

CLEARINGHOUSE



# How to Register as a Trademark Holder or Trademark Agent

13/02/2014

Version 2.0



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# 1. INTRODUCTION

This document provides you with an overview of the steps you need to take to register and/or create an account with the Clearinghouse. The Clearinghouse is open to Trademark Holders and Trademark agents. How to submit a trademark record and manage your profile and portfolio will be provided in other documents.

A trademark holder is an owner, licensee, or assignee of a trademark. A trademark holder can choose from the following methods of payment: 1) via credit card or 2) prepaid account. For further information on the payments terms and conditions and the fee schedule, please go to [www.trademark-clearinghouse.com](http://www.trademark-clearinghouse.com).

A trademark agent is an individual or entity acting on behalf of a trademark holder. A trademark agent can only select the prepaid method. For further information regarding the payments terms and conditions and the fee schedule, please go to [www.trademark-clearinghouse.com](http://www.trademark-clearinghouse.com).



## 2. HOW TO REGISTER WITH THE CLEARINGHOUSE

Registering with the Clearinghouse is a three step process.

The first step of the registration is performed without signing in to the Clearinghouse User Interface and is used to provide us with details of the contracting party. The second and third steps are performed after receiving credentials to sign-in to the private section of the Clearinghouse User Interface. The second step requires the user to change their password, and the third step requires the user to accept our terms and conditions and wire the pre-paid amount if applicable.

Performing all steps is mandatory before submission of any trademark records.

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### Step 1:

General registration information applicable to trademark holders and trademark agents

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1. Access to the registration page can be found at [www.trademark-clearinghouse.com](http://www.trademark-clearinghouse.com) by clicking on the "REGISTER NOW". that will direct you to the registration page (<https://www.secure.trademark-clearinghouse.com>);
2. Trademark holders and trademark agents will be required to complete the following information:
  - ⇒ **Name:** The first name and last name of the individual that will enter into a contract with the Clearinghouse ("contracting party") or that is the responsible for the organization;
  - ⇒ **Name of the organization:** The name of the organization that will enter into a contract with the Clearinghouse ("contracting party"). If the contracting party is an individual "Non Applicable" can be entered here;
  - ⇒ **Address:** Full postal address (Street and Number, Postal code, City, State/Province and Country) of the organization;
  - ⇒ **Phone:** Phone number of the organization in E.164 format (f.e. +1.5557777);
  - ⇒ **Fax:** Fax number of the organization in E.164 format (f.e. +1.5558888);
  - ⇒ **Mail:** The e-mail address where all notifications will be sent to as well as the sign-in credentials (User ID and Password).
  - ⇒ **VAT information:** Only applicable if your organization is located within the EU;
    - **Registered for VAT:** The contracting party must supply a VAT number;
      - **VAT number:** Value added tax number of the contracting party or organization that will be used for invoicing;
    - **No VAT number:** The contracting party is exempt from VAT or does not know their VAT number;
      - **VAT exemption certificate of the user:** If the contracting party has indicated a VAT exemption, the certificate for this exemption may be requested by the Trademark Clearinghouse later in the registration process.



### 3. Type and payment method:

- Agent Silver with pre-payment of \$ 5,000 USD; or
- Agent Gold with pre-payment of \$ 15,000 USD; or
- Holder with on-line payment (credit card); or
- Holder with pre-payment.

### 4. Ancillary Services:

The Ancillary Services box must be checked in order to receive a newsletter about any future ancillary services the Clearinghouse will provide.

### 5. Application User:

The application user is the person who will actually be submitting trademark records and who will interact with the Clearinghouse. If this information is the same as above, please complete the information again. If there will be someone else within the organization acting as the application user, you will need to provide the Clearinghouse with the:

- Name of the application user: first name and last name;
- Phone number of the application user: phone number where the application user can be reached;
- E-mail address: at this current stage, please note that this e-mail address needs to match the e-mail address provided above.

Upon completion of all the mandatory fields, you may then select “**Registration**”. Please note that all mandatory fields are marked with an asterisk (\*). If any necessary fields are incomplete, you will not be able to submit your information and the incomplete fields will be marked.

Upon submission, all information will be reviewed and you will be submitted to a sanction review. Once the information is deemed valid, an e-mail will be sent with a User ID and temporary password. Upon receipt of the e-mail notification, you will be required to complete step 2 of the registration process.

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## Step 2:

### Continuation of the registration process applicable to trademark holder or trademark agents

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In order to perform step 2 of the registration process, you will need to go to <https://secure.trademark-clearinghouse.com> and click on the sign-in page. You will then have to sign-in with your User ID and temporary password. Before proceeding, you will be requested to change your temporary password. Once you have changed your temporary password, you can then complete the registration process by signing in. Depending on which user type you have indicated in the first step, you will be directed to step 3A or 3B or, 3C as described below.



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### Step 3:

Continuation of the registration process, this step differs for trademark holders and trademark agents

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#### Step 3A: Applicable to trademark agents

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After signing in, the user will have access to a secure web page where, after clicking “Contract”, the information provided during the online registration is shown; additionally you will have access to the contract and a copy of the pro-forma invoice.

1. Download the contract

A PDF document containing a template contract is downloadable by clicking the “Contract” button.

2. Upload the contract

After signing the contract you can upload it by clicking the “Signed Contract” button, selecting the correct file, and clicking “Add signed contract”.

3. Pro-Forma Invoice

A pro-forma invoice can be downloaded by clicking the “Pro-Forma Invoice” button. Before the registration is fully completed you will need to wire the selected amount of \$5,000 USD or \$15,000 USD. For more information please see the information provided in Payments Terms and Conditions.

Once these steps have been completed you will receive an e-mail notification informing you that registration has successfully been completed. At this point, you can sign in and submit trademark records. For more information, please see “How to submit a trademark record.”

#### Step 3B: Applicable to trademark holders with pre-payment

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After signing in, the user will have access to a secure web page where, after clicking “Contract”, the information provided during the online registration is shown; additionally, you will have access to the terms and conditions and a copy of the pro-forma invoice.

1. Accept the Terms and Conditions

By clicking on “Accept T’s And C’s”, the Terms and Conditions of the Clearinghouse will be shown on the left side of the screen. After reading the Terms and Conditions you must check the “I accept these terms and conditions” box and click on “Confirm my acceptance of the terms and conditions”.

2. Pro-Forma Invoice

A pro-forma invoice can be downloaded by clicking the “Pro-Forma Invoice” button. Before the registration is fully complete you will need to wire an amount of \$15,000 USD. For more information please see the information provided in Payment Terms and Conditions in the contract as well as on the invoice.

Once these steps have been completed you will receive an e-mail notification informing you that registration has successfully been completed. At this point, you can sign in and submit trademark records. For more information, please see the “How to submit a trademark record.”



**Step 3C:** Applicable to trademark holders with online payment (credit card)

After signing in, the user will have access to a secure web page where, after clicking “Contract”, the information provided during the online registration is shown; additionally, you will have access to the terms and conditions.

1. Accept the Terms and Conditions

By clicking on “Accept T’s And C’s” the Terms and Conditions of the Clearinghouse will be shown on the left side of the screen. After reading the Terms and Conditions you must check the “I accept these terms and conditions” box and click on “Confirm my acceptance of the terms and conditions”.

Once these steps have been completed you will receive an e-mail notification informing you that registration has successfully been completed. At this point, you can sign in and submit trademark records. For more information, please see the “How to submit a trademark record.”