Trademark Clearinghouse

Manual

How to manage My Account

July 2014

Version 1.1

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1. Introduction

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

The following functionalities are in scope of this document:

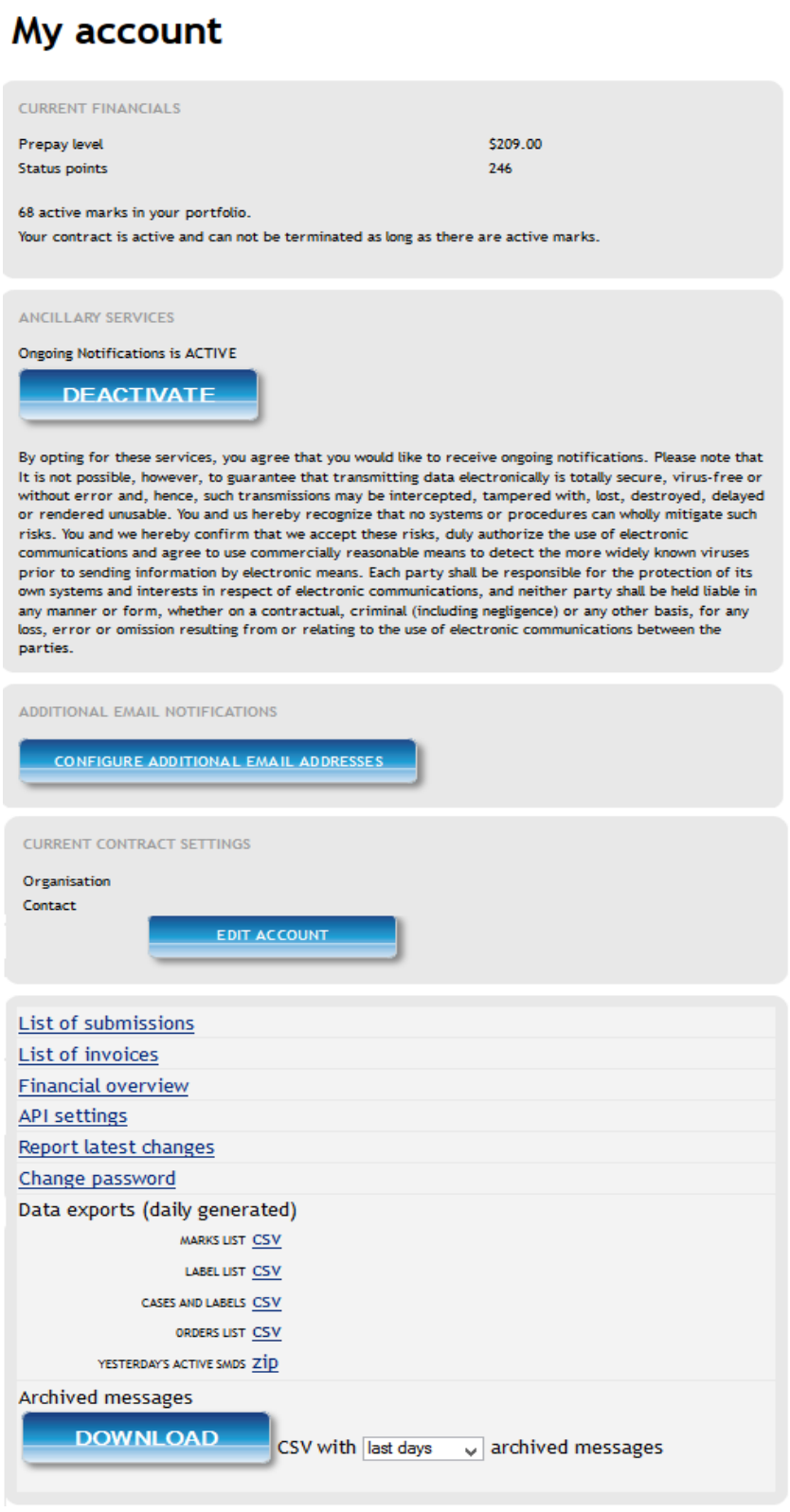
- How to edit ancillary services
- How to add additional e-mail address for notifications
- Current contract settings
- How to consult your submissions and invoices
- How to consult your financials
- How to edit API settings
- Data Exports
- Archived messages

2. How to manage your account

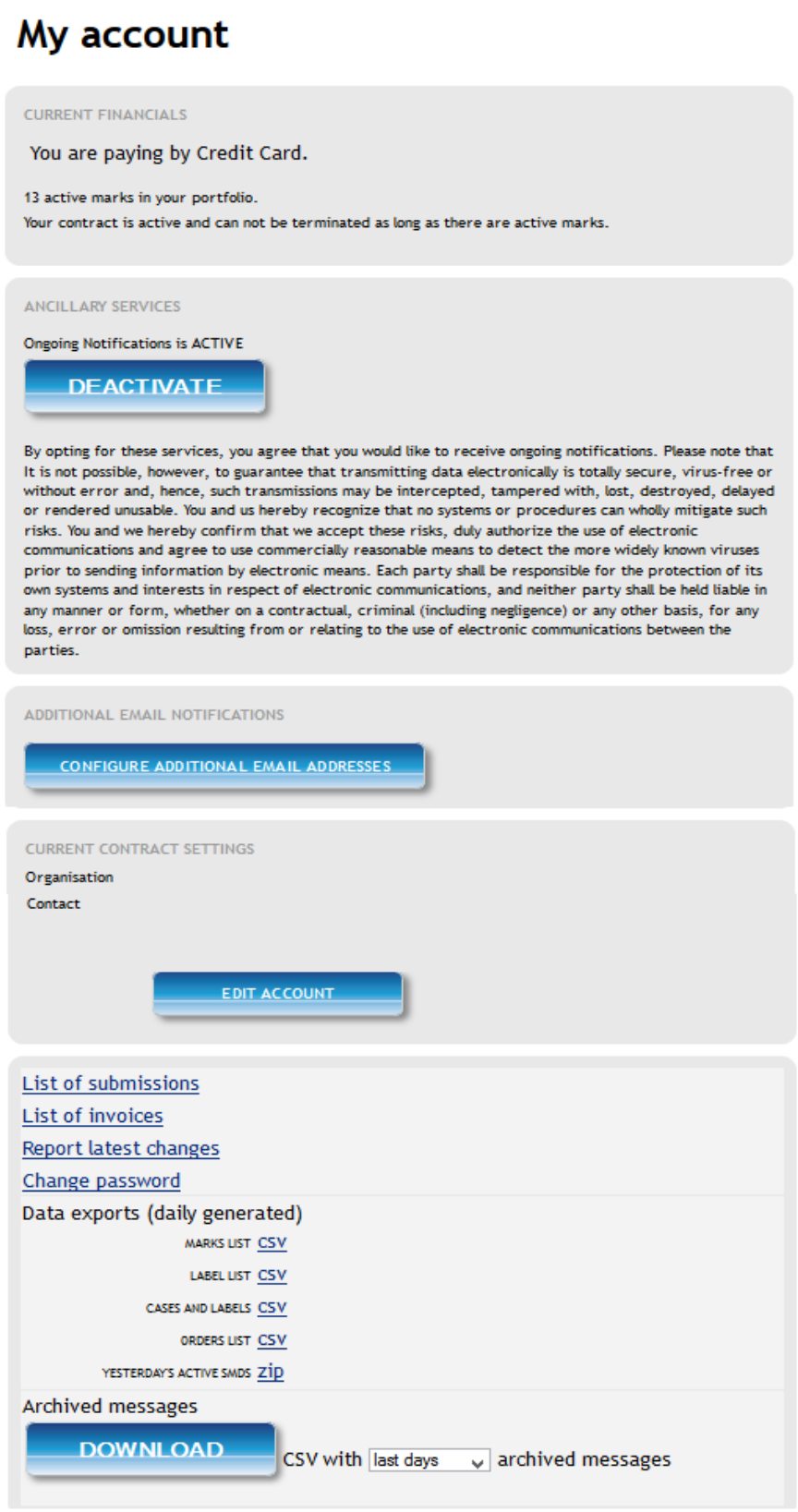
Once the user has signed in to the Trademark Clearinghouse User Interface you can navigate to your account settings by clicking on the “My account” button located in the header of the Trademark Clearinghouse User interface, as shown in the image below:

The account page is divided in multiple sections as shown in the image below:

Trademark Agent view:



Trademark Holder view:



2.1. Current Financials

The current financials section displays the remaining credits of the user. This section differs for Trademark Holders and Trademark Agents.

Trademark Agents will be able to view their current prepay amount and status points.

2.2. Ancillary Services

This section displays the status of your ancillary services.

Currently the only available ancillary services is “Ongoing Notifications”. For more information on how to manage ongoing notifications please refer to: http://www.trademark-clearinghouse.com/sites/default/files/files/downloads/How%20to%20manage%20your%20TMCH%20services%20v1%200.pdf

2.3. Additional e-mail notifications

You will be able to add 6 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 mark record has been assigned status verified;
- A mark record has been assigned status incorrect;,
- A mark record has been assigned status invalid;
- A mark record has been assigned status invalid because it has been on status incorrect for too long;
- Manual status change of a mark record;
- A mark record has been assigned status deactivated;
- A mark records has expired;
- A mark 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 amount has gone below watermark level (Trademark Agent only);

Expiry notifications:

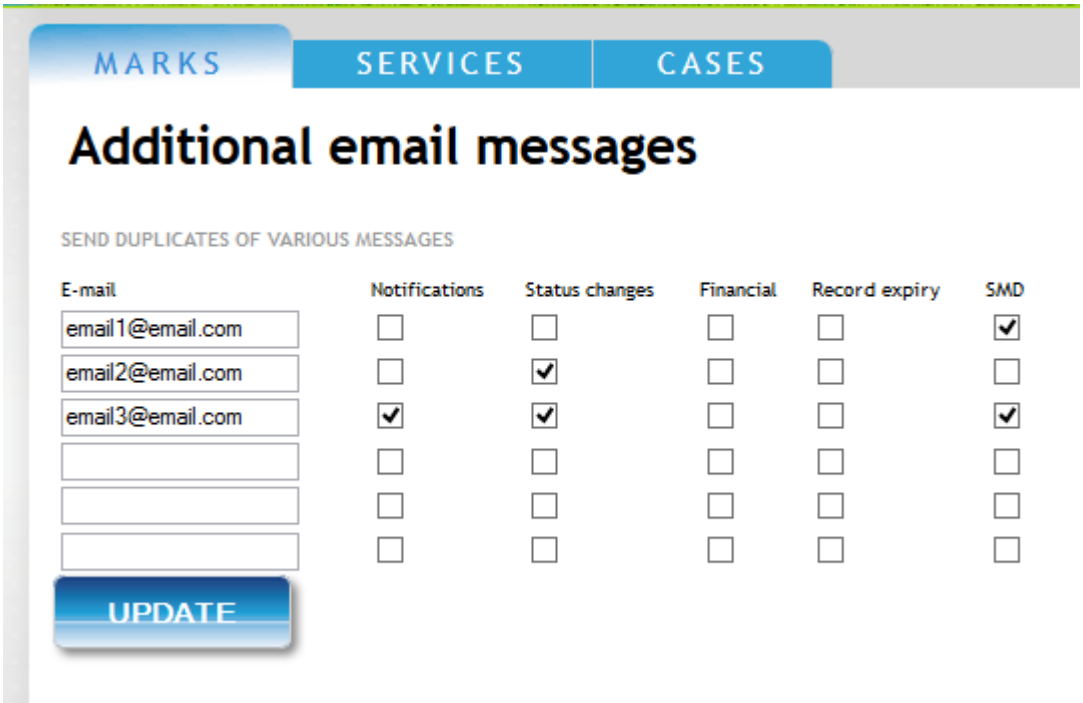
- Your mark record will expire soon;
- Your trademark will expire soon;
- Your Proof Of Use will expire soon.

SMD notifications:

- An SMD has been created for a mark record;
- An SMD has been regenerated for a mark record;
- An SMD has been revoked for a mark record.

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

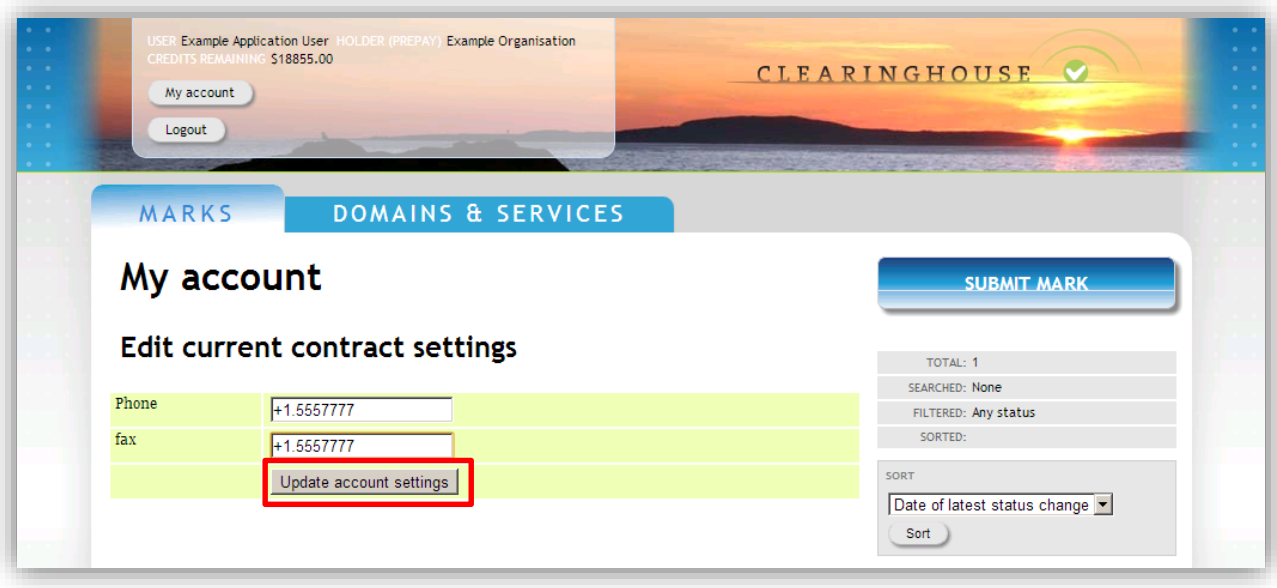
After clicking on the update button, the selected messages will be sent to the linked e-mail addresses.



2.4. Current Contract Settings

This section displays the organization and contact information.

The Phone number and the Fax number can be edited by the user by pressing on the “Edit”. After pressing the “update account settings” button the changes are saved and applied as shown in the image below.



Other contract information can also be edited under certain conditions. For more information on how to change your contract information, please refer to:

http://clearinghouse.org/sites/default/files/files/downloads/How%20to%20Change%20contract%20data%20v1.pdf

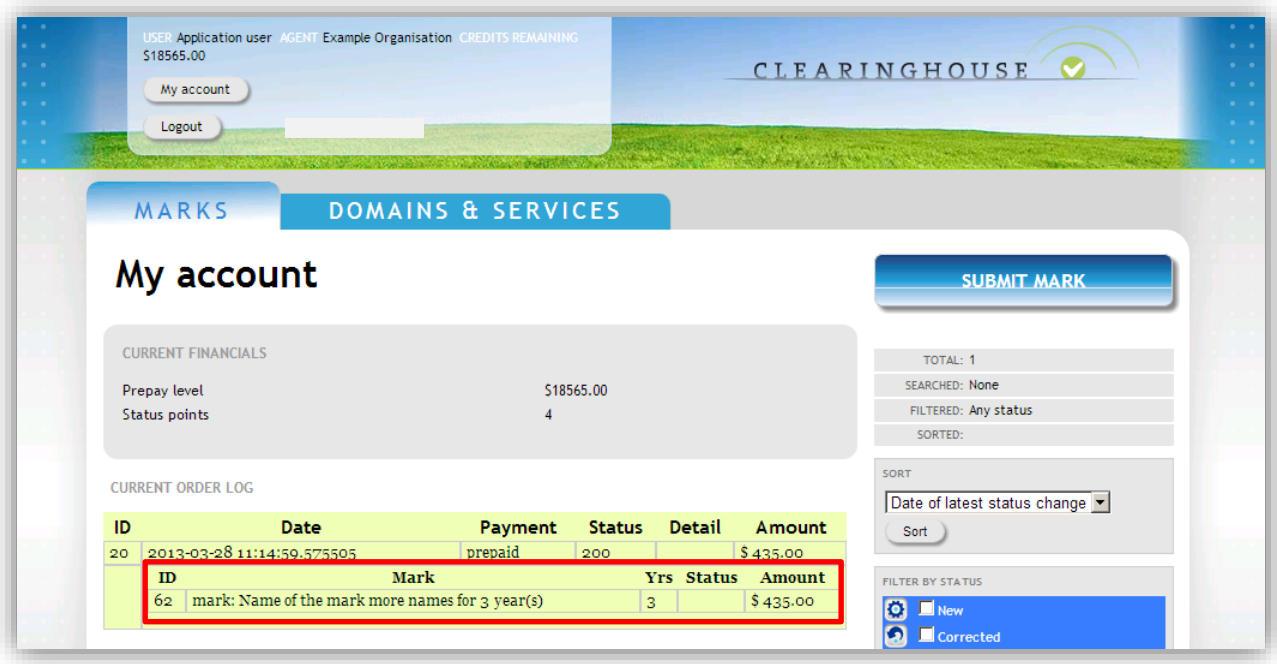
2.5. List of Submission

To access the list of Mark Record submissions the user must press the “List of submissions”.

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

- ID;
- Date;
- Payment;
- Status;
- Detail;
- Amount;

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

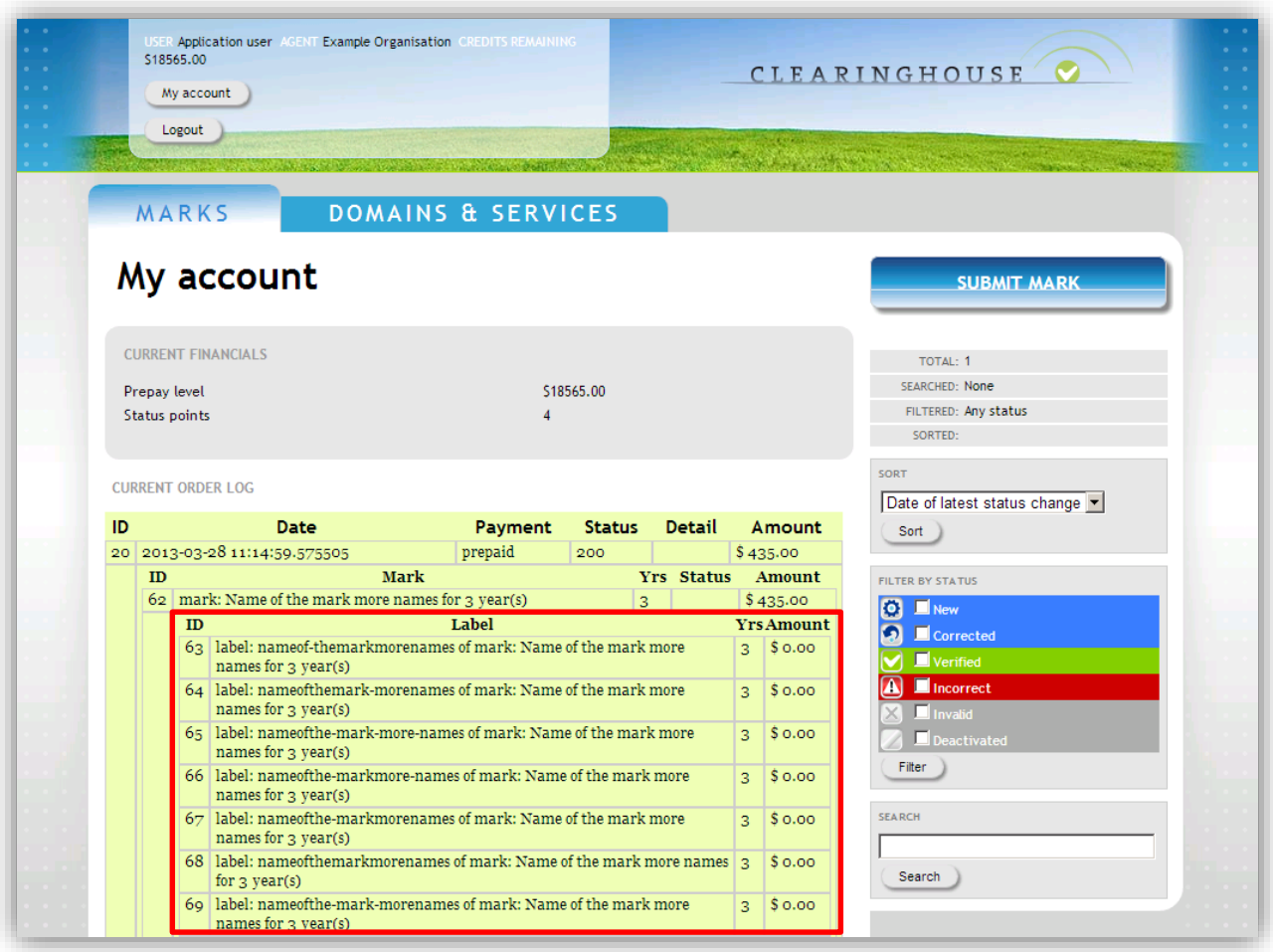


The following information per submitted mark record is displayed:

- ID;
- Mark;
- Yrs;

- Status;
- Amount;

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



The following information per submitted label is displayed:

- ID;
- Label;
- Yrs;
- Amount.

2.6. List of Invoices

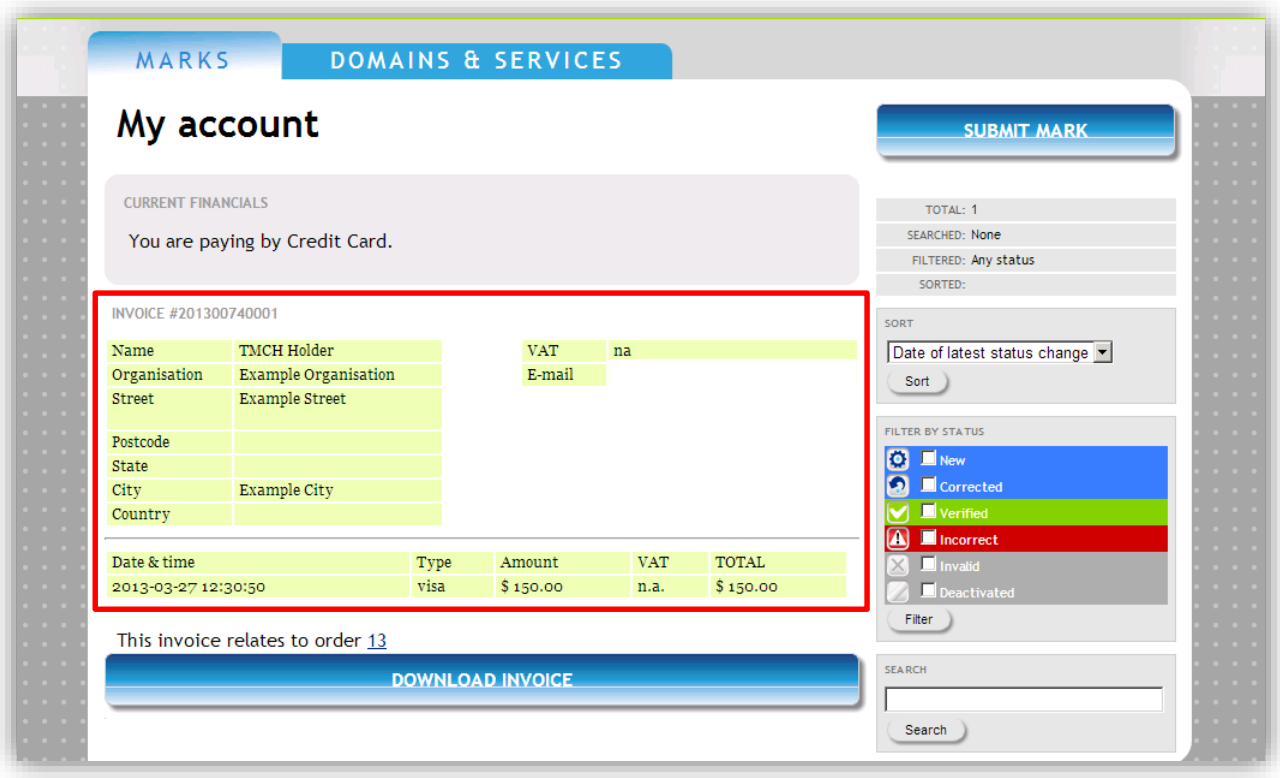
To access the list of invoices the user must press the “List of invoices” button.

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:

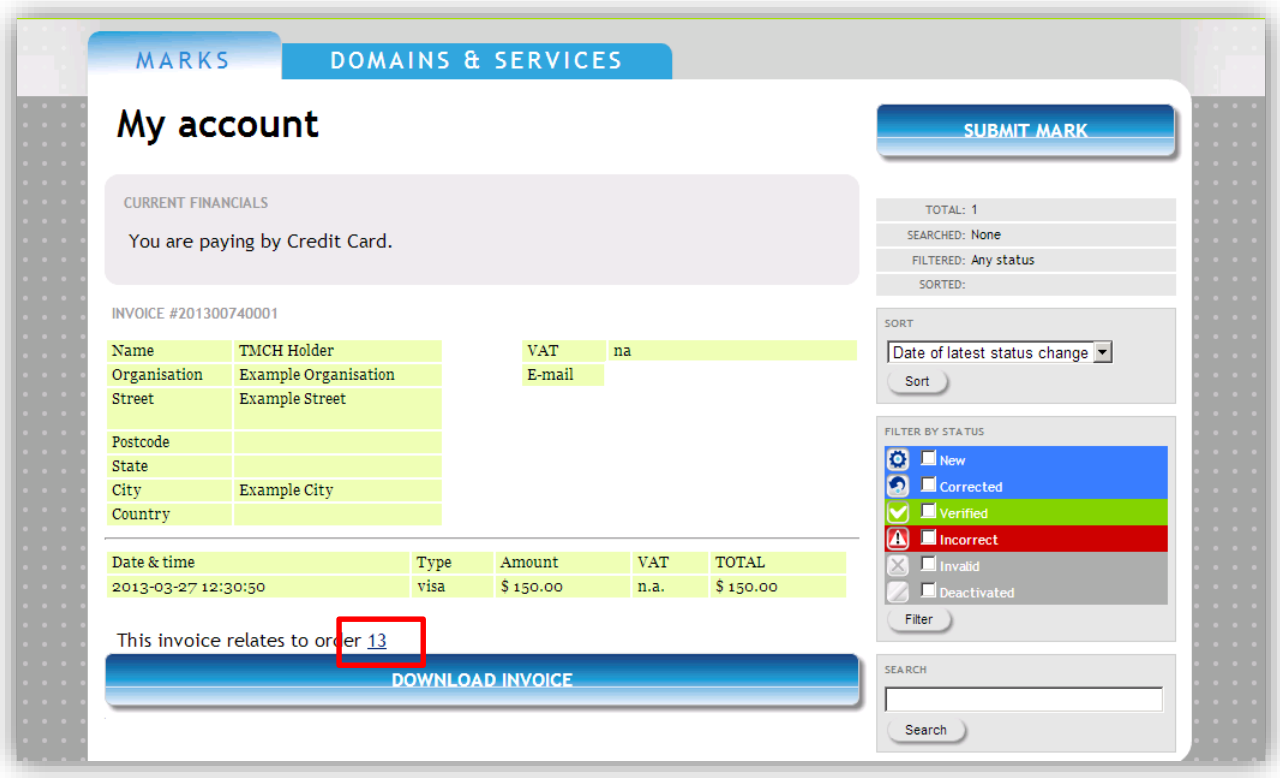
The list displays the following information about payment transactions.

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

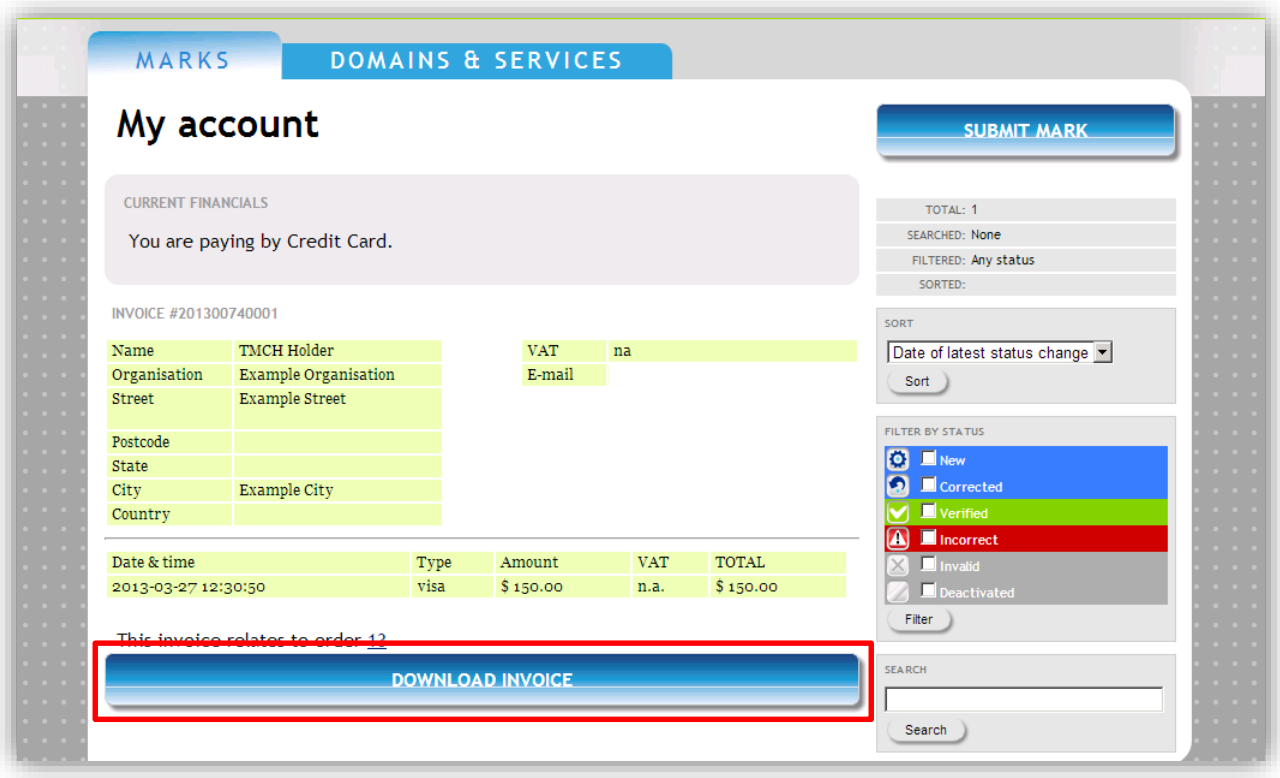
Clicking on one of the links in the ID column will redirect the user to a page containing detailed information about the corresponding invoice as shown in the image below:



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



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

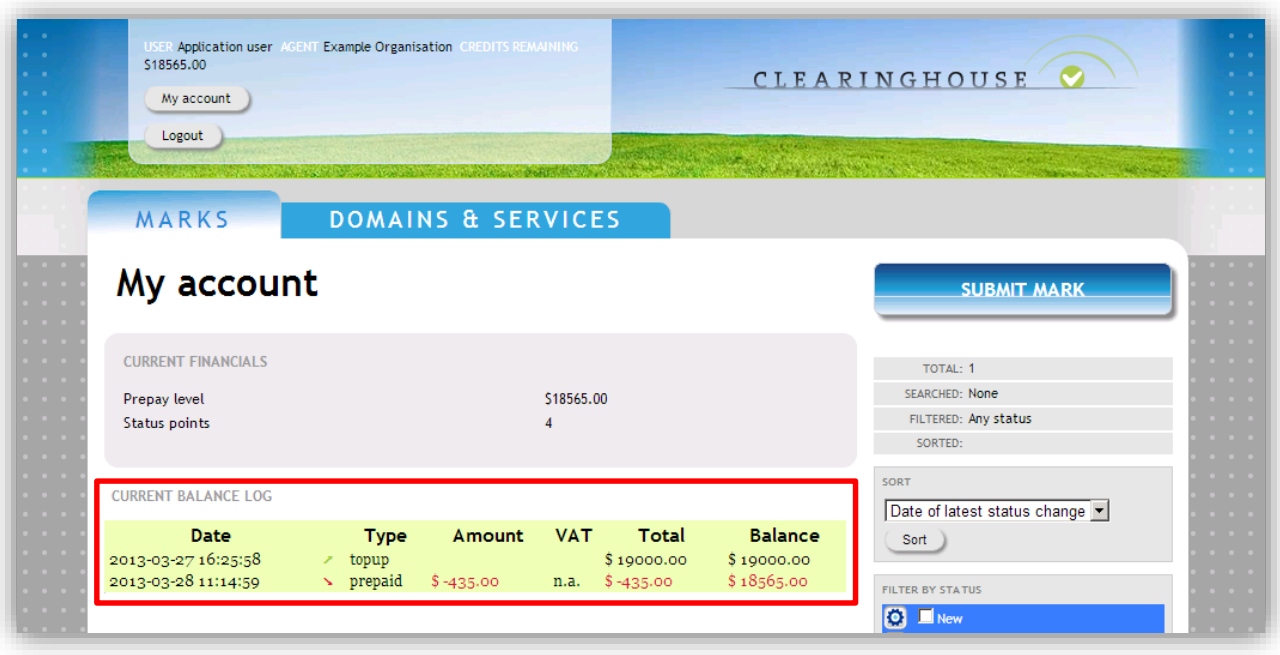

MARKS
DOMAINS & SERVICES
My account
SUBMIT MARK
CURRENT FINANCIALS
You are paying by Credit Card.
INVOICE #201300740001
Name TMCH Holder
Organisation Example Organisation
Street Example Street
Postcode
State
City Example City
Country
VAT na
E-mail
Date & time Type Amount VAT TOTAL
2013-03-27 12:30:50 visa $ 150.00 n.a. $ 150.00
This invoice relates to order 12
DOWNLOAD INVOICE
TOTAL: 1
SEARCHED: None
FILTERED: Any status
SORTED:
SORT
Date of latest status change
Sort
FILTER BY STATUS
New
Corrected
Verified
Incorrect
Invalid
Deactivated
Filter
SEARCH
Search

2.7. Financial Overview (only applicable for Trademark Agents)

To access the financial overview the user must press the “Financial Overview” button.

When signed in as a Trademark Agent using a prepayment account, the “current financial overview” displays the amount of money on your prepayment account and the amount of status points.

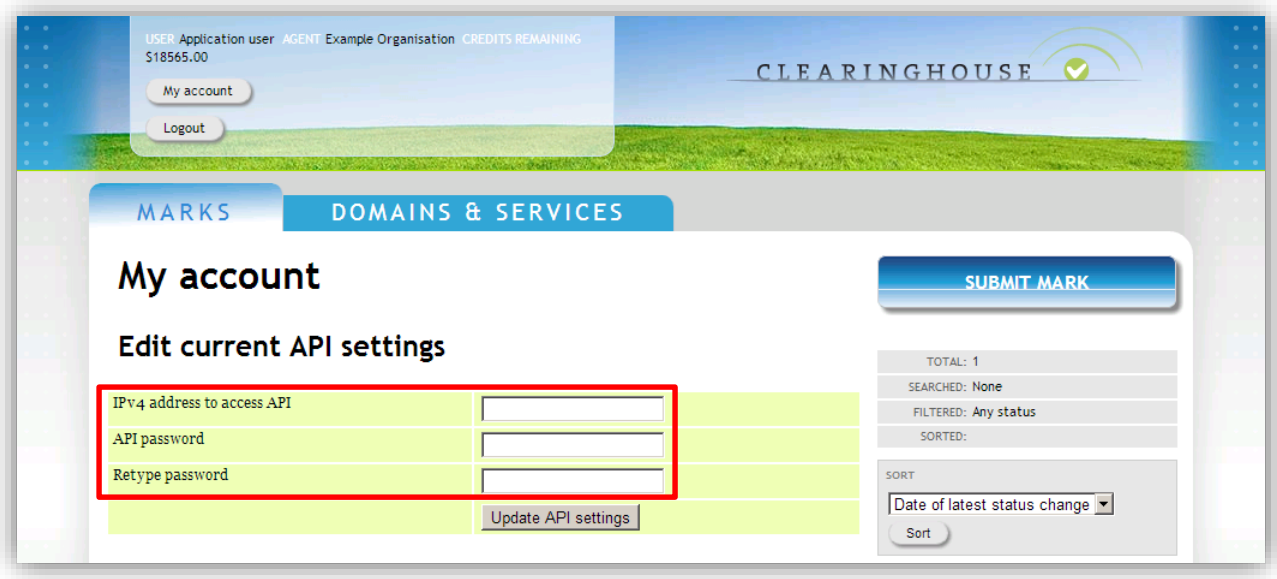
In the current balance log section contains an overview of all activity related to top-ups and payments as shown in the image below:



2.8. API Settings (only applicable for Trademark agents)

To access the API Settings page the user must press the “API Settings” button as shown in the image below:

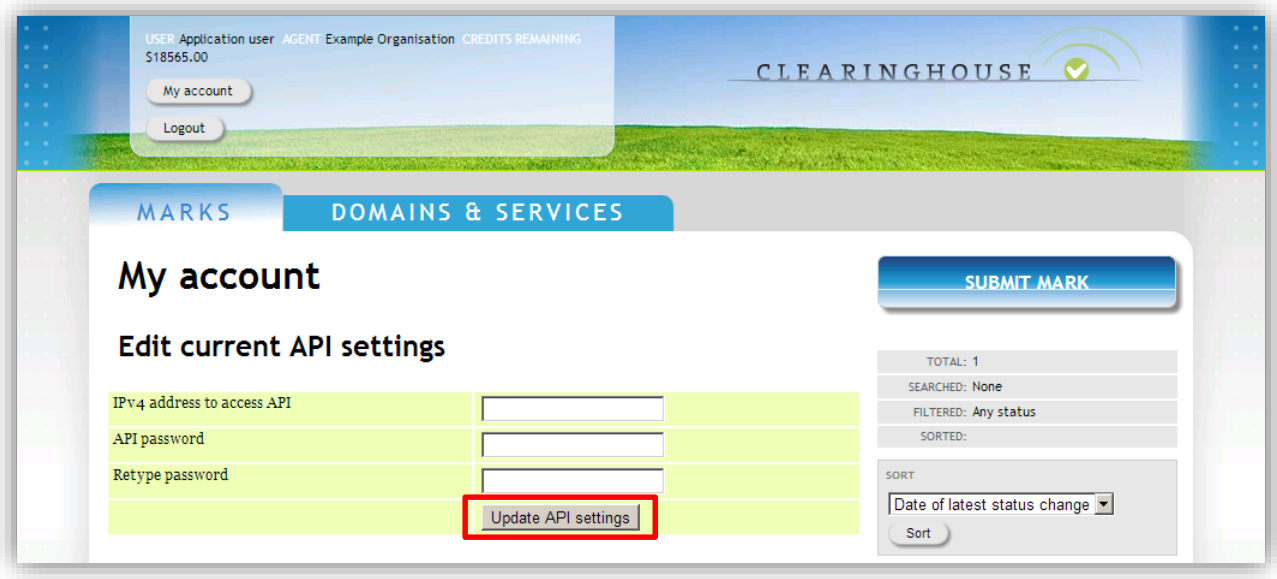
When signed in as a Trademark Agent using a prepayment account, the “API settings” overview displays the following information as shown in the image below:



The user can edit the following fields:

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

The user can submit the changes by pressing on the “Update API Settings” as shown in the image below:



For more information on how to gain access to the API please refer to http://www.trademark-clearinghouse.com/sites/default/files/files/downloads/tmch-api2.zip

2.9. Report latest Changes

To access the latest changes page the user must press the “Report latest changes” button .

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

The list displays the following information about submitted mark records.

- Mark;
- Changed;
- Status;

2.10. Data Exports

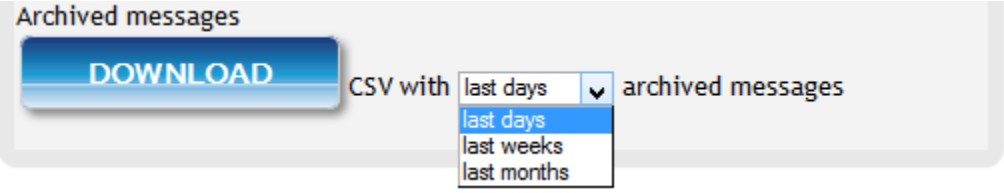
The following CSV files can be extracted on the Account page, keep in mind that this the reports are only generated once per day (at 0h00 UTC):

- Marks list
  - Overview of all mark records linked to your account.
- Label list
  - Overview of all labels linked to mark records submitted by the user.
- Cases and labels
  - Overview of the UDRP and Court cases and their labels, submitted by the user.
- Orders list
  - Overview of all orders placed by the user.

- Yesterday's active SMDs
    - A archive of all SMD files that were active the previous day.

2.11. Archived Messages

Via the archived messages functionality you can export all messages generated for the user (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.