

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 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:

My account

CURRENT FINANCIALS

Prepay level	\$209.00
Status points	246

68 active marks in your portfolio.

Your contract is active and can not be terminated as long as there are active marks.

ANCILLARY SERVICES

Ongoing Notifications is ACTIVE

DEACTIVATE

By opting for these services, you agree that you would like to receive ongoing notifications. Please note that it is not possible, however, to guarantee that transmitting data electronically is totally secure, virus-free or without error and, hence, such transmissions may be intercepted, tampered with, lost, destroyed, delayed or rendered unusable. You and us hereby recognize that no systems or procedures can wholly mitigate such risks. You and we hereby confirm that we accept these risks, duly authorize the use of electronic communications and agree to use commercially reasonable means to detect the more widely known viruses prior to sending information by electronic means. Each party shall be responsible for the protection of its own systems and interests in respect of electronic communications, and neither party shall be held liable in any manner or form, whether on a contractual, criminal (including negligence) or any other basis, for any loss, error or omission resulting from or relating to the use of electronic communications between the parties.

ADDITIONAL EMAIL NOTIFICATIONS

CONFIGURE ADDITIONAL EMAIL ADDRESSES

CURRENT CONTRACT SETTINGS

Organisation
Contact

EDIT ACCOUNT

[List of submissions](#)

[List of invoices](#)

[Financial overview](#)

[API settings](#)

[Report latest changes](#)

[Change password](#)

Data exports (daily generated)

MARKS LIST [CSV](#)

LABEL LIST [CSV](#)

CASES AND LABELS [CSV](#)

ORDERS LIST [CSV](#)

YESTERDAY'S ACTIVE SMDS [zip](#)

Archived messages

DOWNLOAD

CSV with archived messages

Trademark Holder view:

My account

CURRENT FINANCIALS

You are paying by Credit Card.

13 active marks in your portfolio.

Your contract is active and can not be terminated as long as there are active marks.

ANCILLARY SERVICES

Ongoing Notifications is ACTIVE

DEACTIVATE

By opting for these services, you agree that you would like to receive ongoing notifications. Please note that It is not possible, however, to guarantee that transmitting data electronically is totally secure, virus-free or without error and, hence, such transmissions may be intercepted, tampered with, lost, destroyed, delayed or rendered unusable. You and us hereby recognize that no systems or procedures can wholly mitigate such risks. You and we hereby confirm that we accept these risks, duly authorize the use of electronic communications and agree to use commercially reasonable means to detect the more widely known viruses prior to sending information by electronic means. Each party shall be responsible for the protection of its own systems and interests in respect of electronic communications, and neither party shall be held liable in any manner or form, whether on a contractual, criminal (including negligence) or any other basis, for any loss, error or omission resulting from or relating to the use of electronic communications between the parties.

ADDITIONAL EMAIL NOTIFICATIONS

CONFIGURE ADDITIONAL EMAIL ADDRESSES

CURRENT CONTRACT SETTINGS

Organisation

Contact

EDIT ACCOUNT

[List of submissions](#)

[List of invoices](#)

[Report latest changes](#)

[Change password](#)

Data exports (daily generated)

MARKS LIST [CSV](#)

LABEL LIST [CSV](#)

CASES AND LABELS [CSV](#)

ORDERS LIST [CSV](#)

YESTERDAY'S ACTIVE SMS [zip](#)

Archived messages

DOWNLOAD

CSV with archived messages

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.

MARKS

SERVICES

CASES

Additional email messages

SEND DUPLICATES OF VARIOUS MESSAGES

E-mail	Notifications	Status changes	Financial	Record expiry	SMD
email1@email.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
email2@email.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
email3@email.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

UPDATE

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.

The screenshot displays the 'My account' section of the Trademark Clearinghouse interface. At the top, a header bar shows user information: 'USER: Example Application User', 'HOLDER (PREPAY): Example Organisation', and 'CREDITS REMAINING: \$18855.00'. Below this are 'My account' and 'Logout' buttons. The main navigation bar includes 'MARKS' and 'DOMAINS & SERVICES' tabs. The 'My account' section is active, showing 'Edit current contract settings'. It contains two input fields: 'Phone' with the value '+1.5557777' and 'fax' with the value '+1.5557777'. A red rectangular box highlights the 'Update account settings' button located below the 'fax' field. To the right of the settings is a 'SUBMIT MARK' button and a summary table.

CLEARINGHOUSE	
USER: Example Application User	HOLDER (PREPAY): Example Organisation
CREDITS REMAINING: \$18855.00	
My account Logout	
My account	
Edit current contract settings	
Phone	<input type="text" value="+1.5557777"/>
fax	<input type="text" value="+1.5557777"/>
Update account settings	
SUBMIT MARK	
TOTAL: 1	
SEARCHED: None	
FILTERED: Any status	
SORTED:	
SORT	
<input type="text" value="Date of latest status change"/>	
Sort	

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:

USER: Application user: AGENT Example Organisation CREDITS REMAINING \$18565.00

My account Logout

CLEARINGHOUSE

MARKS DOMAINS & SERVICES

My account

CURRENT FINANCIALS

Prepay level	\$18565.00
Status points	4

CURRENT ORDER LOG

ID	Date	Payment	Status	Detail	Amount
20	2013-03-28 11:14:59.575505	prepaid	200		\$ 435.00
62	mark: Name of the mark more names for 3 year(s)		3		\$ 435.00

SUBMIT MARK

TOTAL: 1

SEARCHED: None

FILTERED: Any status

SORTED:

SORT

Date of latest status change

Sort

FILTER BY STATUS

New

Corrected

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:

My account

CURRENT FINANCIALS

Prepay level	\$18565.00
Status points	4

CURRENT ORDER LOG

ID	Date	Payment	Status	Detail	Amount
20	2013-03-28 11:14:59.575505	prepaid	200		\$ 435.00
62	mark: Name of the mark more names for 3 year(s)				\$ 435.00
	ID	Label	Yrs	Status	Amount
63	label: nameof-themarkmorenames of mark: Name of the mark more names for 3 year(s)	3		\$ 0.00	
64	label: nameofthemark-morenames of mark: Name of the mark more names for 3 year(s)	3		\$ 0.00	
65	label: nameofthe-mark-more-names of mark: Name of the mark more names for 3 year(s)	3		\$ 0.00	
66	label: nameofthe-markmore-names of mark: Name of the mark more names for 3 year(s)	3		\$ 0.00	
67	label: nameofthe-markmorenames of mark: Name of the mark more names for 3 year(s)	3		\$ 0.00	
68	label: nameofthemarkmorenames of mark: Name of the mark more names for 3 year(s)	3		\$ 0.00	
69	label: nameofthe-mark-morenames of mark: Name of the mark more names for 3 year(s)	3		\$ 0.00	

SUBMIT MARK

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

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 screenshot shows the 'My account' page of the Trademark Clearinghouse. The page has a header with the 'CLEARINGHOUSE' logo and a green checkmark. Below the header, there are tabs for 'MARKS' and 'DOMAINS & SERVICES'. The 'My account' section displays 'CURRENT FINANCIALS' with 'Prepay level' at \$18565.00 and 'Status points' at 4. Below this is the 'CURRENT INVOICE LOG' table, which is highlighted with a red border. The table has columns for ID, Date, Invoice No, Type, Amount, VAT, and Total. A single row is visible with ID 20, Date 2013-03-27, Type topup, Amount \$19000.00, VAT n.a., and Total \$19000.00. To the right of the table, there is a 'SUBMIT MARK' button and a summary section showing 'TOTAL: 1', 'SEARCHED: None', 'FILTERED: Any status', and 'SORTED:'. Below this is a 'SORT' dropdown menu with 'Date of latest status change' selected and a 'Sort' button.

ID	Date	Invoice No	Type	Amount	VAT	Total
20	2013-03-27		topup	\$19000.00	n.a.	\$19000.00

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:

MARKS **DOMAINS & SERVICES**

My account

SUBMIT MARK

CURRENT FINANCIALS
You are paying by Credit Card.

INVOICE #201300740001

Name	TMCH Holder	VAT	na
Organisation	Example Organisation	E-mail	
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

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

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:

MARKS **DOMAINS & SERVICES**

My account

SUBMIT MARK

CURRENT FINANCIALS

You are paying by Credit Card.

INVOICE #201300740001

Name	TMCH Holder	VAT	na
Organisation	Example Organisation	E-mail	
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

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

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

CURRENT FINANCIALS

You are paying by Credit Card.

INVOICE #201300740001

Name	TMCH Holder	VAT	na
Organisation	Example Organisation	E-mail	
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 [12](#)

DOWNLOAD INVOICE

SUBMIT MARK

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.

The screenshot shows the 'My account' page in the Trademark Clearinghouse. The user is logged in as 'AGENT Example Organisation' with a remaining credit of '\$18565.00'. The page has tabs for 'MARKS' and 'DOMAINS & SERVICES'. The 'My account' section is highlighted, showing 'CURRENT FINANCIALS' with a 'Prepay level' of '\$18565.00' and 'Status points' of '4'. Below this is a 'CURRENT BALANCE LOG' table. On the right, there are filters for 'TOTAL: 1', 'SEARCHED: None', 'FILTERED: Any status', and 'SORTED:'. A 'SUBMIT MARK' button is also visible.

USER: Application user AGENT Example Organisation CREDITS REMAINING \$18565.00

My account Logout

CLEARINGHOUSE

MARKS DOMAINS & SERVICES

My account

CURRENT FINANCIALS

Prepay level	\$18565.00
Status points	4

CURRENT BALANCE LOG

Date	Type	Amount	VAT	Total	Balance
2013-03-27 16:25:58	topup			\$ 19000.00	\$ 19000.00
2013-03-28 11:14:59		\$ -435.00	n.a.	\$ -435.00	\$ 18565.00

SUBMIT MARK

TOTAL: 1
SEARCHED: None
FILTERED: Any status
SORTED:

SORT
Date of latest status change
Sort

FILTER BY STATUS
New

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

USER: Application user AGENT: Example Organisation CREDITS REMAINING \$18565.00

My account

Logout

CLEARINGHOUSE

MARKS DOMAINS & SERVICES

My account

SUBMIT MARK

CURRENT FINANCIALS

Prepay level \$18565.00

Status points 4

CURRENT BALANCE LOG

Date	Type	Amount	VAT	Total	Balance
2013-03-27 16:25:58	✓ topup			\$ 19000.00	\$ 19000.00
2013-03-28 11:14:59	✗ prepaid	\$ -435.00	n.a.	\$ -435.00	\$ 18565.00

TOTAL: 1

SEARCHED: None

FILTERED: Any status

SORTED:

SORT

Date of latest status change

Sort

FILTER BY STATUS

New

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:

USER: Application user AGENT: Example Organisation CREDITS REMAINING: \$18565.00

My account Logout

CLEARINGHOUSE

MARKS DOMAINS & SERVICES

My account

Edit current API settings

IPv4 address to access API

API password

Retype password

Update API settings

SUBMIT MARK

TOTAL: 1

SEARCHED: None

FILTERED: Any status

SORTED:

SORT

Date of latest status change

Sort

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:

USER: Application user AGENT: Example Organisation CREDITS REMAINING: \$18565.00

My account Logout

CLEARINGHOUSE

MARKS DOMAINS & SERVICES

My account

Edit current API settings

IPv4 address to access API

API password

Retype password

Update API settings

SUBMIT MARK

TOTAL: 1

SEARCHED: None

FILTERED: Any status

SORTED:

SORT

Date of latest status change

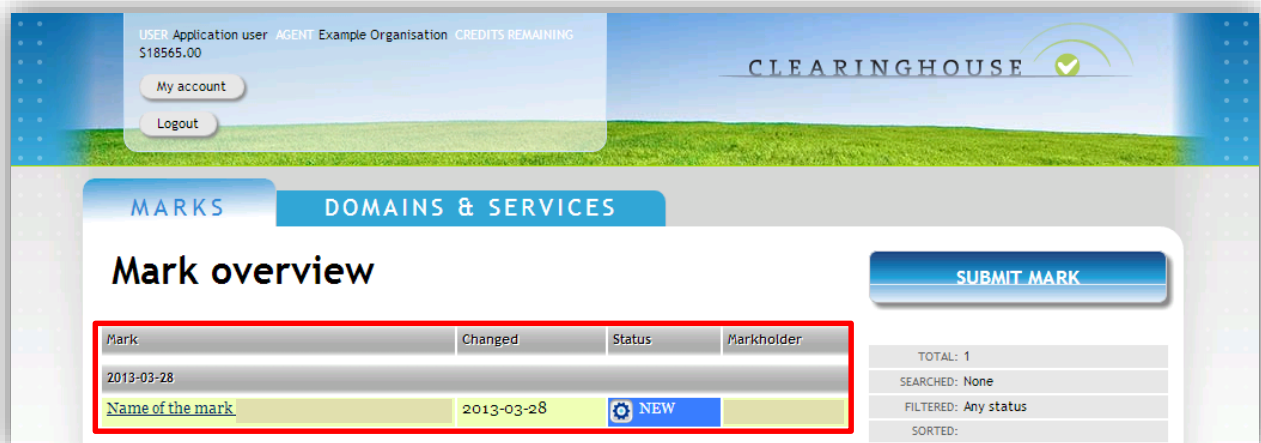
Sort

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

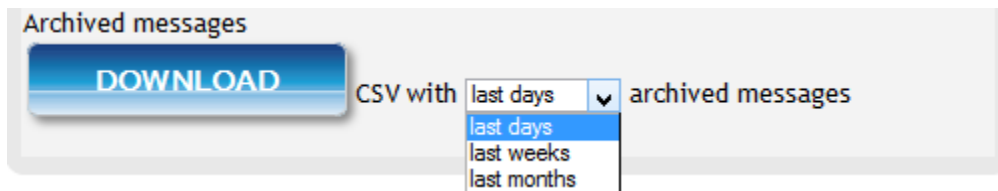
The following CSV files can be extracted on the Account page, keep in mind that this the reports are only generated once per day (at 0h00 UTC):

- 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.