


AbacusNext Account Portal User Guide December 2018



AccountProductsProjectsContactsSupport

Account

Balance

Balance	\$ 1302.00
Overdue	\$ 1302.00
Credit	\$ 90.00

INVOICESMAKE PAYMENT

Last Invoice

Invoice Number	1792062
Total	\$ 77.00
Balance	\$ 77.00
Due	10/24/2018
Status	open

Amicus Attorney Flex User	1	\$ 77.00	USD
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MAKE PAYMENT

Downloads

Product Name	Current Version	Available Version	
AMICUS	2016	AMICUS_APC_Version	<div>DOWNLOAD</div>

Quick Links

- Manage Payment methods
- Abacus Private Cloud Knowledge Base
- Abacus Law Knowledge Base
- Amicus Attorney Knowledge Base

Active Subscriptions

Subscription	Product	Quantity	Total Amount	End Date
1734	APC USER Z	3	\$ 60.00 Monthly	
1734	APC AG US...	3	\$ 78.00 Monthly	
1734	MS OFFICE ...	3	\$ 60.00 Monthly	
1734	AV VS 1GB ...	1	\$ 35.00 Monthly	
1734	Z-INACTIVE...	1	\$ 0.00 Monthly	
1734	Z-INACTIVE...	1	\$ 285.00 Monthly	
1734	APC AG US...	1	\$ 47.00 Monthly	
1734	APC USER Z	1	\$ 47.00 Monthly	
1734	MS OFFICE ...	1	\$ 20.00 Monthly	

Company Information

Client ID
5434581

Crivelli and Barbatl
609-271-9164 F
2653 Nottingham Way #10123
Hamilton NJ 08619 , US

Beta Tester Program

The Abacus Beta Program allows you to access beta versions of our services and products ahead of the general public. It is easy to join and easy to leave. To get started, sign up for the beta service(s) of your choice.

Product Name	Status	Enroll/Cancel
AMICUS	Interested ?	<div>CANCEL</div>

Account Dashboard**Make Payment.....3****View Invoices4****Edit Company Information5****Sign up for Software Beta Program6****Support****Create Support Ticket.....7****Manage Open Tickets.....8****Contacts Management.....9****Add New Contact10****Edit Contact11****View Licensed Products12****View Professional Service Projects.....13****Project Details & Gantt View.....14****Virtual Machines Review15****CPU Usage Review16****Drive C: Disk Usage Review17****Physical Memory Review18**

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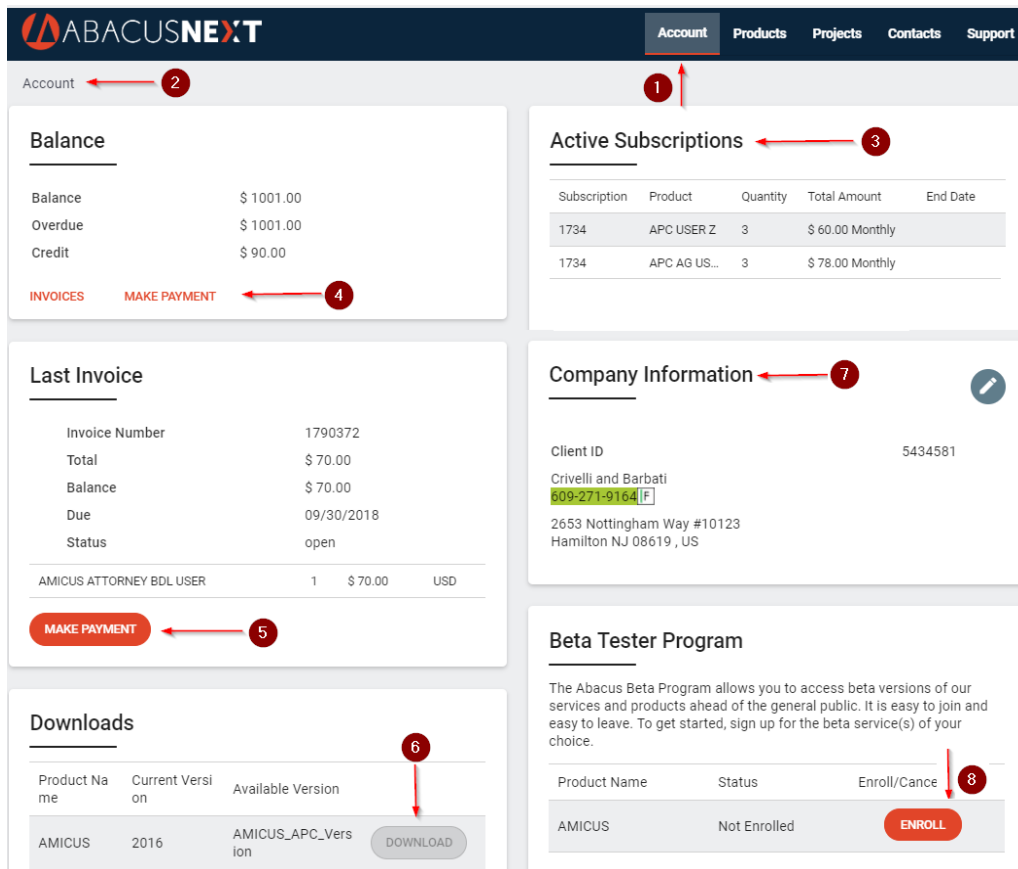
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Account Dashboard

This is the main entry and navigation page within the Account Portal.

You can:

- (1) Navigate to the main page
- (2) View account home page
- (3) Review active subscriptions
- (4) Review your balance
- (5) Review last invoice and make a payment
- (6) Download available product versions
- (7) Review company information and edit as needed
- (8) Review the Beta Tester Program and enroll as needed



The screenshot shows the AbacusNext Account Dashboard with the following sections and callouts:

- Account** (Callout 1): The main navigation header.
- Balance** (Callout 2): A section showing account balance details.

Balance	Amount
Balance	\$ 1001.00
Overdue	\$ 1001.00
Credit	\$ 90.00

 Below the table are links for **INVOICES** and **MAKE PAYMENT** (Callout 4).
- Active Subscriptions** (Callout 3): A table showing active subscriptions.

Subscription	Product	Quantity	Total Amount	End Date
1734	APC USER Z	3	\$ 60.00 Monthly	
1734	APC AG US...	3	\$ 78.00 Monthly	
- Last Invoice** (Callout 5): A section showing the last invoice details.

Field	Value
Invoice Number	1790372
Total	\$ 70.00
Balance	\$ 70.00
Due	09/30/2018
Status	open

 Below the table is a **MAKE PAYMENT** button (Callout 5).
- Company Information** (Callout 7): A section showing company details.

Client ID: 5434581

Crivelli and Barbati
609-271-9164 [F]

2653 Nottingham Way #10123
Hamilton NJ 08619, US
- Downloads** (Callout 6): A table showing available product versions.

Product Name	Current Version	Available Version	Action
AMICUS	2016	AMICUS_APC_Vers ion	DOWNLOAD
- Beta Tester Program** (Callout 8): A section for enrolling in the beta program.

Product Name	Status	Enroll/Cancel
AMICUS	Not Enrolled	ENROLL

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Make Payment

To make a payment, select Make Payment option from the Account page.

Now you can:

- (1) Review the current balance, open invoice totals, and account credit
- (2) Select amount to be paid and payment method
- (3) Review the Pay on Date
- (4) Select Make Payment to submit payment

Make a Payment

Current Balance

\$911.00


Open Invoice Total

\$1,001.00

Unapplied Credit

\$90.00

Payment Methods



Visa ending in 8365

Amount

☒ Current Balance

* Your credit of \$90.00 will be automatically applied

☐ Other Amount

☐ Prepay Amount

Select	Invoice	Due	Total	Balance	Pay	Apply Credit
<input checked="" type="checkbox"/> Apply	1785394	07/11/2018	\$299.00	\$189.00	\$99.00	\$90.00
<input checked="" type="checkbox"/> Apply	1790037	09/24/2018	\$70.00	\$70.00	\$70.00	\$0.00
<input checked="" type="checkbox"/> Apply	1790038	09/24/2018	\$77.00	\$77.00	\$77.00	\$0.00
<input checked="" type="checkbox"/> Apply	1790056	09/24/2018	\$77.00	\$77.00	\$77.00	\$0.00
<input checked="" type="checkbox"/> Apply	1790057	09/24/2018	\$77.00	\$77.00	\$77.00	\$0.00
<input checked="" type="checkbox"/> Apply	1790372	09/30/2018	\$70.00	\$70.00	\$70.00	\$0.00

Pay on date

10/24/2018

MAKE PAYMENT

CANCEL

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View Invoices

To view a list of all invoices, select the invoices link from the Account page.

By selecting an invoice, you can view details, download a PDF and make payment.

[Account](#) > Invoices

Invoices

Invoice Number ↑	Currency	Status	Due Date	Total	Balance
1770883	USD	Paid In Full	11/28/2017	\$ 440.00	\$ 0.00
1776496	USD	Paid In Full	02/20/2018	\$ 4.00	\$ 0.00
1778535	USD	Paid In Full	03/20/2018	\$ 4.00	\$ 0.00
1780575	USD	Paid In Full	04/20/2018	\$ 4.00	\$ 0.00
1782406	USD	Open	05/20/2018	\$ 4.00	\$ 2.00
1784200	USD	Open	06/20/2018	\$ 4.00	\$ 4.00
1784427	USD	Paid In Full	06/27/2018	\$ 65.17	\$ 0.00
1784433	USD	Paid In Full	06/27/2018	\$ 299.00	\$ 0.00

Items per page: 10
 1 - 8 of 8
 < >

[Account](#) > [Invoices](#) > Invoice Details

Invoice Details

Invoice Number

1776496

Total

\$ 4.00

Balance

\$ 0.00

Due

02/20/2018

Status

Paid In Full

Microsoft Office 365 Suite Pro Plus	1	\$ 4.00	USD
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MAKE PAYMENT

CANCEL

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Edit Company Information

To edit your Company information, select Edit Company from the Account page.

Here you can:

- (1) Review Name, Account Passphrase, Phone, Email, and Address
- (2) Select Save to apply the updates

Edit Company 1

Client ID

5434581

Client Name

Crivelli and Barbati

Account Passphrase

All users will be required to provide this passphrase when contacting AbacusNext.

Phone Number *

609-271-9164

555-555-5555 [F] or 555-555-5555 [F] ext 5555

Email *

fcrivelli@cbnjlaw.com

Address1 *

2653 Nottingham Way

Address2

#10123

City *

Hamilton

Country *

US

State or Province *

NJ

Zip *

08619

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SAVE

CANCEL

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Sign up for Software Beta Program

To request to join an open AbacusNext Beta program, you can Enroll from the Account page.

Beta Program submissions are received by the product team, reviewed and approved so that you receive Beta software versions as they become available.

Beta Tester Program

The Abacus Beta Program allows you to access beta versions of our services and products ahead of the general public. It is easy to join and easy to leave. To get started, sign up for the beta service(s) of your choice.

Product Name	Status	Enroll/Cancel
Shane	Not Enrolled	ENROLL

Enroll in Beta Tester Program

Beta Program Terms and Conditions

TERMS AND CONDITIONS GOVERNING ABACUS DATA SYSTEMS, INC.'S BETA TESTER PROGRAM

1.0 SCOPE. These Terms and Conditions govern all aspects of Beta Tester's participation in the Abacus Data Systems, Inc.'s Beta Tester Program. Hereinafter, Abacus Data Systems, Inc. shall be referred to as "Abacus" and the Beta Tester Program shall be referred to as "the Program."

2.0 EFFECTIVE DATE AND TERMINATION.

2.1 Effective Date. Beta Tester's participation in the Program shall commence on the date that Abacus confirms in writing that Beta Tester has been accepted into the Program.

2.2 Termination. Either party may terminate Beta Tester's participation in the Program at any time by providing written notice to the other party. Furthermore, Beta Tester's participation in the Program shall terminate wherein Beta Tester no longer has an active subscription or Maintenance Plan (where applicable) for Abacus products.

3.0 BENEFITS TO BETA TESTER. Beta Tester will receive: early access to new features and functionality of Abacus products or services Beta Tester agrees to test (and which Abacus, at its sole discretion, authorizes Beta Tester to test); direct access to the Abacus Development Team for the particular product(s) or service(s) Beta Tester is testing; and direct access to tier 2 level Client Service Engineers for that product(s) or service(s) Beta Tester is testing. Beta Tester's use of the particular Abacus product or service shall otherwise be governed by the applicable Terms and Conditions or End User License Agreements applicable to the particular product(s) or service(s), however Beta Tester's license to use the particular Beta product or service expires upon notification the particular Beta project is complete.

4.0 BETA TESTER QUALIFICATIONS AND RESPONSIBILITIES

4.1 Qualification. Beta Tester participation in the Program is contingent upon Beta Tester having an active and valid subscription or Maintenance Plan (where applicable) for Abacus products or services.

4.2 Responsibilities. As a participant in the Program, Beta Tester shall have the following responsibilities:

(a) Installation: Where applicable, Beta Tester shall allow Abacus to install all new versions of certain agreed upon Abacus beta products and/or services on Beta Tester's server, network or environment (whichever is applicable) within three (3) business days from when the new version of the agreed upon Abacus product or service is made available. This can be installed in Beta Tester's

☐ By submitting this information, you are applying to participate in the Abacus Beta Tester Program. If accepted to participate in the Abacus Beta Tester Program, you hereby acknowledge such participation shall be governed by the Beta Program Terms & Conditions

* = Required Field

[CANCEL](#)
[SUBMIT](#)

Beta Tester Program

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Product Name	Status	Enroll/Cancel
AMICUS	Interested ?	CANCEL

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Create Support Ticket

Support tickets can be used to add users, applications or files. They can also help with account or password resets.

To create and manage support tickets:

- (1) Select Support on the top menu ribbon
- (2) Review support ticket area
- (3) Under "New Ticket" section, create a New Support Ticket by entering the following information:
 - Subject, Type, Product, Category, Message, CC
- (4) Under the "Tickets" section, you can review all your open submitted tickets
 - Select the ticket desired and it will open the ticket for review.

You may also find the following support forms helpful: <https://www.cloudninerealtime.com/service-forms/>

The screenshot displays the AbacusNext Support Portal interface. At the top, the navigation bar includes 'Account', 'Products', 'Projects', 'Contacts', and 'Support'. The 'Support' tab is selected, indicated by a red arrow and a red circle with the number 1. Below the navigation bar, the 'Support' section is visible, with a red arrow and a red circle with the number 2 pointing to the 'Support' link. The 'New Ticket' section is highlighted with a red arrow and a red circle with the number 3. It contains fields for 'Subject *', 'Type *', 'Product *', 'Category *', 'Contact *' (Frank Crivelli), 'Contact Phone *' (609-271-9162), 'Message *', and 'CC'. A 'SAVE' button is at the bottom. The 'Tickets' section is highlighted with a red arrow and a red circle with the number 4. It shows a table of tickets with columns: Case Number, Subject, User, Incident Date, Assigned To, and Status. The table lists three tickets: N450350, N450335, and N450334.

Case Number ↓	Subject	User	Incident Date	Assigned To	Status
N450350	manjari test	Frank Crivelli	10/09/2018	Quinn Sellers	Not Started
N450335	test	Frank Crivelli	10/04/2018	Amicus Client Services	Not Started
N450334	testID	Frank Crivelli	10/04/2018	Abacus Client Services	Not Started

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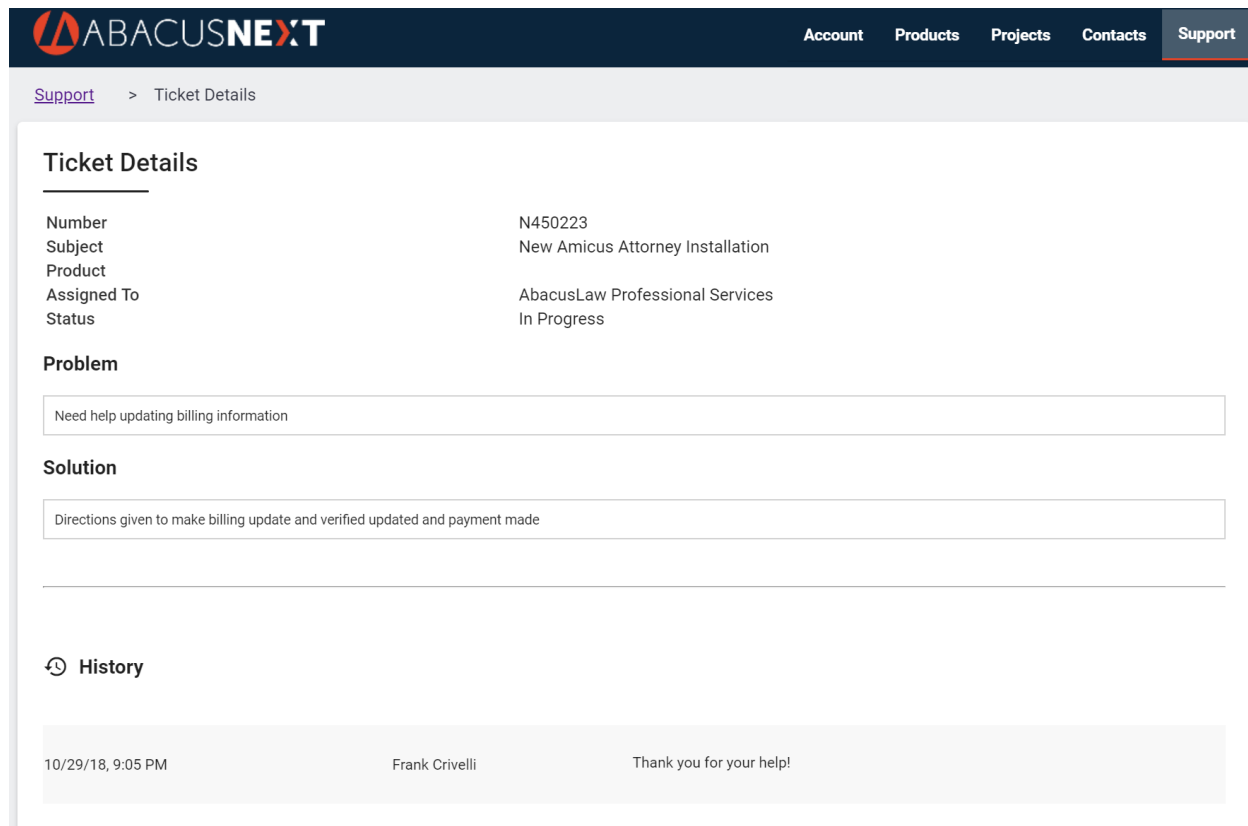
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Manage Open Tickets

To review open support tickets under the Tickets section, click on an open ticket to get to the Ticket Details screen to review the following information:

- Ticket Details (e.g. No, Subject, Product, Assigned To, Status)
- Problem description
- Solution
- History

You can also add comments to provide additional information for an open ticket.



The screenshot shows the AbacusNext web application interface. At the top is a dark blue navigation bar with the AbacusNext logo on the left and a menu of links (Account, Products, Projects, Contacts, Support) on the right. The 'Support' link is highlighted. Below the navigation bar, a breadcrumb trail shows 'Support' followed by a right arrow and 'Ticket Details'. The main content area is titled 'Ticket Details' and contains the following information:

Number	N450223
Subject	New Amicus Attorney Installation
Product	
Assigned To	AbacusLaw Professional Services
Status	In Progress

Below the table, there is a section for the 'Problem' description, which reads: 'Need help updating billing information'. This is followed by a 'Solution' section with the text: 'Directions given to make billing update and verified updated and payment made'. At the bottom of the screen, there is a 'History' section with a clock icon. It contains a single entry dated '10/29/18, 9:05 PM' by 'Frank Crivelli' with the comment 'Thank you for your help!'.

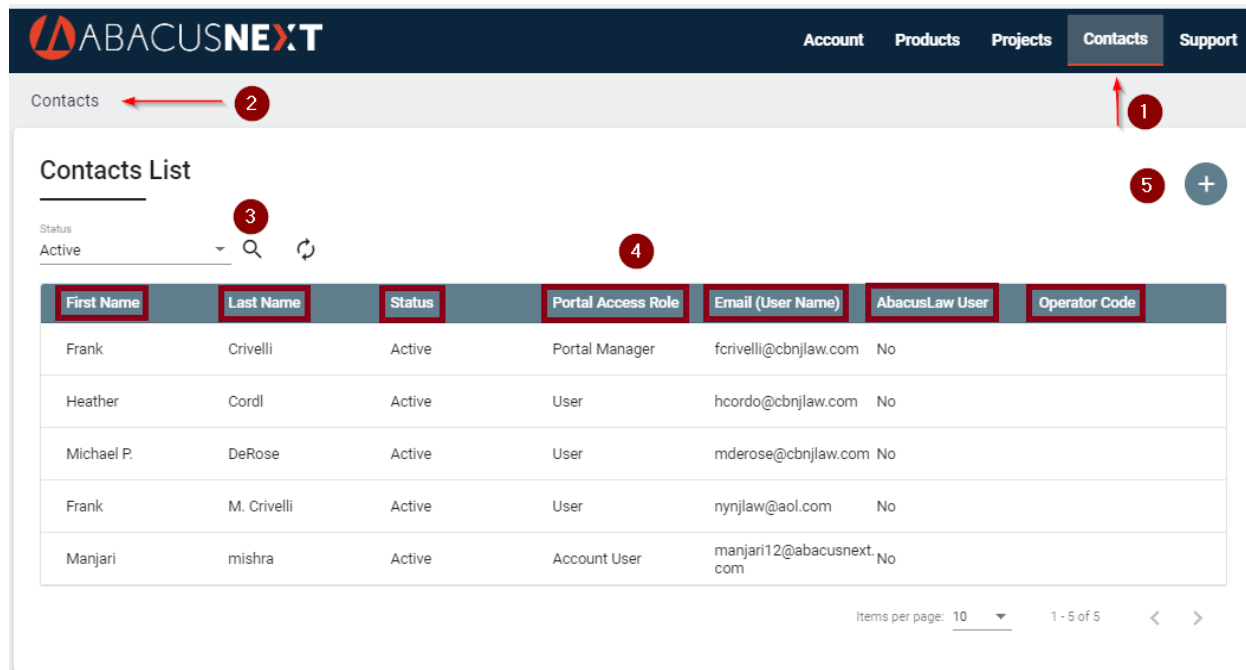
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Contacts Management

To review and update your Contacts:

- (1) Select Contacts in the top menu ribbon
- (2) Go to the Contacts List
- (3) Search for a specific Contact (e.g. Active, Inactive, All)
- (4) Review the contact details (e.g. First/Last Name, Status, Portal Access Role, Email, AbacusLaw User, Operator Code)
- (5) Click on "Add New" to add a new contact.
(To Edit a contact, you can click onto the existing contact)



The screenshot shows the AbacusNext web application interface. At the top is a dark blue navigation bar with the AbacusNext logo and a menu with links: Account, Products, Projects, **Contacts**, and Support. Below this is a light gray header area with the word "Contacts" and a left-pointing arrow, labeled with a red circle and the number 2. To the right of "Contacts" is a red circle with the number 1. Below the header is the "Contacts List" section. It features a search bar with a dropdown menu showing "Status" and "Active", a magnifying glass icon, and a refresh icon, labeled with a red circle and the number 3. To the right of the search bar is a red circle with the number 4. Below the search bar is a table with the following columns: First Name, Last Name, Status, Portal Access Role, Email (User Name), AbacusLaw User, and Operator Code. The table contains five rows of contact data. To the right of the table is a red circle with the number 5 and a plus sign icon. At the bottom right of the table, there is a pagination control showing "Items per page: 10" and "1 - 5 of 5".

First Name	Last Name	Status	Portal Access Role	Email (User Name)	AbacusLaw User	Operator Code
Frank	Crivelli	Active	Portal Manager	fcrivelli@cbnjlaw.com	No	
Heather	Cordl	Active	User	hcordo@cbnjlaw.com	No	
Michael P.	DeRose	Active	User	mderose@cbnjlaw.com	No	
Frank	M. Crivelli	Active	User	nynjlaw@aol.com	No	
Manjari	mishra	Active	Account User	manjari12@abacusnext.com	No	

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Add New Contact

To add a new Contact, select Add New Contact from previous screen, enter the information and Save.

- Email (User Name)
- Password
- First Name; Last Name
- Title
- Phone
- Role

[Contacts](#) > New Contact

New Contact

Email (User Name) *

Password *

First Name *

Last Name *

Title *

Phone *
609-271-9164
555-555-5555 [F] or 555-555-5555 [F] ext 5555

Select Role *

* = Required Field

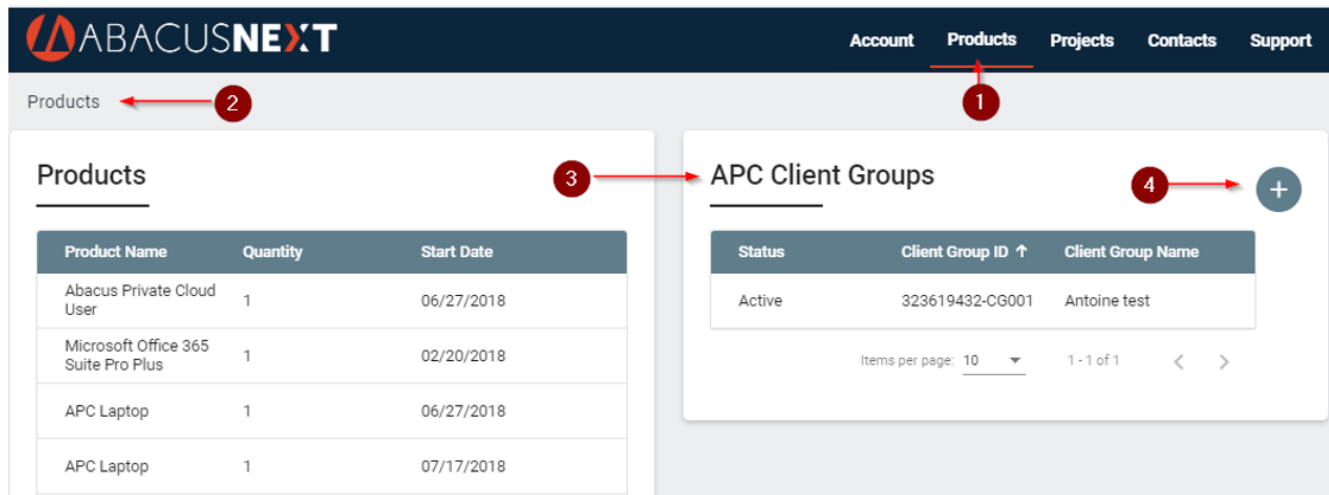
SAVE
CANCEL

Add New Contact

Create a new Client Group that can be associated to the new Contact.

To do so:

- (1) Select Products in the top Menu
- (2) Go to the Products screen
- (3) Go to the Client Group in the top right corner
- (4) Click on Add New to add a new Client Group
 1. The New Client Group screen opens.
 2. Enter the Client Group.
 3. Select OK to save the new Client Group.



The screenshot shows the AbacusNext portal interface. The top navigation bar includes the AbacusNext logo and links for Account, Products, Projects, Contacts, and Support. The main content area is divided into two panels. The left panel, titled 'Products', contains a table with the following data:

Product Name	Quantity	Start Date
Abacus Private Cloud User	1	06/27/2018
Microsoft Office 365 Suite Pro Plus	1	02/20/2018
APC Laptop	1	06/27/2018
APC Laptop	1	07/17/2018

The right panel, titled 'APC Client Groups', contains a table with the following data:

Status	Client Group ID ↑	Client Group Name
Active	323619432-CG001	Antoine test

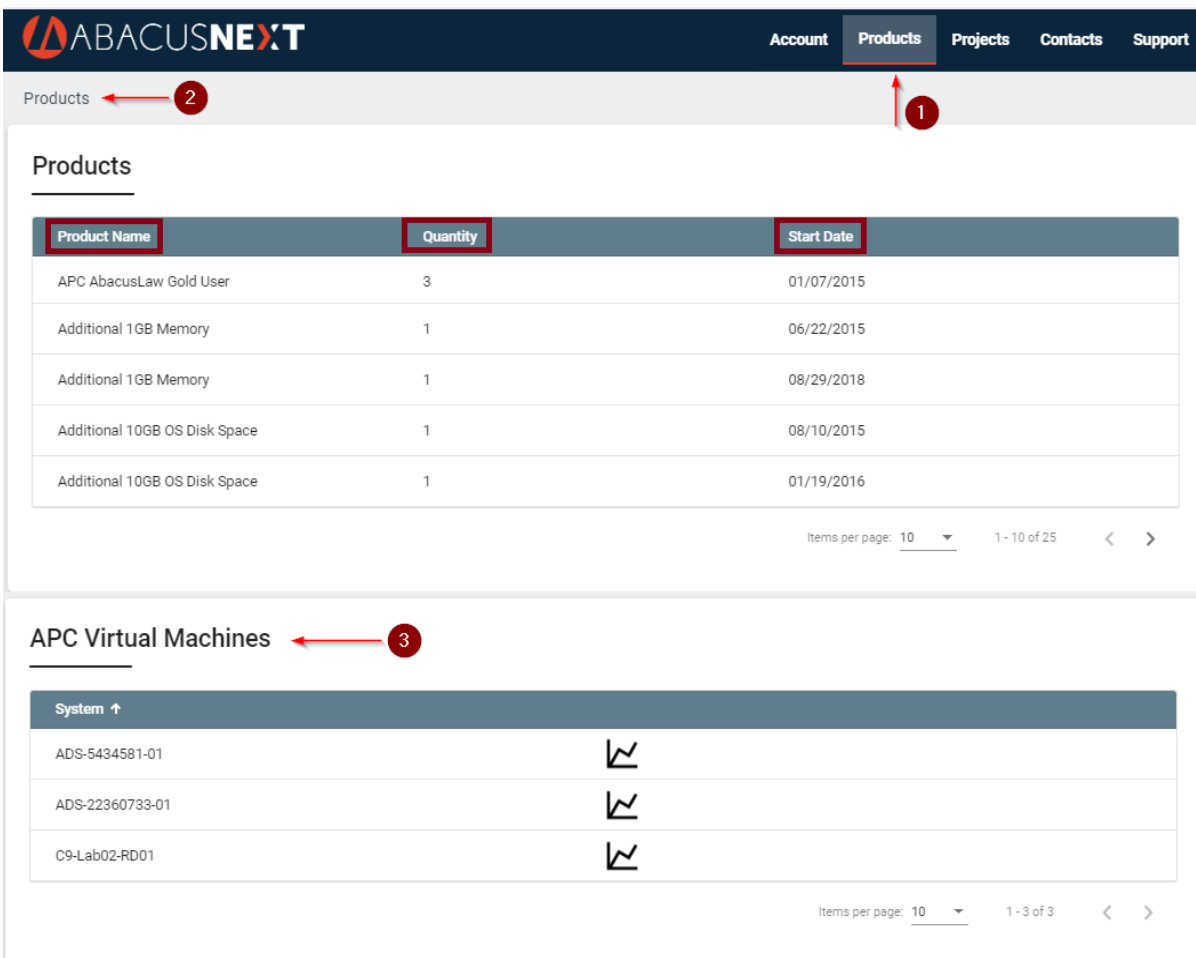
Below the table, there is a pagination control showing 'Items per page: 10' and '1 - 1 of 1'. A red circle with the number 4 points to a '+' button in the top right corner of the 'APC Client Groups' panel.

View Licensed Products

To view Product details at any time, access your personal Products page.

To do so:

- (1) Select Products in the top Menu
- (2) Go to the Products screen and review the subscribed Product Name, Quantity, and Start Date
- (3) Go to the APC Virtual Machines section and review the VM details



Products

Product Name	Quantity	Start Date
APC AbacusLaw Gold User	3	01/07/2015
Additional 1GB Memory	1	06/22/2015
Additional 1GB Memory	1	08/29/2018
Additional 10GB OS Disk Space	1	08/10/2015
Additional 10GB OS Disk Space	1	01/19/2016

Items per page: 10 1 - 10 of 25 < >

APC Virtual Machines

System ↑	
ADS-5434581-01	⌵
ADS-22360733-01	⌵
C9-Lab02-RD01	⌵

Items per page: 10 1 - 3 of 3 < >

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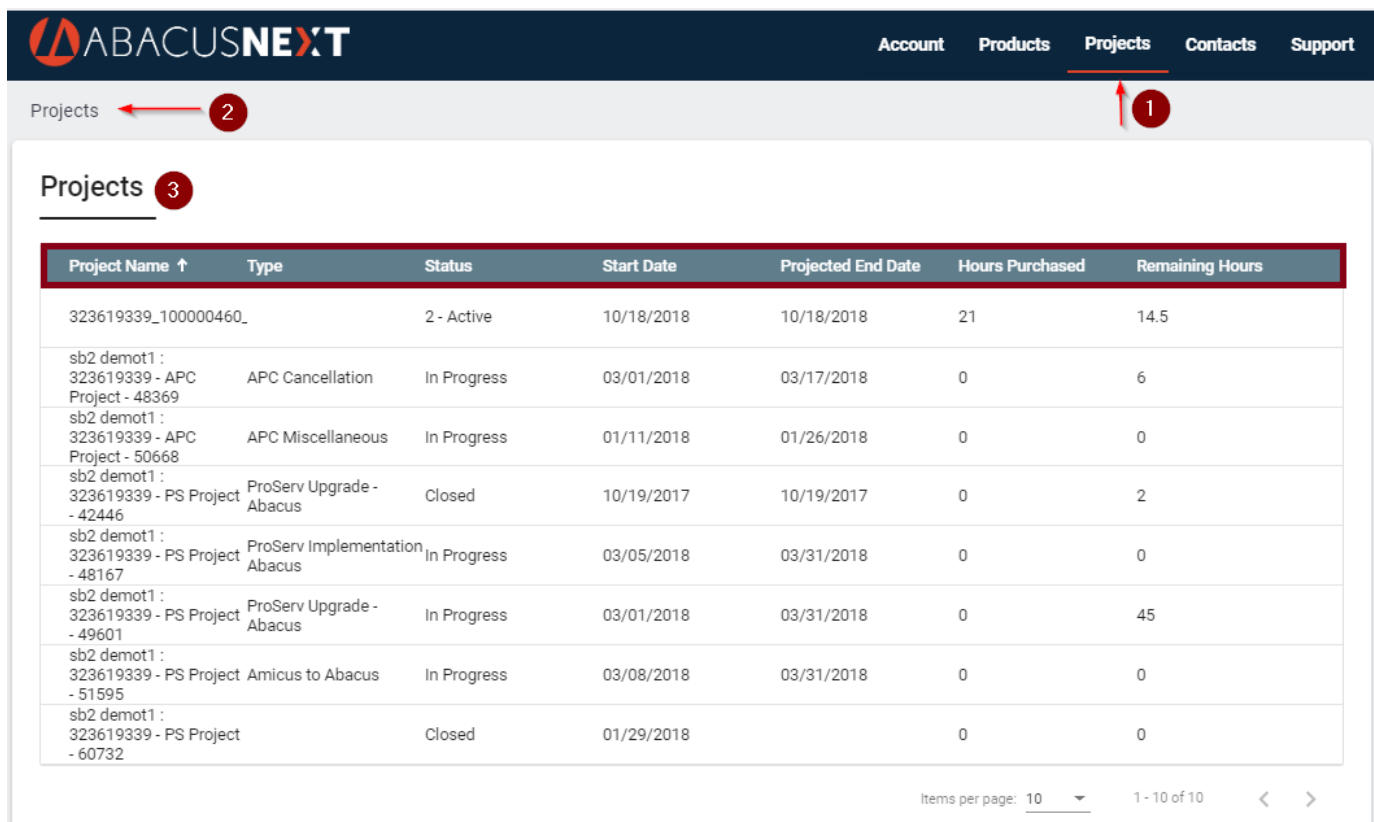
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View Professional Service Projects

To review Project information at any time, you can access your personal Projects page.

To do so:

- (1) Select Projects in the top Menu
- (2) Go to the Projects area
- (3) Under Projects section, review all outstanding Projects. Clicking into a specific Project will display its details and status.



Projects

Project Name ↑	Type	Status	Start Date	Projected End Date	Hours Purchased	Remaining Hours
323619339_100000460_		2 - Active	10/18/2018	10/18/2018	21	14.5
sb2 demot1 : 323619339 - APC Project - 48369	APC Cancellation	In Progress	03/01/2018	03/17/2018	0	6
sb2 demot1 : 323619339 - APC Project - 50668	APC Miscellaneous	In Progress	01/11/2018	01/26/2018	0	0
sb2 demot1 : 323619339 - PS Project - 42446	ProServ Upgrade - Abacus	Closed	10/19/2017	10/19/2017	0	2
sb2 demot1 : 323619339 - PS Project - 48167	ProServ Implementation Abacus	In Progress	03/05/2018	03/31/2018	0	0
sb2 demot1 : 323619339 - PS Project - 49601	ProServ Upgrade - Abacus	In Progress	03/01/2018	03/31/2018	0	45
sb2 demot1 : 323619339 - PS Project - 51595	Amicus to Abacus	In Progress	03/08/2018	03/31/2018	0	0
sb2 demot1 : 323619339 - PS Project - 60732		Closed	01/29/2018		0	0

Items per page: 10 1 - 10 of 10

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Projects Details & Gantt Review

(1) In the Project Details screen, you can review the following:

- Name (of Project)
- Type (of Project)
- Status
- Owner Name and Email
- Hours Purchased | Estimated Hours
- Start Date | Projected End Date
- Progress %

(2) A Gantt Chart view of the project is right below with all the associated tasks.

[Projects](#) > Project Details

Project Details 1

Name
sb2 demot1 : 323619339 - APC Project - 48369

Type
APC Cancellation

Status
In Progress

Owner Name
Micheline Abiaad

Owner Email
mabiaad@abacusnext.com

Hours Purchased
0

Estimated Hours
6

Start Date
03/01/2018

Projected End Date
03/17/2018

Progress: 0%

sb2 demot1 : 323619339 - APC Project - 48369 2

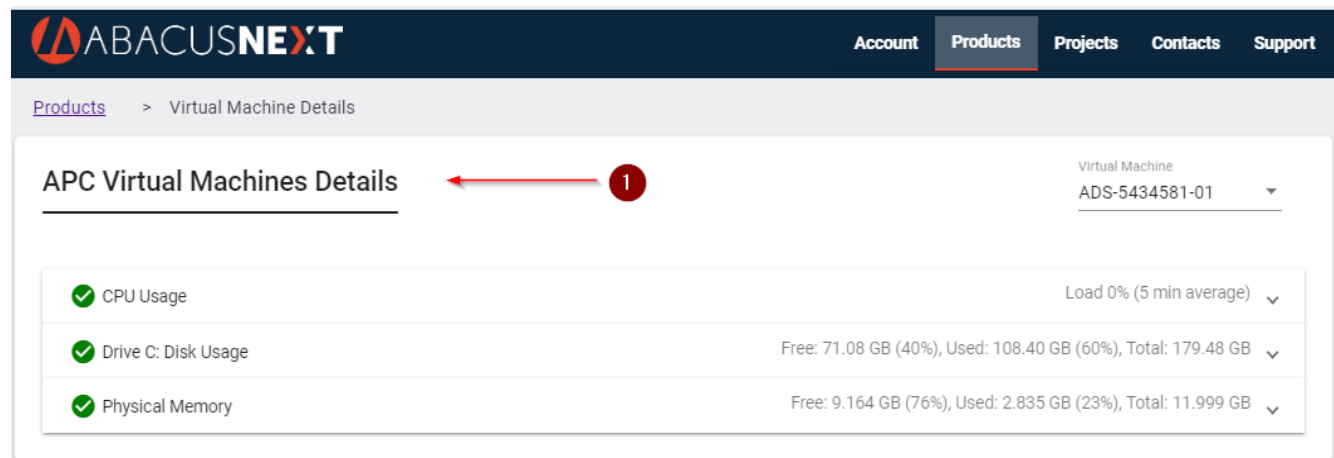
TASK	START DATE	END DATE	DURATION	PROGRESS	28 FEB	01 MAR	02 MAR	03 MAR
task1	03/01/18	03/01/18	3 hours	0.00%		task1		
milestone2	03/01/18	03/01/18	1 hour	0.00%		milestone2		
milestone1	03/01/18	03/01/18	1 hour	0.00%		milestone1		
milestone1 : task3	03/01/18	03/01/18	1 hour	0.00%		milestone1 : task3		

Virtual Machines Review

(1) To review Virtual Machines Details section, select Virtual Machine Details and review the following:

- CPU Usage
- Drive C: Disk Usage
- Physical Memory

** Please note that some of the follow is future functionality for C9 environments.



APC Virtual Machines Details

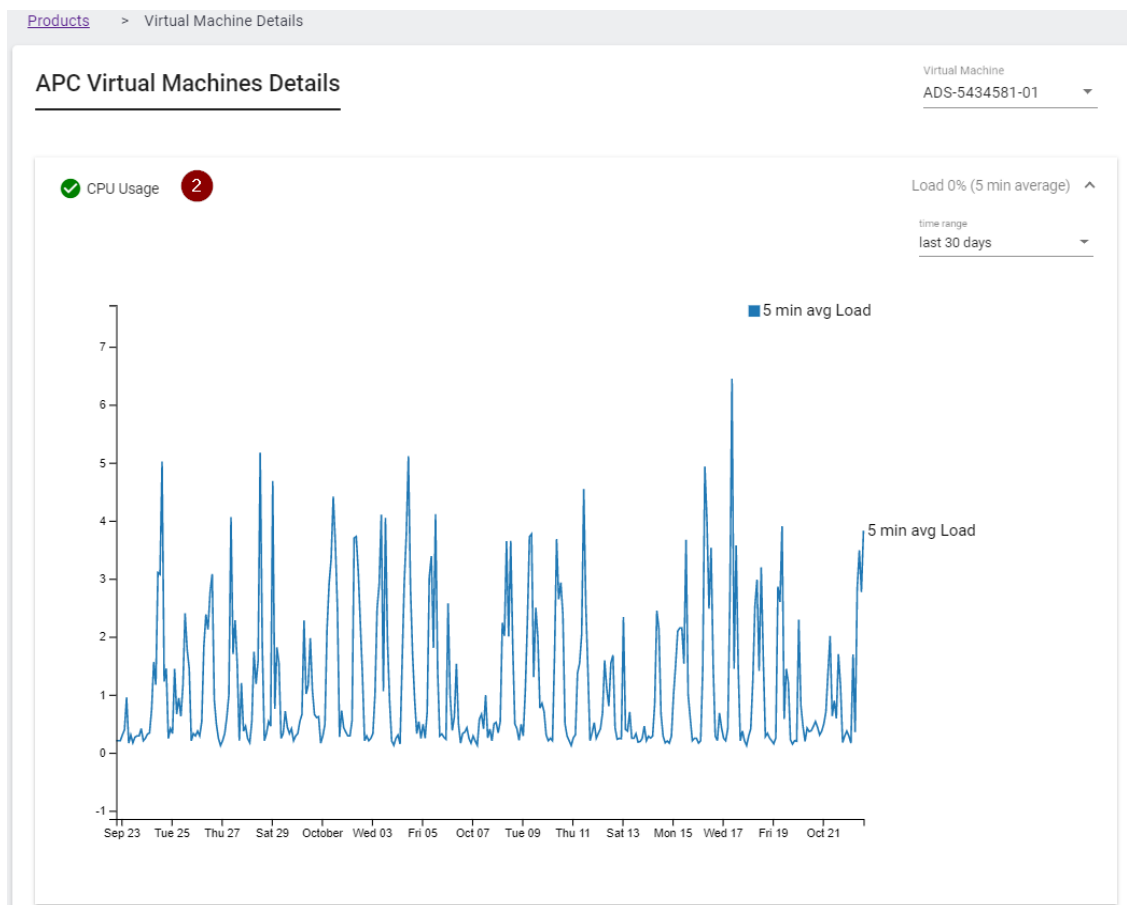
Virtual Machine: ADS-5434581-01

✓ CPU Usage	Load 0% (5 min average)
✓ Drive C: Disk Usage	Free: 71.08 GB (40%), Used: 108.40 GB (60%), Total: 179.48 GB
✓ Physical Memory	Free: 9.164 GB (76%), Used: 2.835 GB (23%), Total: 11.999 GB

CPU Usage Review

(2) You can expand the CPU Usage section to review the following:

- Virtual Machine ID
- 5 Minutes Average Load
- Time Range (e.g. last 30 days, etc.)



Drive C: Disk Usage Review

(3) You can expand the Drive C: Disk Usage section to review the following:

- Virtual Machine ID
- C:\ Used Space (e.g. Free, Used, and Total)
- Time Range (e.g. last 30 days, etc.)

