TRADEMARK CLEARINGHOUSE

How to manage my account

Trademark Clearinghouse
30/09/2020
Version 1.2

Contents

1. Introduction

This document will provide you with an overview of the necessary steps you can take to consult and edit your Trademark Clearinghouse (TMCH) account.

The following functionalities are included in this document:

- How to edit ancillary services
- How to add additional e-mail address for notifications
- Current contract settings
- How to consult your submissions and invoices
- How to consult your financials
- How to edit API settings
- Data exports
- Archived messages

2. How to manage your account

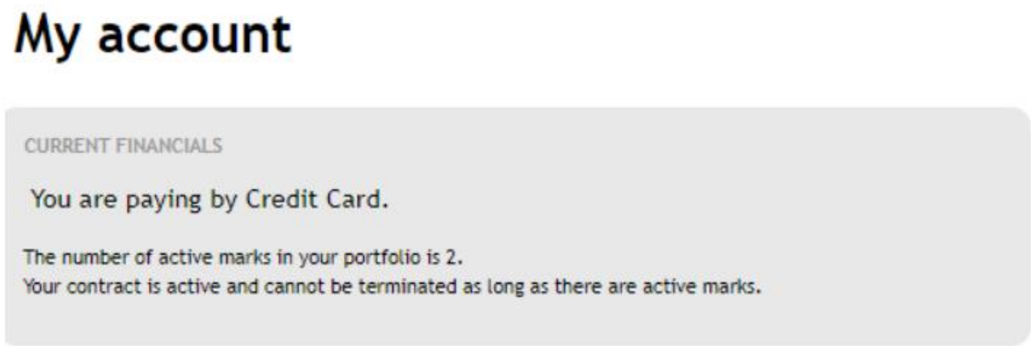
Once you have signed into the Trademark Clearinghouse, you can navigate to your account settings by clicking on the "My Account" button located in the header of the Trademark Clearinghouse user interface.

You will be redirected to your account page where, depending on the type of your account (agent/holder), you will have different sub-categories displayed.

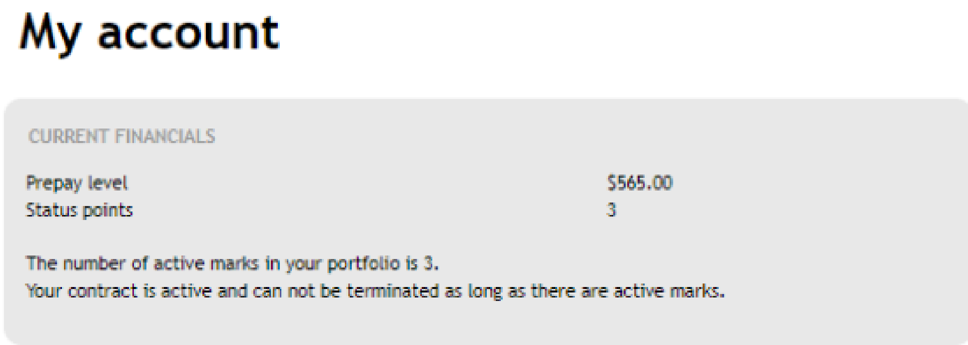
2.1. Current Financials

The current financials section displays the remaining credits of your account. This section differs for Trademark Holders and Trademark Agents and Trademark Holders with prepaid accounts.

A Trademark Holder account who pays by credit card:



A Trademark Holder prepaid as well as a Trademark Agent account:



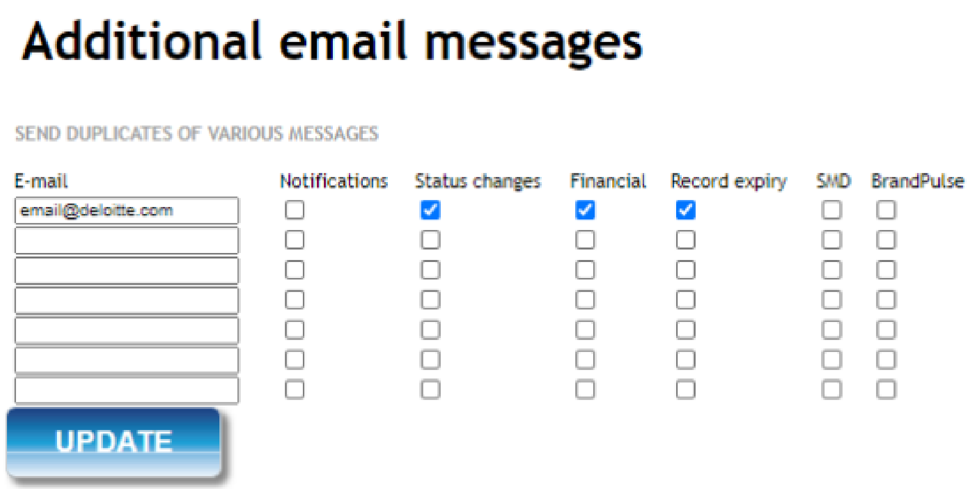
2.2. Ancillary Services

This section displays the status of your ancillary services. The list of services may differ from Trademark Holders to Trademark Agents depending on their services activation and account type.

Please note that the TREx and Brandpulse services are not available for Trademark Holders with credit card account.

2.3. Additional e-mail notifications

Click on "Configure additional email addresses" and add e-mail addresses in the column on the left-hand side, then select the type of message those e-mail addresses should receive.



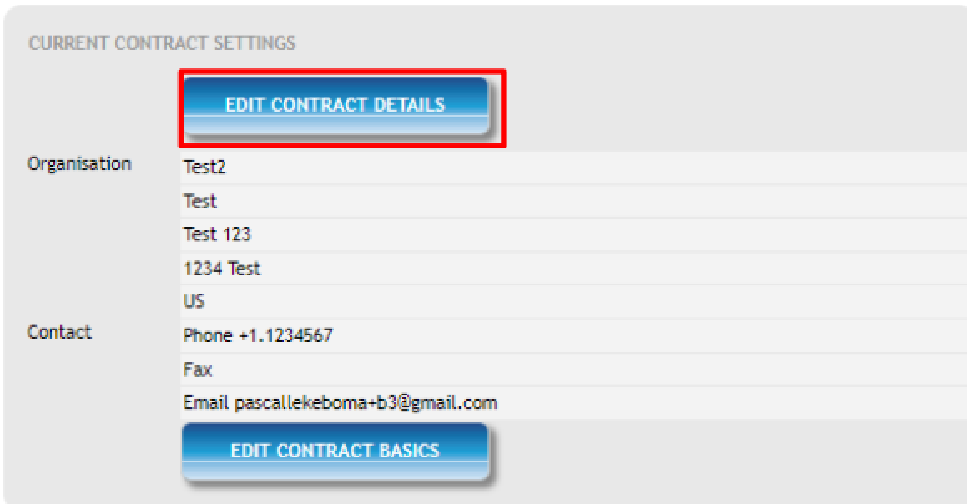
Trademark Agents will be able to add up to 7 additional email addresses, and link 1 or more of the following notification types to those email addresses:

- Notifications:
  - Sunrise notifications
  - Claims notifications
  - Ongoing notifications
- Status Changes:
  - A trademark record has been assigned status verified;
  - A trademark record has been assigned status incorrect;
  - A trademark record has been assigned status invalid;
  - A trademark record has been assigned status invalid because it has been on status incorrect for too long;
  - Manual status change of a trademark record;
  - A trademark record has been assigned status deactivated;
  - A trademark record has expired;
  - A trademark record has been transferred;
  - A UDRP or Court case has changed status;
  - A Proof of Use has expired;
  - A Proof of Use has been verified;
  - A Proof of Use has been invalidated;
  - A Proof of Use has been assigned status incorrect.
- Financial notifications:
  - Your pre-payment balance has gone below watermark level (Trademark Agent only).
- Expiry notifications:
  - Your trademark record will expire soon;
  - Your Proof of Use will expire soon.
- SMD notifications:
  - An SMD has been created for a trademark record;
  - An SMD has been regenerated for a trademark record;
  - An SMD has been revoked for a trademark record.
- Brandpulse:
  - Monthly report.

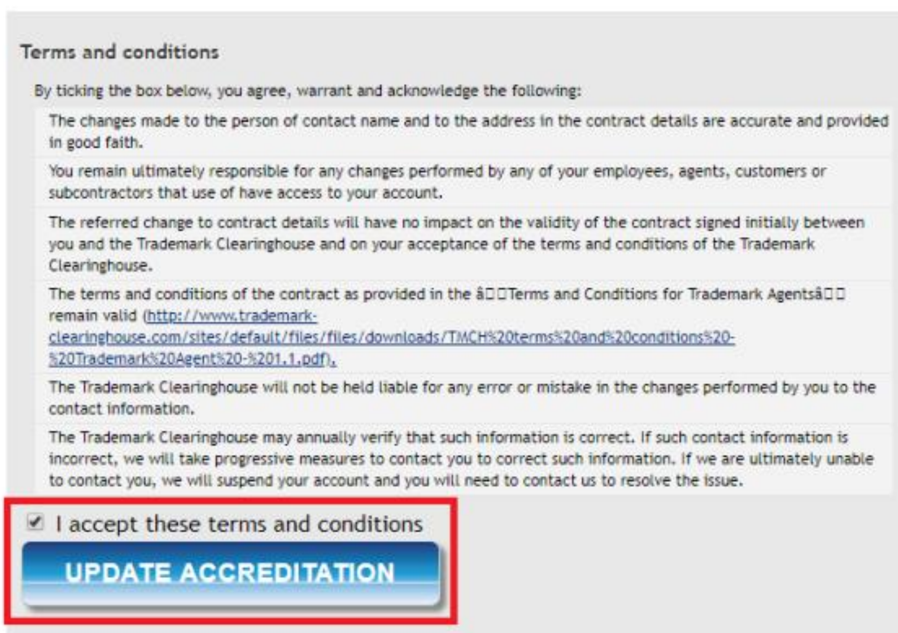
After clicking on the update button, the selected messages will be sent to the linked e-mail addresses.

2.4. Current Contact Settings

This section displays the organization and contact information.

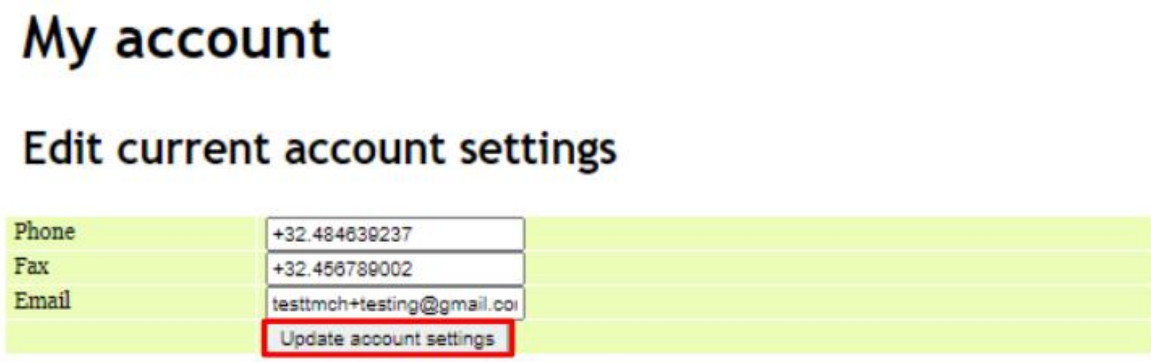


Trademark Agents and Trademark Holders can edit their contract information by clicking on “Edit contract details”. Terms and Conditions have to be accepted by ticking the box at the end of the page to save the changes.



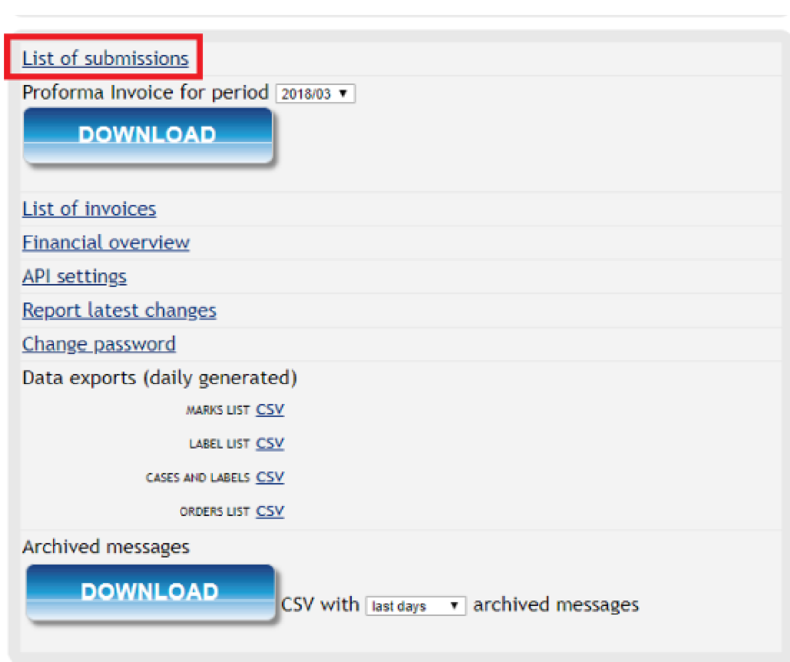
Please note that this option is available at any time for Trademark Agents. However, for Trademark Holders, all their trademark records have to be set to “incorrect” in order to change their contract information.

Trademark Agents/Holders can also edit their phone number, their fax number and email address by pressing on “Edit contract basics”. After pressing the “Update account settings” button, changes will be saved and applied as shown in the image below:



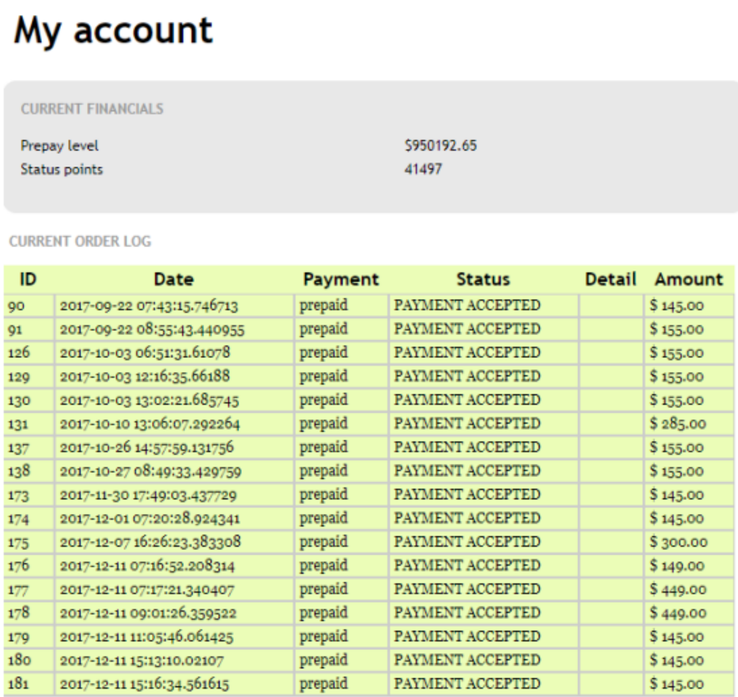
2.5. List of Submissions

To access the list of trademark record submissions you will have to click on “List of submissions”.



It contains a list of all successful and cancelled submissions. The list displays the following information about payment transactions:

- ID;
- Date;
- Payment (prepaid/credit card);
- Status (of payment);
- Amount.



My account

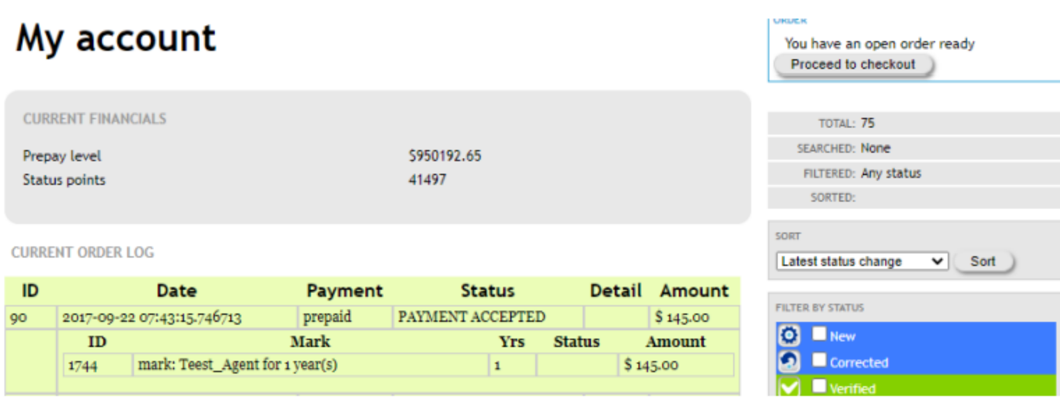
CURRENT FINANCIALS

Prepay level	$950192.65
Status points	41497

CURRENT ORDER LOG

ID	Date	Payment	Status	Detail	Amount
90	2017-09-22 07:43:15.746713	prepaid	PAYMENT ACCEPTED		$ 145.00
91	2017-09-22 08:55:43.440955	prepaid	PAYMENT ACCEPTED		$ 155.00
126	2017-10-03 06:51:31.61078	prepaid	PAYMENT ACCEPTED		$ 155.00
129	2017-10-03 12:16:35.66188	prepaid	PAYMENT ACCEPTED		$ 155.00
130	2017-10-03 13:02:21.685745	prepaid	PAYMENT ACCEPTED		$ 155.00
131	2017-10-10 13:06:07.292264	prepaid	PAYMENT ACCEPTED		$ 285.00
137	2017-10-26 14:57:59.131756	prepaid	PAYMENT ACCEPTED		$ 155.00
138	2017-10-27 08:49:33.429759	prepaid	PAYMENT ACCEPTED		$ 155.00
173	2017-11-30 17:49:03.437729	prepaid	PAYMENT ACCEPTED		$ 145.00
174	2017-12-01 07:20:28.924341	prepaid	PAYMENT ACCEPTED		$ 145.00
175	2017-12-07 16:26:23.383308	prepaid	PAYMENT ACCEPTED		$ 300.00
176	2017-12-11 07:16:52.208314	prepaid	PAYMENT ACCEPTED		$ 149.00
177	2017-12-11 07:17:21.340407	prepaid	PAYMENT ACCEPTED		$ 449.00
178	2017-12-11 09:01:26.359522	prepaid	PAYMENT ACCEPTED		$ 449.00
179	2017-12-11 11:05:46.061425	prepaid	PAYMENT ACCEPTED		$ 145.00
180	2017-12-11 15:13:10.02107	prepaid	PAYMENT ACCEPTED		$ 145.00
181	2017-12-11 15:16:34.561615	prepaid	PAYMENT ACCEPTED		$ 145.00

Clicking on a row will reveal all trademark records that have been registered for that submission as shown in the image below:



My account

CURRENT FINANCIALS

Prepay level	$950192.65
Status points	41497

CURRENT ORDER LOG

ID	Date	Payment	Status	Detail	Amount
90	2017-09-22 07:43:15.746713	prepaid	PAYMENT ACCEPTED		$ 145.00

ID	Mark	Yrs	Status	Amount
1744	mark: Teest_Agent for 1 year(s)	1		$ 145.00

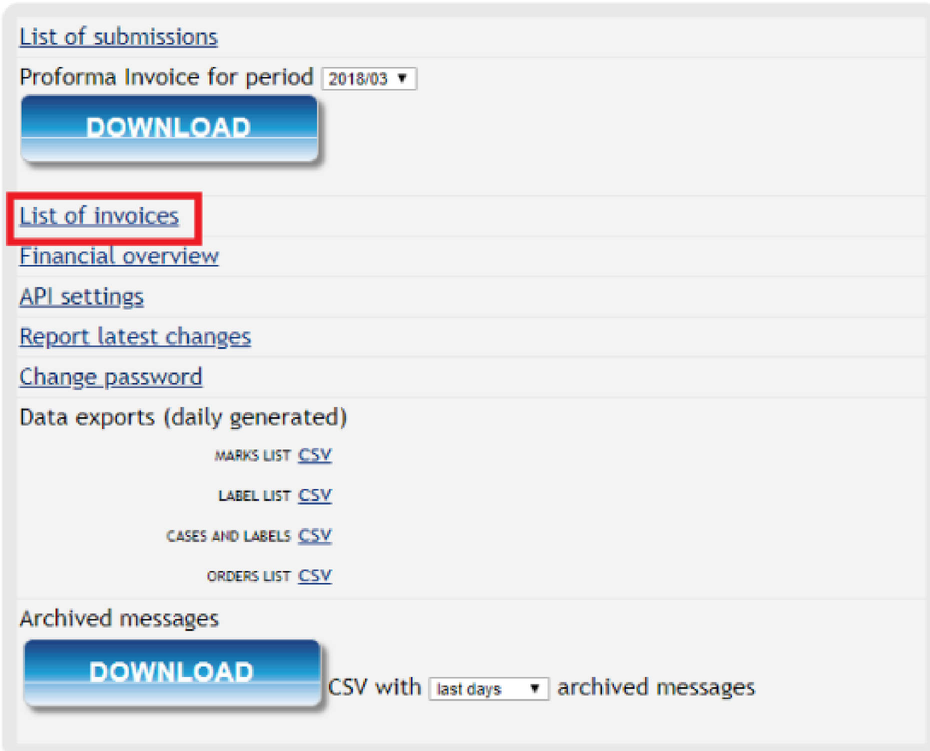
The following information per submitted trademark record is displayed:

- ID;
- Mark name;
- Duration of submission;
- Status (of payment);
- Amount.

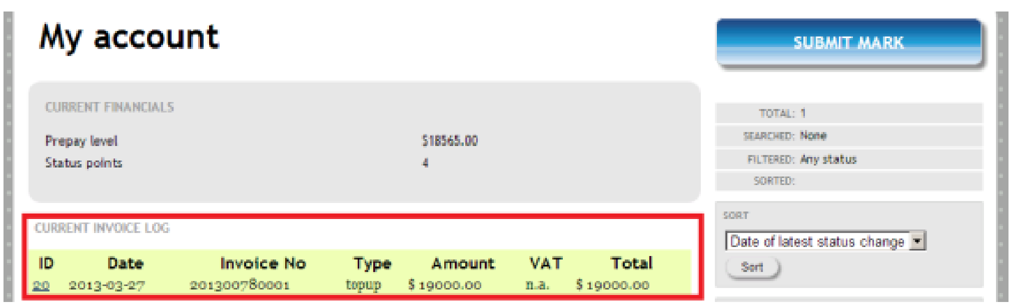
Clicking again on a row will reveal all labels that have been registered for that trademark record as shown in the image below:

2.6. List of Invoices

To access the list of invoices, you must press the “List of invoices” button.



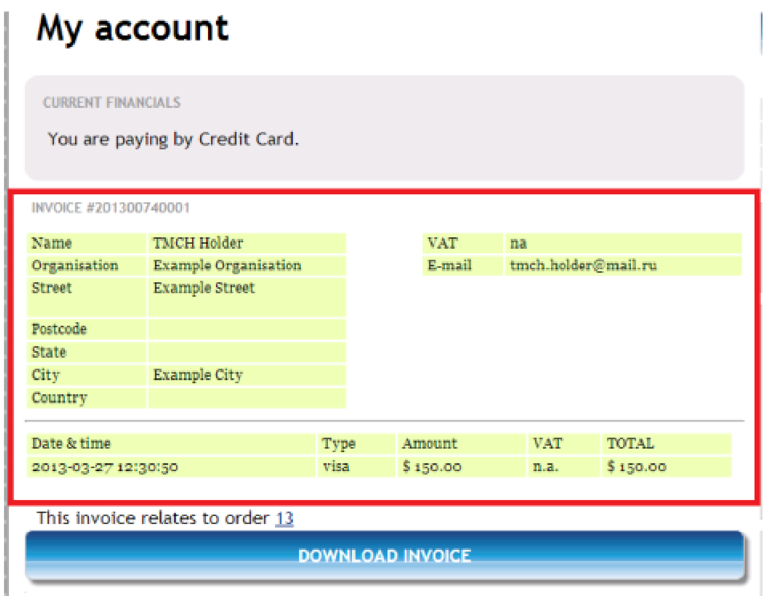
The list of invoices contains a list of all successful and invalid submissions. The list displays the following information about payment transactions as shown in the image below:



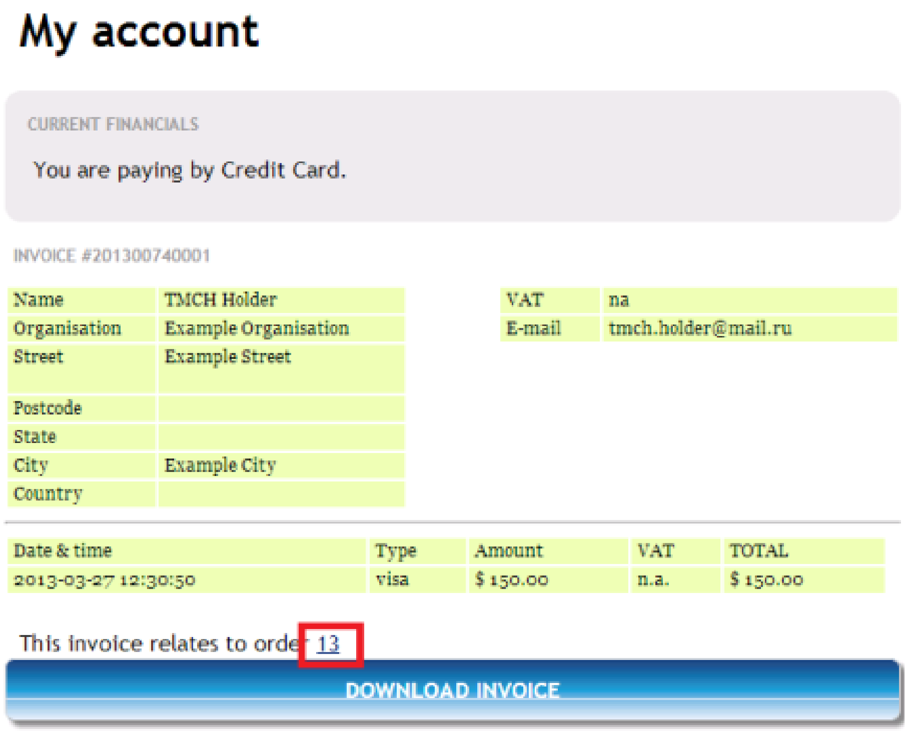
The list displays the following information about payment transactions:

- ID;
- Date;
- Invoice No;
- Type;
- Amount;
- VAT;
- Total.

Clicking on one link in the ID column will redirect you to a page containing detailed information about the corresponding invoice as shown in the image below:



Clicking on the ID to which the invoice relates to will redirect you to the “List of submissions” as shown in the image below:



My account

CURRENT FINANCIALS

You are paying by Credit Card.

INVOICE #201300740001

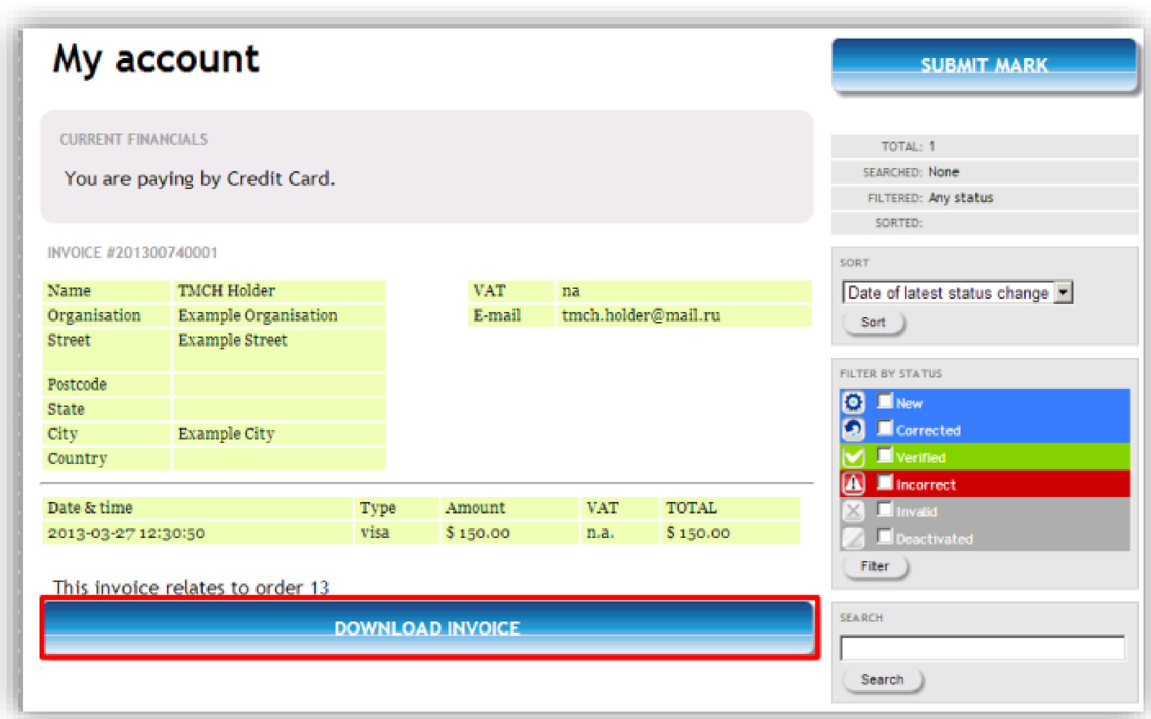
Name	TMCH Holder	VAT	na
Organisation	Example Organisation	E-mail	tmch.holder@mail.ru
Street	Example Street		
Postcode			
State			
City	Example City		
Country			

Date & time	Type	Amount	VAT	TOTAL
2013-03-27 12:30:50	visa	$ 150.00	n.a.	$ 150.00

This invoice relates to order 13

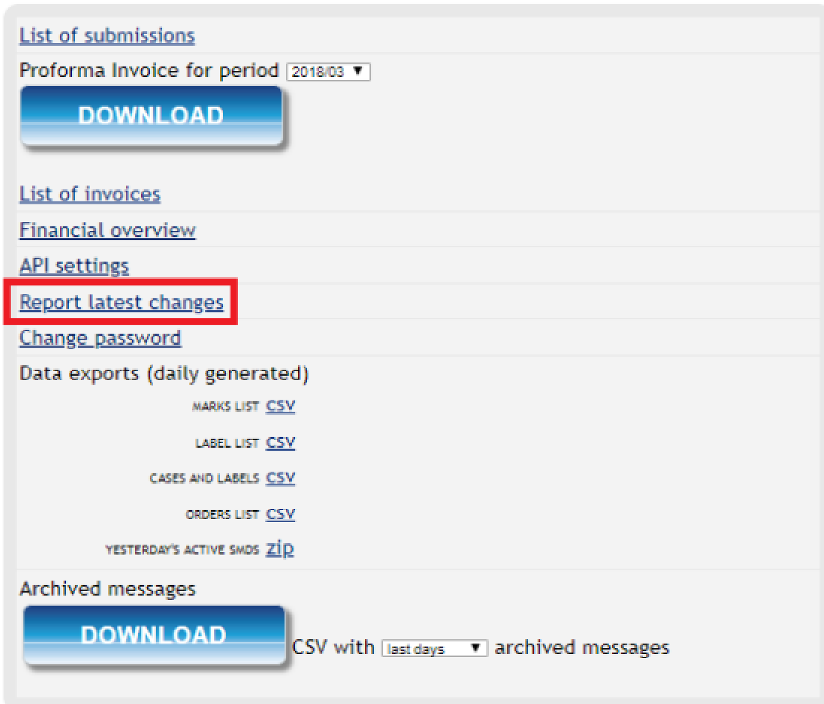
DOWNLOAD INVOICE

In addition, you can download a copy of the invoice by pressing on the “Download invoice” button as shown in the image below:



2.7. Financial Overview (not available for Trademark Holders with credit card account)

To access the financial overview, you must press the “Financial overview” button.



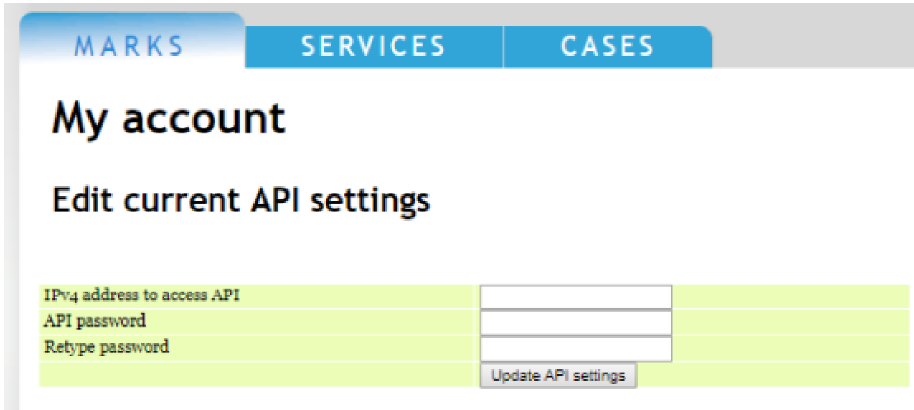
When signed in as a user using a prepayment account, the “Current financial overview” displays the amount of funds on your prepayment account and the amount of status points.

The “Current balance log” section contains an overview of all activity related to top-ups and payments as shown in the image below:

2.8. API Settings (only applicable for Trademark Agents

To access the API Settings page, the Trademark Agents must press the “API settings” button.

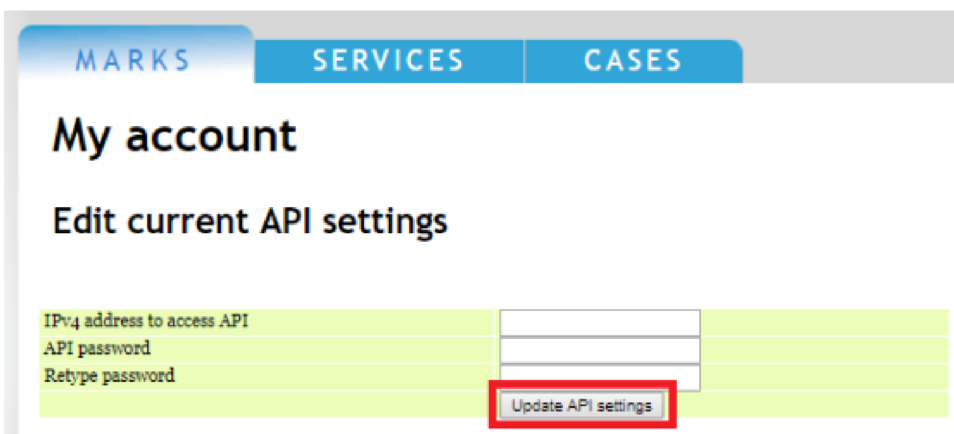
When signed in as a Trademark Agent, the "API settings" overview displays the following information as shown in the image below:



The Trademark Agent can edit the following fields:

- IPv4 address to access the API;
- API password;
- Retype password.

The Trademark Agent can submit the changes by pressing on the "Update API settings" as shown in the image below:



2.9. Report latest Changes

To access to the latest changes page, you must press the “Report latest changes” button.

The latest changes page displays trademark records filtered by date of modification as shown in the image below:

The list displays the following information about submitted trademark records.

- Mark name;
- Date changed;
- Record status;
- Mark Holder.

2.10. Change Password

At any time, you can decide to change the password of your TMCH account. You will be redirected to the following page by clicking on the "Change password" button:

Please follow the procedure indicated. You will receive a confirmation of the change of your password by email.

You will have to log in with your new credentials for changes to be effective.

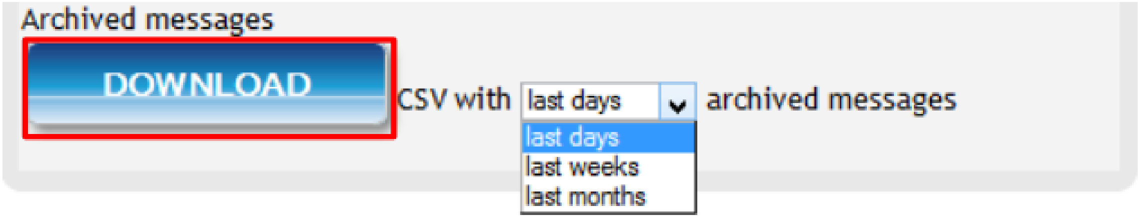
2.11. Data Exports

The following CSV files can be extracted on the "My Account" page. Please note that the reports are only generated once per day (at 00:00 UTC).

- Marks list
  - Overview of all mark records submitted in your account.
- Label list
  - Overview of all labels linked to the trademark records you have submitted.
- Cases and labels
  - Overview of the UDRP/Court cases and labels.
- Orders list
  - Overview of all the orders.
- Yesterday's active SMDs
  - An archive of all SMD files that were active the previous day.

2.12. Archived Messages

Via the archived messages functionality, you can export all the messages generated to your account (e.g. mark record status changes, sent notifications



…).

Select the time range for which you want to download the CSV file and click on “Download” to download the file.