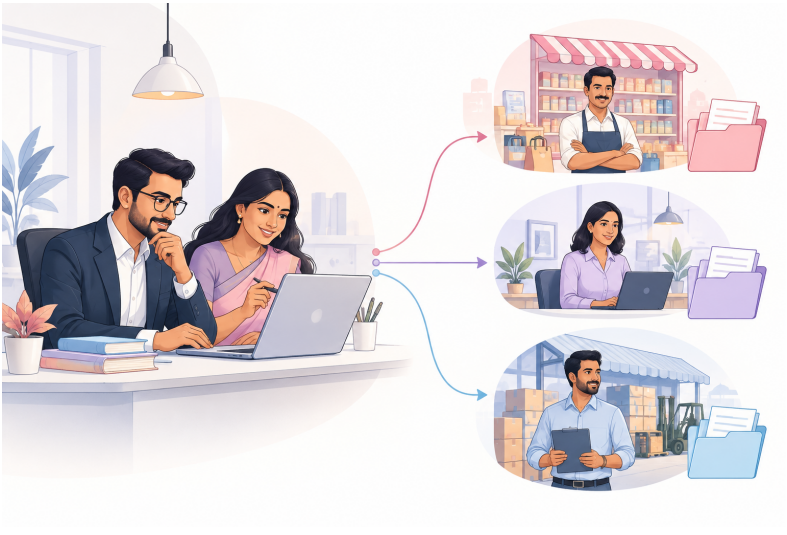
MyKonto
OCTET SOLUTIONS

USER GUIDE 02 / CA OWNERS AND STAFF

Manage clients with your CA office

Set up your office, give colleagues access and work with the correct client records.



Create office → **Client approval** → **Assign** → **Work**

In this guide

Start here: your office and client routes 2

Set up the office and connect clients 4

Client work and ownership handover 10

Troubleshooting 13

CA

CA owners and staff

Help your clients work with your CA office

Support several businesses without mixing their records. Choose which colleagues can work with each client.

1. **Bring your office team together.** Invite colleagues, each using their own sign-in.
2. **Connect the clients you support.** Each business owner chooses what your office can access.
3. **Work on the right business.** Assign colleagues to clients, then open that client to read records or prepare permitted documents.



Separate clients. Assigned colleagues. The right records.

REMEMBER
This guide shows office owners how to set up access, and colleagues how to start client work. Use Guide 01 for the invoice and quotation entry steps.

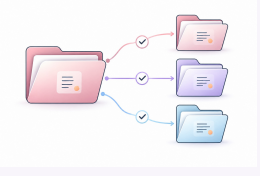
Next: Choose how your client gets started

CA

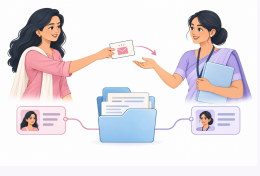
CA owner / manager

Choose how your client gets started

First set up your CA office (page 4). Then choose the route that fits your client.



Your client already uses MyKonto
The client owner requests a CA connection. Your office accepts it and assigns the colleagues who will work on that client.
Start with client approval on page 7.



You help a client get started
With permission, create a separate Business workspace and prepare records. Later, the client joins MyKonto and accepts ownership. They then approve your CA office again.
Follow CA-assisted setup on page 11.

REMEMBER
Both routes require the client's authority. A separate Business workspace has its own records and plan; existing personal invoices are not moved automatically. Setting up a CA office does not grant access to client data.

Next: Register and create your CA office

CA

CA office owner

Register and create your CA office

1. Go to **mykonto.in** and select **Start free**, or **Log in** if you already have an account. Use your own verified sign-in.
2. Complete required account onboarding. Open **Business teams**, enter the office name and choose **CA office** as Business type.
3. Choose **Create business team**. Open the CA office to manage colleagues and client connections.



After creating a CA office: Client businesses shows the office reference. Example data.

REMEMBER
Setting up the office? Follow pages 4-9. Invited to work on clients? Join through your private link (Guide 03, page 6), then follow page 10 here. Octet platform Administration is not needed.

YOU ARE READY WHEN

Your CA office appears in Business teams.



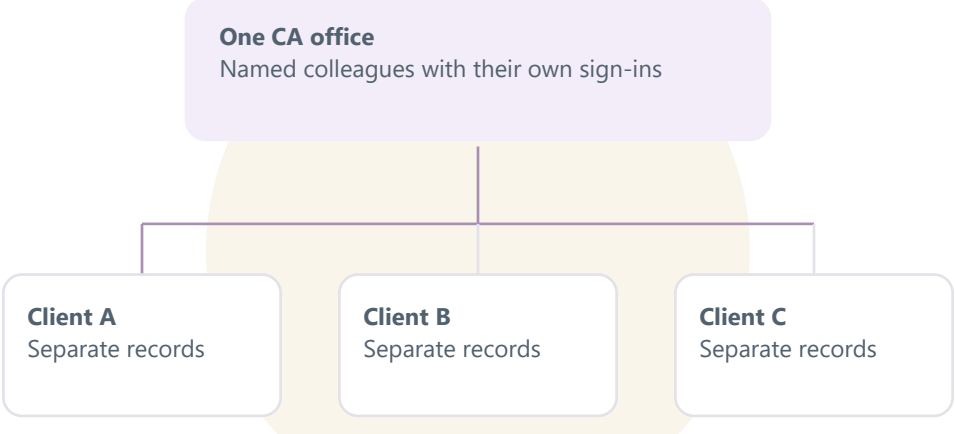
Next: Office, staff and client businesses

CA

Everyone in the office

Office, staff and client businesses

1. The office owner/manager manages the CA team. Each colleague signs in independently.
2. Each client business owns its own documents and plan. Its owner decides whether your office can read/export or prepare invoices.
3. A colleague must also be assigned individually to each client. Even the office owner needs an assignment before opening a client as a CA user.



Each client approves access. The office accepts, then assigns colleagues.

REMEMBER
A client business is the company supported by the CA. An invoice customer is the recipient of that company's invoice.

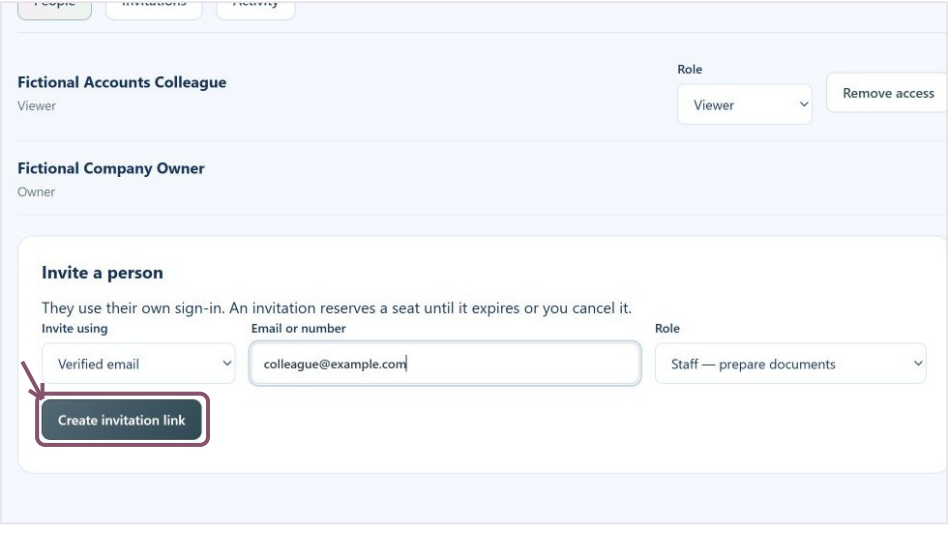
Next: Invite and organize colleagues

CA

CA owner / manager

Invite and organize colleagues

1. Open the CA office in **Business teams**. Under **People**, find **Invite a person**.
2. Choose verified email or WhatsApp number, enter the colleague's address/number and select the role. Create the private invitation link.
3. Share the complete link privately. The colleague signs in with the matching verified identity, reviews the office and role, then joins.



Actual application screen | Example data

REMEMBER
Share the invitation link yourself. The colleague joins with their own matching sign-in. Pending invitations reserve seats; the owner manages the plan. Managers manage Staff/Viewer access. See Guide 03 for roles and joining.

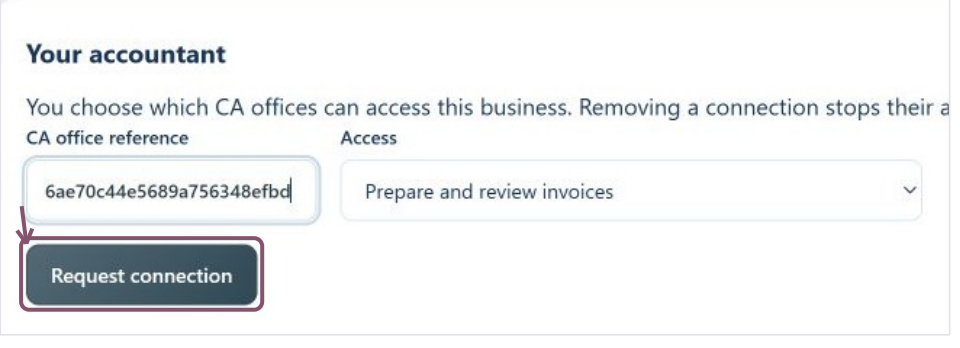
Next: The client owner approves access

CA SETUP / 2

Business owner

The client owner approves access

1. The CA office shares its **CA office reference** shown under Client businesses.
2. The client owner opens their business in **Business teams**. If no team exists, create a Business workspace first (Guide 03, page 2). Under **Your accountant**, paste the reference.
3. Choose **Read and export** or **Prepare and review invoices**, then select **Request connection**.



Actual application screen | Example data

REMEMBER
The request is pending until the CA office accepts it. The business owner chooses the access scope and can remove the CA connection later. A matching business name or knowing a reference alone does not grant access.

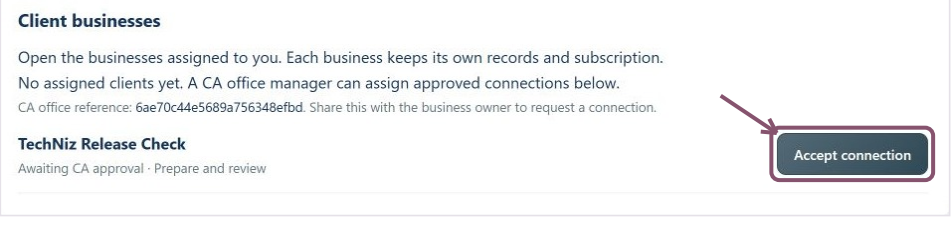
Next: Accept the client connection

CA

CA owner / manager

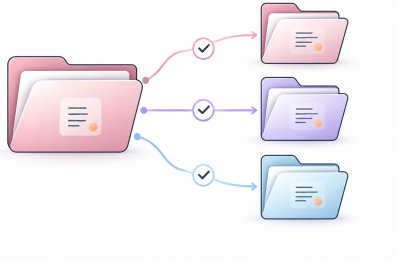
Accept the client connection

1. After the client owner requests access, open the CA office in **Business teams**.
2. Find the pending client under **Client businesses**. Check its business name and approved scope.
3. Choose **Accept connection**. The connection is now active; individual colleague access still needs assignment.



Actual application screen | Example data

> **REMEMBER**
> Repeat the owner-approval and CA-acceptance process for each client. Business-name matching does not connect accounts automatically.



YOU ARE READY WHEN

The office has accepted the right connection.

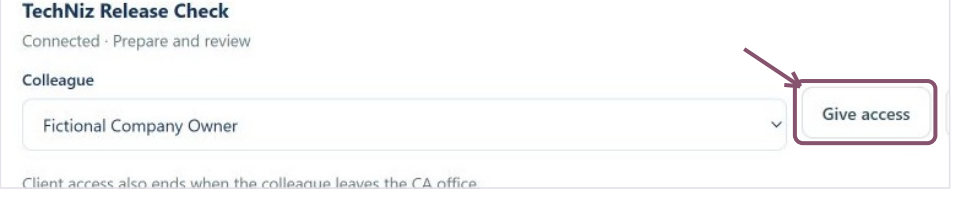
Next: Assign a colleague, then open the client

CA SETUP / 3

CA owner / manager

Assign a colleague, then open the client

1. Open the CA office in **Business teams**. Find the pending client and choose **Accept connection**.
2. Choose an active **Colleague** and select **Give access**. Assign yourself too if you will work on this client.
3. The assigned person opens the client using **Open business**. Check the client name and **CA client** label in the sidebar. Repeat for other approved clients.



Actual application screen | Example data

REMEMBER
Joining the CA office does not expose all clients. To stop a colleague working on one client, use Remove assignment. Removing that colleague from the CA office ends their access to its clients. Rejoining needs fresh assignments.

YOU ARE READY WHEN

The intended colleague is assigned to the client.



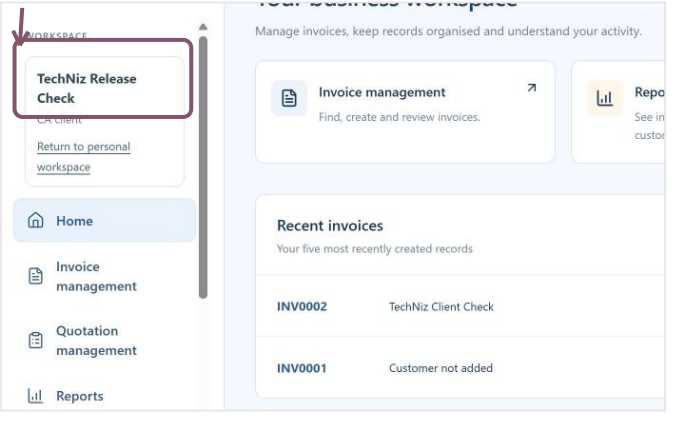
Next: Open the correct client and start work

CA

Assigned colleagues

Open the correct client and start work

1. Open the client from the CA office's assigned-client list. Check the business name and **CA client** label in the sidebar.
2. To create a document, use **Invoice management** or **Quotation management**. Guide 01, pages 5-14, walks through entry, review and PDF output. Viewer access allows reading/export, not preparation.
3. Use **Business teams** to return to the office and open another assigned client. Check the client name again before editing.



Actual application screen | Example data

REMEMBER
CA permission does not include client team administration, business profile/bank settings or billing. Personal invoices are not automatically moved into a connected business. Guide 01 covers the document steps.

Next: CA-assisted client setup

OPTIONAL HANDOVER

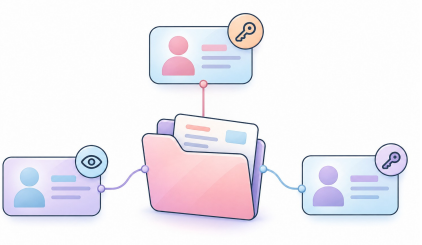
Current / new owner

CA-assisted client setup

1. With the client's authority, the CA can create a separate **Business** workspace and prepare records before the client joins.
2. The client creates their own verified account. The current owner opens **Hand over ownership**, enters the verified recipient and requests handover.
3. The client opens **Business teams**, reviews the request and accepts ownership. The client then approves the chosen CA office again.

IMPORTANT OWNERSHIP CHANGE

Acceptance ends the previous owner's direct access, revokes existing CA connections and cancels pending invitations. Documents and the plan stay with the business. Do not use handover merely to add a colleague; use an invitation for that.



YOU ARE READY WHEN

The client understands the ownership change.

Next: Changing staff or a CA connection

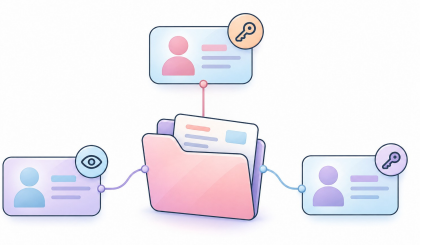
CA

Owners / managers

Changing staff or a CA connection

1. **One colleague, one client:** select the colleague on that connection and choose **Remove assignment**.
2. **Employee leaves:** remove their access to the CA office. Their client access through that office ends; client records stay.
3. **Client changes CA:** the client owner removes the old CA access and approves the new office. Two offices can be authorized separately if needed.
4. **Staff rejoins:** invite/join again as appropriate and assign clients again. Previous assignments are not restored automatically.

REMEMBER
An expired plan and revoked access are different. Existing authorized read/export remains available after expiry; new preparation or assignments may require renewal.



YOU ARE READY WHEN

Former staff no longer have unwanted access.

Next: When a client is not visible

HELP

CA office users

When a client is not visible

1. Check that you opened the **CA office**, rather than your personal workspace or the office's own invoice workspace.
2. Ask the manager to check the client owner's request, the CA acceptance and your individual assignment.
3. Check your role and the approved scope. Viewer or Read and export access does not permit preparation.
4. If Business teams requests a fresh session, sign out and sign in once. If preparation is unavailable, ask the appropriate owner to review the plan.

REMEMBER
For ownership or access disputes, contact support. Never infer access from a company name or ask someone to share their login or OTP.



YOU ARE READY WHEN

You know which access step needs attention.

You have reached the end of this guide