AbacusNext
Account Portal
User Guide
December 2018

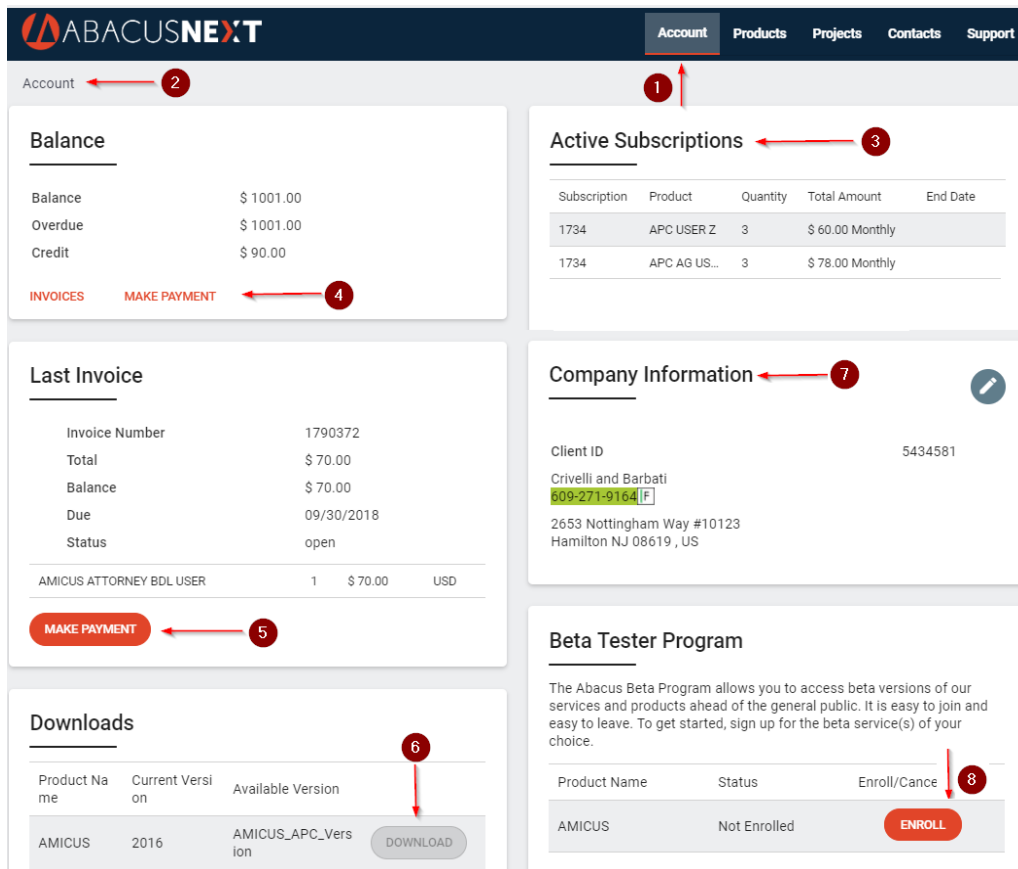# Account Dashboard

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

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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 ❶

Current Balance	**$911.00**
Open Invoice Total	$1,001.00
Unapplied Credit	$90.00

Payment Methods ❷

⦿ VISA Visa ending in 8365

Amount ❸

⦿ Current Balance * Your credit of $90.00 will be automatically applied

○ Other Amount

○ Prepay Amount

Select	Invoice	Due	Total	Balance	Pay	Apply Credit
☑ Apply	1785394	07/11/2018	$299.00	$189.00	$99.00	$90.00
☑ Apply	1790037	09/24/2018	$70.00	$70.00	$70.00	$0.00
☑ Apply	1790038	09/24/2018	$77.00	$77.00	$77.00	$0.00
☑ Apply	1790056	09/24/2018	$77.00	$77.00	$77.00	$0.00
☑ Apply	1790057	09/24/2018	$77.00	$77.00	$77.00	$0.00
☑ Apply	1790372	09/30/2018	$70.00	$70.00	$70.00	$0.00

Pay on date ❹

❺ 10/24/2018

[MAKE PAYMENT] (CANCEL)

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.

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

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 Progream, you hereby acknowledge such participation shall be goverened by the Beta Program Terms & Conditions

*= Required Field

CANCEL   SUBMIT

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 ⓘ	CANCEL

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.

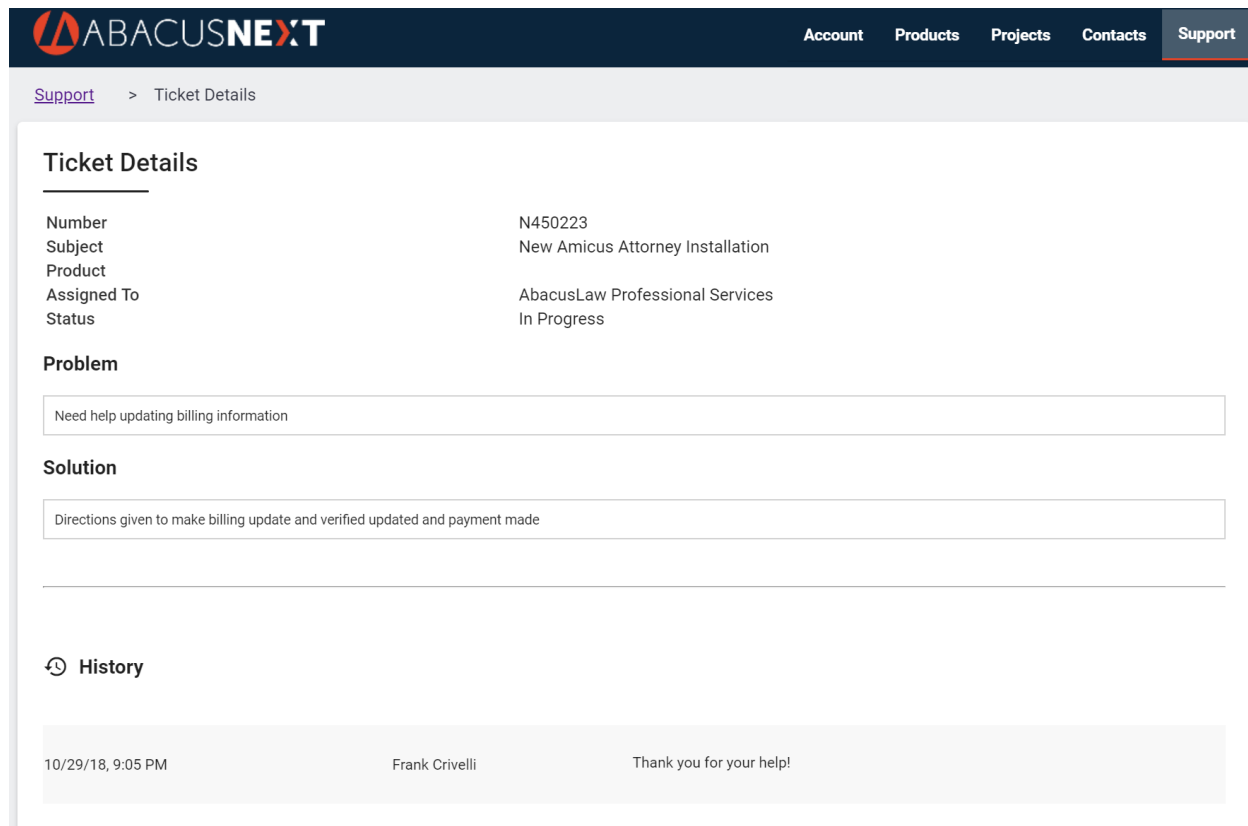You may also find the following support forms helpful: https://www.cloudninerealtime.com/service-forms/

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.
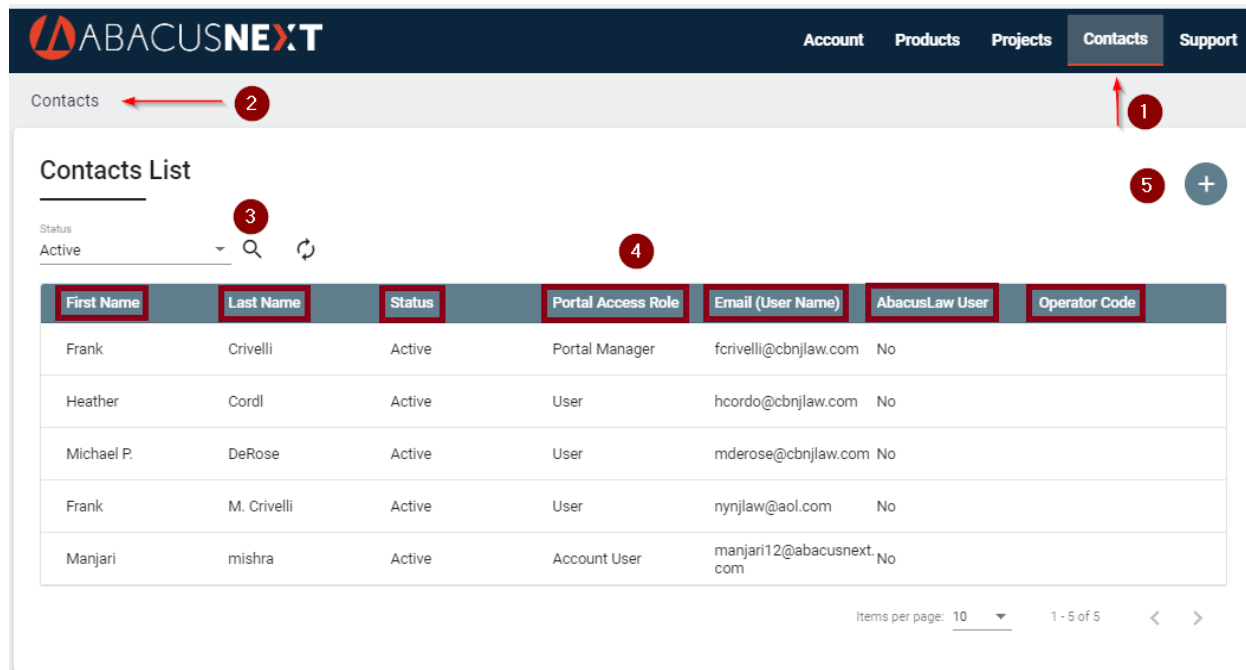
Contacts Management

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)

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
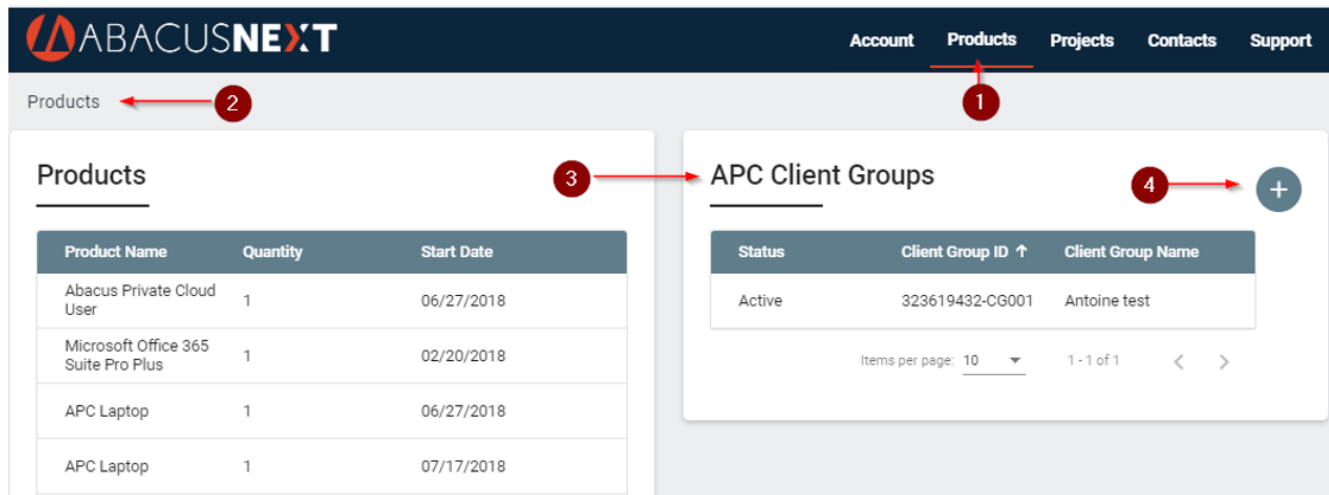
SAVE   CANCEL

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.

Edit Contact

To edit an existing Contact, click on a contact to edit the information and Save.
You may edit the following:

- Email (User Name)
- First Name; Last Name
- Title
- Phone; Address
- Role
- Inactive (set to Inactivate contact)

Contacts   >   Edit Contact

Edit Contact   ☐ Inactive

Email (User Name) *
fcrivelli@cbnjlaw.com

First Name *
Frank

Last Name *
Crivelli

User ID
2069294

Title *

Phone *
609-271-9162

555-555-5555 F or 555-555-5555 F ext 5555

Address1 *

Address2

City *

Country *
US   ▼ State or Province *   ▼ Zip *

Select Role *
Portal Manager   ▼

* = Required Field

SAVE   CANCEL

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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
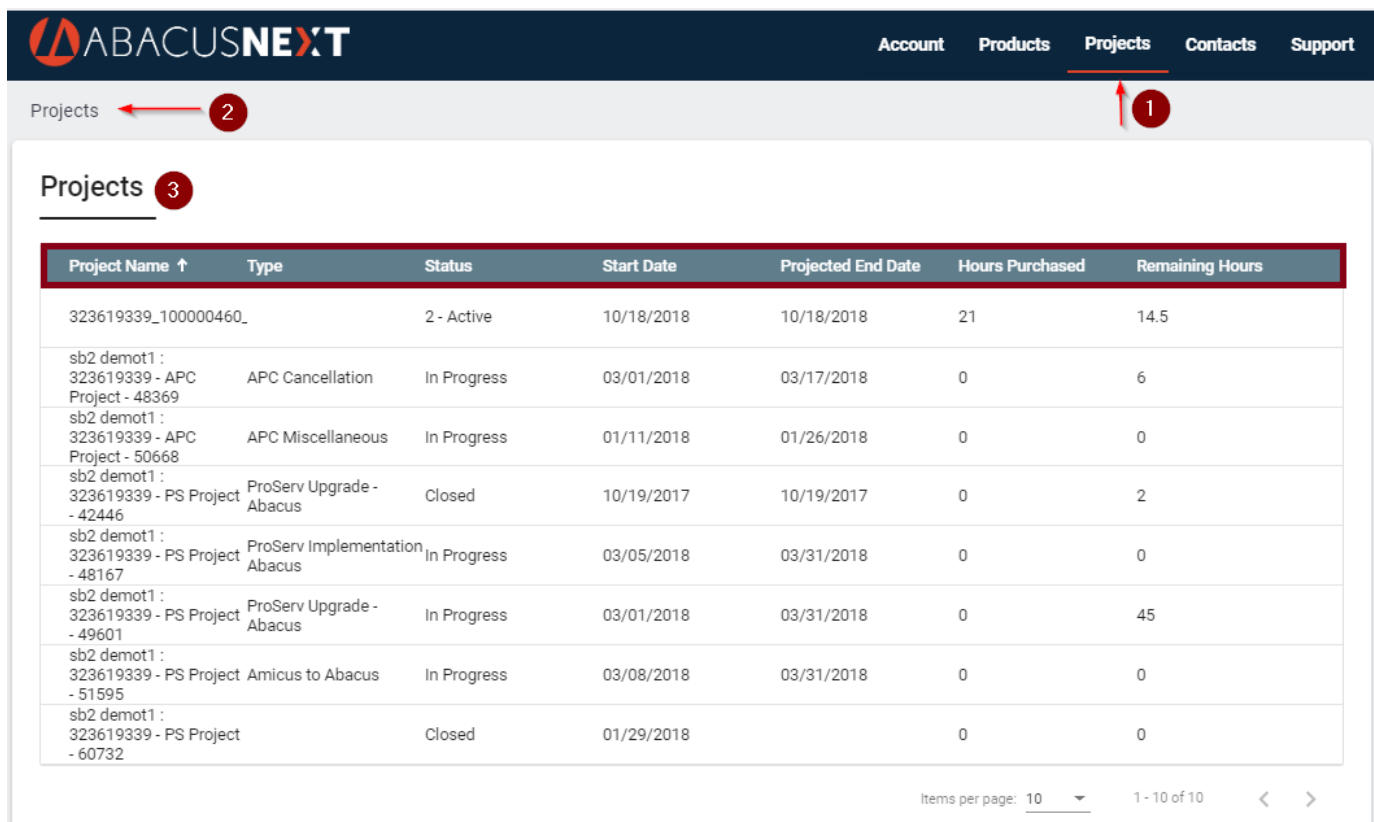
View Professional Service Projects

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.

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

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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.
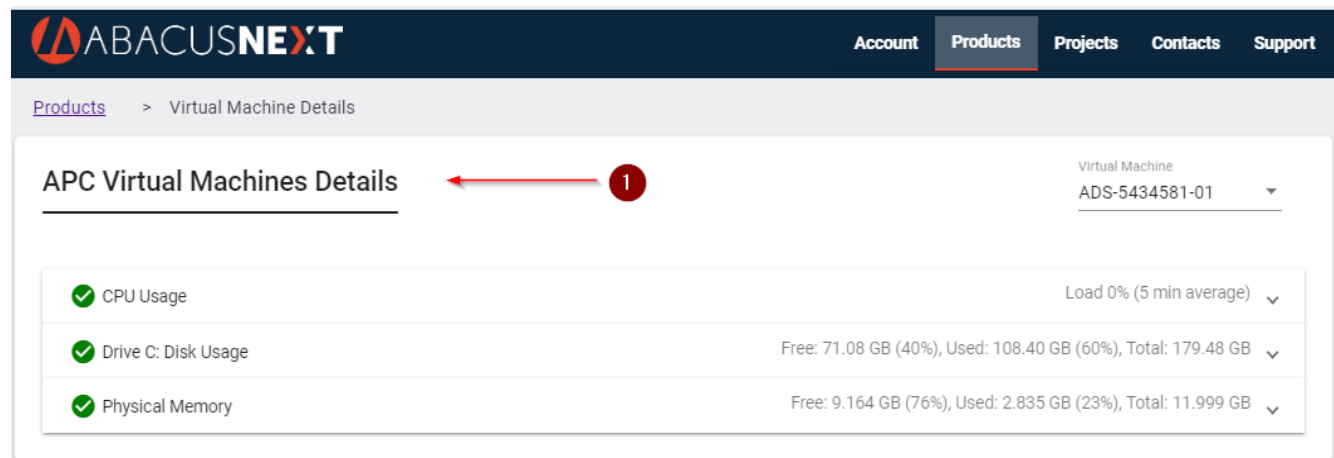
Virtual Machines Review

(1) To review Virtual Machines Details section, select Virtual Machine Details and review the following:
- CPU Usage
- Drive C: Disk Usage
- Physical Memory

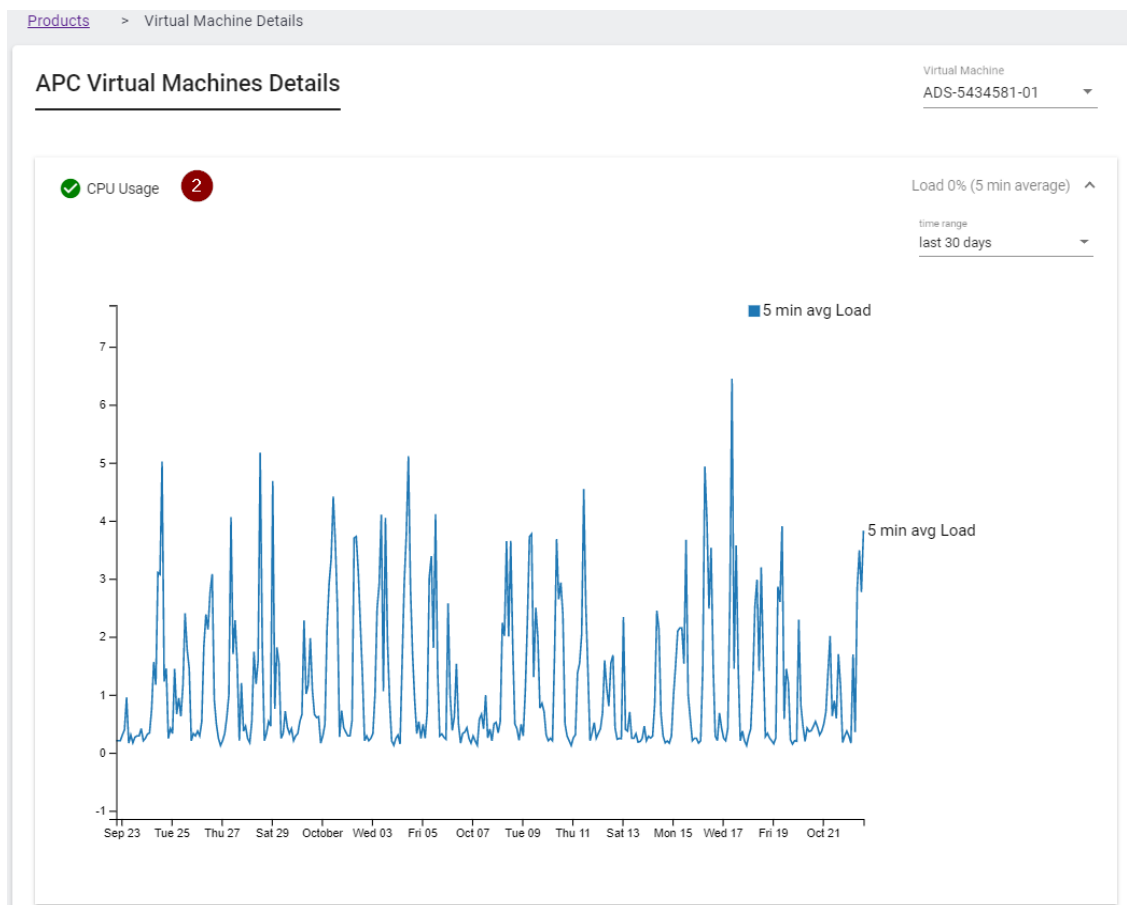** Please note that some of the follow is future functionality for C9 environments.

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.)

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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.)