Lawmatics USPTO Automation Guide

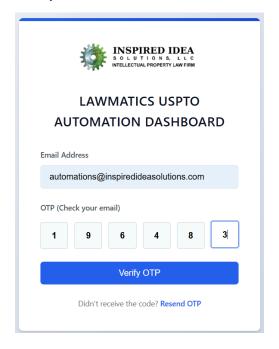
In this guide, we will walk through how to control and trigger the automation to review each matter and ensure that the data is received successfully.

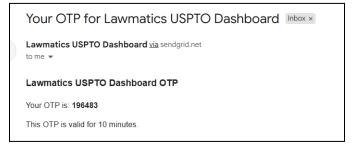
Login Screen

- Visit the URL: https://lawmatics-frontend.onrender.com/
- Enter the authorized email ID: automations@inspiredideasolutions.com



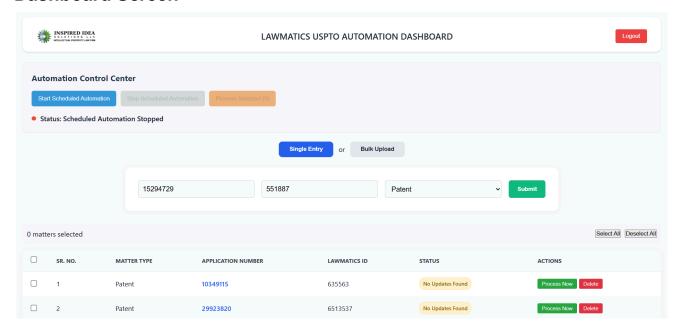
Once you click on "Generate OTP", a one-time password (OTP) will be sent to the registered email ID.





Once you complete the authentication process, you will be redirected to the **Automation Dashboard**.

Dashboard Screen



How to Add a Matter in the Automation?

For Single Entry

- Enter the **Matter Number** corresponding to its **Lawmatics Matter ID**.
- Select the appropriate **Matter Type**.
- Click Submit.

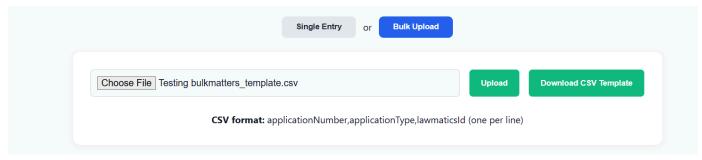
Once submitted, the matter will be successfully added to the automation system.



For Bulk Matter

- Download the provided dummy CSV template.
- Enter the Matter Number, Matter ID, and Matter Type in the template.
- Upload the completed CSV file to the dashboard.

Note: Do not modify the header names in the CSV file, as it may cause errors during upload.



	А	В	С
1	applicationNumber	applicationType	lawmaticsId
2	PCTUS1759389	Patent	125632
3	11058753	Patent	572550
4	90269972	Trademark	687830
5			

How to Add a Trademark Matter?

- Enter the **Trademark Matter Number** without any special characters or spaces. It must be a valid 8-digit active trademark number.
- Enter the corresponding **Lawmatics ID** without any special characters.

Example of Allowed Formats:

• Trademark Number: 98149203

• Trademark ID: 4777201

Examples of Not Allowed Formats:

• Trademark Number: 9814/9203, 98/149,203, 9814,9203, 98 1492/03, 98a492c3

Trademark ID: /4777201, /477,7201, 4777a01

How to Add a Patent Application Number?

Patent application numbers are of two types:

1. PCT Type Numbers

- Add the number in this format: PCT/US20/15976
- Not allowed: PCTUS20/15976, PCTUS201597, PCTUS20/15976, PCT US20 15976

2. Standard Patent Numbers

- Add the number in this format: 16398140
- Special characters, alphabets, or spaces are not allowed.

Not allowed: 16/398140, 16/398/140, 16 398140, 16/39 8140

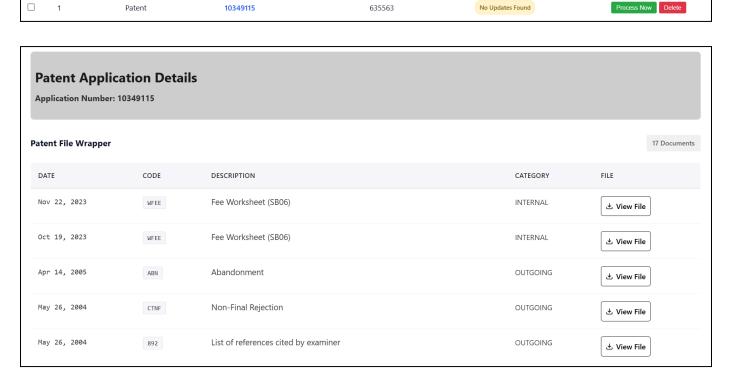
Note: For Patent IDs, follow the same rules as for Trademark IDs.

Matter Individual Page / Document History

Once you enter the application number in the dashboard, the system will fetch all past history and the current status of the matter.

For Patents:

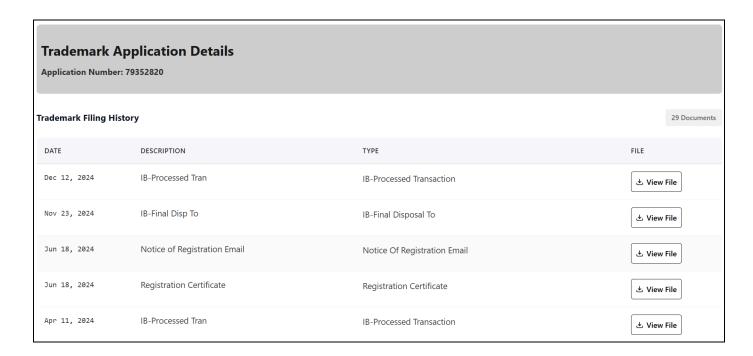
Clicking on the hyperlinked application number will open the **Patent File Wrapper Page**, displaying the patent history along with the latest updates.



For Trademarks:

Clicking on the trademark application number will fetch the trademark filing history.



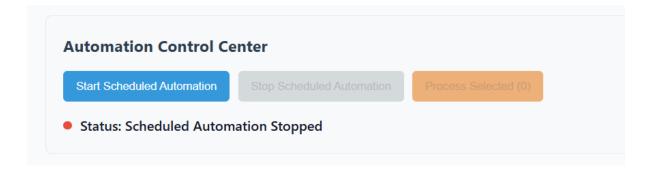


Matter Details Page

On the Matter Details page, the user can view all documents along with the complete trademark history.

How to Trigger Automation for All Matters?

- Select the matters you want to process using the checkboxes.
- Click Start Automation from the Automation Control Center.



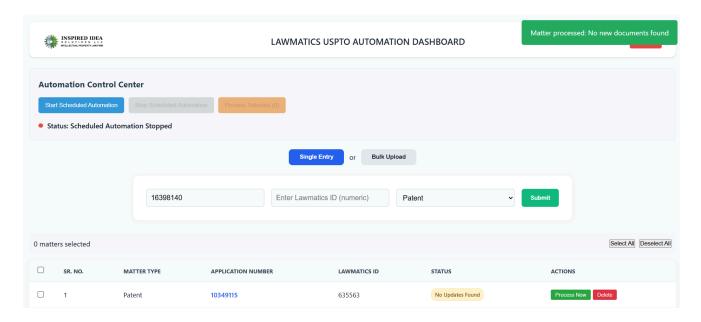
Note: Ensure all required matters are selected before triggering automation to avoid missing any entries.

How to Push a Particular Matter to Automation

Once a user enters a matter into the system, it will automatically be included in the **daily 24-hour** scheduled automation.

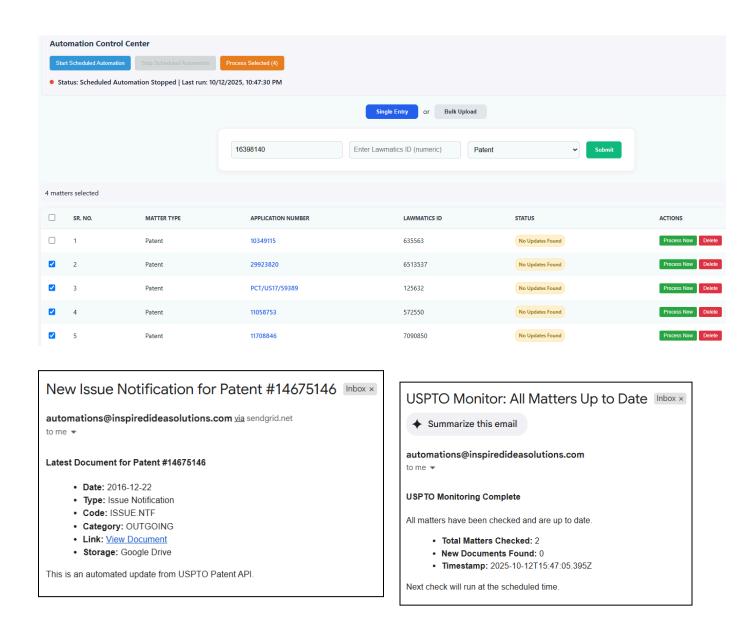
How to Check Updates for a Particular Matter?

- For a single matter, click on "Process Now".
- If there are any updates, the system will:
 - Display a notification on the dashboard.
 - Send an update via email.



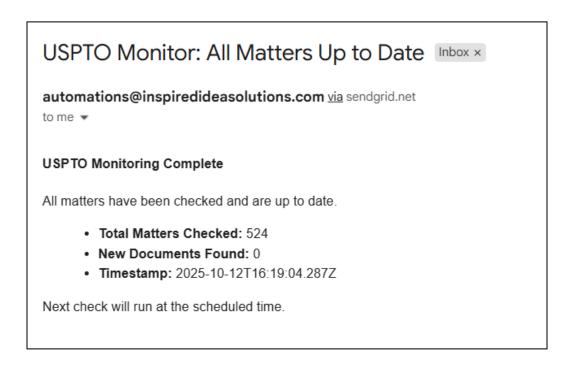
Checking Updates for Bulk Matters

- Select the matters you want to check in the Automation Control Center.
- Click "Process Selected".
- The system will handle updates as follows:
 - If there are new updates for any selected matter, an email will be triggered for those specific matters.
 - o If there are no updates, a consolidated email will be sent confirming that there are no updates for the selected matters.



Default Automation Process

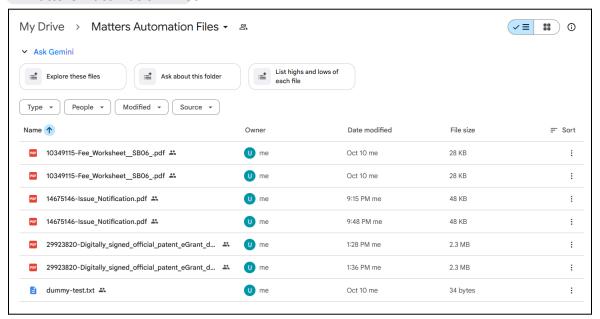
During the default 24-hour automation cycle, if there are **no updates** for matters under automation, a **consolidated email** will be triggered confirming that all matters have been checked and no updates are available to date.



How to Check the Uploaded Drive Files

To view all uploaded files related to matters automation, use the following link:

Matters Automation Files



How to Delete the Matter?

- Each matter has a **Delete** button.
- Clicking the **Delete** button will remove the respective matter from the system.
- Once deleted, **no further updates** will be triggered for that matter.

