DEMONSTRATION

How to demo Balaaji

Six steps to show a new prospect a CA firm with live clients, vouchers and tasks.

Before the demo

- A Windows 10 or later PC, 64-bit
- Internet on that PC
- An email address you can open, for the demo firm

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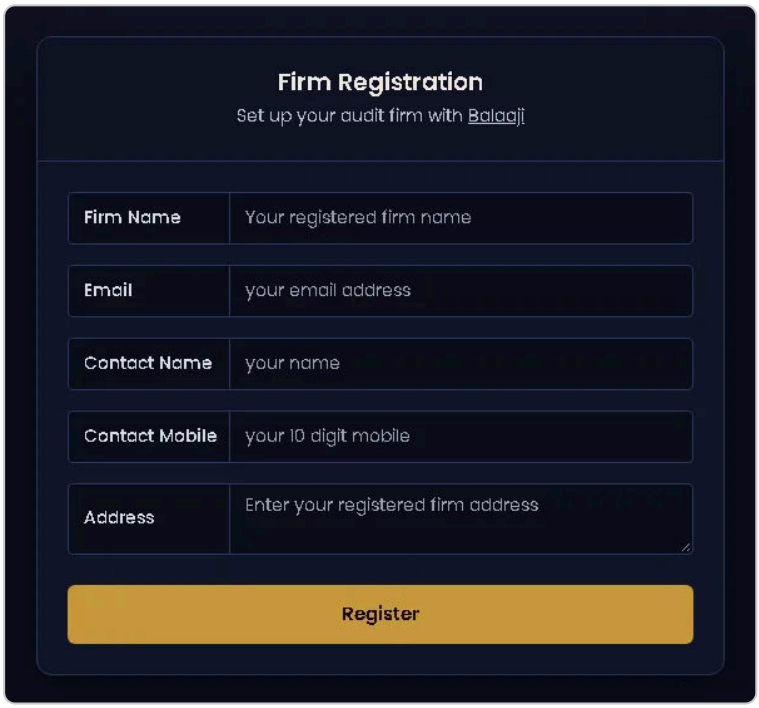
STEP 1

Business Registration

Make a new demo firm. Never use a customer's account.

Open Firm Registration (https://balaaji.ca/register/)

1. **Firm Name**: 8 characters or more
2. **Email**: yours. It becomes the Login ID.
3. **Contact Name** and a 10 digit **Contact Mobile**
4. **Address**: 20 words or more
5. Click **Register**. Copy the **Password** shown.



The Firm Registration form.

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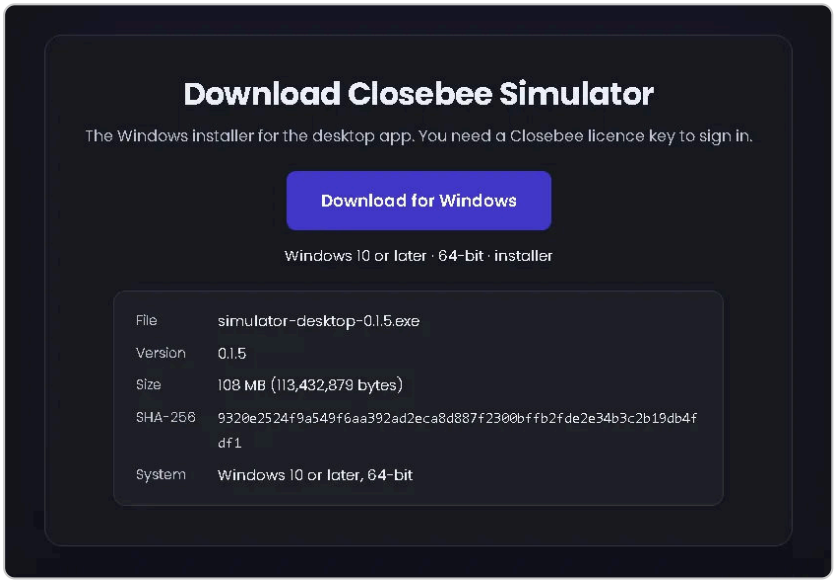
STEP 2

Download the simulator

The Closebee Simulator is a Windows app. It plays the firm's clients.

Download for Windows (https://simulator.closebee.com/#download)

1. Click **Download for Windows** on simulator.closebee.com to get the latest installer (about 108 MB)
2. Run the installer. It puts a **Closebee Simulator** shortcut on the desktop, and the simulator updates itself when a new version comes out.
3. Open **Closebee Simulator**



The download on simulator.closebee.com.

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STEP 3

Take the Admin key

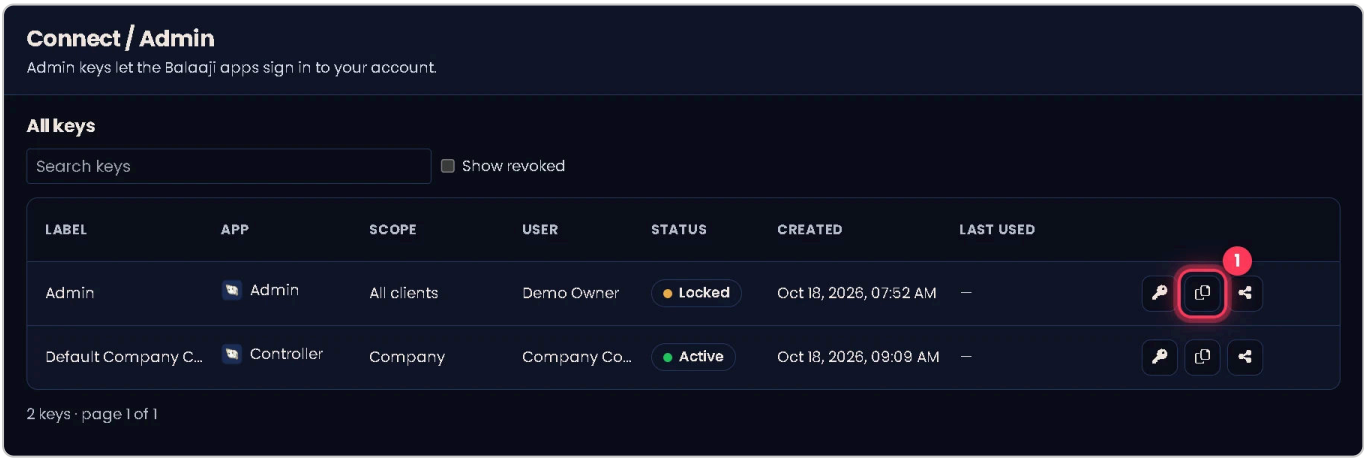
The simulator signs in with the demo firm's key.

Open the Balaaji web app (https://app.balaaji.ca)

1. Sign in with the Login ID and password from step 1
2. Open **Connect > Admin**
3. Under **All keys**, on the **Admin** row, click **Copy**: the middle of the three icons (1)
4. Or click the key icon to open the key, then click **Copy** under the key box (2)



Sign in at app.balaaji.ca.



1. Click Copy on the Admin row.

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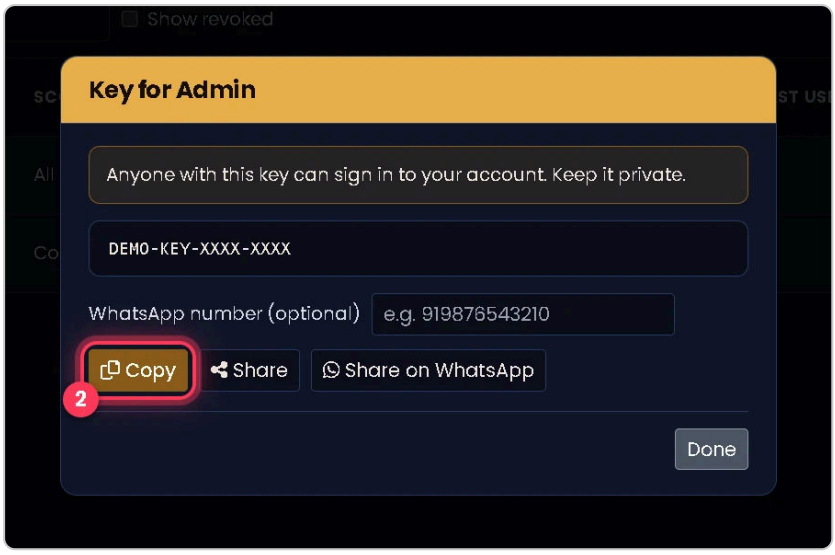

2. Or open the key and copy it here.

> **Keep the key private.** Anyone with it can sign in.

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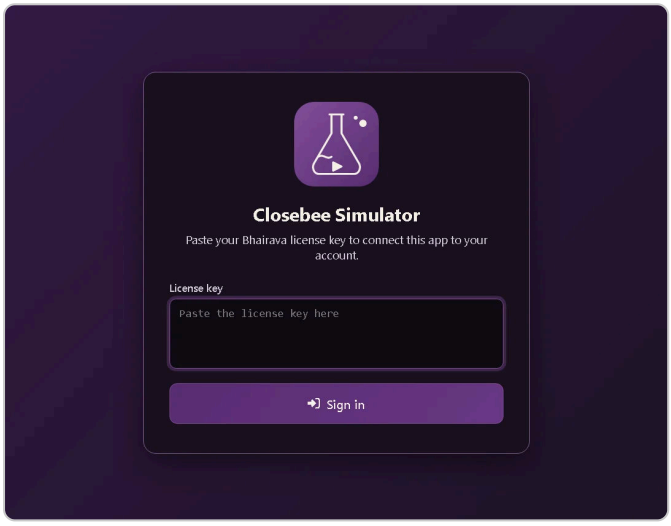
STEP 4

Start the simulator

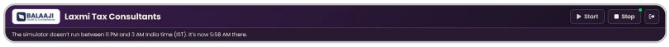
A Balaaji key opens the Balaaji view by itself.

About the simulator (https://simulator.closebee.com/)

1. Paste the key into **License key**
2. Click **Sign in**
3. The Balaaji view opens: **Tenants** and **Log**



Paste the key, click Sign in.



The firm's name, then Start and Stop.

> Nothing runs until you press **Start**.

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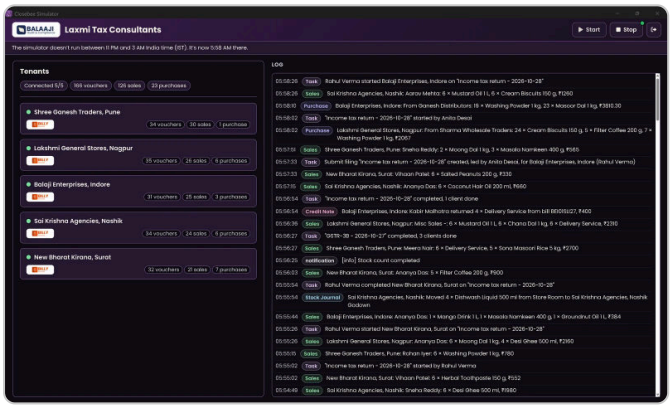
STEP 5

Run the simulation

Five fixed simulator clients keep books and send them to the firm.

1. Click **Start**
2. Each client is reused or created, with a licence key from the firm
3. Each links its licence key and goes **Connected** via the relay
4. Vouchers are written: Sales 70%, Purchase 10%, the rest split
5. Their alerts go to the firm, the auditor
6. Operators are added. Tasks are created, assigned and completed.
7. Click **Stop** to end



Running: Connected 5/5.



The Log: vouchers and Task steps.

> Operators: Priya Sharma, Rahul Verma, Anita Desai. Tasks: Collect client information, Submit filing.

> No runs from 11 PM to 3 AM in the firm's time zone. Demo data is cleaned up each night.

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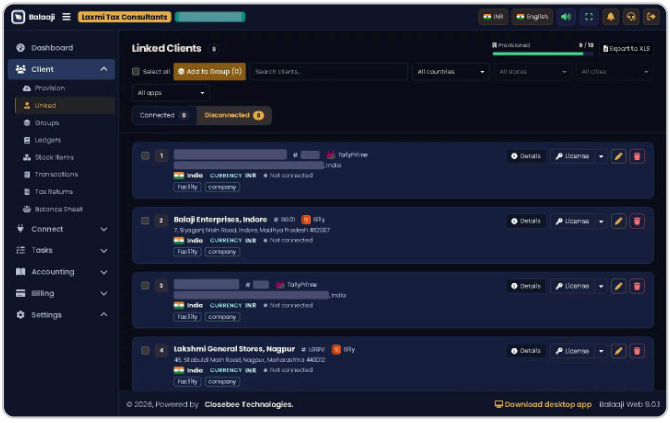
STEP 6

View the output

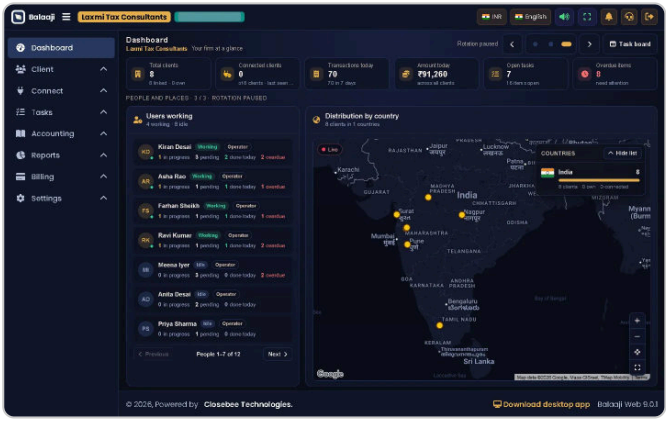
Show the prospect the firm filling up in Balaaji.

Open the Balaaji web app (https://app.balaaji.ca)

1. **Client > Linked**: green dots on connected clients
2. **Dashboard**: the map in **People and places**
3. The bell in the header: transaction alerts
4. **Client > Transactions**: **Month**, **Week** or **Day**. Click a bar for that day.
5. **Client > Ledgers**, **Stock Items**, **Godowns**
6. **Client > Profit & Loss**: gross and net profit for the year so far, from the vouchers the simulator wrote
7. **Tasks > Task Board**: tasks moving



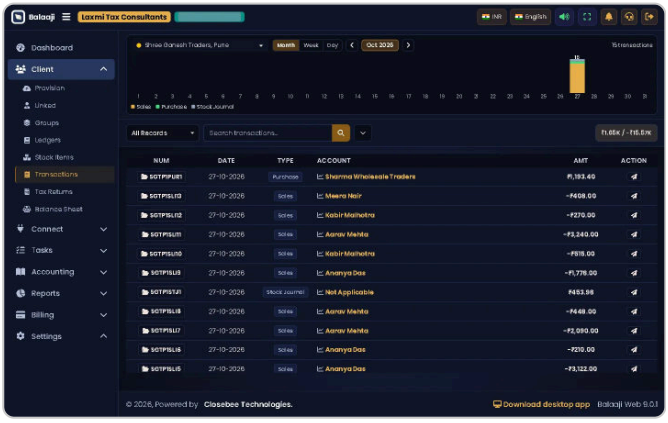
Client > Linked.



Dashboard: the map.



Header alerts.



Transactions: Month.

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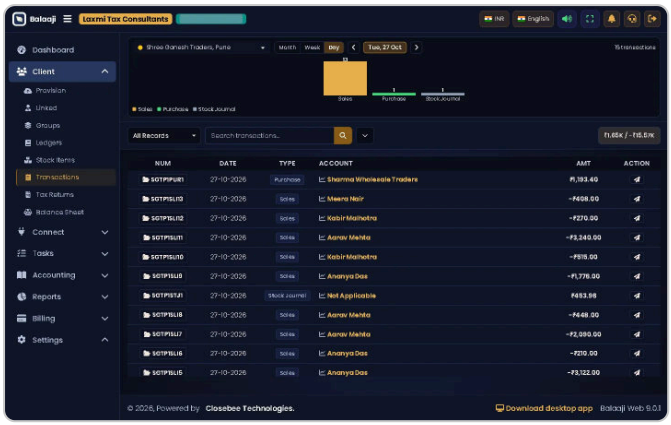
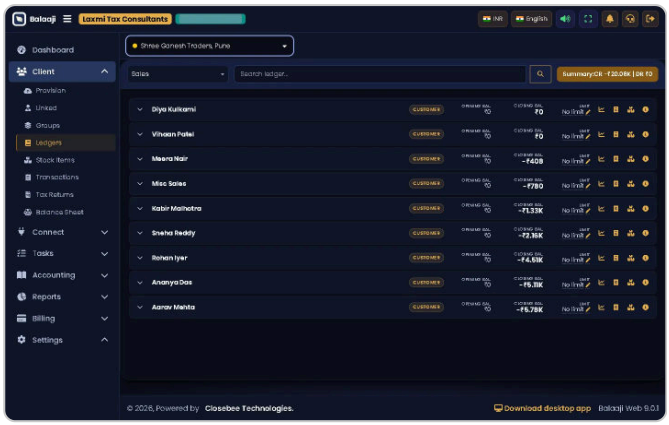
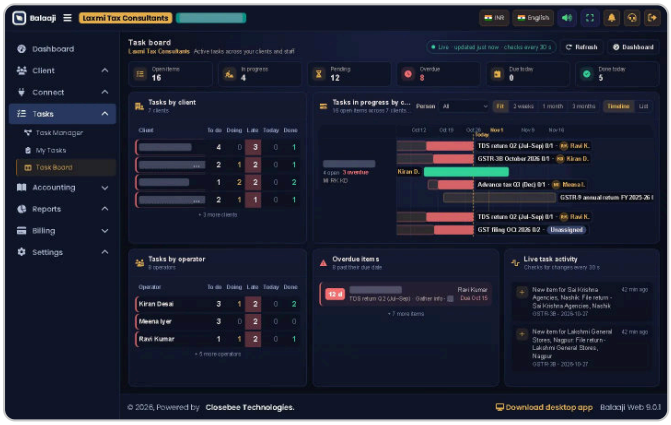


Transactions: Day.



Client > Ledgers.



Tasks > Task Board.

If something goes wrong

You see	Do this
License key is required.	Paste the key, then Sign in.
Cannot reach the platform. Check your connection and try again.	Check the internet, Sign in again.
Your access was revoked or removed. Sign in again with a valid license key.	Copy the key again from Connect > Admin.
The wrong view opens	Wrong product's key. Sign out (top right), use the Balaaji key.
Start is greyed out	Already running, or 11 PM to 3 AM.
Not connected (grey dot)	Normal before Start and after Stop.
Not ready yet — press Start again (amber dot)	Stop, then Start.
The tenants could not be checked. Press Start again.	Check the internet, press Start.
The window is gone	Tray icon, then Open.

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Need further assistance?

Write to us and we will help.

Email tech@closebee.com Contact form

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