



# Self Service System User Manual



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## 1 Introduction

### 1.1 Document Purpose

The purpose of this document is to describe how to use the self-service system of the Trademark Clearinghouse to ask the support desk for information or assistance.

### 1.2 Scope

The scope of this document is to walk you through the basics of using the Trademark Clearinghouse self-service system including how to create cases, view all your cases, view case details, reopen and close resolved cases.

### 1.3 Intended Audience

This document is written for Trademark Clearinghouse registered users (Trademark Agents and the Trademark Holders).

## 2 Support page

You can create and manage your cases using the Support page which is available in the Trademark Clearing House platform.

### 2.1 Accessing the Support page

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**Note:** To access the Support page, you must have a registered account (Trademark Agent account or Trademark Holder account).

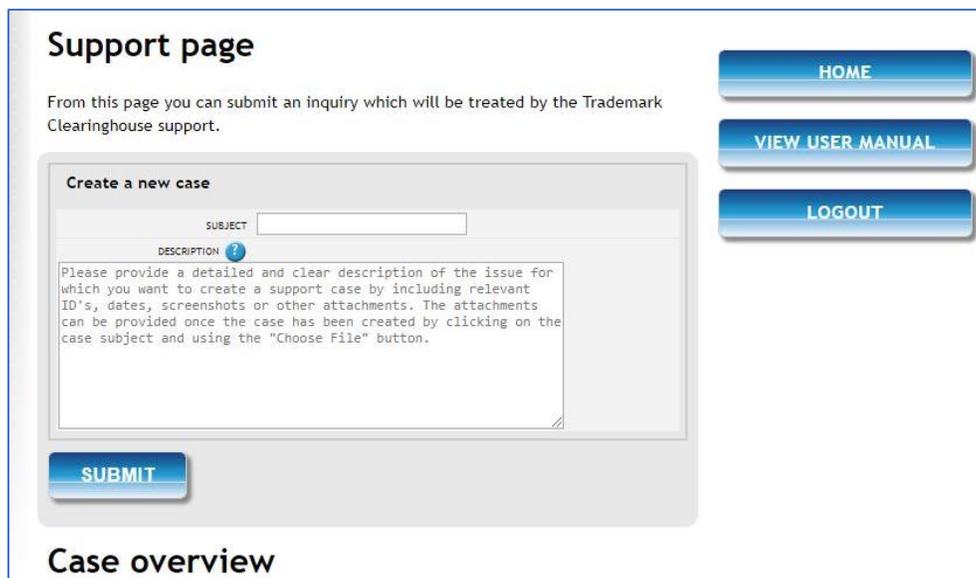
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To access the Support page, follow these steps:

1. Open a web browser and go to <https://secure.trademark-clearinghouse.com>
2. Enter your registered account credentials (username and password). The Trademark Clearinghouse Mark details page will be displayed.
3. In the upper-right corner of the page, click the **Get Support** button.



The Support page will be displayed which contains (1) a new case creation form and (2) your list of cases.





### 2.1.1 Accessing the Support page from the Home page

To access the Support page from the Home page, on the right side of the page, click the **Get Support** button:

## Welcome to the Trademark Clearinghouse

If you are interested in protecting your brand in the New gTLD era, please register as trademark holder or trademark agent. Upon a successful registration, you will be able to submit your trademark records and be eligible for trademark claims notification and/or sunrise services.

For more information about the Trademark Clearinghouse, please go to [www.trademark-clearinghouse.com](http://www.trademark-clearinghouse.com).

All related documents, FAQ and "how to's" are made available on [www.trademark-clearinghouse.com](http://www.trademark-clearinghouse.com).

To start the transfer process of your Mark Record to a (new) agent, using the Signed Mark Data (SMD) file, please [follow this link](#). For more information on the Mark Record transfer process please refer to [our FAQ section](#).

- MARK OVERVIEW
- SUBMIT MARK
- LOGOUT
- REGISTER DISPUTE
- GET SUPPORT**



## 3 Cases Management

### 3.1 Creating a Case

Creating cases from the Support page allows you to track all your cases in real-time, close resolved cases, request more information and reopen resolved cases.

To create a new case, follow these steps:

1. Go to the Support page. For details on how to access this page, see [Accessing the Support page](#). The Create a new case form will be displayed.
2. In the **Subject** field, provide a subject for the support case you want to submit. This field is mandatory.
3. In the **Description** text box, provide a detailed and clear description of the issue for which you want to create a support case by including relevant IDs and dates. This field is mandatory.

**Support page**

From this page you can submit an inquiry which will be treated by the Trademark Clearinghouse support.

**Create a new case**

SUBJECT

DESCRIPTION 

Please provide a detailed and clear description of the issue for which you want to create a support case by including relevant ID's, dates, screenshots or other attachments. The attachments can be provided once the case has been created by clicking on the case subject and using the "Choose File" button.

**SUBMIT**



4. Click the **Submit** button.

The case will be submitted to the Trademark Clearinghouse support desk. It will also be displayed in the Case overview section and will have the status **new**.

### Case overview

You can search cases by creation date (YYYY-MM-DD formatting), case ID, status and subject by entering the search term in the text field and clicking the magnifier icon. To go back to all the cases you have submitted, click the All cases button.

Date	Case	Status	Subject
2018-05-16T13:09:54Z	411	new	

You will receive an email notification that the case has been submitted, to the email address associated with your Trademark Clearinghouse account.

If you need to attach files to a case, you can do so once the case has been created by clicking the case subject from the Case overview section and using the **Choose File** button. For information on how to attach a file to a case, see [Attaching Files to Cases](#).

### 3.2 Viewing Cases

The Case overview section from the Support page allows you to track all your cases. It also allows you to search for specific cases. For more information on how to search cases, see [Searching Cases](#).

### Case overview

You can search cases by creation date (YYYY-MM-DD formatting), case ID, status and subject by entering the search term in the text field and clicking the magnifier icon. To go back to all the cases, you have submitted click the All cases button.

Date	Case	Status	Subject
2018-07-09T11:07:30Z	716	resolved	
2018-06-13T11:48:14Z	693	open	
2018-07-03T16:31:07Z	662	closed	
2018-06-08T14:27:05Z	660	closed	
2018-06-08T13:32:19Z	659	open	
2018-06-08T06:49:03Z	652	closed	
2018-06-27T13:33:14Z	581	closed	
2018-05-29T07:17:48Z	552	closed	



The table below lists the cases details you can see in the Case overview section:

Case Detail	Description
Date and time	The date and time when you created the case.
Case	The case ID.
Status	<p>The case status. The status can be:</p> <ul style="list-style-type: none"> <li>• <b>New.</b> The initial status of a Case after creation.</li> <li>• <b>Open.</b> The operator is handling the case, or you reopened the case.</li> <li>• <b>Pending.</b> The Case is in stand-by and an action is required from you. This status is given when additional information is requested by the Service Desk or when the issue is being fixed.</li> <li>• <b>Resolved.</b> Information has been gathered and routed, service has been restored or a solution has been applied.</li> <li>• <b>Closed.</b> The Case is archived and may be consulted to get information and solutions to help resolve another Case.</li> </ul>
Subject	The case subject.

### 3.3 Searching Cases

In the Cases overview section, you can search cases by: case creation date, case ID, status and subject using the available search feature.

## Case overview

You can search cases by creation date (YYYY-MM-DD formatting), case ID, status and subject by entering the search term in the text field and clicking the magnifier icon. To go back to all the cases, you have submitted click the All cases button.

Date	Case	Status	Subject
2018-07-09T11:07:30Z	716	resolved	_____
2018-06-13T11:48:14Z	693	open	_____
2018-07-03T16:31:07Z	662	closed	_____
2018-06-08T14:27:05Z	660	closed	_____
2018-06-08T13:32:19Z	659	open	_____
2018-06-08T06:49:03Z	652	closed	_____
2018-06-27T13:33:14Z	581	closed	_____
2018-05-29T07:17:48Z	552	closed	_____

You will be able to search cases by using both exact and partial searching. When searching cases by date, you will have to enter a date following the following format: YYYY-MM-DD.



You can search cases using partial search by providing part of a query search text, as follows:

- Partial search by date. entering only partial year (e.g. *20* to search for all cases submitted in 2018), partial YYYY-MM (e.g., *2018-05*) or partial YYYY-MM-DD (*2018-06-1*).
- Partial search by case ID
- Partial search by case status (e.g., *op* to search for cases which have the status **open**).
- Partial search by the case subject.

To search for cases, enter the search query in the search text field and click the magnifier () icon.

The table within the Case overview section is replaced by a table which contains the cases matching the search criteria.

## Case overview

You can search cases by creation date (YYYY-MM-DD formatting), case ID, status and subject by entering the search term in the text field and clicking the magnifier icon. To go back to all the cases you have submitted, click the All cases button.


All cases

Showing 3 of 13

Date	Case	Status	Subject
2018-06-08T14:27:05Z	660	closed	
2018-06-08T13:32:19Z	659	open	
2018-06-08T06:49:03Z	652	closed	

To go back to the list of all cases, click the **All cases** button.

If no results matching the search query are found, no table will be displayed, but a magnifier icon with the following text beneath it: “No results found”.

## Case overview

You can search cases by creation date (YYYY-MM-DD formatting), case ID, status and subject by entering the search term in the text field and clicking the magnifier icon. To go back to all the cases you have submitted, click the All cases button.


All cases



No results found

To go back to the list of all cases, click the **All cases** button.



### 3.4 Viewing Case Details

To view details for a specific case, in the Case overview section click the subject link corresponding to the case whose details you want to see:

## Case overview

You can search cases by creation date (YYYY-MM-DD formatting), case ID, status and subject by entering the search term in the text field and clicking the magnifier icon. To go back to all the cases you have submitted, click the All cases button.

Date	Case	Status	Subject
2018-05-23T12:49:49Z	513	resolved	<a href="#">This is a sample Subject</a> <span style="color: red; font-weight: bold;">←</span>
2018-05-23T09:51:31Z	501	open	
2018-05-23T07:21:34Z	470	resolved	

The Case Details section will be displayed.

## Case "

Origin	Message
<b>Case created</b> 2018-05-16T13:09:54Z	
<b>Support</b> 2018-05-16T13:18:05Z	Dear,  Can you please describe the issue you are having in more detail so we can better assist you?  Kind regards, TMCH Support.
<b>You</b> 2018-05-16T13:30:21Z	I cannot register my mark. Where can I find more information?
<b>You</b> 2018-05-16T13:30:22Z	<a href="#">This is user's attachment</a>  <a href="#">Return to cases overview</a>

This section lists the date and time when you created the case, the send and received messages together with the date and time when the messages have been sent/received.



The table below lists the case details:

Origin	Description	Message
Case Created	The date and time when the case has been created, in format YYYY-MM-DD HH:MM:SS.	The first message.
Support	The date and time when the case has been replied/updated by a support operator.	The reply received from a support desk operator.
You	The date and time when you sent a message to the support desk operators	A message sent by you to the support desk.
Attachment	The date and time when you or the support desk have attached a file to the case. The attachment is displayed below the reply message with a delay of a few seconds.	

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**NOTE:** The **close this case** button is only visible when an operator has resolved the case and changed the case status accordingly.

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To return to the Case overview section, at the bottom of the case details section click the [“Return to case overview”](#) link.

### 3.4.1 Viewing Attachments

You can view an attachment by clicking on the attachment link in the case details page.

Based on the browser settings, the attachment will either be opened using the default app corresponding file type, or it will be downloaded to the default download location on your computer/device in which case you will have to manually open the downloaded file.

### 3.5 Attaching Files to Cases

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#### NOTES:

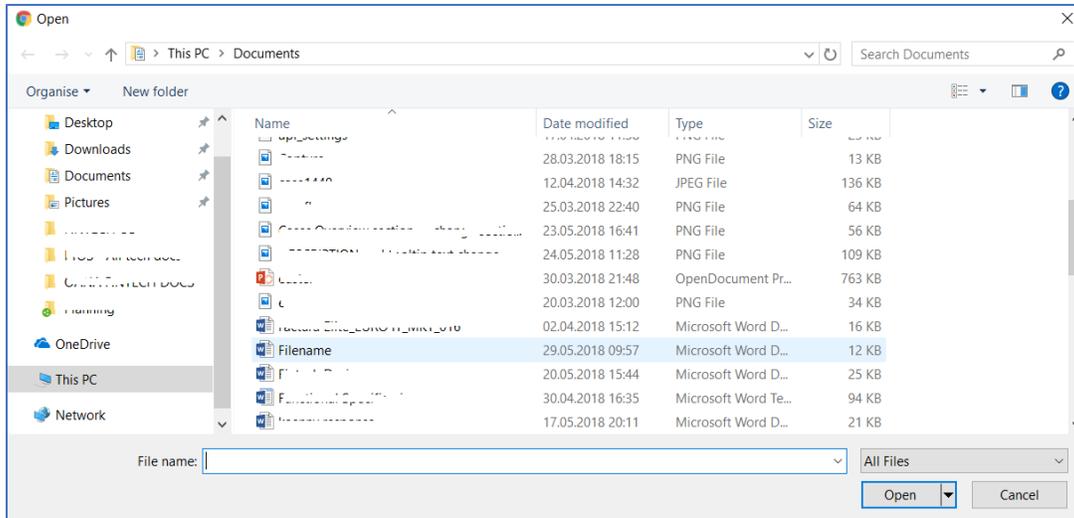
You are not able to add attachments when creating a case; you can only attach files when [replying to a case](#) or [reopening a case](#).

You can only attach one file at a time.

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To attach a file to a case, follow these steps:

1. Go to the case details page. For information on how to view the case details page, see [Viewing Case Details](#).
2. Click the **Choose File** button. A file browser window will be displayed.
3. Browse for the file you want to upload.



4. Either double-click on the file or select it and click the **Open** button. The file is uploaded on the case details page and the name of the file is displayed at the right-side of the **Choose File** button.

**NOTE:** You can only submit pdf and jpeg files with a file size that does not exceed 10MB. In the **Description** text box, provide additional feedback to your case. This field is mandatory.

5. Click the **Submit** button.

**Note:** If you try submitting a file that exceeds this limit, or a file with a format other than pdf or jpeg, a notification message will be displayed on top of the Support page.

The reply message (from the **Description** field) and the attachment will be sent to the Trademark Clearinghouse support desk. Both the reply message and the attachment will be displayed on the case details page. The attached file will be displayed as a link in a new entry under the end user’s reply message entry:





You will receive an email notification that the case has been submitted, to the email address associated with your Trademark Clearinghouse account

### 3.6 Replying to a Case

#### 3.6.1 Replying to a case via email

You can reply to a case submitted via email by replying to one of the email notifications received regarding the case.

#### 3.6.2 Replying to a Case from the Support page

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**NOTE:** You can only reply to cases which have not been closed.

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To reply to a case, follow these steps:

1. Go to the case details page. For details on how to view case details, see [viewing case details](#).
2. On the case details page, complete the Update case form:
  - Optionally, add an attachment by clicking the **Choose File** button, browsing and selecting the desired file.

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**NOTE:** You can only submit pdf and jpeg files with a file size that does not exceed 10MB. If you try submitting a file that exceeds this limit, or a file with a format other than pdf or jpeg, an error message will be displayed on top of the Support page.

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- In the **Description** text box, provide additional feedback to your case. This field is mandatory.

The screenshot shows a web form titled "Support page". Below the title is a paragraph: "Here you can provide the TMCH support team additional feedback to your case. These details will be added to your current case." The form itself is titled "Update This is a sample Subject". It contains an "ADD ATTACHMENT" section with a "Choose File" button and the text "No file chosen". Below this is a "DESCRIPTION" section with a question mark icon and a text area containing the instruction: "Please provide a detailed and clear description of the issue for which you want to create a support case by including relevant ID's, dates, screenshots or other attachments." At the bottom of the form is a blue "SUBMIT" button.



3. Click the **Submit** button.

A notification that the case has been updated will be displayed at the top of the page. You will also get an email notification. The case status is changed to **open**. You can check the status change on the Case overview section.

### 3.7 Reopening a Case

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**NOTES:** You can only reopen resolved cases.

You can reopen a **resolved case** within 5 days since the operator resolved the case and changed its status accordingly; otherwise, it will be automatically closed.

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To reopen a resolved case, follow these steps:

1. Go to the case details page. For details on how to view case details, see [viewing case details](#).
2. On the case details page, complete the Update case form:
  - Optionally, add an attachment by clicking the **Choose File** button, browsing and selecting the desired file.

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**NOTE:** The maximum file size limit for upload is 10MB. Therefore, if you try uploading a file that exceeds this limit, a notification message is displayed on top of the Support page.

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- In the **Description** text box, provide additional feedback to your case. This field is mandatory.
3. Click the **Submit** button.

A notification that the case has been updated will be displayed at the top of the page. You will also get an email notification. The case status is changed to **open**. You can check the status change on the Case overview section.

### Case overview

You can search cases by creation date (YYYY-MM-DD formatting), case ID, status and subject by entering the search term in the text field and clicking the magnifier icon. To go back to all the cases you have submitted, click the All cases button.

🔍
All cases

Date	Case	Status	Subject
2018-06-08T13:32:19Z	659	open	



### 3.8 Closing a Case

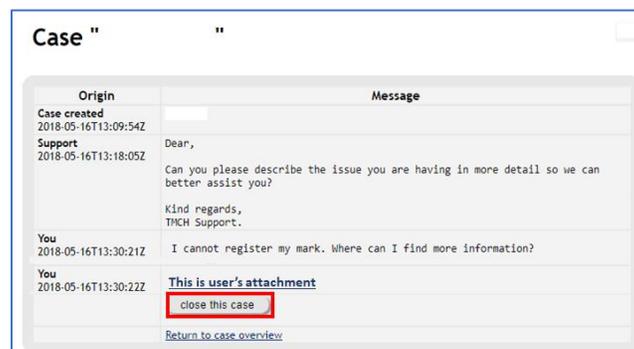
#### NOTES:

The **close this case** button is only visible when an operator has resolved the case and changed the case status accordingly.

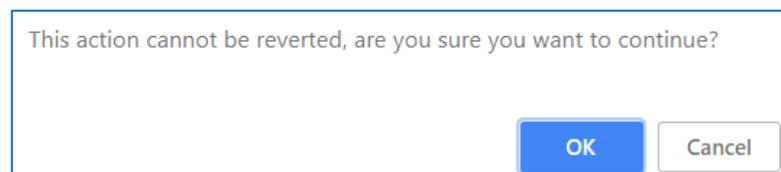
Once a case is closed, you are no longer able to reopen the case. If you closed a case accidentally, you have to create a new case.

To close a resolved case follow these steps:

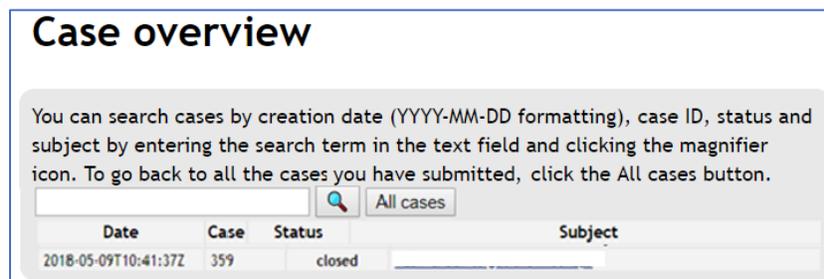
1. Go to the case details page. For details on how to view case details, see [viewing case details](#).
2. Click the **close this case** button:



A notification pop-up message will be displayed on top of the Support page:



3. Click **OK**. The page refreshes, the Case overview section is displayed and the case status changes to **closed**.



**NOTE:** If you do not close the case within five days since the operator has changed the case status to resolved, the case will be automatically closed.



## 4 Glossary of Terms

<b>Term</b>	<b>Description</b>
Case	A request for information, support or intervention.
Support page	The self-service system of the Trademark Clearinghouse is referred throughout this manual, as the Support page.