

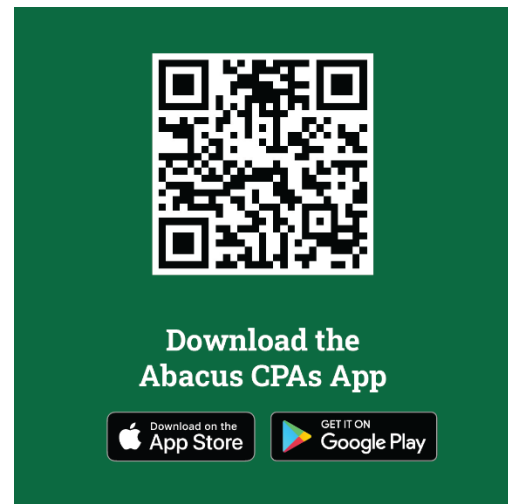
# How to Use the Abacus CPAs App

To use the Abacus CPAs app, you need to have an active client account with Abacus CPAs.

## Download the Abacus App – Abe’s App

Download the Abacus CPAs App (*Abe’s App*) to your phone from the Google Play Store or Apple App store.

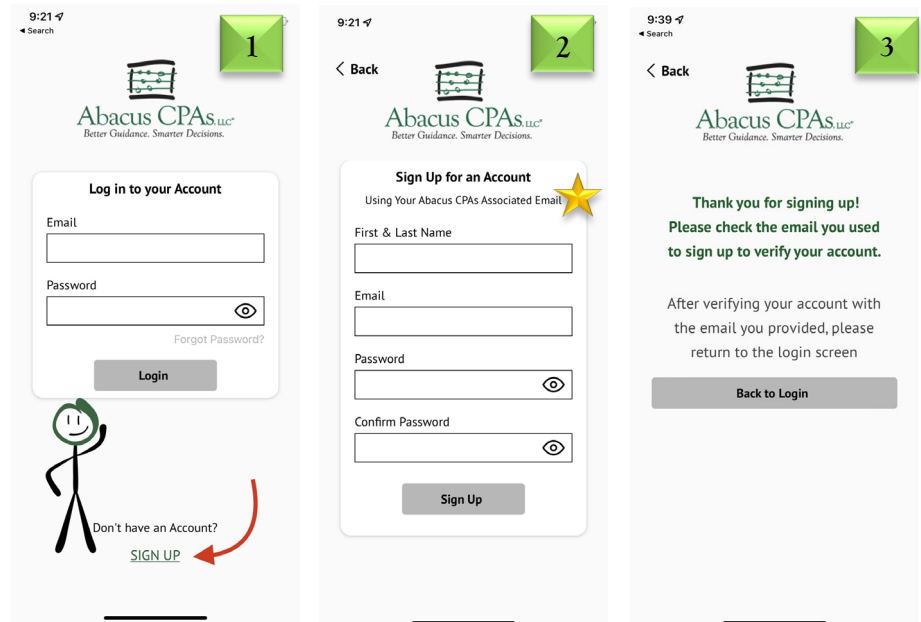
Use the QR code to the right or click this link with your phone: <https://abacuscpas.app.link/download>



## Sign-Up to See Your Account

After you download the Abacus CPAs app, you will need to sign-up to see your account on Abe’s App, which can be done immediately.

To sign up for an account on Abe’s App, press the “SIGN UP” button **1**. This will navigate you to the following screen **2** where you will be prompted to fill out your name, e-mail (*email associated with your Abacus account*) and create a password. You will then receive an email confirming your sign-up **3**.



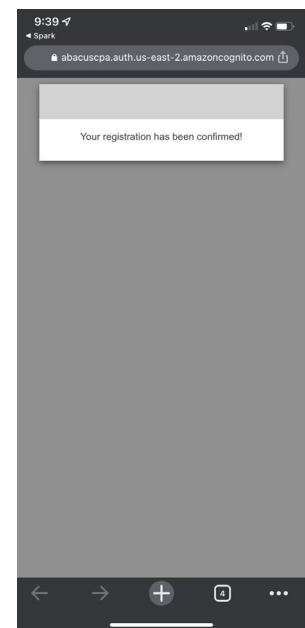
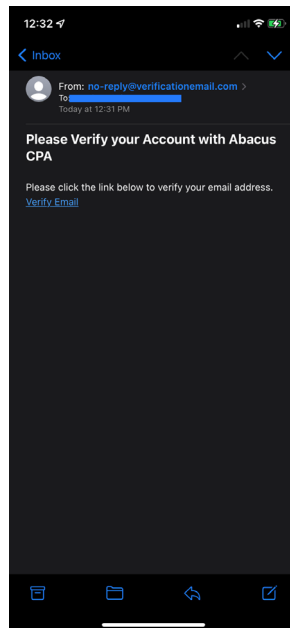
If you are unable to make an account with the email you believe is on file or you do not see all of your tax accounts, contact Abacus CPAs for assistance.

## Email Verification

With the correct email, the verification link will look like the images shown here.

Select the link in the email and your registration will be confirmed.

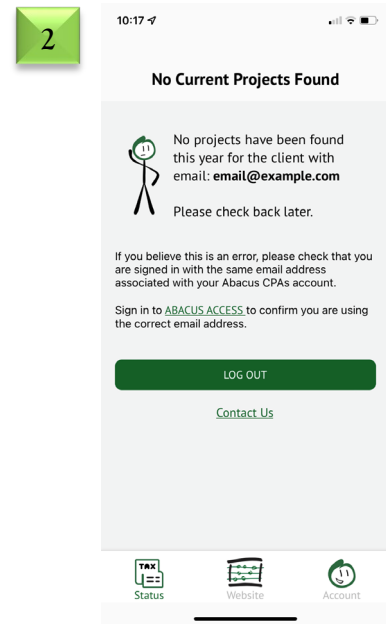
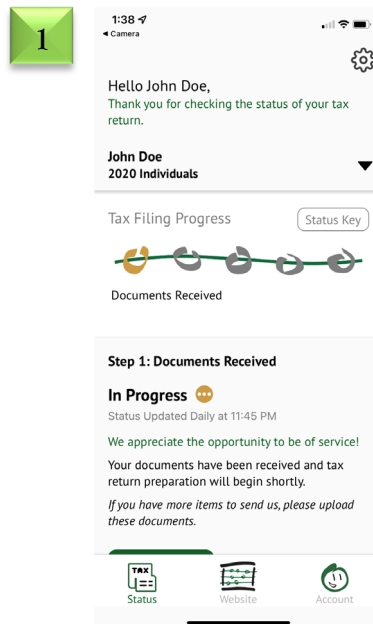
You are now ready to log into the application using your email and password.



## Login Screen & Project Visibility

Upon login, you will be directed to a screen like either of the ones shown here.

If you have a project that's started for the current year, you will see the first screen. If not, you will see the second.

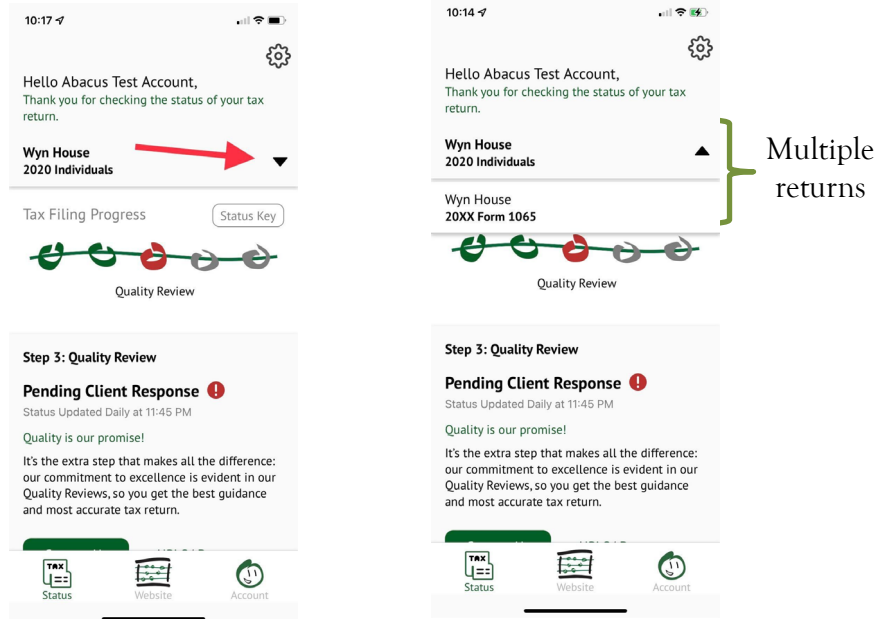


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## Status of Your Tax Filing

Here you will see the status of your tax filing(s). If you have multiple filings, you will press the black dropdown arrow to select another one of your filings to view its status.

The beads are selectable, so you know exactly what steps you've completed and what steps are left in the tax process. Under the beads, there is a description of each step of the process. The status key indicates the significance of the bead color.



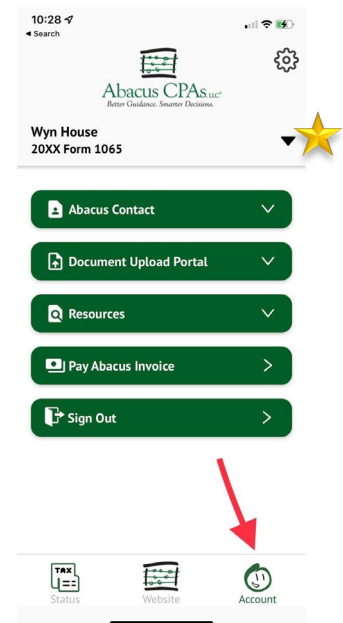
If you see a **RED** bead, contact Abacus CPAs about the information needed from you to continue working on your return.

## Resources within the App

The Account tab on the bottom right-hand portion of the screen will take you to a new screen where you will have the ability to access a variety of resources.

1. **Abacus Contact:** Populates an email address for contacting Abacus CPAs. The email that populates is based on your tax return type.
2. **Document Upload Portal:** Provides a link to Abacus Access for uploading your documents securely.
3. **Resources:** Contains helpful IRS links like “Where is My Refund?”.
4. **Pay Abacus Invoice:** Provides a link for electronic payment of your Abacus invoice.
5. **Sign Out:** This button will log you out of Abe’s APP.

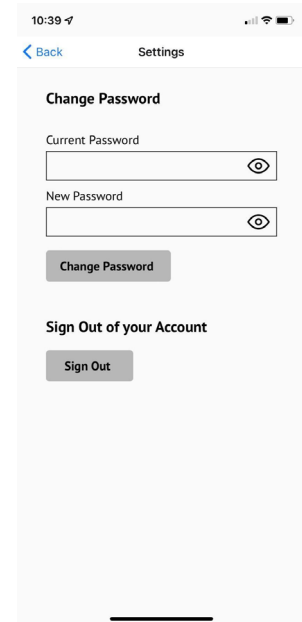
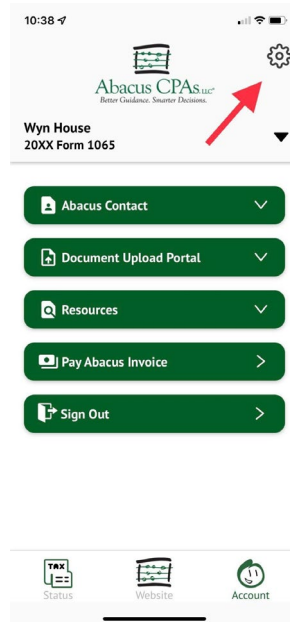
In order to contact the correct staff at Abacus CPAs, please ensure you are on the tax return project for which you want to contact Abacus CPAs before clicking the email link.★



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## Change Your Password or Sign-Out

Pressing the cog in the upper right-hand corner of the screen will take you to the following screen where you may change your password and/or sign out.



## Changed Your Email?

If your email on file with Abacus recently changed, you will need to update your login information within the Abacus App to match the new email. To do this, log into the Abacus App with your existing account. You will see the following screens. This will prompt you to change your email to the new email within Abacus' system and enter your current Abacus App account password.

Once completed, you will receive an email to confirm. When the email is confirmed, you'll be able to login in with your new email and existing password credentials.

