

CLEARINGHOUSE



How to manage my account

Trademark Clearinghouse

30/09/2020

Version 1.2



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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 in to 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:

My account

CURRENT FINANCIALS

You are paying by Credit Card.

The number of active marks in your portfolio is 2.

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

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

My account

CURRENT FINANCIALS

Prepay level	\$565.00
Status points	3

The number of active marks in your portfolio is 3.
Your contract is active and can not be terminated as long as there are active marks.

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.

Additional email messages

SEND DUPLICATES OF VARIOUS MESSAGES

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



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 Contract Settings

This section displays the organization and contact information.

CURRENT CONTRACT SETTINGS

EDIT CONTRACT DETAILS

Organisation Test2
Test
Test 123
1234 Test
US

Contact Phone +1.1234567
Fax
Email pascallekeboma+b3@gmail.com

EDIT CONTRACT BASICS

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.

Terms and conditions

By ticking the box below, you agree, warrant and acknowledge the following:

The changes made to the person of contact name and to the address in the contract details are accurate and provided in good faith.

You remain ultimately responsible for any changes performed by any of your employees, agents, customers or subcontractors that use of have access to your account.

The referred change to contract details will have no impact on the validity of the contract signed initially between you and the Trademark Clearinghouse and on your acceptance of the terms and conditions of the Trademark Clearinghouse.

The terms and conditions of the contract as provided in the <http://www.trademark-clearinghouse.com/sites/default/files/files/downloads/TMCH%20terms%20and%20conditions%20-%20Trademark%20Agent%20-%201.1.pdf>.

The Trademark Clearinghouse will not be held liable for any error or mistake in the changes performed by you to the contact information.

The Trademark Clearinghouse may annually verify that such information is correct. If such contact information is incorrect, we will take progressive measures to contact you to correct such information. If we are ultimately unable to contact you, we will suspend your account and you will need to contact us to resolve the issue.

I accept these terms and conditions

UPDATE ACCREDITATION



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:

My account

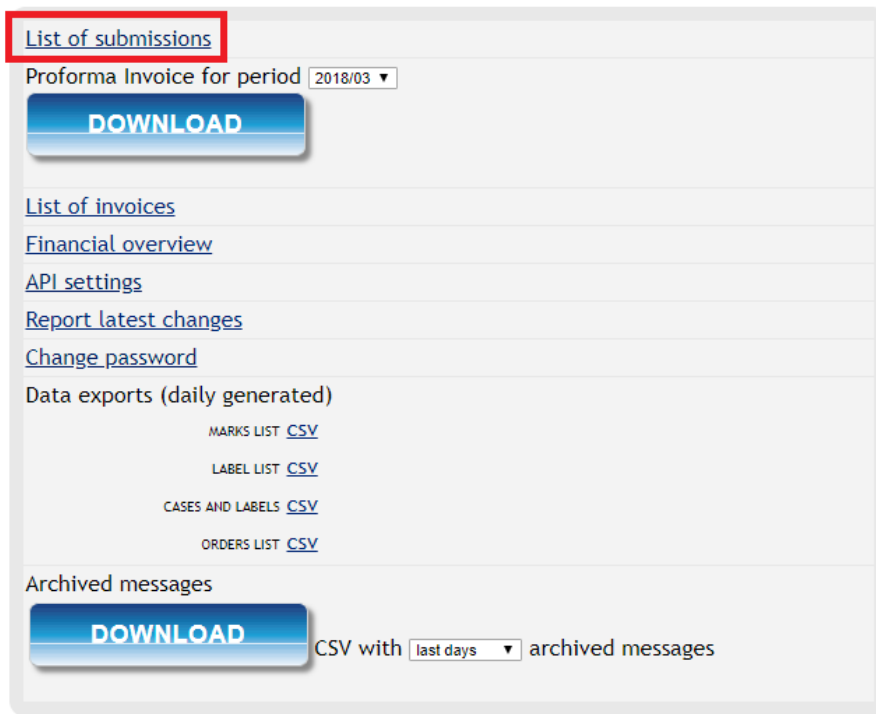
Edit current account settings

Phone	+32.484639237
Fax	+32.456789002
Email	testtmch+testing@gmail.coi
Update account settings	



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 5950192.65
 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 5950192.65
 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

ORDER

You have an open order ready
 Proceed to checkout

TOTAL: 75

SEARCHED: None

FILTERED: Any status

SORTED:

SORT

Latest status change

FILTER BY STATUS

- New
- Corrected
- Verified

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:

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

ID	Label	Yrs	Amount
1745	label: teestagent of mark: Teest_Agent for 1 year(s)	1	\$ 0.00
1746	label: teest-agent of mark: Teest_Agent for 1 year(s)	1	\$ 0.00

ORDER

You have an open order ready

Proceed to checkout

TOTAL: 75

SEARCHED: None

FILTERED: Any status

SORTED:

SORT

Latest status change Sort

FILTER BY STATUS

- New
- Corrected
- Verified
- Incorrect
- Invalid
- Deactivated



2.6. List of invoices

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

The screenshot shows a sidebar menu with the following items:

- List of submissions
- Proforma Invoice for period
 - DOWNLOAD**
- List of invoices** (highlighted with a red box)
- 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](#)
- Archived messages
 - DOWNLOAD** CSV with archived messages

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 with a 'SUBMIT MARK' button at the top right. Below it, there are statistics: TOTAL: 1, SEARCHED: None, FILTERED: Any status, SORTED: (empty). A 'SORT' dropdown menu is set to 'Date of latest status change' with a 'Sort' button below it.

The 'CURRENT INVOICE LOG' table is highlighted with a red box and contains the following data:

ID	Date	Invoice No	Type	Amount	VAT	Total
20	2013-03-27	201300780001	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 link in the ID column will redirect you to a page containing detailed information about the corresponding invoice 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](#)

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

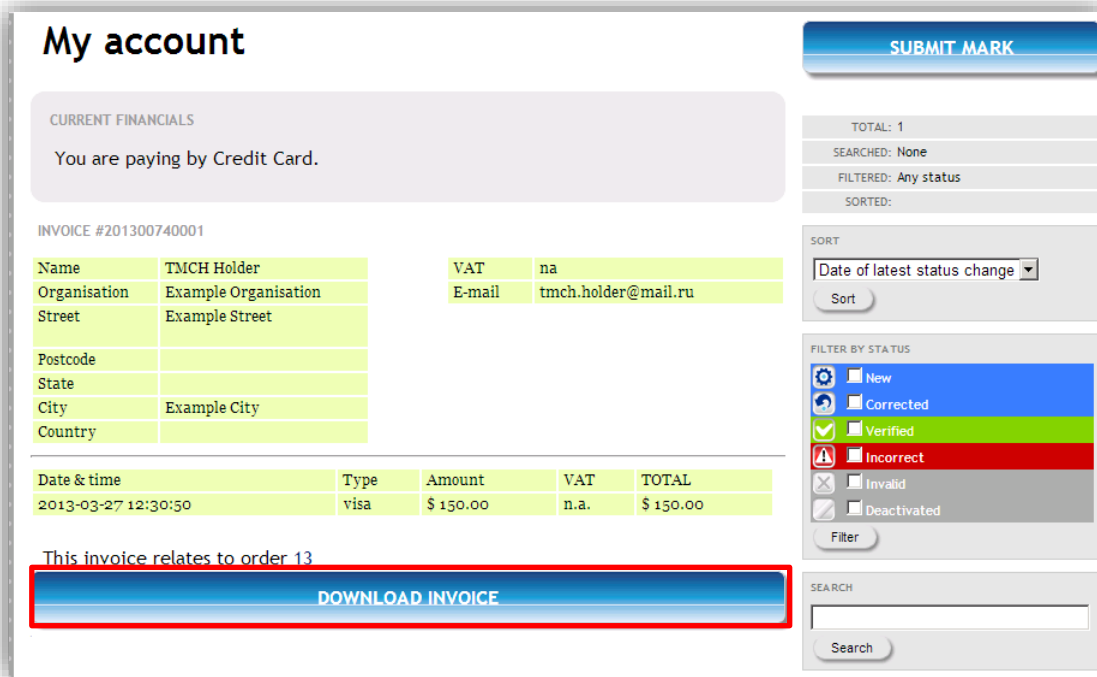
Name	TMCH Holder	VAT	na
Organisation	Example Organisation	E-mail	tmch.holder@mail.ru
Street	Example Street		
Postcode			
State			
City	Example City		
Country			

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:



My account

SUBMIT MARK

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

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 (not available for Trademark Holders with credit card account)

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



[List of submissions](#)

Proforma Invoice for period

DOWNLOAD

[List of invoices](#)

Financial overview

[Report latest changes](#)

[Change password](#)

Data exports (daily generated)

MARKS LIST [CSV](#)

LABEL LIST [CSV](#)

CASES AND LABELS [CSV](#)

ORDERS LIST [CSV](#)

Archived messages

DOWNLOAD CSV with archived messages

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.



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

[My account](#) [Logout](#)

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 16:25:18	topup			\$ 19000.00	\$ 19000.00
2013-03-28 11:14:59	prepaid	\$ -435.00	n.a.	\$ -435.00	\$ 18565.00

SUBMIT MARK

TOTAL: 1

SEARCHED: None

FILTERED: Any status

SORTED:

SORT:

Sort

FILTER BY STATUS: New

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



The screenshot shows the 'My account' page with a 'CURRENT BALANCE LOG' table highlighted in red. The table contains the following data:

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

2.8. API Settings (only applicable for Trademark Agents)

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



The screenshot shows the 'API settings' overview page with the following elements:

- [List of submissions](#)
- Proforma Invoice for period 2018/03
- [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
 - CSV with last days

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



MARKS SERVICES CASES

My account

Edit current API settings

IPv4 address to access API	<input type="text"/>
API password	<input type="password"/>
Retype password	<input type="password"/>
<input type="button" value="Update API settings"/>	

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:

MARKS SERVICES CASES

My account

Edit current API settings

IPv4 address to access API	<input type="text"/>
API password	<input type="password"/>
Retype password	<input type="password"/>
<input type="button" value="Update API settings"/>	

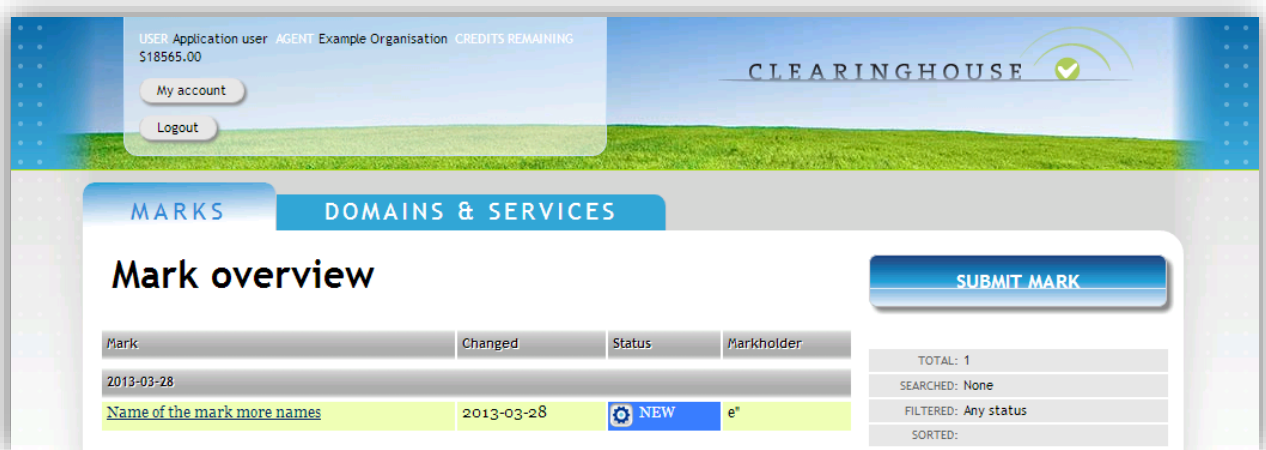


2.9. Report latest changes

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:

Change current password.

CURRENT PASSWORD
Current Password

NEW PASSWORD
New Password

CONFIRM NEW PASSWORD
Confirm New Password

CHANGE PASSWORD

Password policy

- The password is case-sensitive.
- The password must be made up of at least 8 characters.
- The password must contain at least 4 alphabetic characters.
- The password must contain at least 2 non-alphabetic characters.
- Any character of the password can not be repeated more than 2 times.
- A new password can be used for a period of 91 days. After this period, the user must change it.

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).

[List of submissions](#)

Proforma Invoice for period

[DOWNLOAD](#)

[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

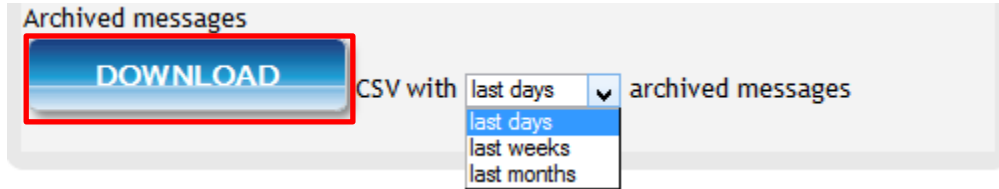
[DOWNLOAD](#) CSV with archived messages

- 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.