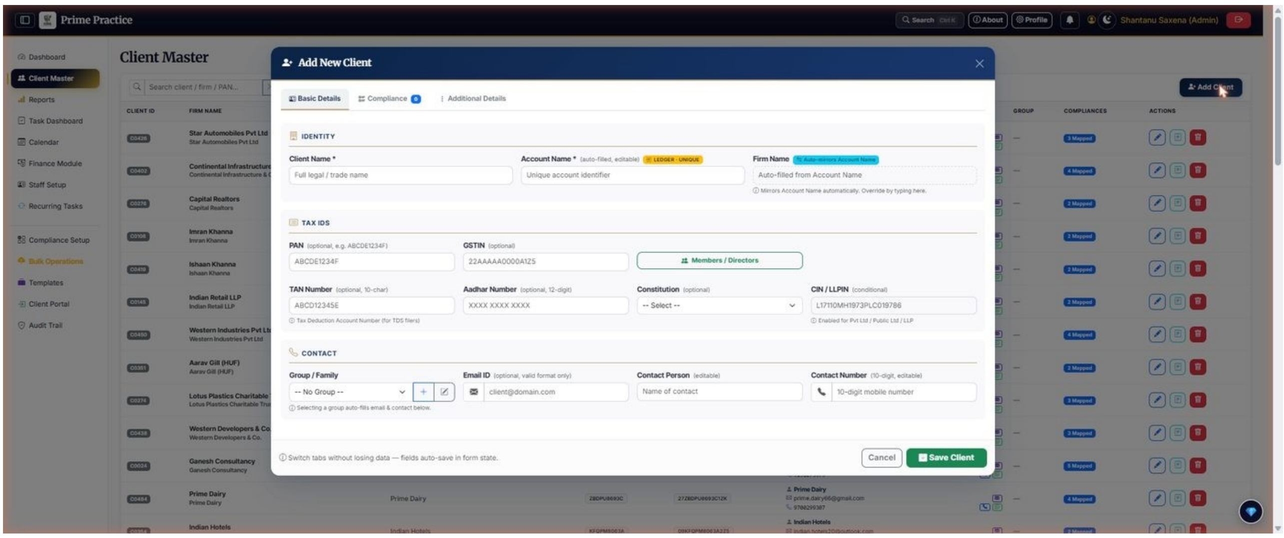


Client Master — 516 clients with search, compliance badges, WhatsApp/email shortcuts and actions

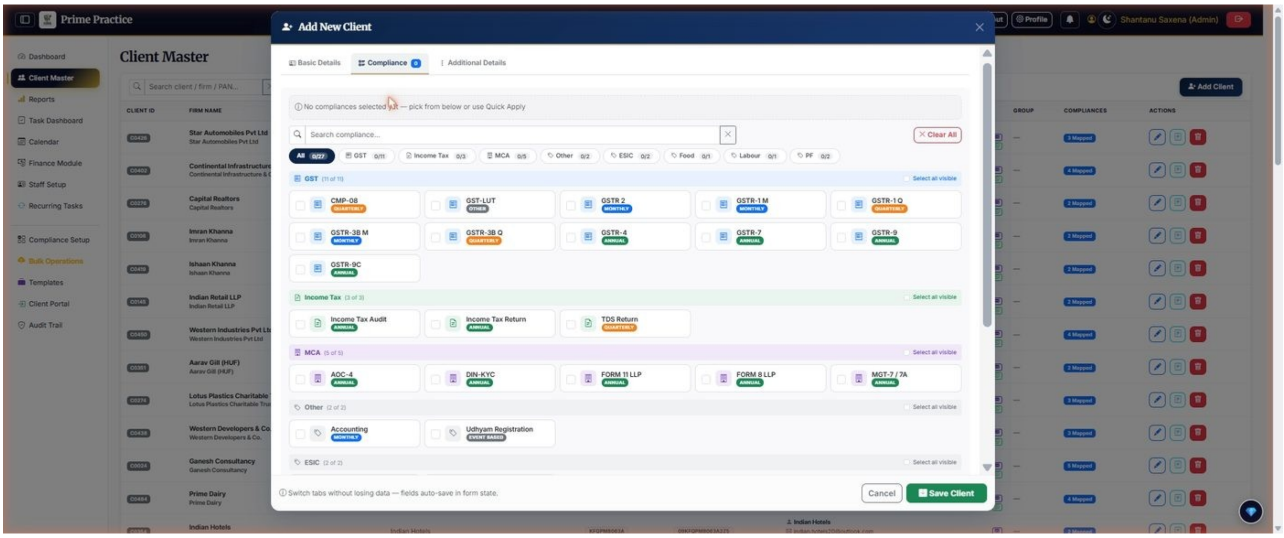
Search any client by **name, firm or PAN** in the search bar. Each row shows tax IDs, contact details, the **"Mapped" badge** (how many compliances this client has), and one-click **WhatsApp / Email** icons.

Adding a client (60 seconds)

1. Click **+ Add Client** (top-right).
2. **Basic Details tab —** type the Client Name; Account Name and Firm Name fill themselves. Add PAN, GSTIN, TAN, constitution, CIN if you have them — all optional.
3. **Contact section —** email, contact person, 10-digit mobile. Put family firms into a Group so contact details auto-fill for the whole group.
4. **Compliance tab —** tick the compliances this client needs (GSTR-3B, ITR, Audit…). Search, filter by category, or "Select all visible".
5. Click **Save Client**. Done — the client is live with compliances already mapped.



Add New Client — Basic Details: identity, tax IDs and contact in one clean form



Add New Client — Compliance tab: tick-tick-done. Compliances map at the moment of creation

□ Pro tips

Switch tabs freely — **nothing is lost**; the form keeps everything until you save.

Use **Members / Directors** inside Tax IDs to store partner/director details for firms and companies.

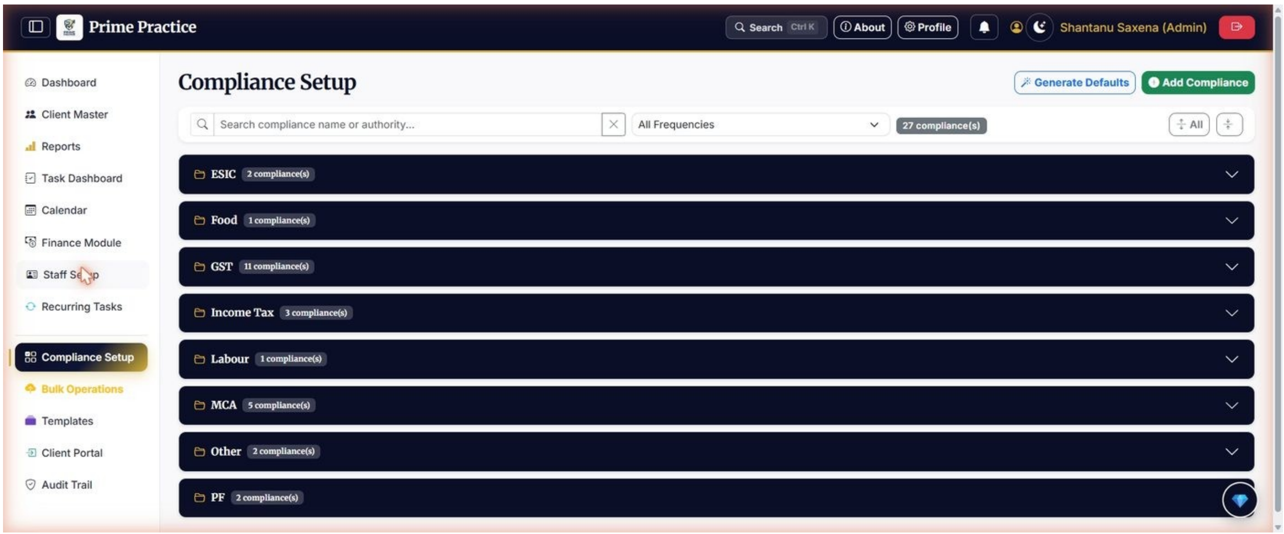
Have 100+ clients in an old Excel? Don't type them — use **Bulk Operations → Smart Import** (Chapter 10) and finish in minutes.

CHAPTER 5

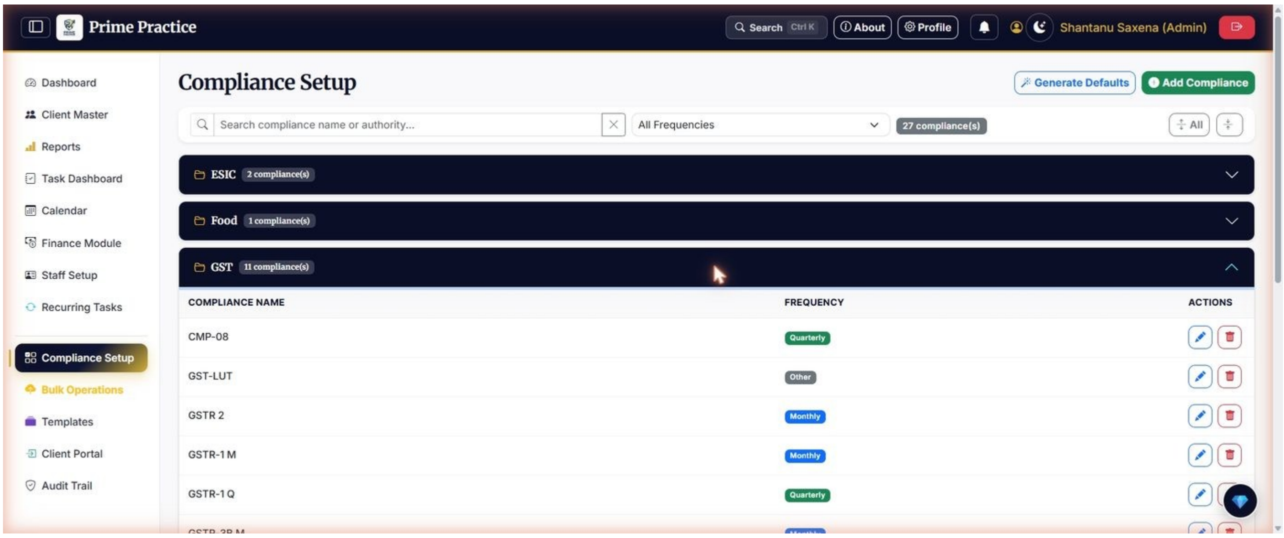
Compliance Setup — Your Master List

Define every service you offer — once. Then map it to clients forever.

Compliance Setup is the master list of all work-types your office handles — GSTR-1, GSTR-3B, ITR, Tax Audit, AOC-4, DIN-KYC, PF, ESIC and more. Prime Practice ships with **27 ready-made compliances** organised by authority. Use **Generate Defaults** to load them in one click.



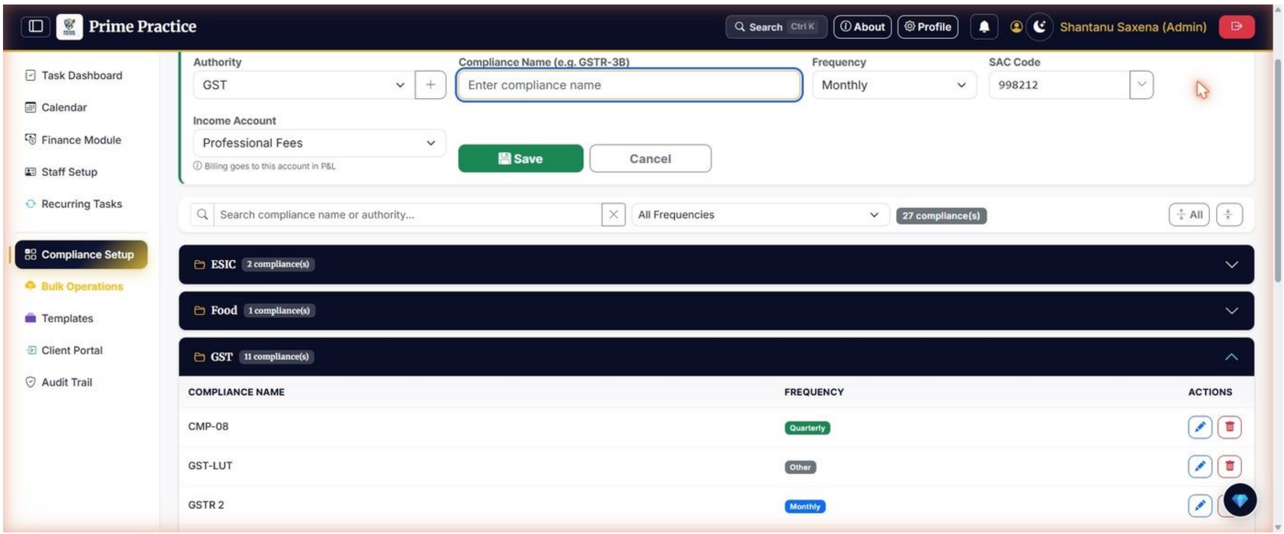
Compliance Setup — 27 compliances neatly grouped: ESIC, Food, GST, Income Tax, Labour, MCA, PF…



Open a category — every compliance with its frequency badge (Monthly / Quarterly / Annual)

Adding your own compliance

1. Click **Add Compliance**.
2. Pick the **Authority** (GST, Income Tax, MCA…) — or add a new authority with the + button.
3. Type the **name** (e.g. GSTR-3B), set the **frequency** and the **SAC code** for invoicing.
4. Choose the **Income Account** — billing for this compliance flows to that account in your P&L automatically.
5. Click **Save**. It is now available everywhere — client mapping, tasks, invoices, schedules.



Add Compliance — authority, frequency, SAC code and income account

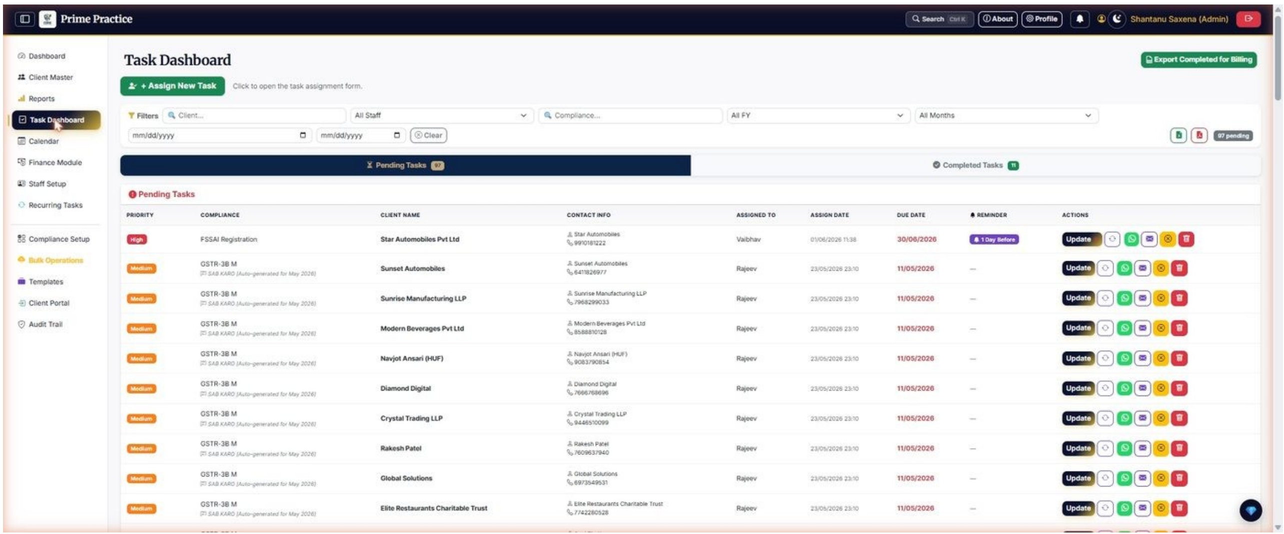
☐ Why this matters

Because compliances are structured (not free text), Prime Practice can auto-generate recurring tasks, prefill invoices with SAC codes, and show clients a clean deadline timeline — all from this one list.

CHAPTER 6

Task Dashboard — Assign, Track, Done

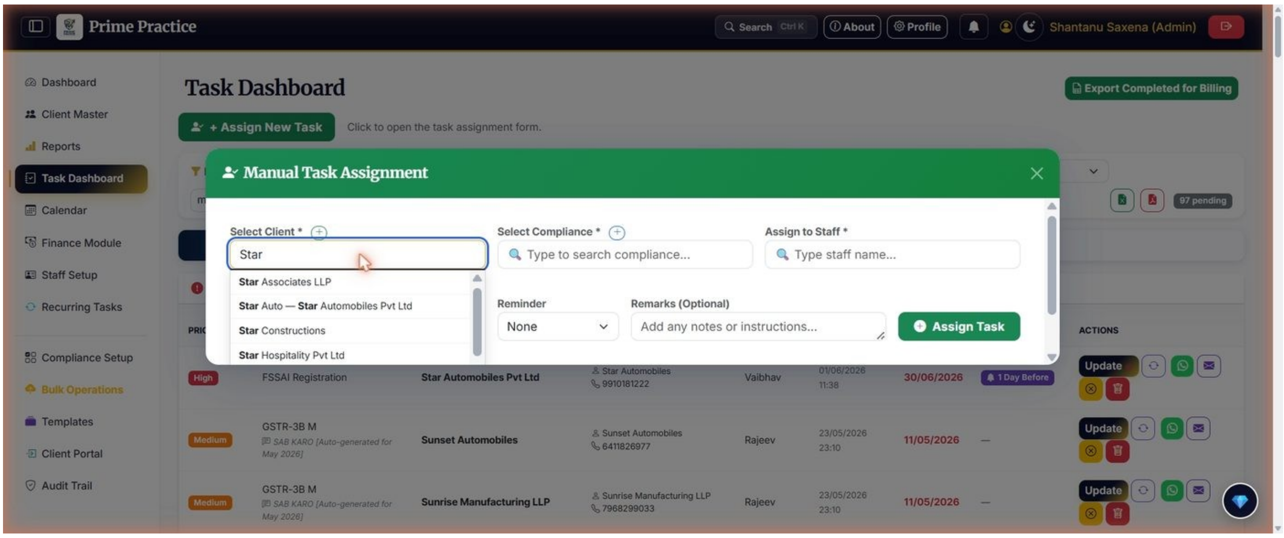
Kis client ka kaun sa kaam, kis staff ke paas, kab tak — sab ek screen par.



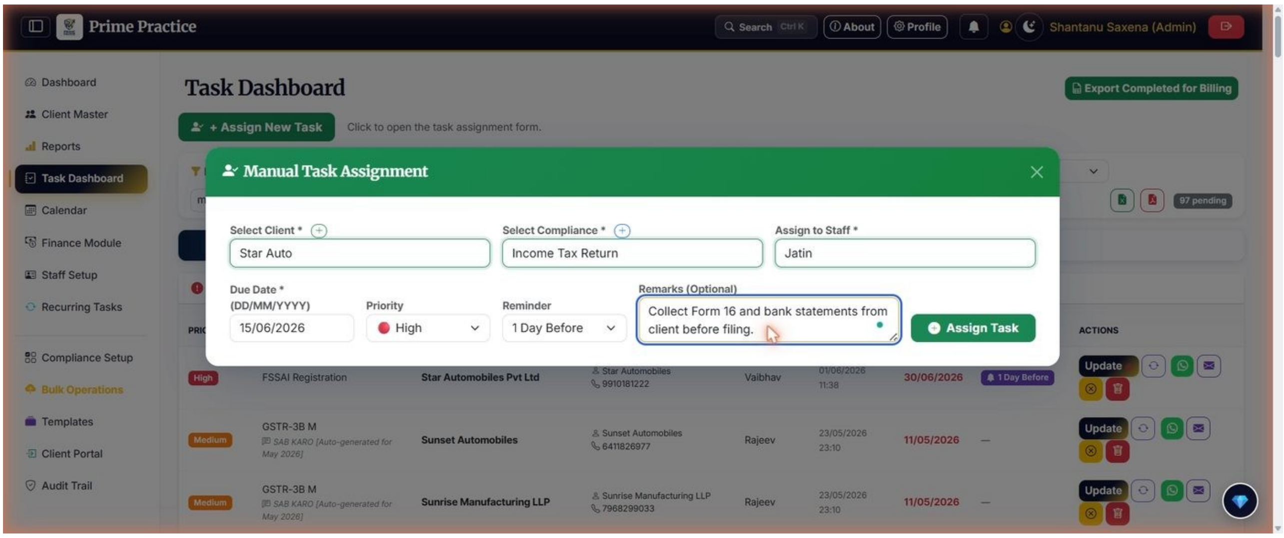
Task Dashboard — Pending / Completed tabs, filters, priorities, reminders and per-task actions

Assigning a task (the 30-second flow)

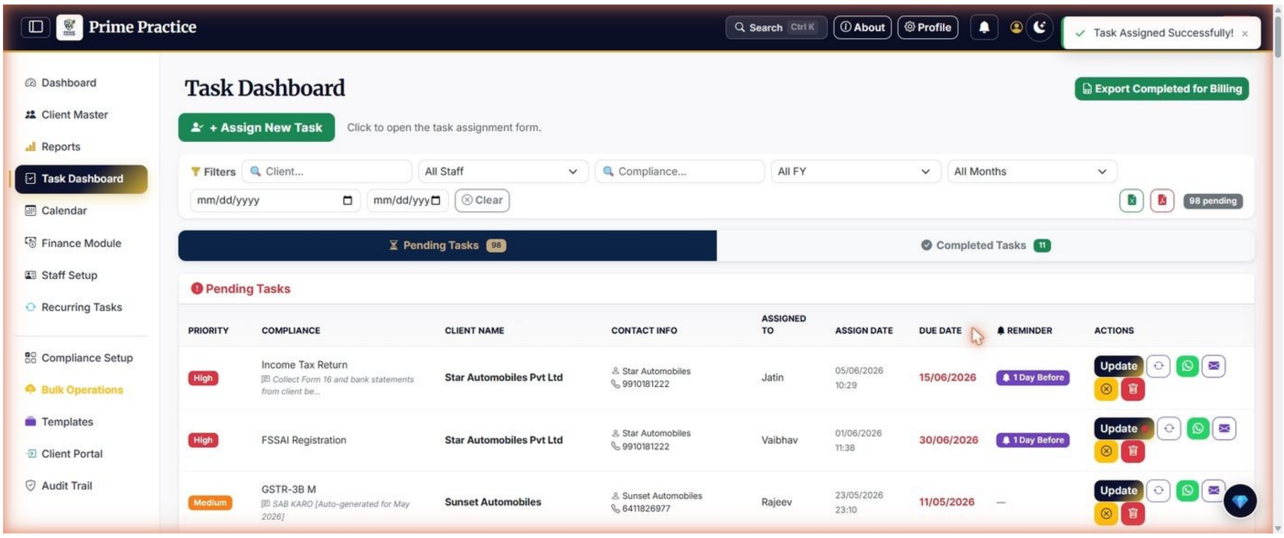
1. Click **+ Assign New Task** — the assignment form opens.
2. **Select Client —** start typing; smart search suggests as you type ("Star" → Star Automobiles Pvt Ltd).
3. **Select Compliance —** same smart search (e.g. Income Tax Return). Need a brand-new compliance? Click the + right there.
4. **Assign to Staff —** type the staff name (e.g. Jatin).
5. **Due date, Priority, Reminder —** pick from calendar; set High/Medium/Low; choose an auto-reminder (e.g. 1 Day Before).
6. **Remarks (optional) —** internal instructions, e.g. "Collect Form 16 and bank statements".
7. Click **Assign Task**. The task instantly appears at the top of the list — and in the staff member's own dashboard.



Smart client search — suggestions appear as you type



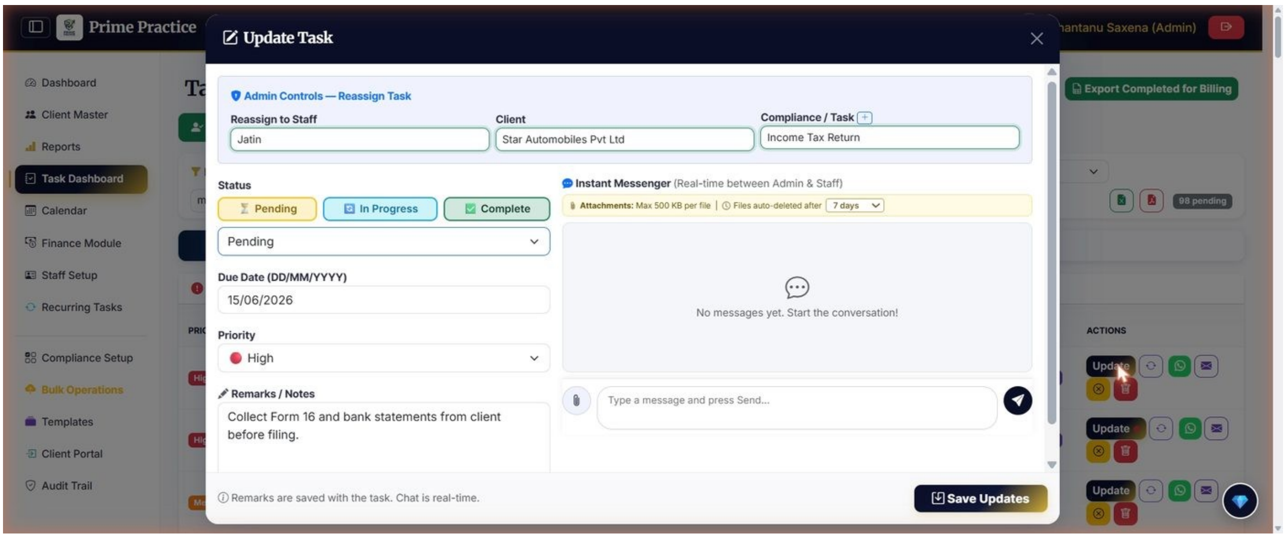
The filled form — client, compliance, staff, due date, priority, reminder and remarks



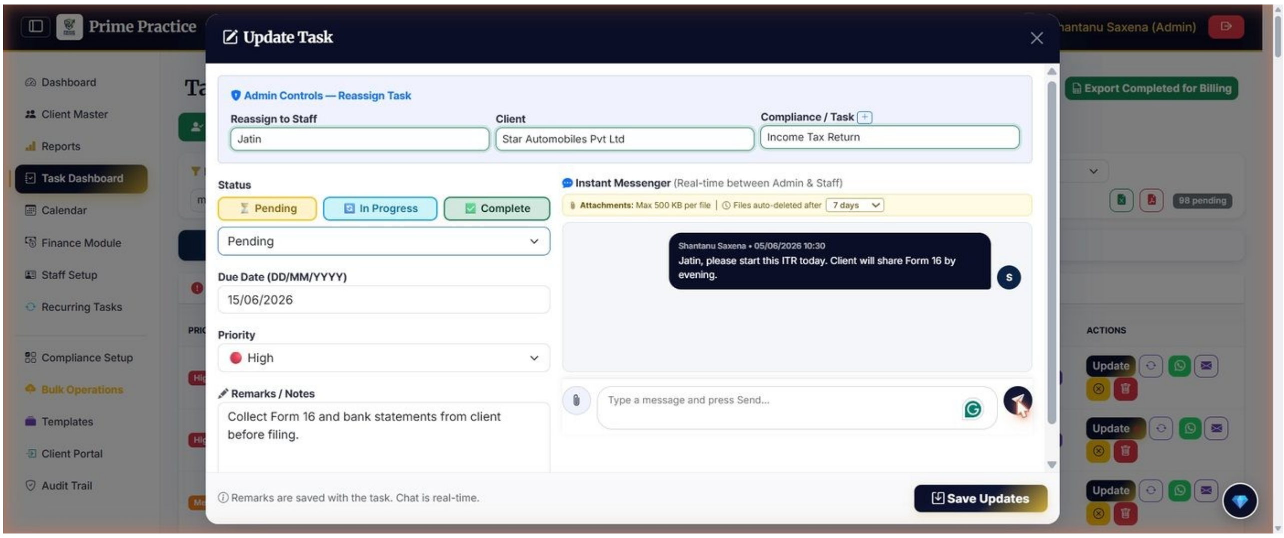
Task created — on top of Pending list, assigned to Jatin, due date and reminder set

The Update Task window — mission control

Click **Update** on any task. As Admin you can **reassign** the task to another staff, change status (**Pending** → **In Progress** → **Complete**), shift the due date, edit remarks — and talk to your staff in the built-in **Instant Messenger**.



Update Task (Admin view) — reassign controls, status, due date, remarks and real-time chat



Chat in action — your message reaches the assigned staff instantly (attachments up to 500 KB)

⚠ **IMPORTANT — Chat vs Remarks (read this twice!)**

Task Chat is a group conversation — it is visible to you, your staff **and the client on the Client Portal**.

Remarks / Notes stay strictly inside your office — only Admin and staff see them. **Remarks never appear on the Client Portal.**

So: personal / internal baat — always in **Remarks**. Client-facing updates — in **Chat**.

More power on every task row

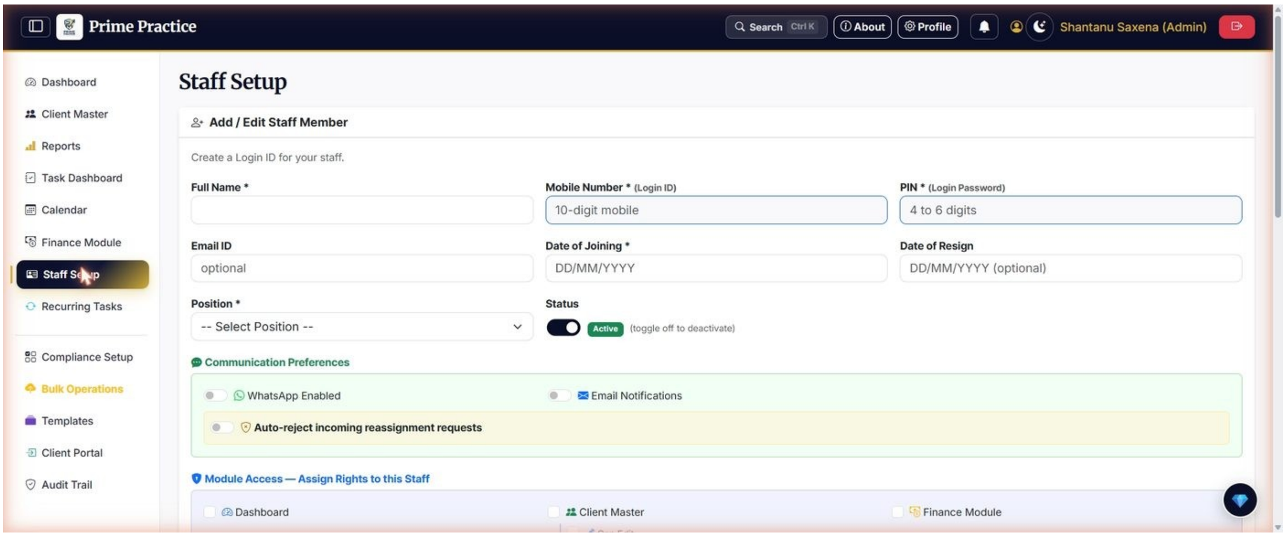
- **WhatsApp / Email icons —** send the client a template message about this exact task in one click (Chapter 11).
- **Reminder badge —** automatic due-date reminders (1/2/3 days before, or daily).
- **Export Completed for Billing —** one click converts finished work into a billing-ready list. No fee is ever forgotten.
- **Excel / PDF export —** share the day's task list with anyone.

Staff Setup — Team with Boundaries

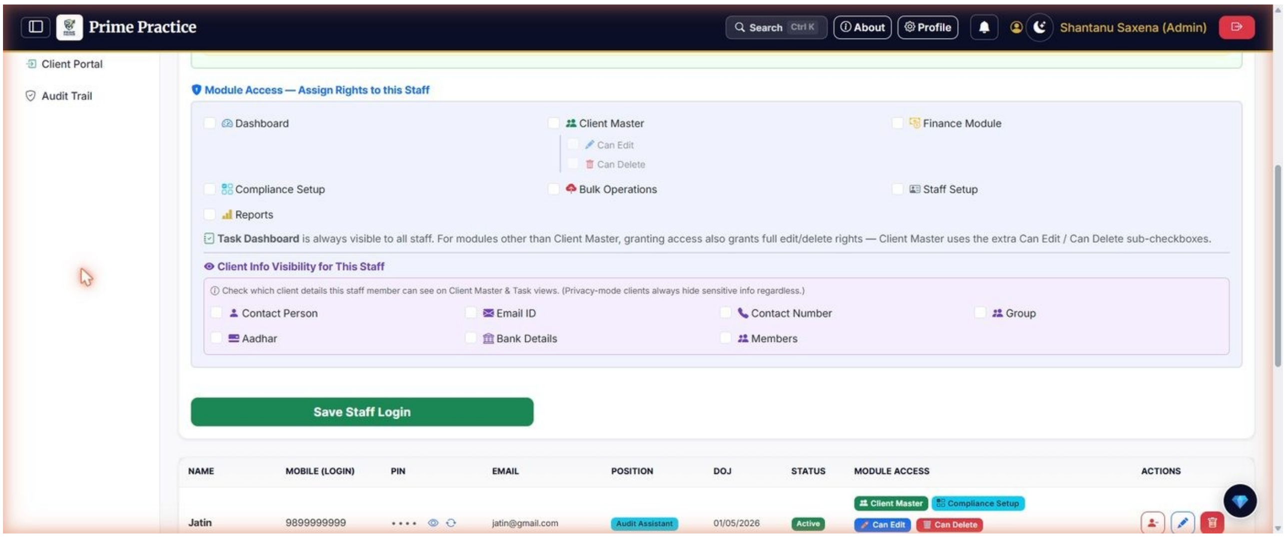
Har staff ka apna login, apne rights — aap decide karte hain kaun kya dekhe.

Creating a staff login

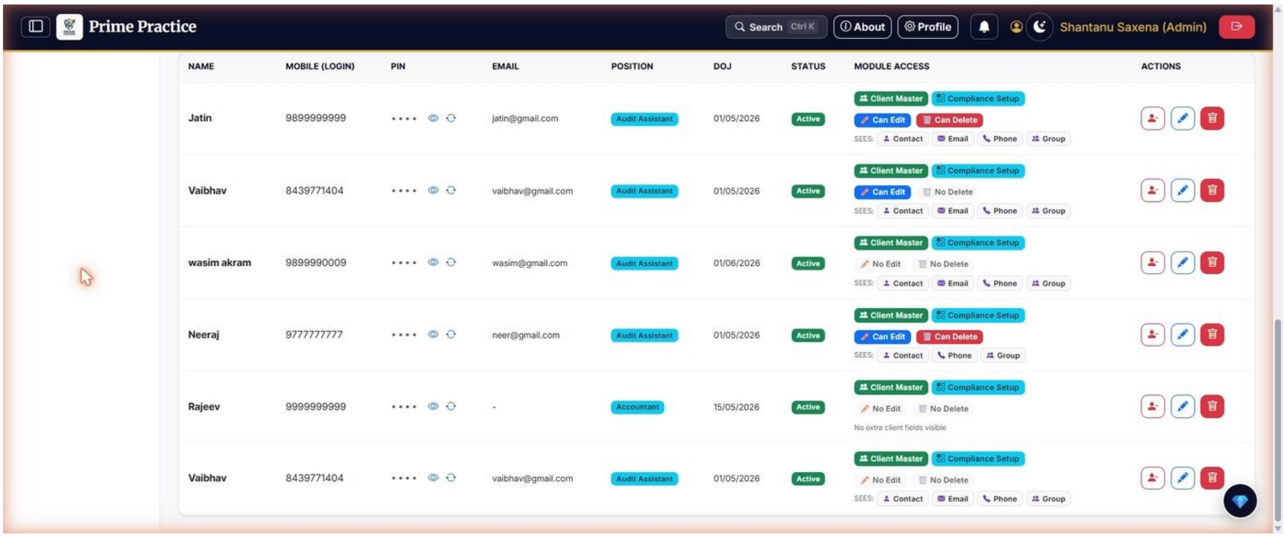
1. Open **Staff Setup** and fill **Full Name, Mobile Number** (this becomes the login ID) and a **4–6 digit PIN** (their password).
2. Add email (optional), **Date of Joining** and **Position** (Audit Assistant, Accountant…).
3. **Communication preferences —** enable WhatsApp / Email notifications; optionally auto-reject reassignment requests.
4. **Module Access —** tick exactly which modules this staff can open (Dashboard, Client Master, Finance…).
5. **Field-level privacy —** decide if staff sees client contact, email, phone, group; allow or block Edit and Delete.
6. Click save — staff logs in from the same login page, **Staff tab**, with mobile + PIN.



Add staff — mobile becomes the login ID, PIN is the password, position and status



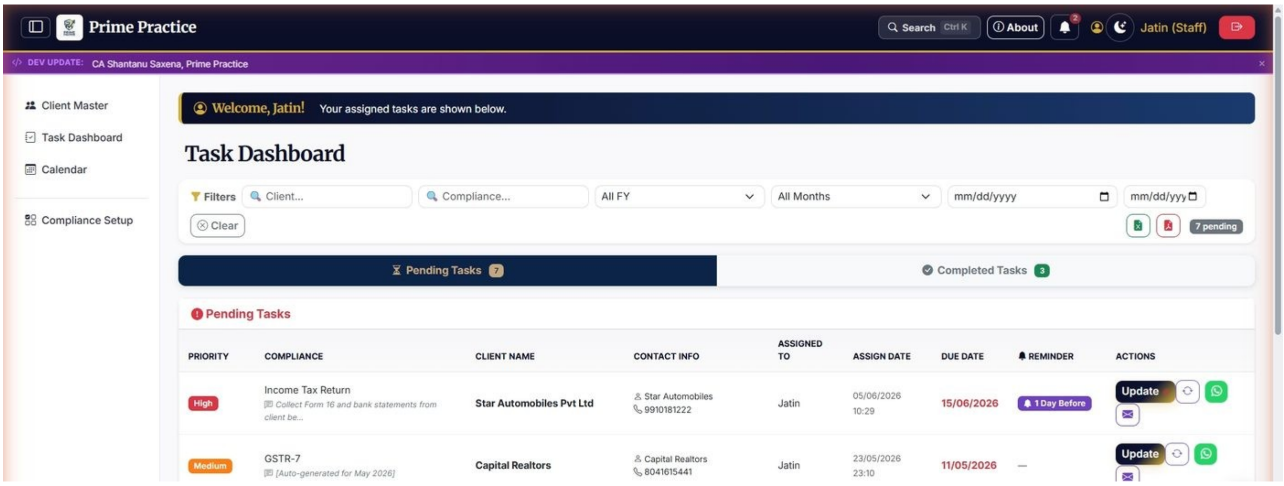
Module Access — choose exactly what this staff member can see and do



Staff list — rights badges (Can Edit / No Delete) and field-level visibility at a glance

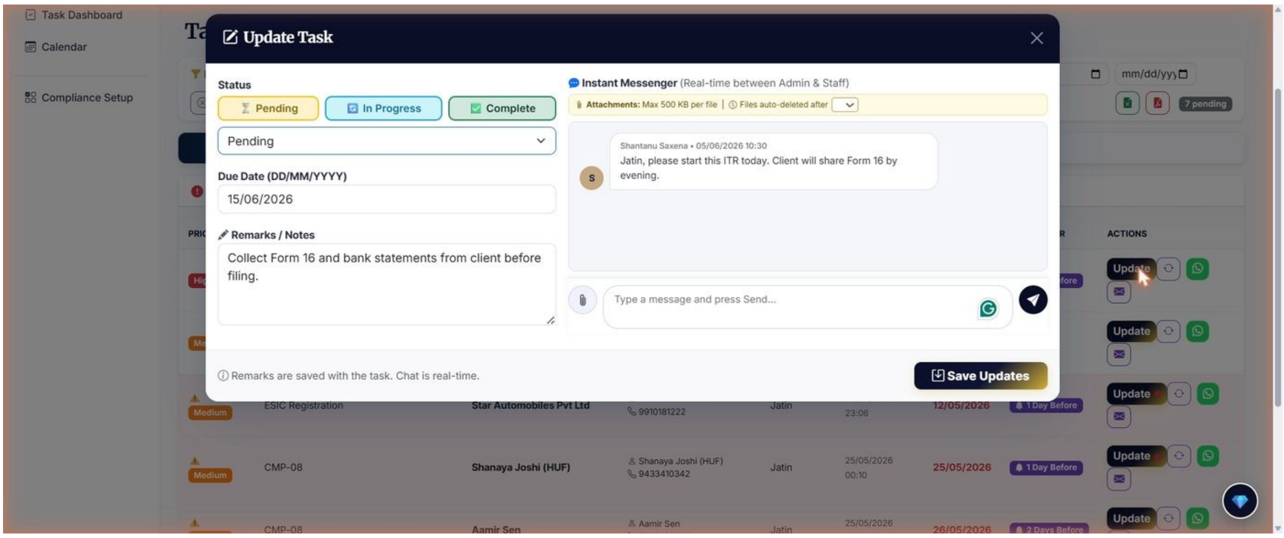
What does the staff member see? (Staff ka view)

When Jatin logs in, the app greets him — **"Welcome, Jatin! Your assigned tasks are shown below."** He sees **only his own tasks**, and only the modules you allowed. No Finance, no Staff Setup, no Audit Trail — unless you permit.

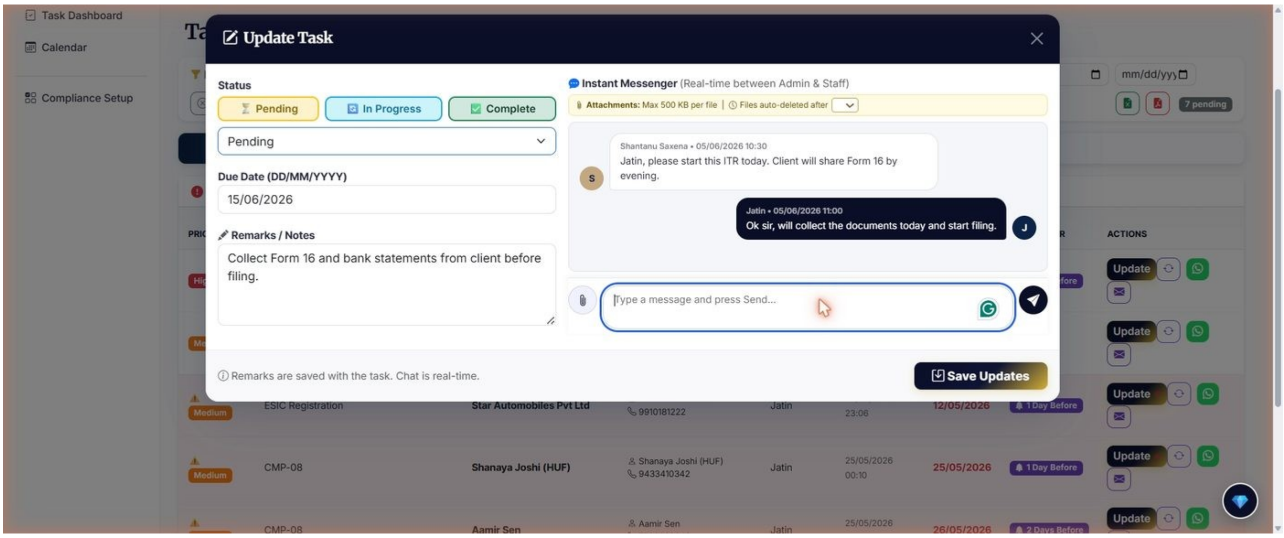


Staff view — limited sidebar, own tasks only, with the new Income Tax Return task on top

Staff opens **Update** on a task to change status (Pending → In Progress → Complete), read your **Remarks**, and reply in **Chat**. Staff **cannot** delete tasks or reassign them — they can only *request* reassignment, which you approve.



Staff's Update window — no admin controls; status, remarks and chat only



Real-time conversation — staff's reply appears instantly under your message

□ Pro tip

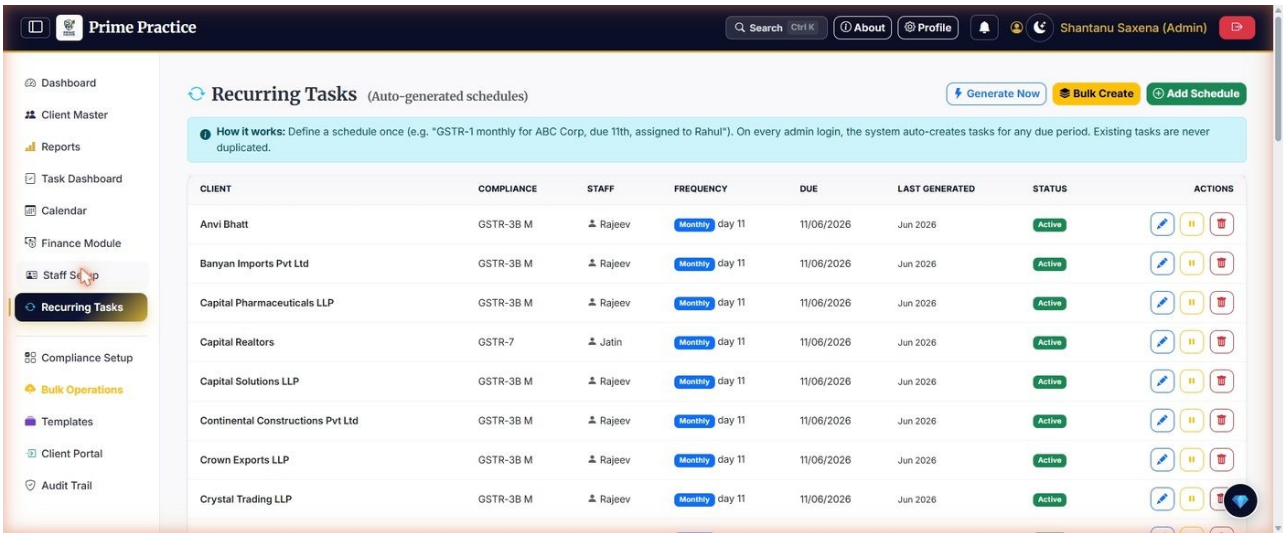
Staff performance (pending / completed / overdue per person) shows automatically on your Dashboard — no extra reports needed for Monday meetings.

CHAPTER 8

Recurring Tasks — Work that Creates Itself

GSTR-3B har mahine khud ban jaye — bina yaad rakhe.

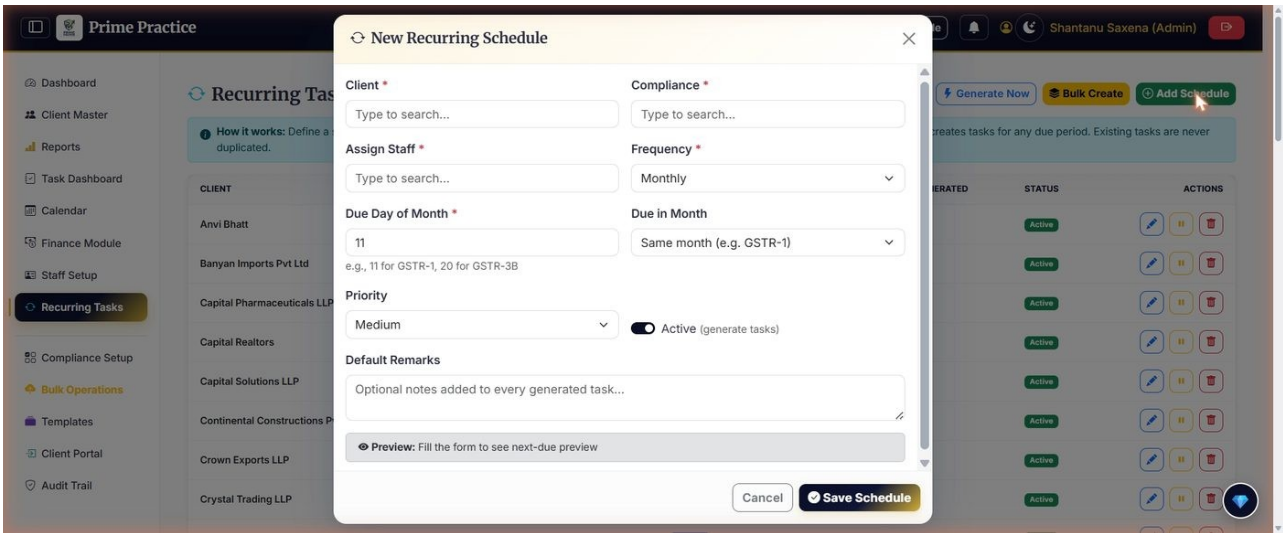
Define a schedule once — e.g. **"GSTR-3B monthly for Capital Realtors, due day 11, assigned to Jatin"**. From then on, the system auto-creates the task for every due period when you log in. **Existing tasks are never duplicated.**



Recurring Tasks — every schedule with client, staff, frequency, next due and status

Creating a schedule

1. Click **Add Schedule**.
2. Pick **Client, Compliance, Staff** (same smart search as tasks).
3. Set **Frequency** (Monthly / Quarterly / Annual) and **Due Day** — e.g. 11 for GSTR-1, 20 for GSTR-3B.
4. Choose **Due in Month** — same month or next month (GSTR-1 style).
5. Optionally add **Default Remarks** that will be attached to every generated task.
6. Keep the **Active** toggle on and save — the preview shows the next due date instantly.



New Recurring Schedule — frequency, due day, priority and default remarks

□ Power moves

Bulk Create — set up one compliance schedule for dozens of clients at once.

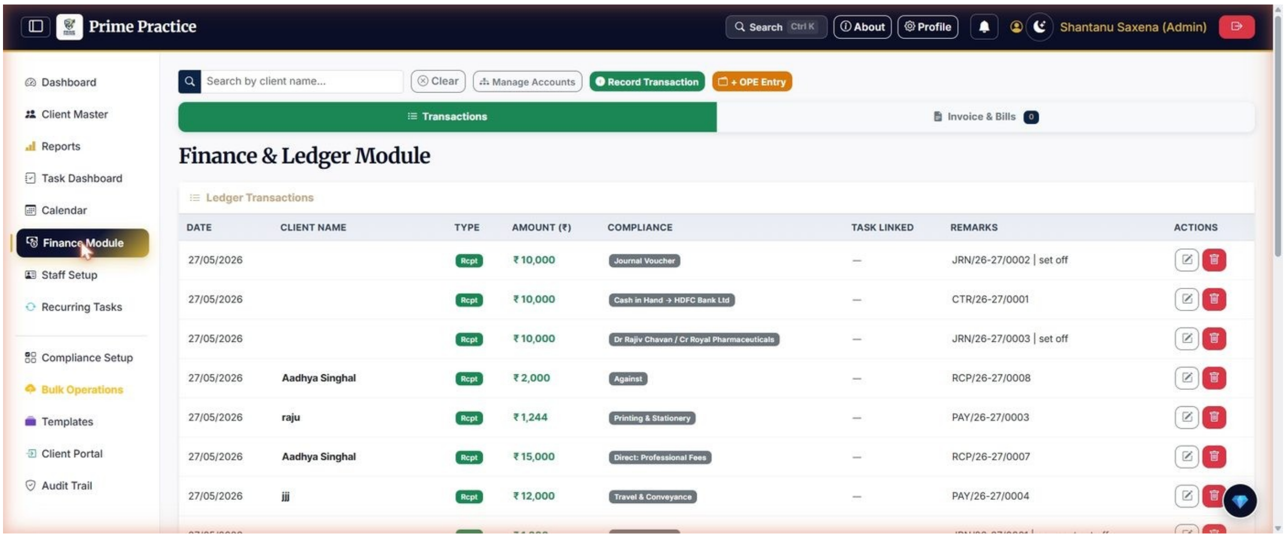
Generate Now — don't want to wait for the next login? Create all due tasks immediately.

Pause a schedule with the □ **button** when a client leaves — resume any time.

CHAPTER 9

Finance Module — Billing & Ledger

GST invoice se lekar client ledger tak — CA-office accounting, simplified.

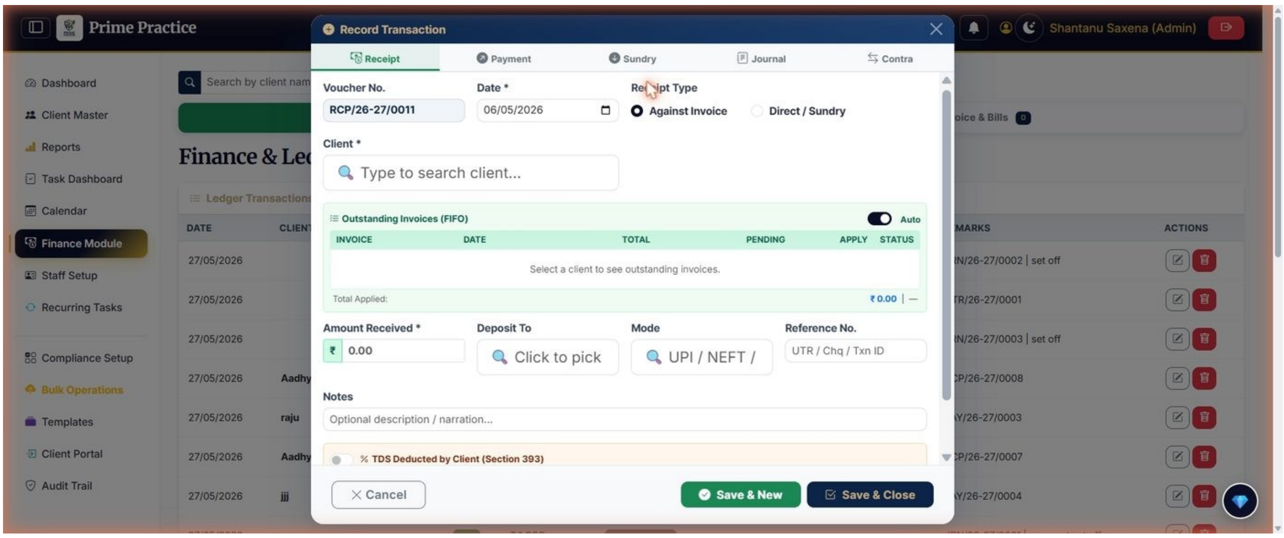


Finance & Ledger — every transaction with voucher numbers, type chips and linked compliance

Recording money — the Record Transaction window

One green button — **Record Transaction** — handles all five voucher types: **Receipt, Payment, Sundry, Journal and Contra**. The voucher number (RCP/26-27/0011 style) generates itself.

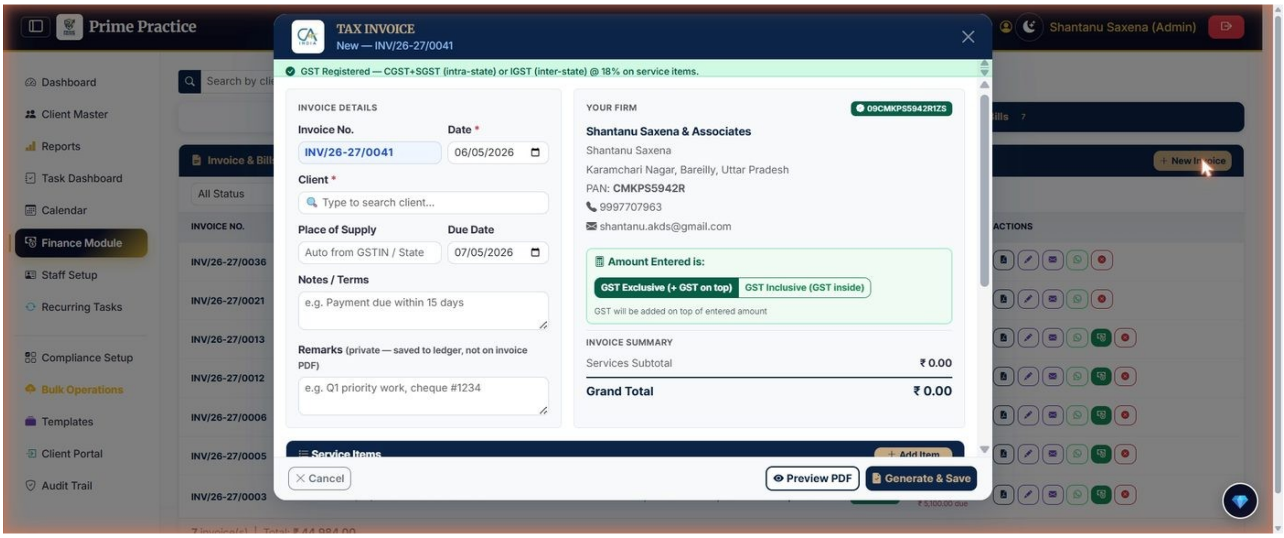
1. **Receipt against invoice —** pick the client; outstanding invoices appear in FIFO order; the Auto toggle spreads the received amount across oldest invoices first.
2. **Direct / Sundry receipt —** for amounts without an invoice.
3. **TDS deducted by client? —** switch on the Section 393 toggle; Prime Practice books TDS Receivable automatically.
4. **Deposit To & Mode —** cash, bank, UPI / NEFT with reference number.
5. Finish with **Save & New** (next entry) or **Save & Close**.



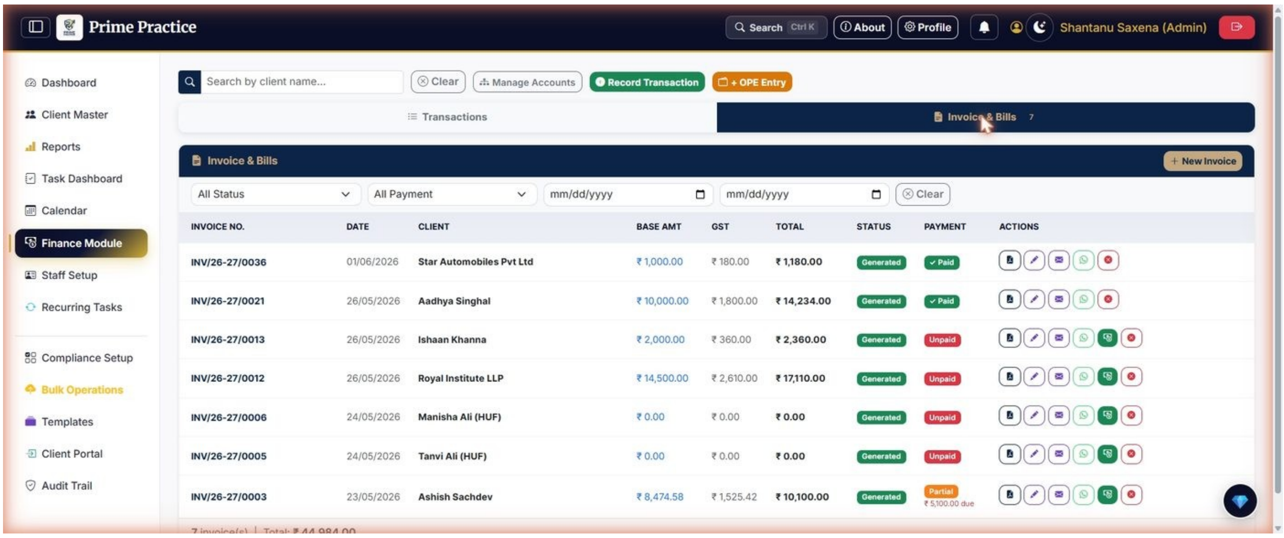
Record Transaction — Receipt with FIFO invoice allocation, TDS toggle and auto voucher number

GST Tax Invoices

Open the **Invoice & Bills** tab → **+ New Invoice**. Your firm details, GSTIN and the client's place of supply fill automatically. Choose **GST Exclusive or Inclusive** — CGST+SGST or IGST applies itself based on the state.



New Tax Invoice — auto numbering, GST logic, service items and live summary

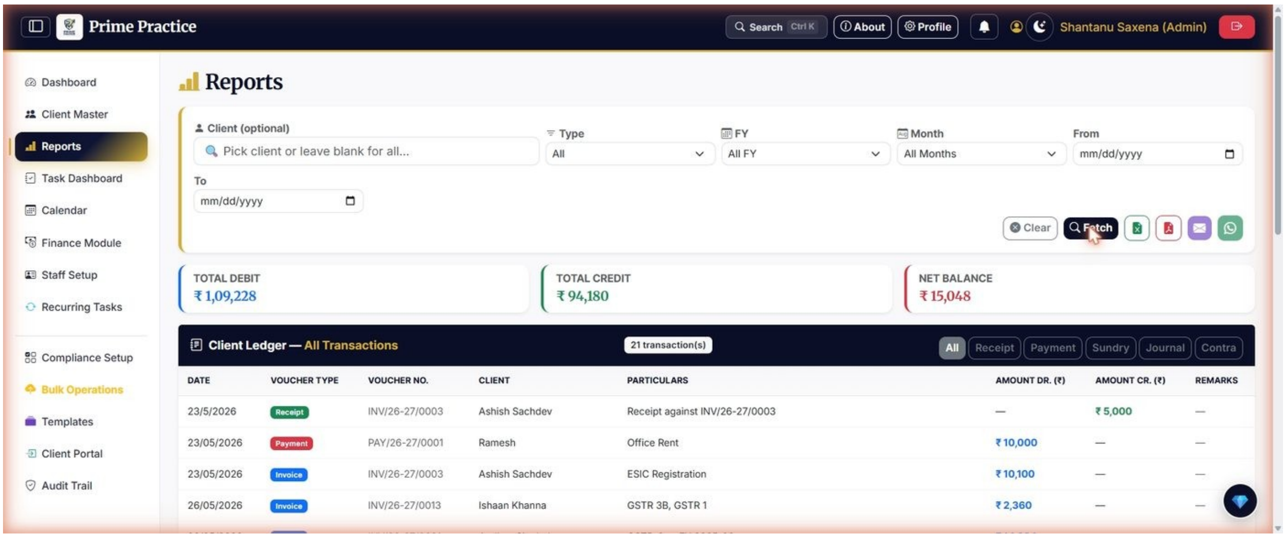


Invoice register — status, Paid / Unpaid / Partial badges, PDF, email, WhatsApp and record-payment shortcuts

> **□ Private remarks on invoices**
>
> The Remarks field on an invoice is saved to your ledger only — it is never printed on the client's invoice PDF. Perfect for internal notes like "Q1 priority work, cheque #1234".

Reports — the client ledger

The **Reports** module gives you a full ledger — filter by client, type, financial year, month or date range, then **Fetch**. Export the result as **Excel or PDF**, or send it to the client by **Email / WhatsApp** in one click.

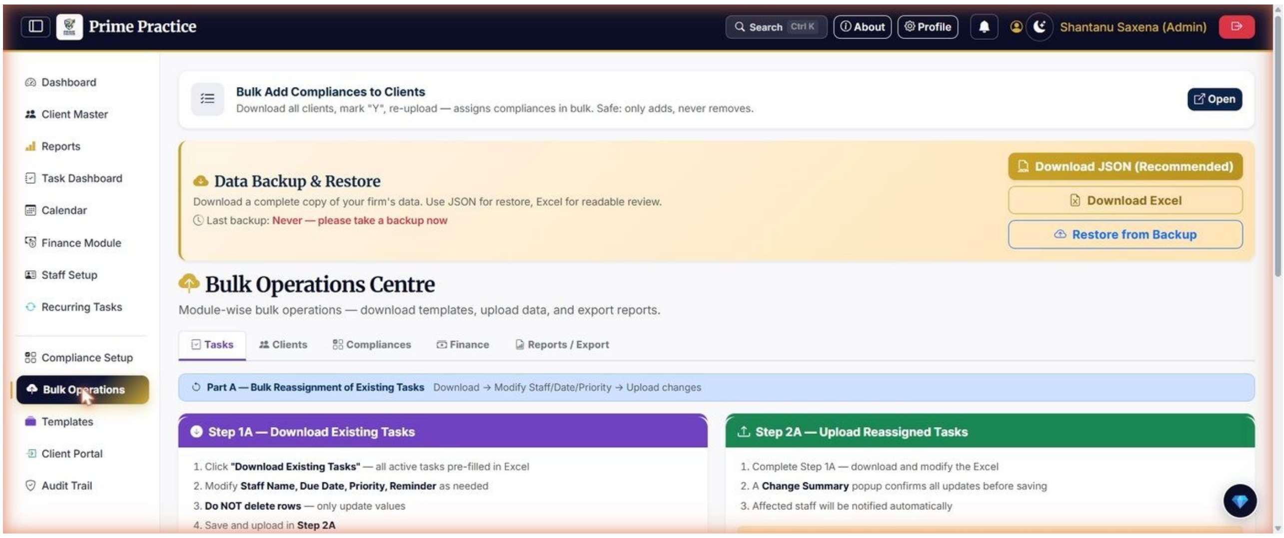


Reports — total debit / credit / net balance with a voucher-wise ledger and export buttons

CHAPTER 10

Bulk Operations — Hours of Work in Minutes

500 clients ka data? Purani Excel se seedha import — chai khatam hone se pehle.

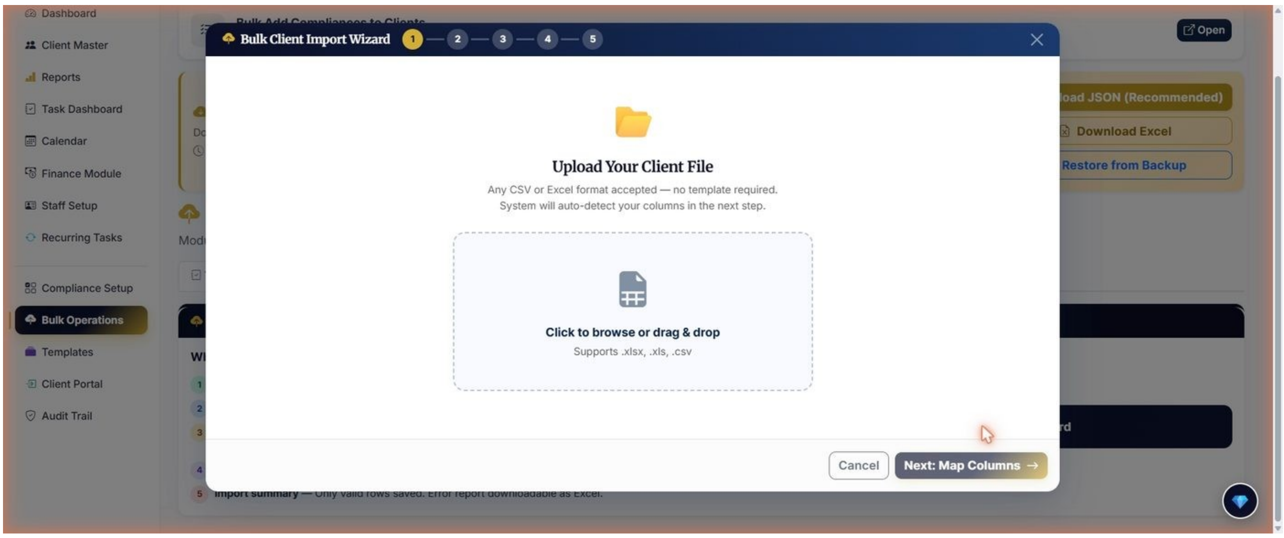


Bulk Operations Centre — module-wise tabs, plus one-click Data Backup & Restore

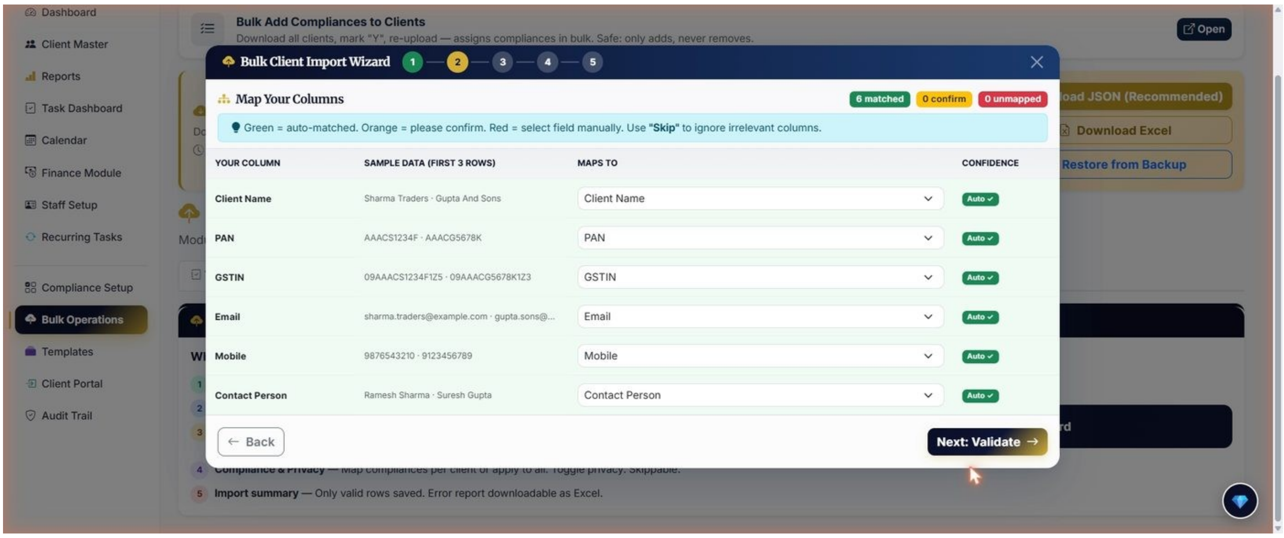
A. Smart Bulk Client Import (any Excel works!)

Your existing client list — in any format, any column names — imports in 5 steps. **No template required.** The wizard reads your file and matches columns itself.

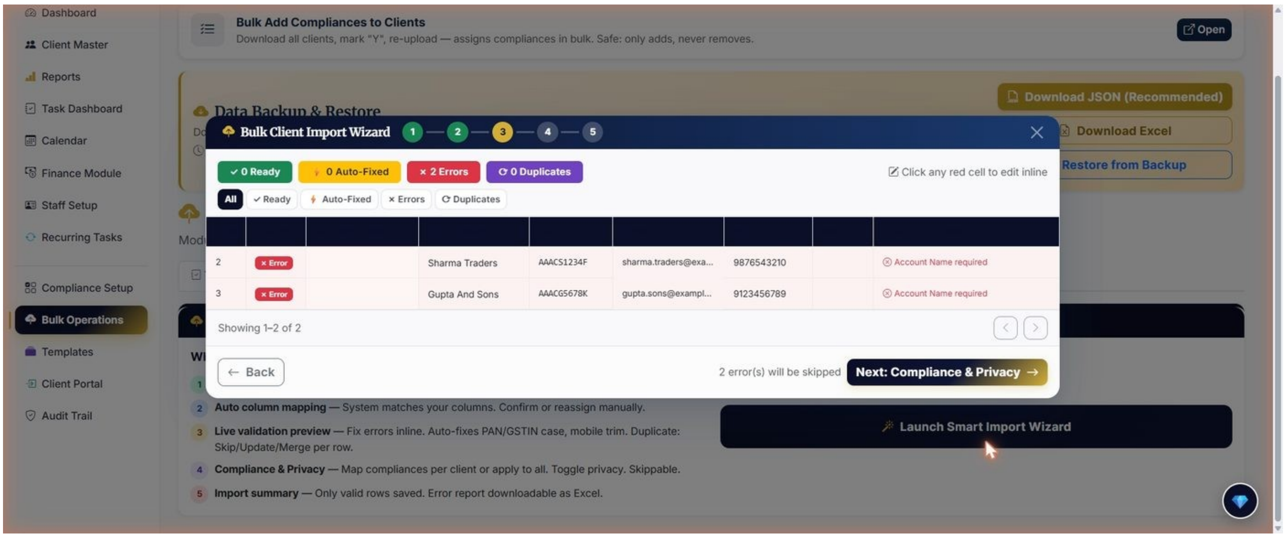
1. **Upload —** drag in any .xlsx / .xls / .csv. ("File loaded! 2 rows detected.")
2. **Auto column mapping —** the system matches your columns (Client Name, PAN, GSTIN, Email, Mobile…) and shows its confidence. Fix any orange/red ones with a dropdown.
3. **Live validation —** every row is checked. PAN/GSTIN case is auto-fixed; duplicates can Skip / Update / Merge. Errors? Click the red cell and type the fix right there — no need to re-upload!
4. **Compliances & privacy —** map compliances per client, or Apply to ALL, or skip and do it later.
5. **Import summary —** "Import Complete! 2 Clients Added." Only valid rows are saved; an error report can be downloaded as Excel.



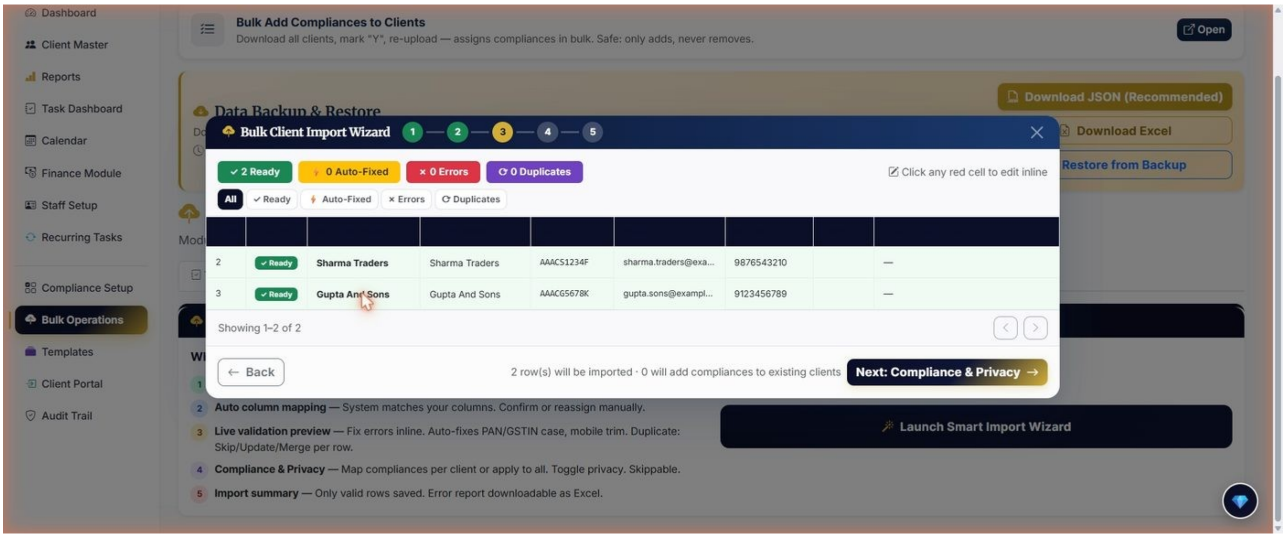
Step 1 — drop in any CSV or Excel; no template needed



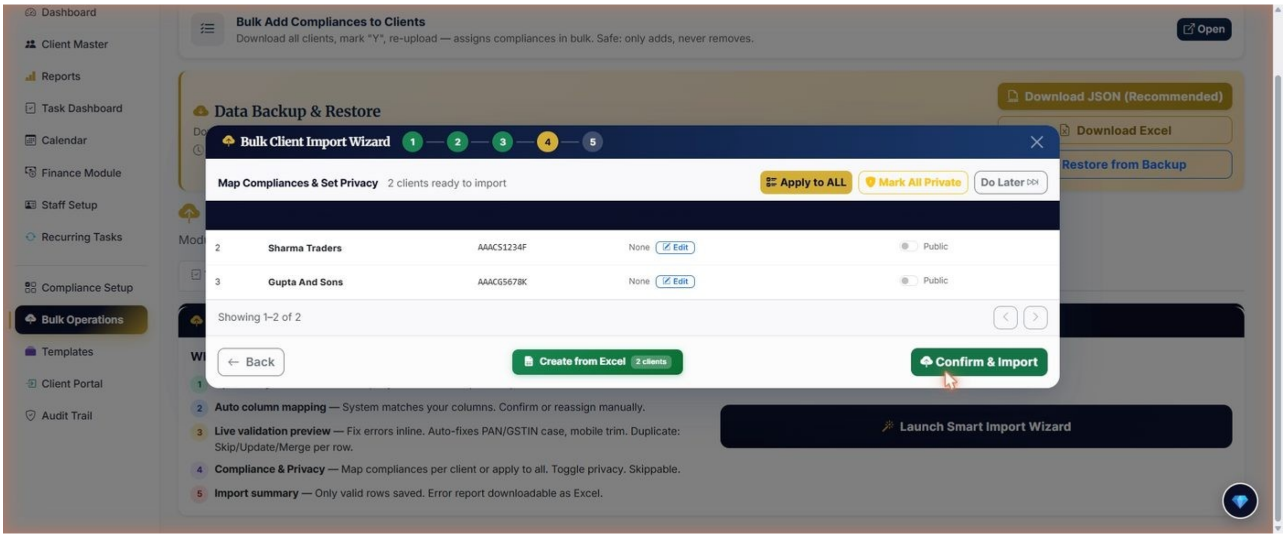
Step 2 — columns matched automatically: 6 matched, 0 unmapped



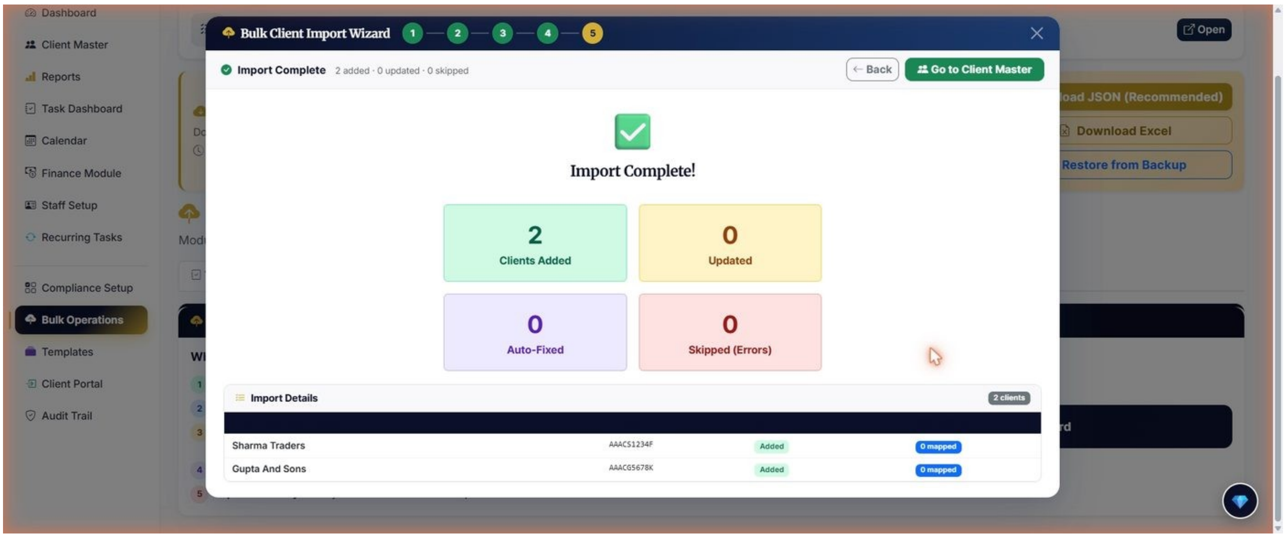
Step 3 — validation catches missing Account Names…



…click the red cell, type the value, and the row turns green. 2 Ready!



Step 4 — map compliances and set portal privacy per client (or Apply to ALL)

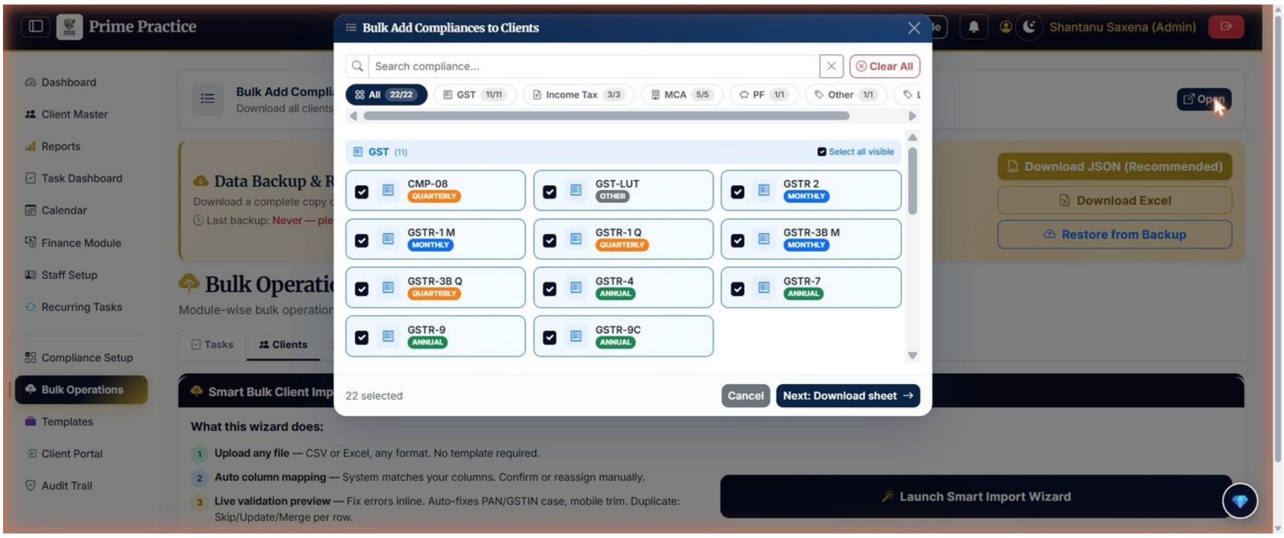


Step 5 — Import Complete: added / updated / auto-fixed / skipped, row by row

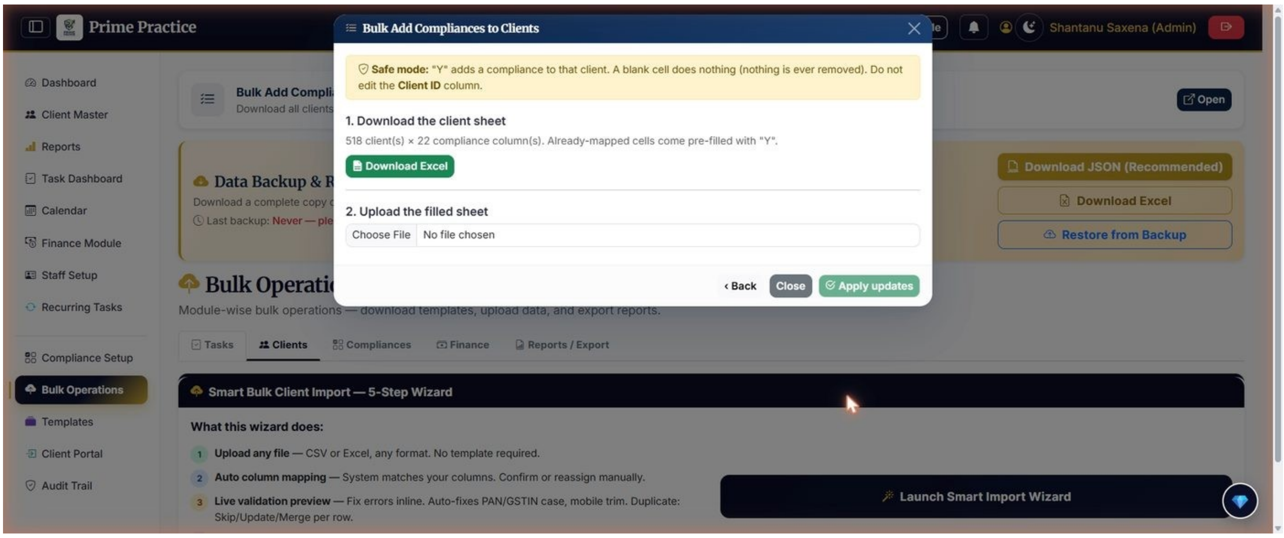
B. Bulk Add Compliances — the famous “Y” sheet

Clients aa gaye, lekin compliances baad me map karni hain? This wizard does the whole firm in one Excel round-trip:

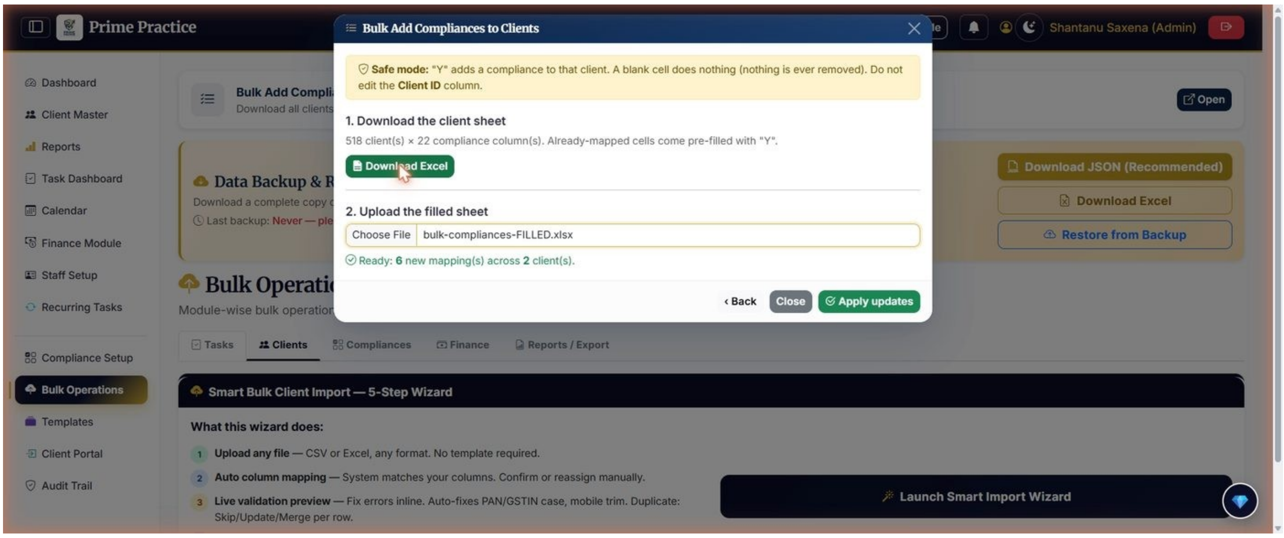
1. Open **Bulk Operations → Bulk Add Compliances to Clients → Open**.
2. **Select compliances** you want to work with (search, category chips, select-all). Click **Next: Download sheet**.
3. **Download the Excel** — every client is a row, every selected compliance is a column. Cells that are **already mapped come pre-filled with “Y”**; everything else is blank.
4. In Excel, simply **type Y** where you want to add a compliance. Blank = no change. Save.
5. **Upload the filled sheet** — Prime Practice previews: “Ready: 6 new mapping(s) across 2 client(s).”
6. Click **Apply updates** — “Done! Added 6 compliance mappings. Nothing was removed.”



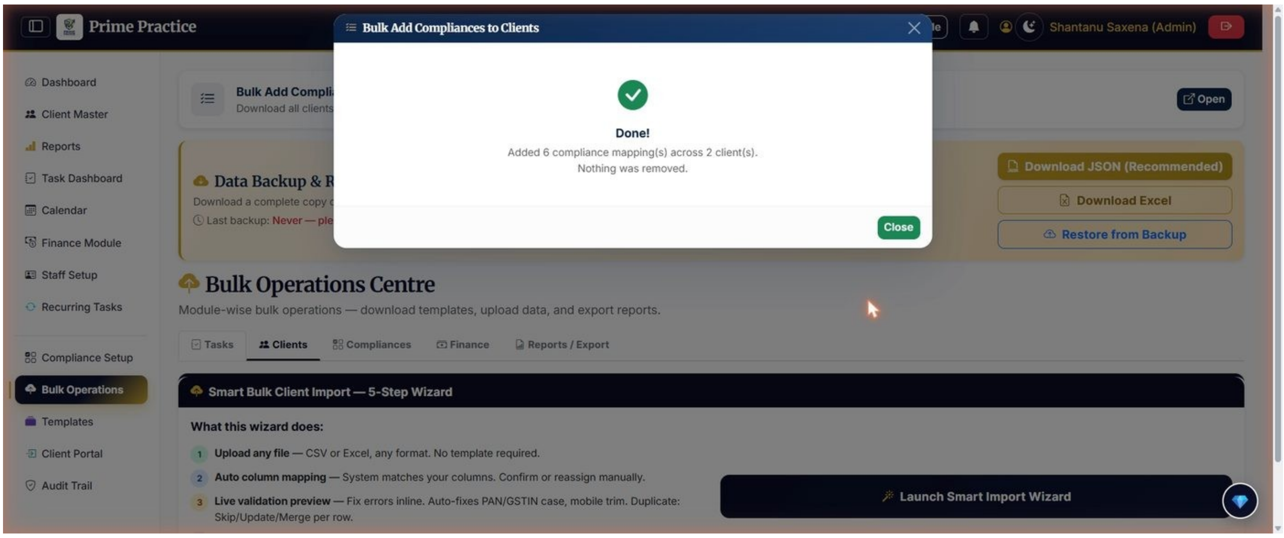
Choose the compliances for your bulk sheet — 22 selected here



Safe mode — "Y" adds, blank does nothing, nothing is ever removed. Download → fill → upload



Uploaded — the wizard counts exactly what will change before you commit



Applied — 6 mappings added across 2 clients; nothing removed

Safe by design

This wizard only ADDS mappings. A blank cell never deletes anything, and the Client ID column keeps every row matched to the right client. You cannot damage your data with a wrong upload.

C. More bulk power

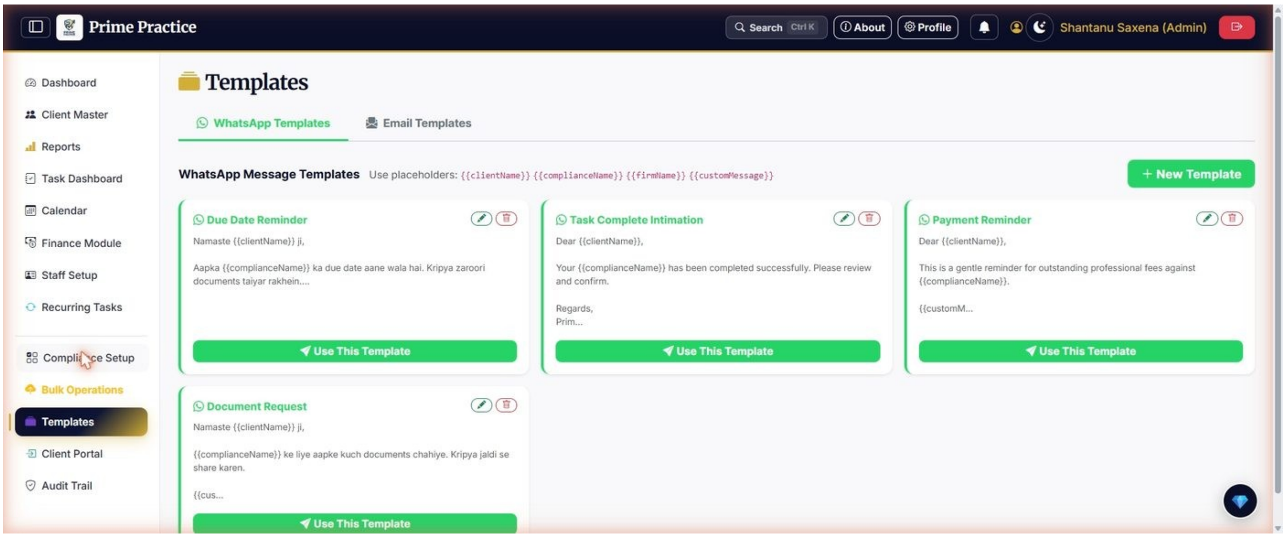
- **Bulk task reassignment —** download all active tasks, change staff / due date / priority in Excel, upload back. Affected staff are notified automatically.
- **Data Backup & Restore —** download your firm’s complete data as JSON (for restore) or Excel (for reading). Make it a Friday habit.
- **Finance & Reports tabs —** bulk-import opening balances and export module-wise reports.

CHAPTER 11

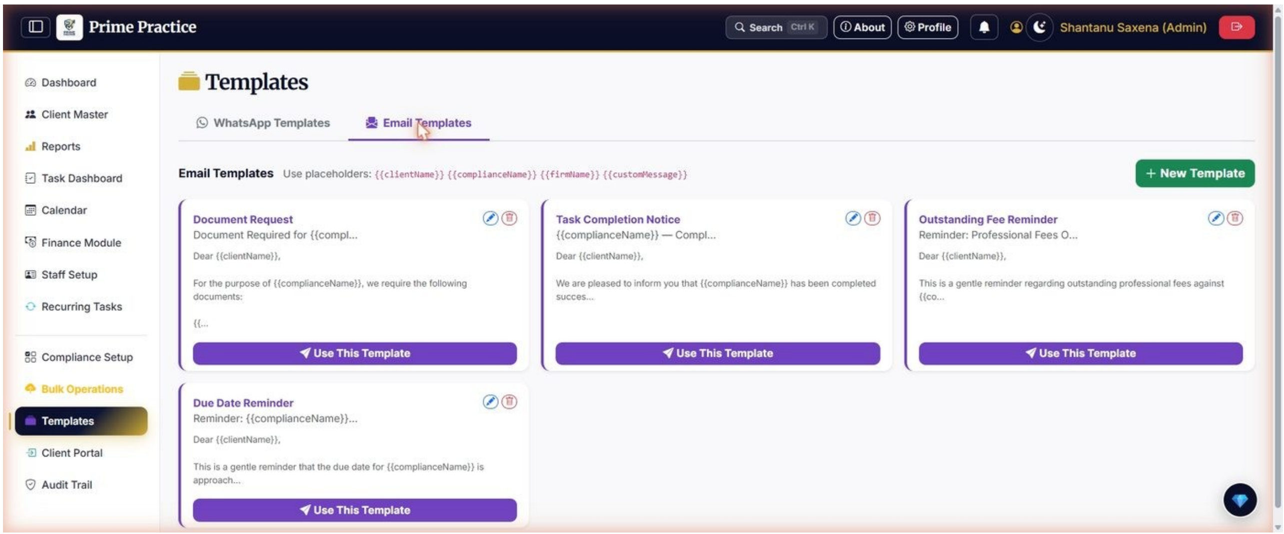
Templates — WhatsApp & Email in One Click

“Namaste {{clientName}} ji…” — likho ek baar, bhejo hazaar baar.

Templates turn repeat messages — due-date reminders, document requests, fee reminders, completion notices — into **one-click sends**. Placeholders fill themselves with the right client, compliance and firm name.



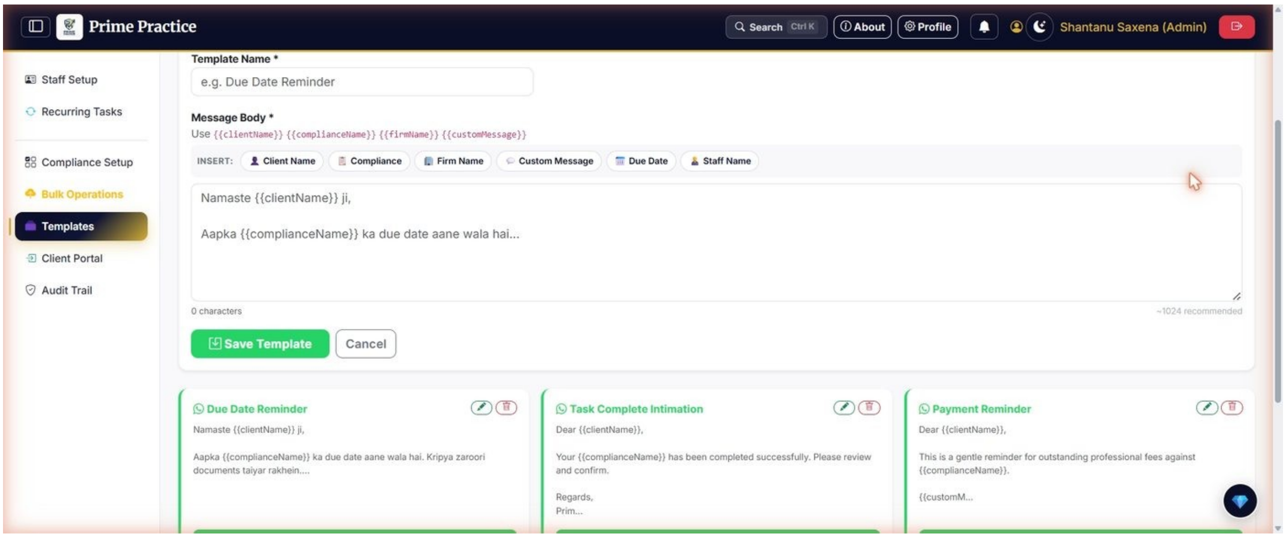
WhatsApp templates — ready-made Hinglish reminders with placeholders and “Use This Template”



Email templates — subjects included: document request, completion notice, fee reminder

Creating a template

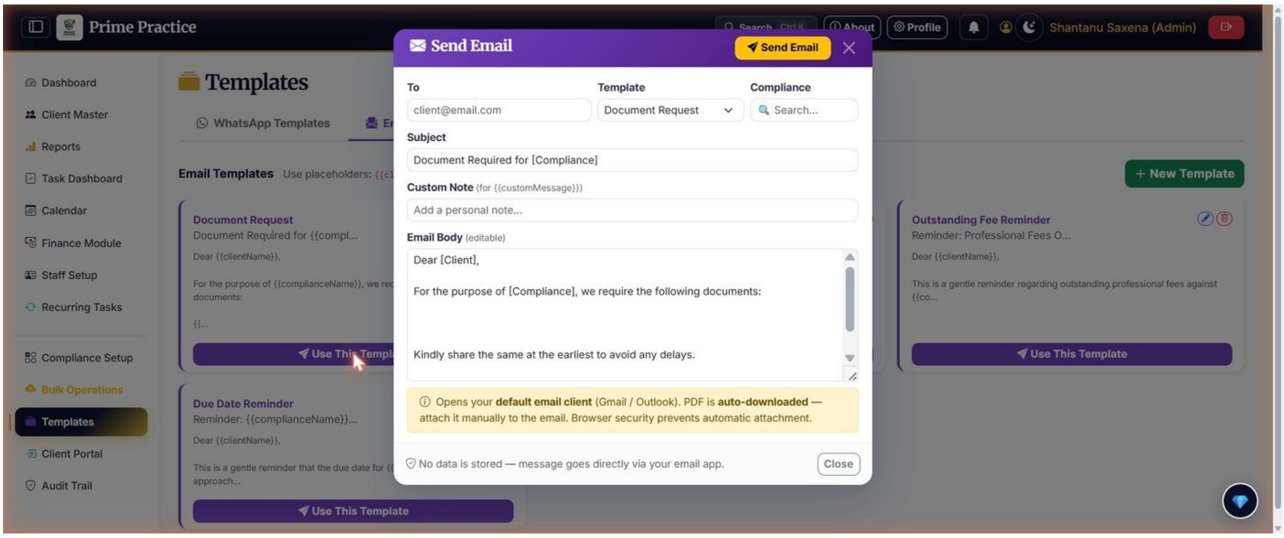
1. Open **Templates**, choose the **WhatsApp or Email** tab, click **+ New Template**.
2. Give it a name and write the message. Click the **INSERT chips** — Client Name, Compliance, Firm Name, Custom Message, Due Date, Staff Name — to drop placeholders exactly where you want them.
3. Click **Save Template**. It joins your library instantly.



Template editor — INSERT chips add {{placeholders}} that auto-fill at send time

Using a template

1. Click **Use This Template** (or the WhatsApp/Email icon on any task row).
2. Pick the client / compliance — the message builds itself with real names and dates.
3. Add a personal line in **Custom Note** if you like — it replaces {{customMessage}}.
4. Send — WhatsApp opens with the message ready; email opens in your Gmail/Outlook with subject and body filled.



Send Email — subject and body auto-filled; nothing is stored, the message goes via your own email app

Privacy bonus

Messages go out through YOUR WhatsApp and YOUR email app. Prime Practice stores nothing and never messages your clients by itself.

CHAPTER 12

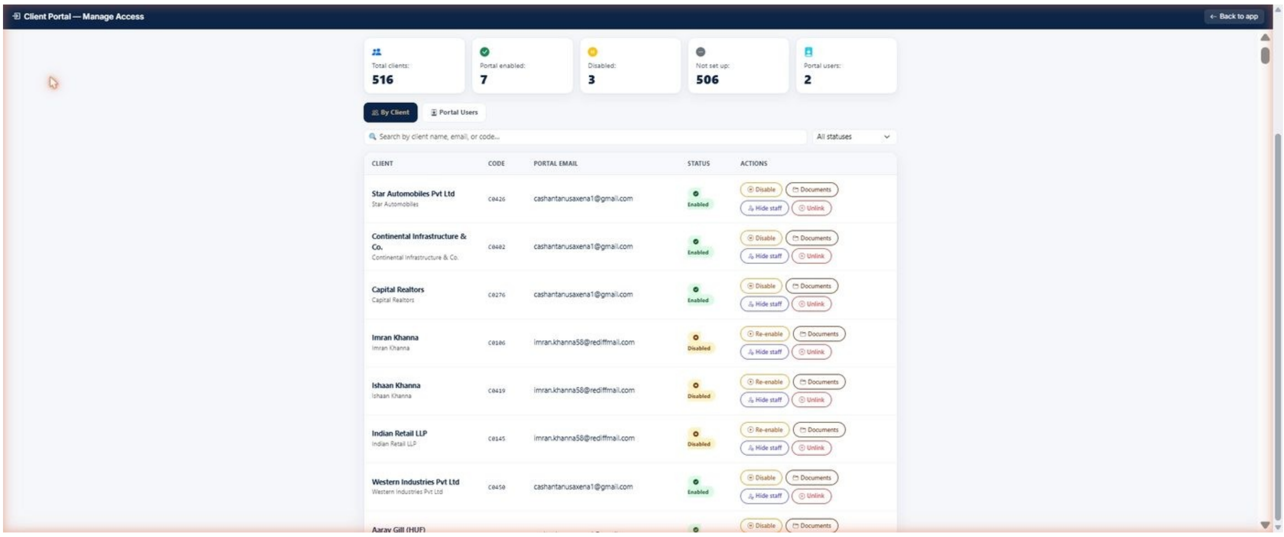
Client Portal — Wow Your Clients

Client ko dijiye apna personal compliance dashboard — 24×7. Calls kam, goodwill zyada.

The Client Portal is your secret weapon for client delight. Each client gets a personal, login-protected page showing **their deadlines, their tasks (with live status), their invoices and a chat** with your office. No more “kya status hai?” phone calls.

Step 1 — You enable it (CA side)

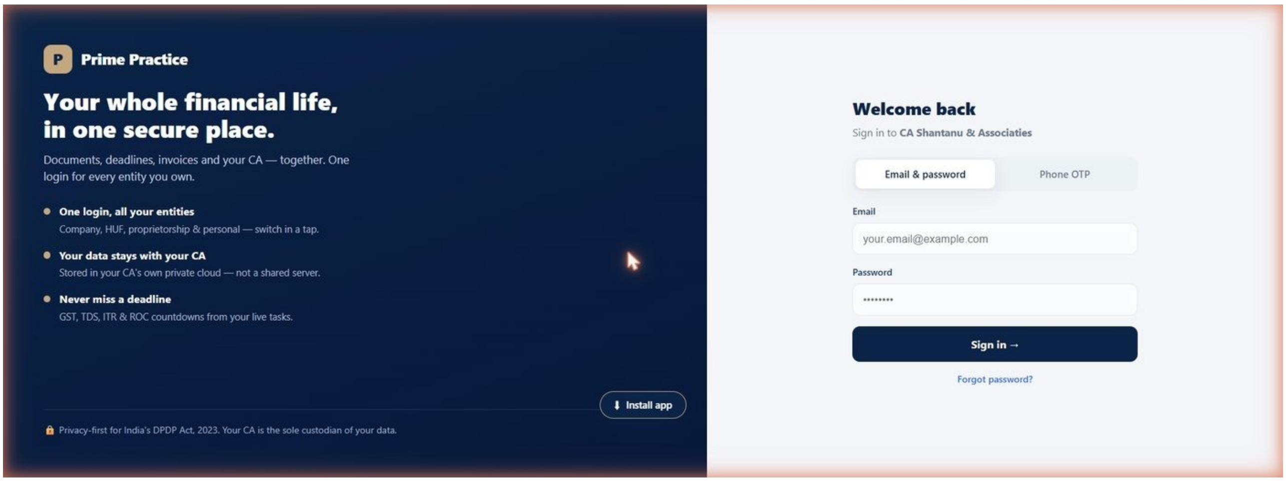
1. Open **Client Portal** from the sidebar — the Manage Access screen shows every client’s portal status.
2. Set the client’s **portal email**, click **Enable** — that’s it. Use **Disable / Re-enable** any time.
3. **Hide staff** — if you don’t want a client to see which staff member works on their file, hide it per client.
4. **Documents / Unlink —** manage shared files and portal users from the same row.



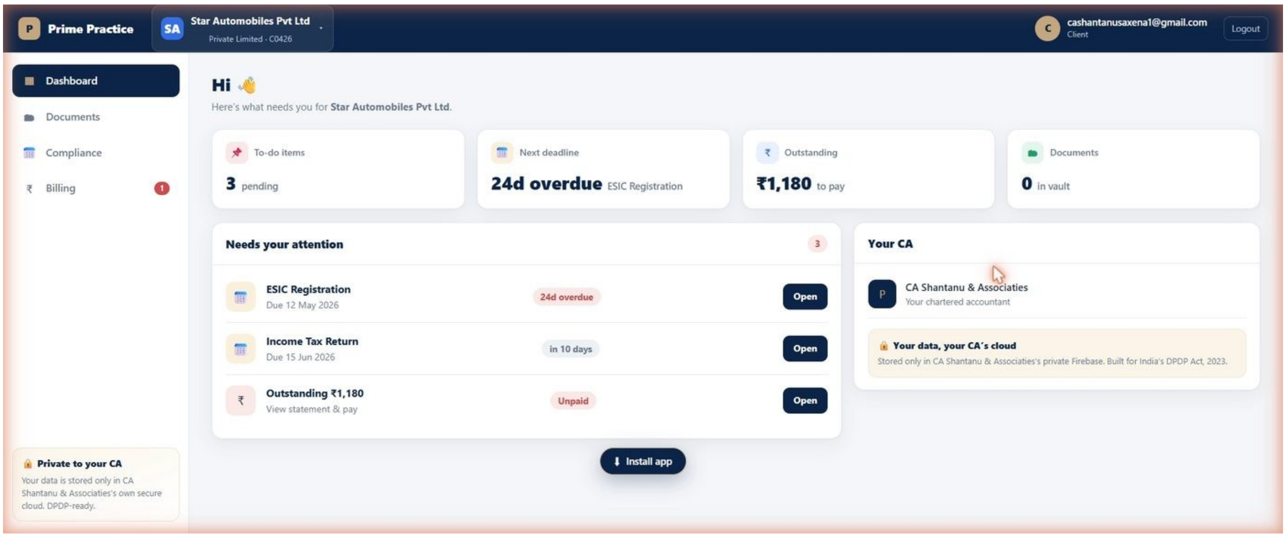
Manage Access — enable/disable per client, hide staff, manage documents and portal users

Step 2 — The client logs in

Clients open the same **primepractice.in** login and pick the **Client** tab — or go straight to your portal link. They sign in with **email + password or Phone OTP**.



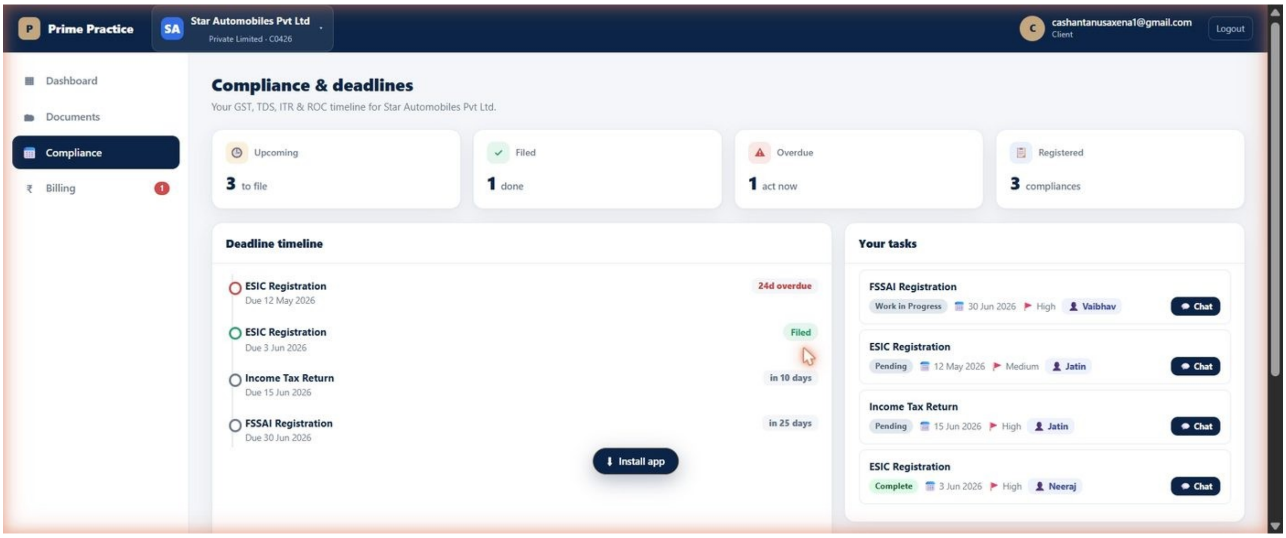
Client Portal login — *"Your whole financial life, in one secure place."*



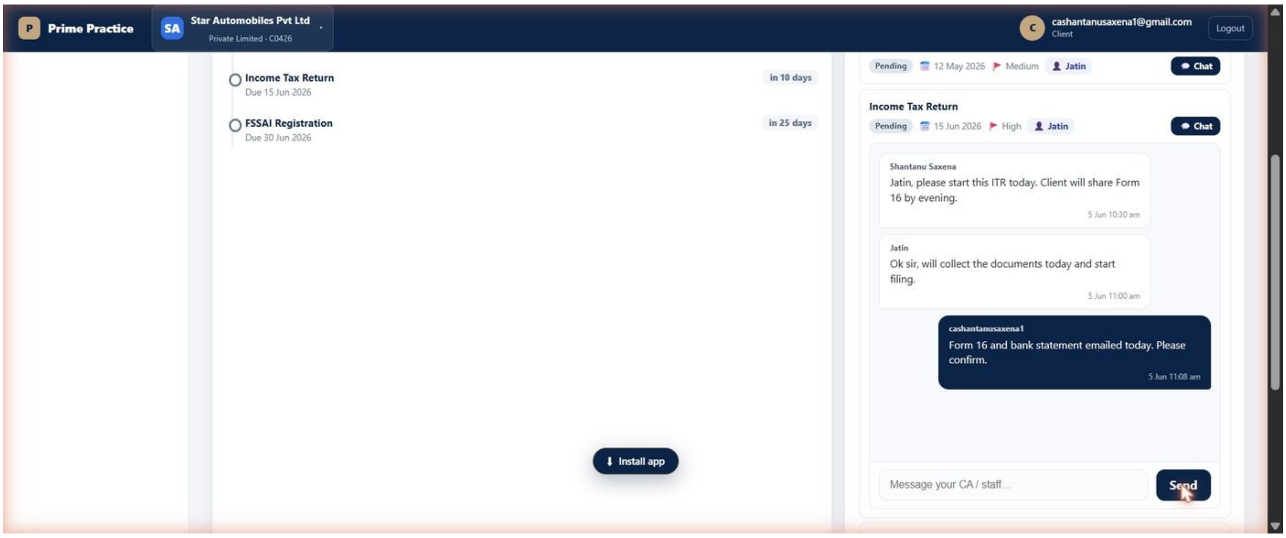
Client dashboard — to-dos, next deadline, outstanding amount, documents and "Your CA" card

What your client can do

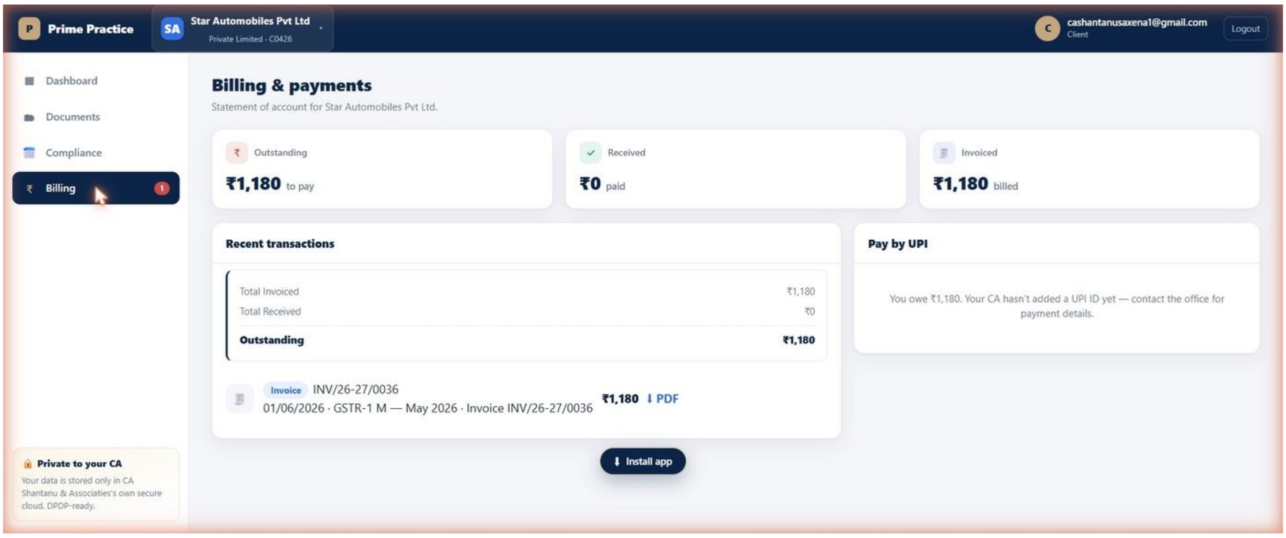
- **See deadlines —** a clean Compliance & Deadlines timeline: upcoming, filed, overdue.
- **Track tasks live —** each task shows status (Pending / Work in Progress / Complete) and the staff member handling it.
- **Chat with CA and staff —** a per-task group chat. Client, you and the assigned staff — all in one thread.
- **Pay & download —** Billing shows outstanding, statement and invoice PDFs; a UPI panel guides payment.
- **Documents vault —** files you share appear here; client uploads switch on when your storage is enabled.
- **Switch entities —** one login covers all of the client's firms: company, HUF, proprietorship — switch in a tap.
- **Install as an app —** the Install chip puts your portal on the client's phone home screen. Your firm's icon, on their phone!



Compliance & deadlines — timeline plus "Your tasks" with status, staff and Chat buttons



The 3-way chat — CA's message, staff's reply and the client's response, all in one thread



Billing & payments — outstanding, statement, invoice PDF download and UPI guidance

⚠ Remember the golden rule

Whatever you or your staff write in **task Chat** is **visible to the client** on this portal. Internal notes go in **Remarks** — those never reach the portal. (See Chapter 6.)

□ Marketing magic

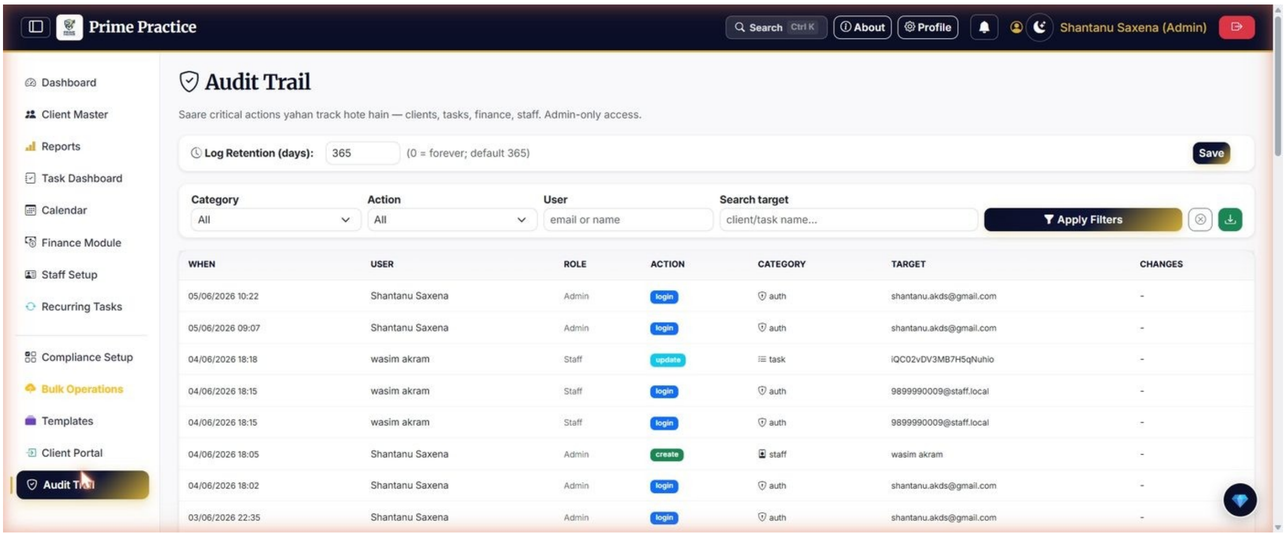
Print your portal link on your visiting card and letterhead. A client who checks deadlines on YOUR app every week never thinks of changing his CA.

CHAPTER 13

Audit Trail — Who Did What, When

Office ka CCTV — har critical action recorded, sirf Admin ke liye.

Every login, every create / update / delete on clients, tasks, finance and staff is logged with **user, role, action, target and timestamp**. When someone says “maine nahi kiya” — you check, not guess.



Audit Trail — filter by category, action and user; export; set log retention (default 365 days)

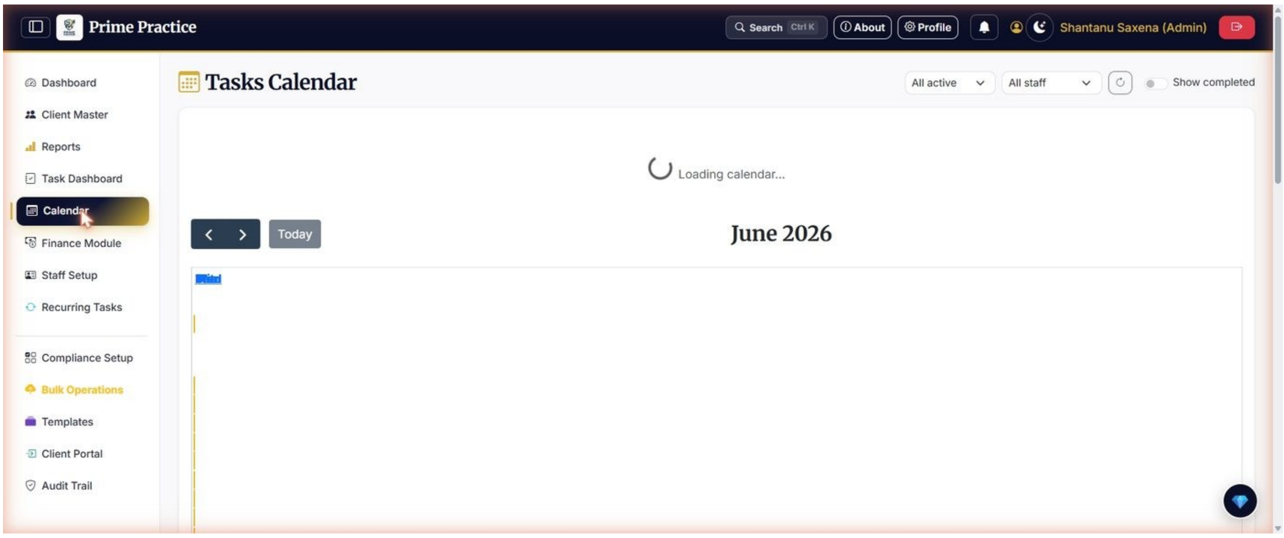
- **Filters —** category (auth / task / staff / finance), action (login / create / update), user, and target search.
- **Retention —** keep logs 365 days by default; set 0 to keep forever.
- **Export —** download the log for your records.
- **Admin-only —** staff never see the Audit Trail.

CHAPTER 14

Calendar — Deadlines on a Wall

Mahine ka poora compliance load — ek nazar me.

The Calendar paints your tasks on a monthly grid — due dates, overdue items and completed work, colour-coded. Perfect for the Monday planning meeting: open the month, see the load, balance the team.



Calendar — your month's compliance load at a glance

NEW IN 2026

What has been added since the last edition

Naye features — wahi aasaan tarika, aur zyada kaam ek hi app me.

Prime Practice keeps growing. The chapters that follow cover everything that was added after the first edition of this manual. Each one works exactly like the rest of the app — open it from the left sidebar, and it is available to the people you allow.

Chapter	What it does for you
15 · Password Vault	Keep every portal login (Income Tax, GST, MCA, TRACES…) encrypted, with an MCA company master
16 · GST Return Status	See which clients have filed GSTR-1 / 3B, straight from the GST system
17 · Diary & Notepad	Day-wise work diary for you and your team, plus a private notepad
18 · To-Do Lists	Your own CA to-do list and a to-do list for every staff member
19 · Self-Assign	Staff can log the work a client just called about — without waiting for you
20 · Portal Invites by Email	One click sends your client their portal login, instructions and a flyer
21 · Staying Updated	How new versions and new security rules reach your firm automatically

CHAPTER 15

Password Vault — Every Login, Safely Locked

Diary me likhe passwords ab band. Ek master PIN, aur poora office secure.

Every CA office keeps dozens of client logins — Income Tax, GST, MCA, TRACES, EPFO, ESIC and more. Most offices keep them in a register, a WhatsApp chat, or an Excel file that anyone can open. The **Password Vault** replaces all of that.

Every login you store is **encrypted on your own computer** before it is saved. Even inside your firm's database it is unreadable without your master PIN. Prime Practice cannot read it. Nobody can.

Setting it up (one time)

1. Open **Vault** from the left sidebar.
2. The first time, it asks you to create a **Master PIN**. Choose something you will remember — this PIN is the key to everything inside.
3. Type it twice and click **Create Vault**. That is all — the vault is ready.

Please remember your Master PIN

The PIN is never stored anywhere — that is exactly why the vault is safe. If you forget it, the saved passwords cannot be recovered and the vault has to be started again. Write the PIN somewhere safe (not inside Prime Practice).

Saving a client login

1. Open Vault and enter your Master PIN (once per session).
2. Click **Add Credential**.

3. Pick the client, choose the portal (Income Tax, GST, MCA, TRACES, EPFO, ESIC or Other), and type the login ID and password.
4. Click **Save**. The login ID and password are encrypted the moment you save.

Using a saved login

1. Find the client in the Vault list.
2. Click **Login** — the government portal opens in a new tab and the password is copied to your clipboard.
3. On the portal, type the login ID and press Ctrl+V for the password.

MCA Company Master

The second tab of the Vault keeps the company record you keep looking up: CIN, date of incorporation, ROC, authorised and paid-up capital, status and registered office — plus the full list of directors with DIN, appointment and resignation dates and DSC expiry. Each director can also carry their own MCA login, encrypted the same way.

The DSC expiry dates are the quiet hero here: one look and you know whose signature is about to expire.

Who can open the Vault

By default, only you (the Admin). To let a trusted staff member in, open **Staff Setup**, edit that staff member and tick **Can view passwords**. They will still need the Master PIN. Everyone else does not even see the menu.

CHAPTER 16

GST Return Status — Filed or Not, at a Glance

Kaun sa client kaunsa return bhool gaya — poochhna nahi, dekh lijiye.

Chasing clients for "GSTR-3B file ho gaya kya?" takes hours every month. This module answers it for your whole client list, using data straight from the GST system.

1. Open **GST Status** from the left sidebar.
2. You see every client who has a GSTIN saved in Client Master, along with the last GSTR-3B and GSTR-1 filed.
3. Click **Check All** to refresh the whole list, or the refresh button on a single row to refresh just that client.
4. Click any client to open the year-wise, month-wise grid — each month shows filed or pending at a glance.
5. Click **Export to Excel** for a sheet you can send to a partner or keep as a record.

Nothing to set up, nothing to pay

The GST look-up runs through Prime Practice's own secure service. You do not need any API key, subscription or configuration — it simply works. Checking a long list takes a few minutes because the GST system limits how fast anyone may ask; the screen keeps you posted as it goes.

Only public filing data is fetched — the same information anyone can see on the GST portal by entering a GSTIN. No password of yours or your client's is ever used.

CHAPTER 17

Diary & Notepad — The Day, Written Down

Din bhar kya hua — do line me, roz. Mahine ke ant me poori kahani saamne.

The Diary is a simple habit that changes how an office runs. Every staff member writes what they did; you write what you did. Nobody has to remember anything at review time — it is all there, day by day.

Open **My Diary** from the sidebar (staff see the same menu for themselves). The module has three tabs.

Tab	What it is for
Diary	Day-wise entries — what was done, for which client, with an optional remark and up to 3 attachments per entry
To-Do	A running list of things still to do (see the next chapter)
My Notes	A private notepad with rich text — visible only to the person who wrote it

Writing a diary entry

1. Open **My Diary** → the **Diary** tab. Today's date is already selected; use the date box to go back to any earlier day.
2. Type what was done. Attach files if useful — up to 3 per entry, 500 KB each (PDF, images, Word, Excel, CSV, text, ZIP).
3. Add a **Remark** if something needs explaining, then click **Save**.

Team Diary — for the Admin only

As the Admin you also get **Team Diary**: pick any staff member and any date range and read their entries. It is the fastest monthly review you will ever do, and it settles "kaam hua tha ya nahi" questions without an argument. Export to Excel when you want a record.

My Notes — genuinely private

The notepad is personal. A staff member's notes are visible only to them, and your notes only to you. Use it for rough working, call notes, or anything you would otherwise scribble on a slip of paper and lose.

CHAPTER 18

To-Do Lists — Yours, and Your Team's

Task Dashboard client ka kaam sambhalta hai. To-Do baaki sab kuch.

Some work never becomes a client task — a bank visit, a call to return, a partner meeting, a form to collect. That is what the to-do lists are for.

My To-Do (for you)

1. Open **CA Diary** → the **To-Do** tab.
2. Type the item and click **Add**. It appears under Pending.
3. Tick it when it is done — it moves to Done, and an entry is written into your diary automatically so the day's record stays complete.
4. Use the **Show to staff** switch on any item you want your team to be aware of. It then appears in a "Handled by the CA" card at the top of every staff member's To-Do tab — so nobody chases you for something you have already taken up.

Staff To-Do

Every staff member has the same list for themselves, in **My Diary** → **To-Do**. Ticked items log into their diary the same way. You can see the outcome in Team Diary.

Import and export

Both lists support Excel import and export — useful when you want to move a long checklist in, or hand a status list to someone outside the firm.

CHAPTER 19

Self-Assign — When the Client Calls the Staff

Client ne staff ko seedha call kiya? Kaam turant record ho, aapko pata bhi chal jaye.

Normally you assign work and your staff completes it. But clients call staff directly all the time — and that work used to go unrecorded until someone remembered to tell you.

With **Self-Assign Task (Client Called)**, the staff member logs it themselves in ten seconds, and it lands in your list as a normal task.

How your staff uses it

1. On the Task Dashboard, click **Self-Assign Task (Client Called)**.
2. Pick the client, choose the compliance or type the work, set a due date.
3. Write a short note about what the client asked for, and click **Save**.

What you see

The task appears on your Task Dashboard with a purple **SELF** badge, so you know at a glance that it came from a client call and not from you. You get a notification too. Everything else — status, chat, completion, reports — works exactly like any other task.

CHAPTER 20

Client Portal Invites — One Click, Full Welcome

Client ko portal dena ab ek click. Link, password, instructions aur flyer — sab automatic.

Chapter 12 explained the Client Portal. This chapter is about getting your clients *into* it — which used to mean typing out a WhatsApp message with a link and a password for every single client.

Now the whole welcome goes out by email, automatically, in your firm's name.

Inviting a client

1. Open **Client Portal** from the sidebar. You see every client with their portal status.
2. Click **Invite** on the client you want to give access to.
3. Check the email address, type a temporary password, and leave **Send welcome email** ticked.
4. Click **Create & Link**. The login is created and the email goes out immediately.

What your client receives

- A clean, branded email in your firm's name — replies come to you.
- Their portal address (for example **primepractice.in/your-firm**), login email and temporary password, in a box they can copy from.
- Four simple sign-in steps, written in plain English.
- Six things they can now do — documents, deadlines, live work status, bills and UPI payment, secure messages, bank-grade security.
- A Prime Practice flyer they can keep or forward.

- Clear instructions for resetting a forgotten password themselves.

Sending it again

If a client deletes the email or says it never arrived, click **Email** on their row and send it again. Leave the password box blank and the email simply tells them to use the password they already have.

> **Other buttons on this screen**
>
> Disable / Re-enable turns portal access off or back on without deleting anything. Documents lets you upload files for that client (tick "visible to client" to share, untick to keep internal). Hide staff / Show staff controls whether the client sees which staff member is handling their work. Unlink removes the link but keeps the login alive.

CHAPTER 21

Staying Updated — New Features, Automatically

App khud update hoti hai. Aapko bas ek button dabana hota hai, kabhi-kabhi.

Prime Practice improves continuously, and your firm receives every improvement at no extra cost. There is nothing to install and nothing to buy again.

The update banner

When a new version is published, a small banner appears at the top of your screen. Click it and the app reloads with the new version. If you ever feel a screen is showing something stale, that banner (or a plain refresh) is the fix — you do not need Ctrl+F5 any more.

What's New

Open the **What's New** item to read what changed in each version, in plain language. It is a short list, not a technical changelog.

Security rules updater

Your firm's data lives in your own Google Firebase project, protected by security rules that only your firm can read it. When a new feature needs a new rule, you will see an amber notice with a **one-click updater**. Run it and the rules are brought up to date.

> **If the amber notice keeps coming back**
>
> Refresh the page once first — the app may still be running the older version. If it still appears, reply to your Prime Practice welcome email and we will complete it for you. It is a two-minute job and we are happy to do it.

Getting help

The fastest way to reach us is to reply to your welcome email — it comes straight to the Prime Practice team. Tell us what you were doing and what you expected; a screenshot always helps. We answer as people, not tickets.

Your Practice Deserves Prime Practice

Join the pilot — be among the first firms to run a truly private, truly modern practice.

Old way	Prime Practice way
Client list in 5 different Excels	One Client Master — searchable, grouped, compliance-mapped
“GSTR-3B kiska reh gaya?” panic on the 19th	Recurring tasks create themselves; reminders chase the team
Status-check phone calls all day	Clients see live status on their own portal
Fees forgotten after work is done	Unbilled Tasks card + Export-for-Billing
Data on someone else’s server	Data in YOUR OWN Firebase — DPDP-aligned, verifiable privacy
New software = weeks of data entry	Smart Import: any Excel → full client base in minutes

□ Why CAs are switching

“10 minutes from signup to running your practice. No servers to manage, no IT setup.”

Multi-staff with permissions · Real-time chat · GST invoicing · Client portal · Bulk everything · Audit trail

Made for India □□ — GST, TDS, ITR, ROC workflows and Hinglish templates out of the box.

Pilot program now open for Indian professionals

Register today — your private workspace is 6 wizard-steps away.

www.primepractice.in

Prime Practice — your data, your cloud, your practice.