PG PracticeGuru Learnings

Your first hour, first day and first week with Learnings

Read this guide from top to bottom. Each step tells you where to click, how long it takes and how to know it's done. By the end of the week you and your staff each have a login and have started reading, your office rules sit inside the onboarding course, and you can see who has read what.

FIRST HOUR

Try it, then choose

Register free, read a free first lesson, find your course path and choose a plan.

FIRST DAY

Bring your office in

Write your office rules, invite your staff and start your own first course.

FIRST WEEK

Make it a habit

Book study time, see who is reading, start a 90-day plan for a new joiner and set a 10-minute weekly check.

Three things to know before you start

1. **The first lesson of every course is free.** Register with your email and read any first lesson before you pay. You don't need a card to register.
2. **We open your plan by hand after you pay.** Pay with the email you registered with. We open it within 1 working day. If you send us the payment ID on WhatsApp, it's faster.
3. **Your staff join through your invite link, each with their own login.** Everyone has their own progress and certificate, and you can see what each person has read. The invite page tells staff this before they join.

PracticeGuru Learnings · Help: WhatsApp 91366 67325 · support@practiceguru.pro
Screenshots show a sample office with sample staff.

DECIDE FIRST One course, or a plan for your office?

Choose this before you pay. A single course is yours for life, for one person. A Subscription Plan opens every course for a year.

One course

One course, for you

Rs. 599, 799 or 999 + GST, one time

- The price depends on the course
- One login, yours for life, no renewal
- Your own certificate
- Good when you need one topic for yourself

Subscription Plan

Single user

Rs. 1,499 / year + 18% GST

- Every Learnings course, including new ones added during the year
- For you only, one login
- A certificate for every course you finish
- Need staff later? Move to a team plan when you renew

Office Subscription Plan

Small team

Rs. 1,999 / year + 18% GST

- Every course, for you and up to 5 staff at a time
- Add and remove staff any time
- Each person has their own login, progress and certificate
- See who in your office finished what

Office Subscription Plan

Large office

Rs. 2,499 / year + 18% GST

- Every course, for you and as many staff as your office has
- Everything in Small team

Good to know	
Yearly plans	Access ends if you don't renew. You can change level when you renew, and the new year starts when your current year ends.
Staff places	On Small team, the 5 places count people who have joined plus invites still open.
Money-back guarantee	Ask within 7 days of paying for a 100% refund, once per course or plan. Certificates earned through a refunded purchase are cancelled.
Extra 10% off	For CA and tax firms less than 3 years old, and for women proprietors. It works on any course or plan. WhatsApp us before you pay.

This guide follows the Office Subscription Plan. Steps marked Team are for Small team and Large office. On one course or Single user, skip them.

BEFORE YOU START

Keep these ready

With these at hand, the first hour and the first day take about an hour of clicking in all.

- [ ] Your email and mobile number. If you already use PracticeGuru or OneClick Branding, log in with the same email and password. You don't need a new account.
- [ ] The names and emails of your staff. Each person logs in with the email you invite.
- [ ] 15 quiet minutes to write your office rules: office hours, who to ask for what, DSCs and passwords, talking to clients.
- [ ] Your GSTIN, if you want it on the invoice. You fill in billing details once, on Payments and invoices.

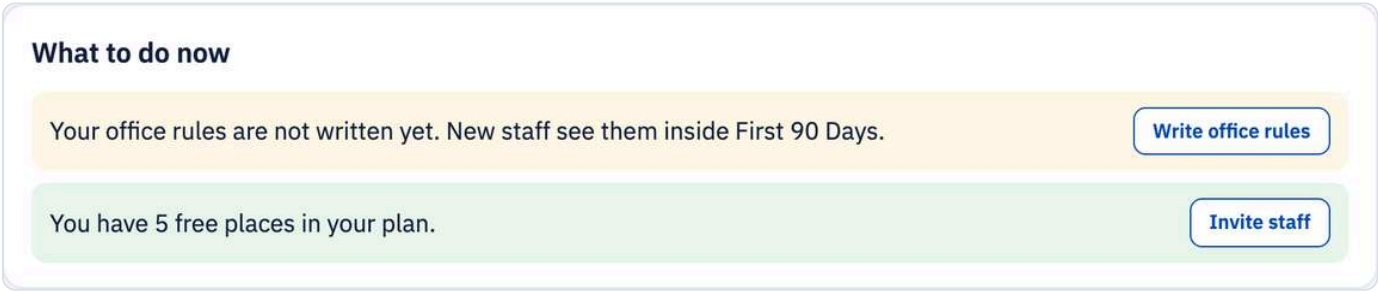
What it costs

What you buy	Price	You pay (with 18% GST)
Register and read every first lesson	Free	Nothing
One course (lifetime, one person)	Rs. 599, 799 or 999	Rs. 707, 943 or 1,178
Single user plan (1 year)	Rs. 1,499	Rs. 1,768
Small team plan (1 year, you + 5 staff)	Rs. 1,999	Rs. 2,359
Large office plan (1 year, unlimited staff)	Rs. 2,499	Rs. 2,949

You pay on a Razorpay payment page.

Your "What to do now" card

Once your plan is open, the Office overview page shows what is still left to do. This guide follows the same order, and adds what to do in your first day and week.



FIRST HOUR

Try it, then choose

By the end of this hour you have an account, you've read a real lesson, and you've chosen and paid for a plan.

1 Register free

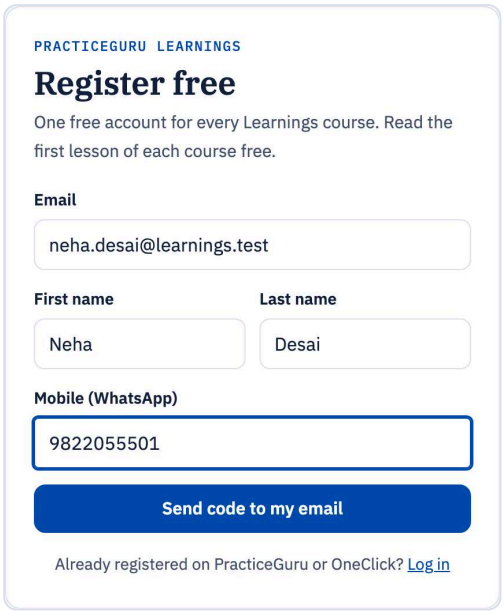
3 min

Go to **practiceguru.pro/learnings** and press **Register free**

Fill in your email, name and mobile number (WhatsApp), then press **Send code to my email**.

Type the 6-digit code from the email and choose a password of at least 8 characters. Press **Create my account**.

The code works for 10 minutes. No email? Look in Spam, or press **Send a new code**.



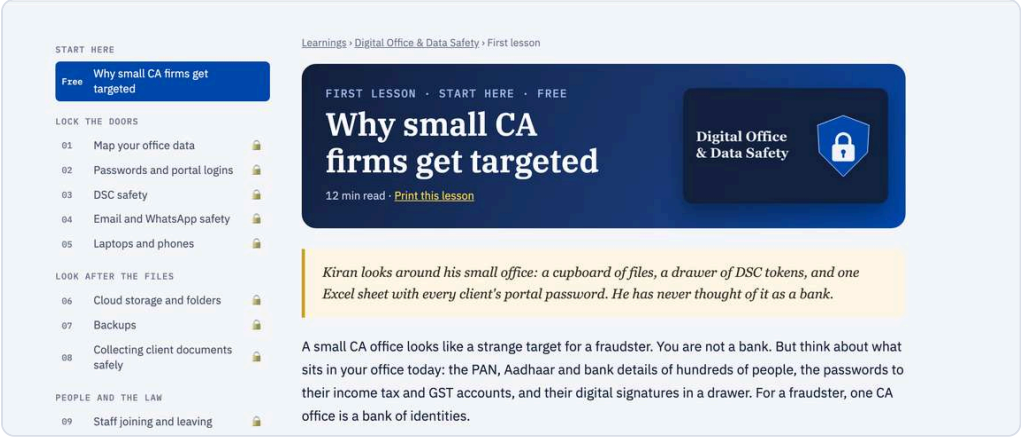
- [ ] You're on My courses, and it says "Your account is ready".

2 Read one free lesson

10 min

Menu: **My courses**, then **Read free lesson** on any course

Every course has a free first lesson, so pick a topic your office needs. At the end, press **Mark lesson as read**. That's how your progress, and later your certificate, is counted.



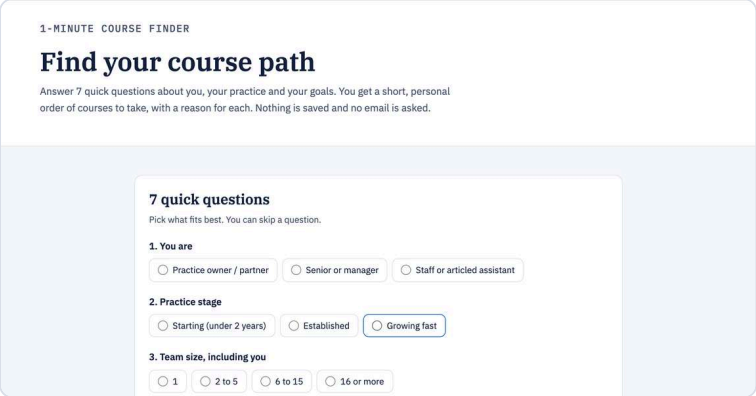
- [ ] You've read one lesson and marked it as read.

3 Find your course path

1 min

Go to **practiceguru.pro/learnings/start.php** (Find your course path)

Answer 7 quick questions about you, your practice and your goals (pick up to 3 goals). You get a short order of courses to take, up to 6, with a reason for each. Nothing is saved and no email is asked.



- [ ] You know which 2 or 3 courses to start with.

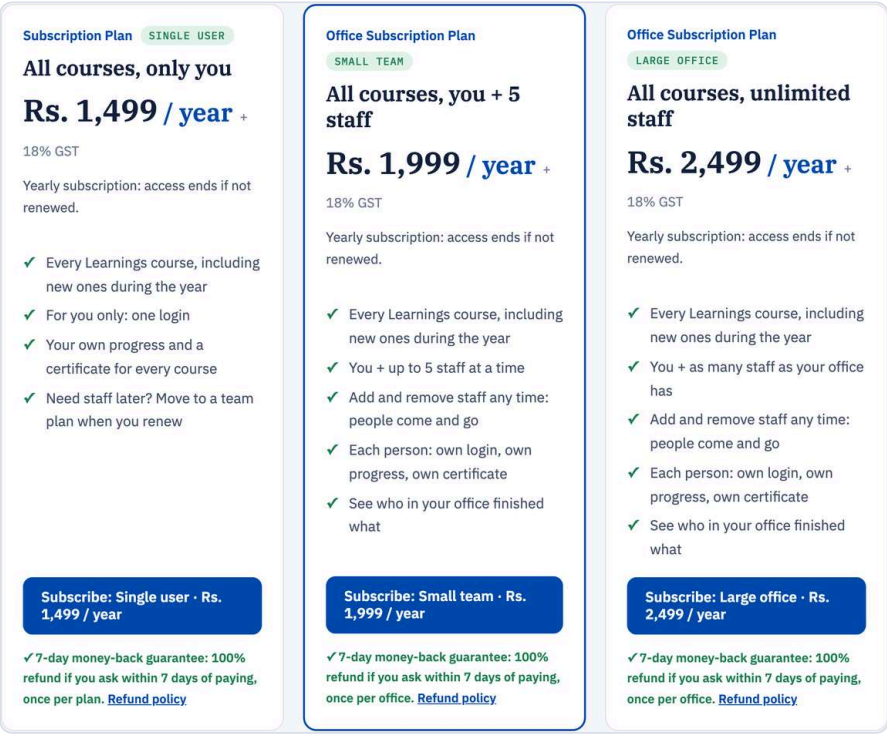
4 Choose a plan and pay

5 min

Menu: **Train your office → See the plans**

1. Press **Subscribe** on the plan you chose. The Razorpay page opens.
2. Pay with your **registered email**. That's how we know whose account to open.
3. Back on the plans page, press **I have paid for the …** (WhatsApp) and add your payment ID.

We open your plan within 1 working day.



- [ ] The Office overview shows your plan, for example "Small team · active till …".

Paid but nothing has opened yet? Check that you paid with the email you registered with. Then WhatsApp us on 91366 67325 with your payment ID. If you're not happy, WhatsApp us within 7 days of paying for a full refund.

End of the first hour: check these

- [ ] Account created, and you can log in
- [ ] One free lesson read and marked as read
- [ ] Course path noted: your first 2 or 3 courses
- [ ] Plan paid with your registered email, and payment ID sent on WhatsApp

FIRST DAY Bring your office in

Once your plan is open: by the end of the day your office rules are written, your staff have joined, and you've started your own first course.

5 Write your office rules

Team · 15 min

Menu: **Office rules** (or **Write office rules** on the Office overview)

There are 12 topics, from **Hours and leave** and **DSCs, passwords and OTPs** to **Safe workplace**. Each box starts with a suggestion.

1. Change the words in [brackets] to how your office works. Clear a box to leave that topic out.
2. Add up to 10 rules of your own under **Other office rules**, such as timesheets or dress code.
3. Press **Save our office rules**.

Staff see each rule inside the matching lesson of **First 90 Days in a CA Office**, and confirm they have read them.

- [ ] The Office overview no longer says "Your office rules are not written yet".

FIRST 90 DAYS IN A CA OFFICE

Our office rules

Each box starts with a suggestion. Change it to how your office works, or clear a box to leave that topic out. Your staff see each rule inside the matching lesson.

Hours and leave suggestion, not saved yet

Office hours are [10 am to 7 pm], [Monday to Saturday]. Lunch is [1:30 to 2 pm].
Mark attendance in [the register / the app] when you arrive and when you leave.
If you will be late or absent, message [senior's name] before [10 am].
Ask for planned leave in writing at least [7 days] before. Leave in [the last two weeks of July and September] is given only in emergencies.

Who to ask for what suggestion, not saved yet

You report to [senior's name]. When they are away, ask [second name].
Work, software and forms: [senior's name]. Files and DSCs: [front office name]. Computer and login problems: [IT person].
Leave, salary and stipend: [office manager / partner].
Go straight to [partner's name] if a client complains, a mistake may cost the client money, or anyone asks for client information.
Never give tax advice or quote fees to a client. Say you will check and call back.

Confidentiality suggestion, not saved yet

Everything you see about a client stays inside the office, even after you leave this job. Your signed confidentiality undertaking applies.

Office rules: each topic starts with a suggestion you change to your own words.

6 Invite your staff

Team · 10 min

Menu: **Staff and invites**

Type each person's name and the email they'll log in with, and press **Send invite**. If they already use PracticeGuru, use the email they log in with.

We email them a link to join. The link also shows on screen once, so you can press **Copy link** or **Send on WhatsApp**. It works for 7 days, only once, and only for that email.

Invite created for rohan.k@learnings.test.

✓ Send this link to Rohan Kulkarni

It works for 7 days, only once, and only for **rohan.k@learnings.test**. We show it only now.

`https://practiceguru.pro/learnings/join.php?t=de4a5947c34e001695cabc10f06bf70b389103e53aeb8a37b26cb8`

Copy link | Send on WhatsApp

- [ ] Each person shows as **Invited** in the People list, with the date their link works till.

7 Your staff join from their phone

Team · 2 min each

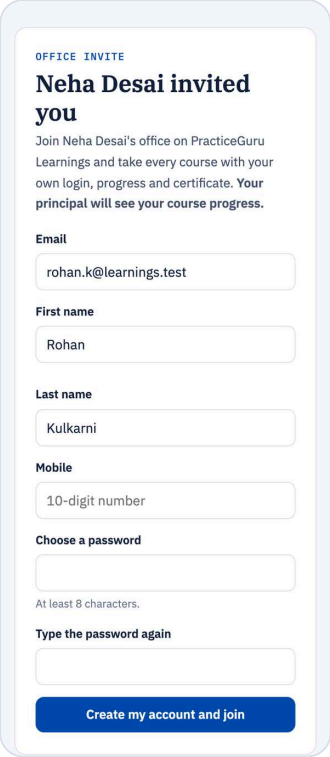
Their phone: the invite link from your email or WhatsApp

They open the link, add their mobile number, choose a password and press **Create my account and join**. Someone who already has a PracticeGuru login presses **Log in to join**.

The page tells them that you will see their course progress.

Then they open **My courses** and can read every course in your plan.

Someone left the office? On Staff and invites, press Remove. Their progress and certificates stay with them, and their place is free again.



The invite page on a phone, the way your staff see it.

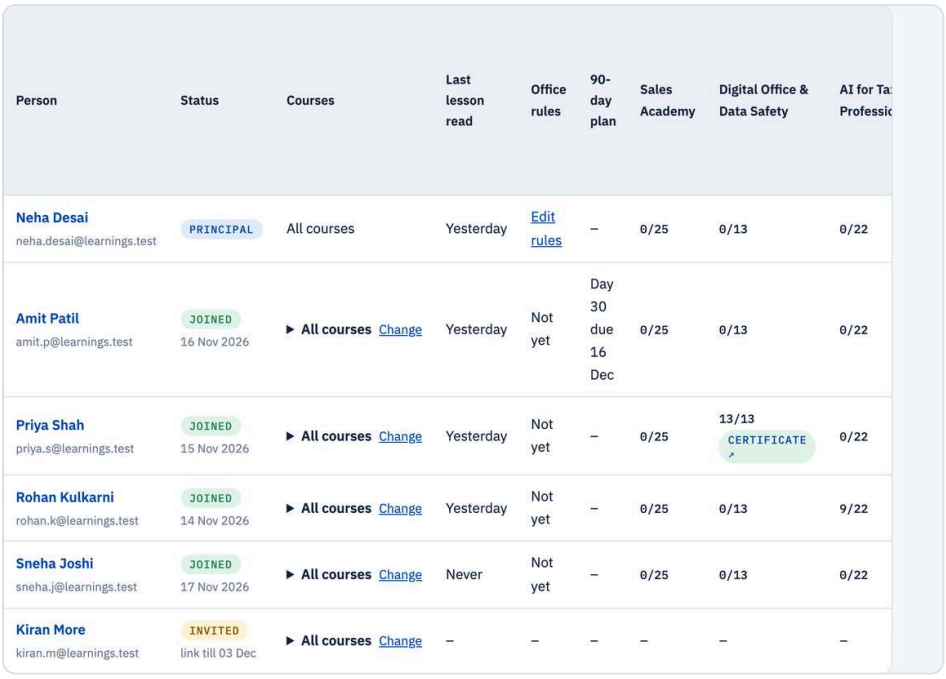
- [ ] Each person shows as **Joined** , with the date.

8 Choose courses for each person (if you want)

Team · 5 min

Menu: **Staff and invites**, then **Change** in the Courses column

By default everyone gets **All courses**, which also opens new courses added during the year. To keep an article on the basics, choose only some courses and tick them. If you close a course, the person's progress and certificate in it are kept.



Person	Status	Courses	Last lesson read	Office rules	90-day plan	Sales Academy	Digital Office & Data Safety	AI for Ta: Professic
Neha Desai neha.desai@learnings.test	PRINCIPAL	All courses	Yesterday	Edit rules	–	0/25	0/13	0/22
Amit Patil amit.p@learnings.test	JOINED 16 Nov 2026	▸ All courses Change	Yesterday	Not yet	Day 30 due 16 Dec	0/25	0/13	0/22
Priya Shah priya.s@learnings.test	JOINED 15 Nov 2026	▸ All courses Change	Yesterday	Not yet	–	0/25	13/13 CERTIFICATE ↗	0/22
Rohan Kulkarni rohan.k@learnings.test	JOINED 14 Nov 2026	▸ All courses Change	Yesterday	Not yet	–	0/25	0/13	9/22
Sneha Joshi sneha.j@learnings.test	JOINED 17 Nov 2026	▸ All courses Change	Never	Not yet	–	0/25	0/13	0/22
Kiran More kiran.m@learnings.test	INVITED link till 03 Dec	▸ All courses Change	–	–	–	–	–	–

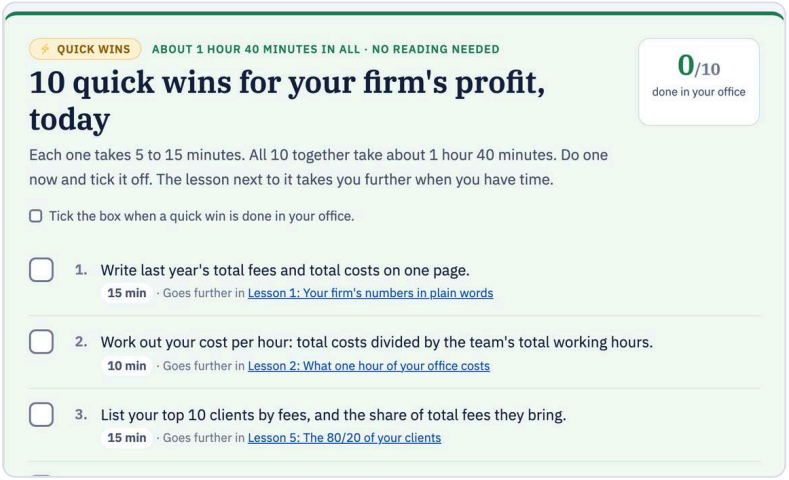
- [ ] Each person has the courses you want them to read.

9 Start your own first course

15 min

Menu: **My courses**, then **Open** on a course from your path

Open your first course. At the top are 10 **quick wins**: small tasks of 5 to 15 minutes each, no reading needed. Do one in your office and tick it off. Then read the first lesson and press **Mark lesson as read**.



QUICK WINS · ABOUT 1 HOUR 40 MINUTES IN ALL · NO READING NEEDED

10 quick wins for your firm's profit, today

0/10 done in your office

Each one takes 5 to 15 minutes. All 10 together take about 1 hour 40 minutes. Do one now and tick it off. The lesson next to it takes you further when you have time.

Tick the box when a quick win is done in your office.

1. Write last year's total fees and total costs on one page.
   15 min · Goes further in Lesson 1: Your firm's numbers in plain words
2. Work out your cost per hour: total costs divided by the team's total working hours.
   10 min · Goes further in Lesson 2: What one hour of your office costs
3. List your top 10 clients by fees, and the share of total fees they bring.
   15 min · Goes further in Lesson 5: The 80/20 of your clients

- [ ] One quick win is ticked, and one lesson is marked as read.

End of the first day: check these

- [ ] Office rules saved
- [ ] Invites sent, and your staff have joined
- [ ] Courses chosen for anyone who should not get them all
- [ ] Your own first course started

FIRST WEEK Make it a habit

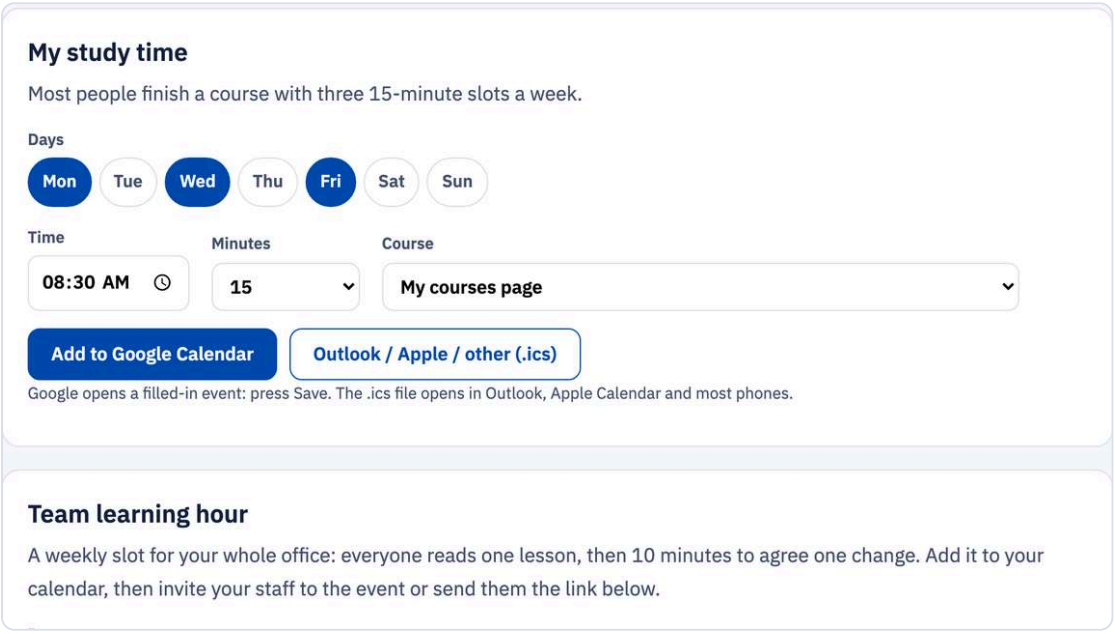
By the end of the week your office has a fixed study slot, you can see who is reading, and you know your weekly check.

10 Book study time in the calendar

Day 2 · 5 min

Menu: **Study reminders**

- **My study time:** pick the days, time and course, then press **Add to Google Calendar** or **Outlook / Apple / other (.ics)**. Your phone reminds you 10 minutes before, and the event opens your course. Most people finish a course with three 15-minute slots a week.
- **Team learning hour:** a weekly slot for your whole office. Everyone reads one lesson, then you take 10 minutes to agree on one change. Add it to your calendar with your staff as guests, or press **Send to staff on WhatsApp**.



- [ ] Your study time and the Team learning hour are in the calendar.

11 See who is reading

Team · Days 3 and 4 · 5 min

Menu: **Overview**, **People and progress** and **Who read what**

- **Overview:** how many read a lesson in the last 7 days, staff not started, and certificates earned.
- **People and progress:** each person's courses and last lesson read. Click a name to see every lesson they read, with dates. **Remind** asks you before it sends anything.
- **Who read what:** lessons read in each course, person by person.



- [ ] You've seen who has started, and reminded anyone who hasn't.

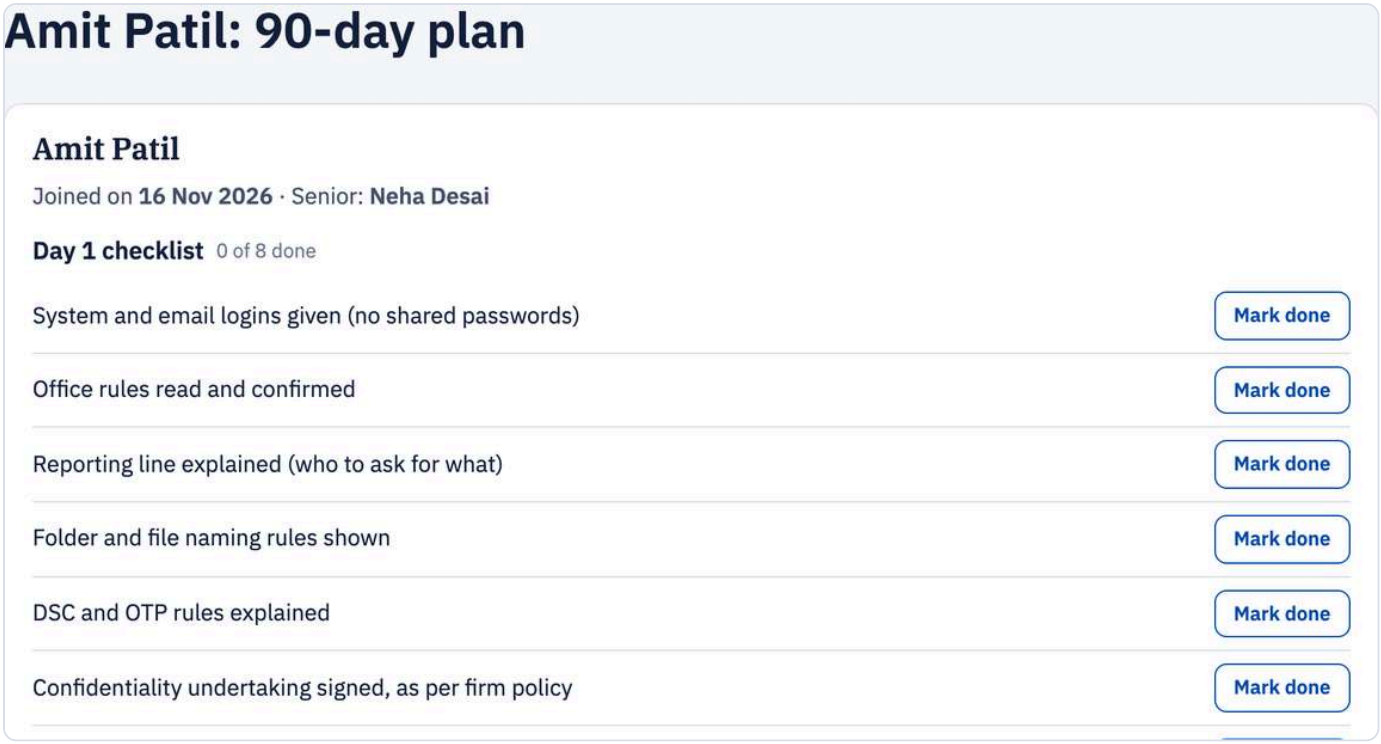
12 New joiner? Start a 90-day plan

Team · Day 4 · 5 min

Menu: **People and progress**, click the person's name, then **Start 90-day plan**

Choose their joining date and a senior. They get a Day 1 checklist and Day 30, 60 and 90 reviews, which the senior signs off. With a plan, their First 90 Days certificate also needs the Day 30 sign-off. It's there to help a new person settle in, and it isn't an appraisal.

- [ ] Your newest joiner has a senior and a Day 1 checklist. See them on **90-day plans** .



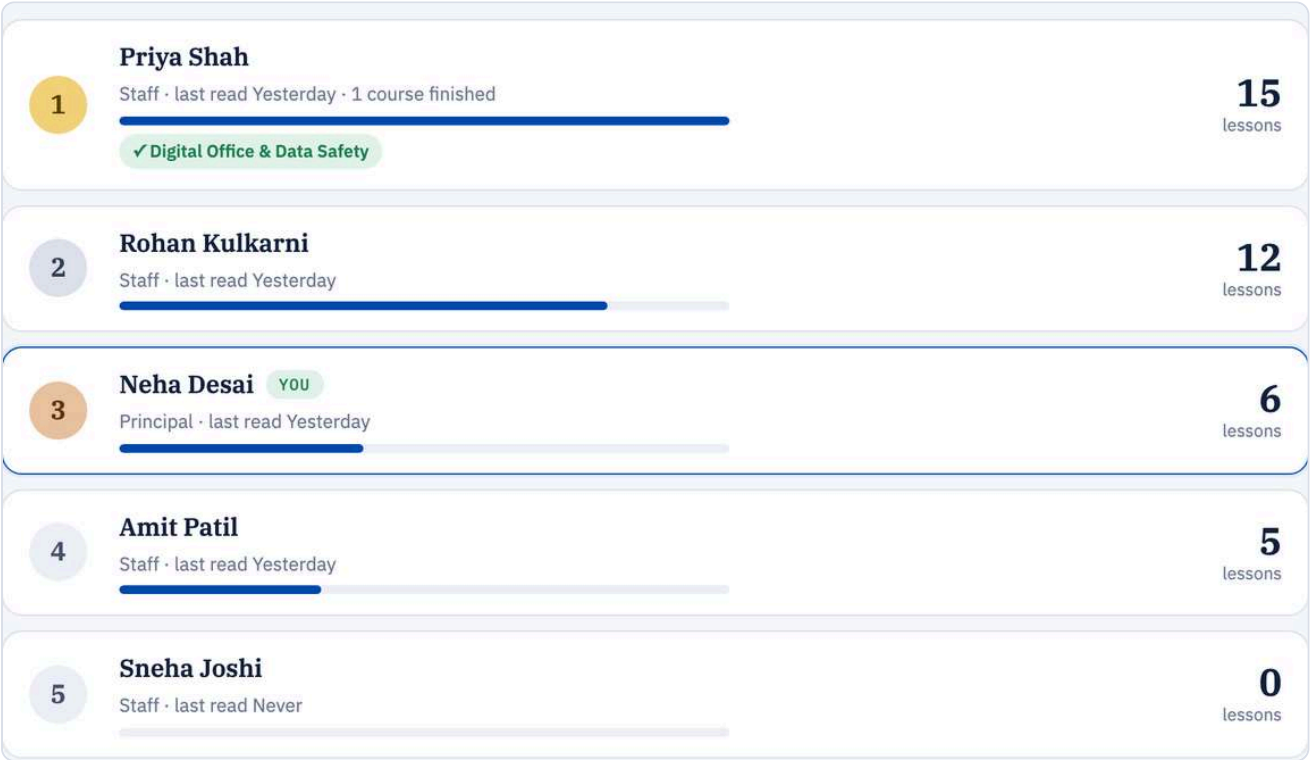
A 90-day plan: Day 1 checklist, then the Day 30, 60 and 90 reviews.

13 Certificates and the leaderboard

Days 5 to 7

Menu: **My certificates**, **Team certificates** and **Leaderboard**

- A certificate comes when every lesson of a course is marked as read. You type the name to print, and the certificate has a number anyone can check online.
- From the certificate page you can download it, add it to LinkedIn, or share it on WhatsApp.
- **Leaderboard** ranks everyone in your office by lessons read. Only people in your office can see it.



- [ ] You've opened the Leaderboard and know how a certificate is earned.

Your 10-minute weekly check (every Monday)

1. **Overview:** lessons read this week, and staff not started.
2. **People and progress:** press Remind for anyone who hasn't read in a week.
3. **Staff and invites:** invites still open. If a link has expired, send a new one.
4. **90-day plans:** any review that is due.
5. **Team learning hour:** did it happen, and what one change did you agree on?

When you need them

Page	What it does
Payments and invoices	Fill in your billing details once and download the GST invoice for each payment.
Plan and renewal	See your level, places used and end date. Renew, or change level when you renew.
Courses in your office	How far your office has got in each course.
Team certificates	Every certificate earned in your office.
Office rules	Change a rule any time. Staff see the new version.

Later

- **New staff:** invite them on Staff and invites, then start a 90-day plan for them.
- **Someone leaves:** press Remove. They keep their certificates, and the place is free again.
- **Renewal:** renew before your end date so nobody loses access. Moving to a bigger or smaller level happens at renewal.

QUICK HELP

If this happens

If this happens	Do this
I paid, but my plan or course isn't open	We open it within 1 working day. Check that you paid with your registered email, then WhatsApp us on 91366 67325 with the payment ID.
The sign-up code didn't come	Look in Spam. The code works for 10 minutes, and you can ask for up to 3 codes an hour with **Send a new code**.
"This email is already registered"	You already have a PracticeGuru or OneClick Branding login. Log in with the same password. Forgot it? Press **Forgot password?** on the login page.
A staff member says the invite link doesn't work	Links work for 7 days and only once. On Staff and invites, create a new link for them.
A staff member is logged in with another email	The invite page offers **Log out and continue** with the invited email. Or invite the email they already use.
"Your Small team already has 5 people"	Joined staff and open invites both count. Remove someone who has left, or an invite nobody used. For more staff, move to Large office when you renew.
No certificate yet	Every lesson of the course must be marked as read. In First 90 Days with a 90-day plan, the Day 30 review must also be signed off.
I want a refund	WhatsApp us within 7 days of paying for a 100% refund, once per course or plan.

Still stuck?

WhatsApp us on **91366 67325** or write to support@practiceguru.pro.