24ETAX ERP · PROCESS GUIDE 18

Practice console – for CA firms

Covers: Practice › Practice console, Batch review, Filing calendar, Practice settings

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Purpose

For a CA or accounting firm that keeps the books of several client organisations. From one place the firm sees the health of every client, opens a client's books, approves work across clients in one pass and tracks every client's filing dates. Each staff member reaches only the clients assigned to them.

The **Practice** menu appears only for users who belong to a practice firm.

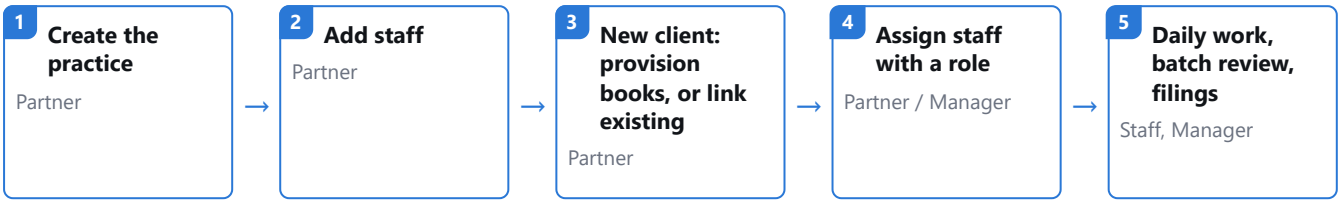
Who does what

Firm role	What they do
Partner	Creates the practice, adds people, sets up clients, grants and revokes access, branding.
Manager	Assigns work, batch review, filing calendar.
Staff	Works in the books of clients assigned to them, with the role granted in each client.

Inside a client's books a staff member acts with the role granted there (Accountant, Approver, Auditor or Admin), and every action is recorded in that client's audit trail under their own name.

Process flow

TAKING ON A CLIENT



↳ A client who already uses the system links their books by entering your practice code in their Billing & plan page.

↳ Offboarding a client or revoking a grant removes the staff member's access to those books at once.

Steps

1. Set up the practice (once)

1. Open the practice console. On first use it shows **Set up your practice**: enter the **Firm name** and **Office e-mail** and click **Create practice**.
2. Open **Practice** › **Practice settings**. Under **People** add each colleague with name, e-mail and role (staff, manager or partner) and click **Add**.
3. Note the **Practice code for clients to link their books:** – give it to clients who already have their own organisation.
4. Under **White-label** set the **Brand name**, **Primary colour**, **Support e-mail** and **Portal welcome line** shown to your clients' portal users and on client-facing e-mails. **Save branding**.

2. Add a client

1. Open **Practice** › **Practice console**. Enter the **Client name**, **Legal name**, **State code**, **GSTIN** and **PAN**.
2. Choose the **Staff role** you will hold in the client's books and click **Provision books**.
3. A new organisation is created with its head-office branch, standard voucher types, chart of accounts and the current financial year. You become its administrator.
4. Continue with the setup order in guide 00: branches and GSTINs, masters, opening balances.

> **STOP**
>
> Check the name, GSTIN, PAN and state before clicking **Provision books**. They can be corrected later in the client's **Administration** › **Settings**, but the GSTIN and state only until the first voucher is posted.

3. Give staff access to a client

1. In **Practice** › **Practice settings** under **Client access**, choose the person, the client and the **Role in client**, and click **Grant**.
2. From the console, **Assign staff** does the same for one client.
3. When the person changes work or leaves, click **Revoke**. To end the engagement altogether, **Offboard** the client.

Keep maker and checker separate inside each client too: do not grant one person both Accountant and Approver work on the same entries.

4. Daily: the client grid

1. The console lists every client assigned to you with a health **Score** and counts: **Approvals** waiting, **AI queue**, **Anomalies**, **Bank unmatched**, **Overdue AR**, filings **Due 14d**, legal matters, the **Last close** and **Flags**.
2. Start with the lowest scores. Click **Open** to enter that client's books; the organisation switcher at the top shows whose books you are in.
3. Work there exactly as described in the module guides. Switch back to the console when done.

5. Batch review across clients

1. Open **Practice** › **Batch review**. It gathers, for all your clients, vouchers awaiting approval, AI proposals with their **Confidence** and **Explanation**, and anomalies with **Severity**.
2. Open any item you are unsure of and check it in the client's books.
3. Select rows and click **Approve / acknowledge selected** or **Reject / resolve selected**.
4. Each decision is applied in that client's books under your grant there. You cannot approve what your role in that client does not allow, nor an entry you prepared yourself above the client's self-approval limit.

6. Filing calendar

1. Open **Practice** › **Filing calendar** and click **Rebuild from client calendars** to pull every client's due dates: GST, TDS, PF, ESI, notices, hearings.
2. Give each item an **Assignee** and a **Note**.
3. When the filing is done in the client's books, mark it **Done**; **Reopen** if it must be redone.
4. A weekly digest of what is due goes to the firm.

Checks and controls

CHECKS AND CONTROLS

- Each grant creates a real membership in the client's organisation and is recorded there (access granted, access revoked, context switched).
- Staff see only clients assigned to them; a partner sees all.
- The client's administrator can see the firm's people under their own Users & access and can revoke them.
- Practice staff are organisation-wide inside a client's books; branch limits do not apply to them.

Limits

LIMITS

- The Practice menu is hidden until you belong to a firm. For the very first setup, ask the administrator for the practice console address.
- The filing calendar is rebuilt on request; it does not remove old rows by itself. Rebuild before the weekly review.
- The practice module must be included in the plan.

Routine checklist

Daily

- [ ] Client grid checked; clients with approvals, unmatched bank lines or flags attended to.
- [ ] Batch review cleared.

Weekly

- [ ] Filing calendar rebuilt; items due in 14 days assigned; done items marked.

Quarterly

- [ ] Client access reviewed: grants of staff who moved or left are revoked.