Online Account Creation and Dashboard Navigation

Account Creation

Step 1: Go to the online website home page.

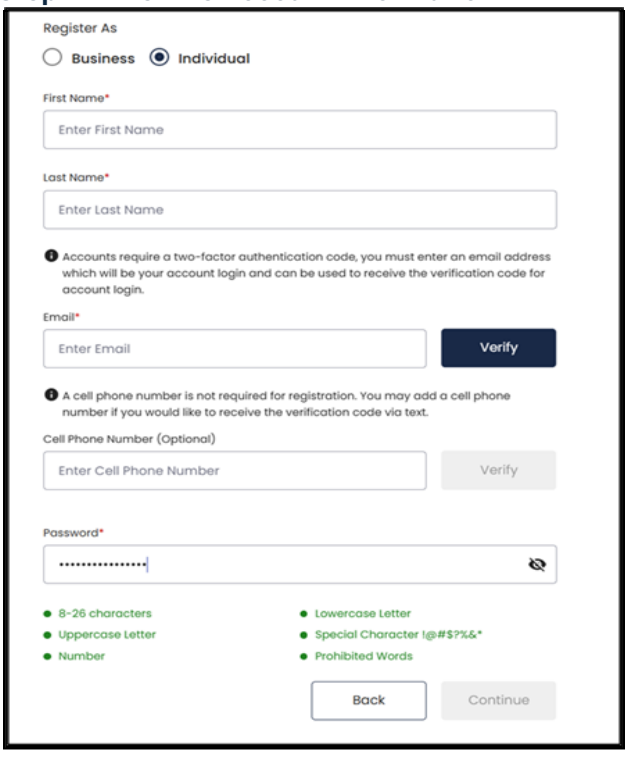
Navigate to the online website home page.

Click on the **Create User** button to start the process.

This will open the first of two pages in the Create User process.



Step 2: Enter the Account Information



Enter the information for the new user in the fields.

The email address will be the Username for this User.

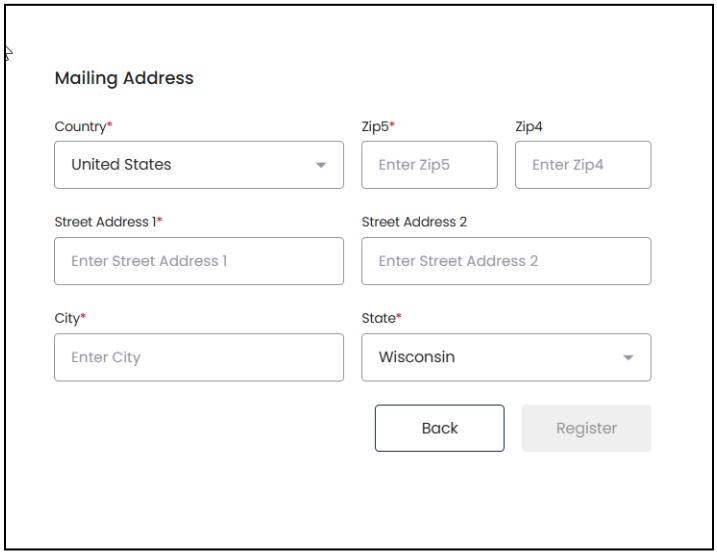
Once the email address and Cell Phone Number (optional) fields are entered, the Verify button for each will be enabled. Click on the Verify button for each one to verify that method of communication by sending a code. Enter the code on the screen to complete each verification.

Enter a password. (Note - you may not use: Password, 123456, Qwerty, Letmein, Admin, Welcome)

When all required fields are filled and verification(s) are complete, the Continue button will be enabled.

Click on **Continue** to move to the next step.

Step 3: Enter the Address Information



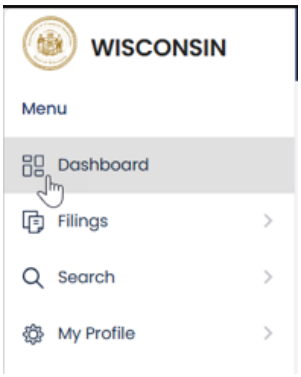
Enter the mailing address information for the new user.

When all required fields have been completed, the Register button will be enabled.

Click on the **Register** button. Your online user account is now created and ready to use.

Navigation the Dashboard

Menu

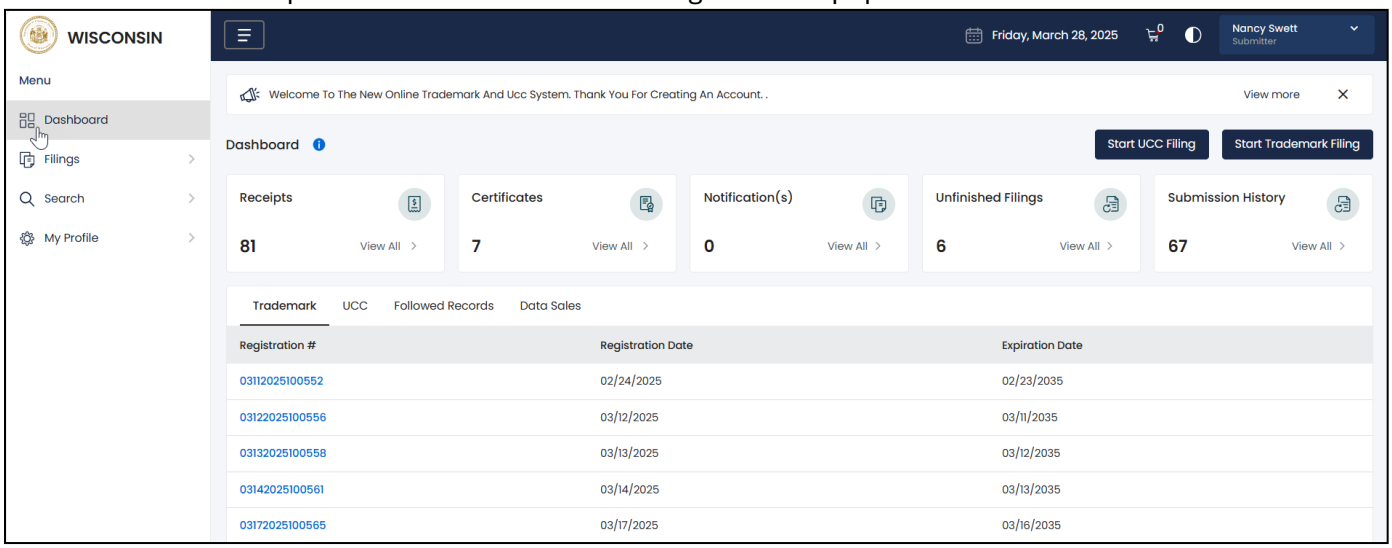


- Dashboard: Contains tiles and tabs to navigate user submissions.
- Filings: Trademark and UCC Filing options and order services are available for purchase.
- Search: Free searches of Trademark or UCC may be performed here.
- Profile: You may update your account information or password.

There are several places on the dashboard to view information about your submitted, approved and rejected filings.

Dashboard Tabs:

- Trademark: This will list all Registration IDs of Trademarks the user has registered or filed against
- UCC: This will list all Initial Financing Statements the user has filed or filed against
- Followed Records: All Trademark or UCCs the user has elected to follow
- Data Sales: All purchased database and/or image files will populate here

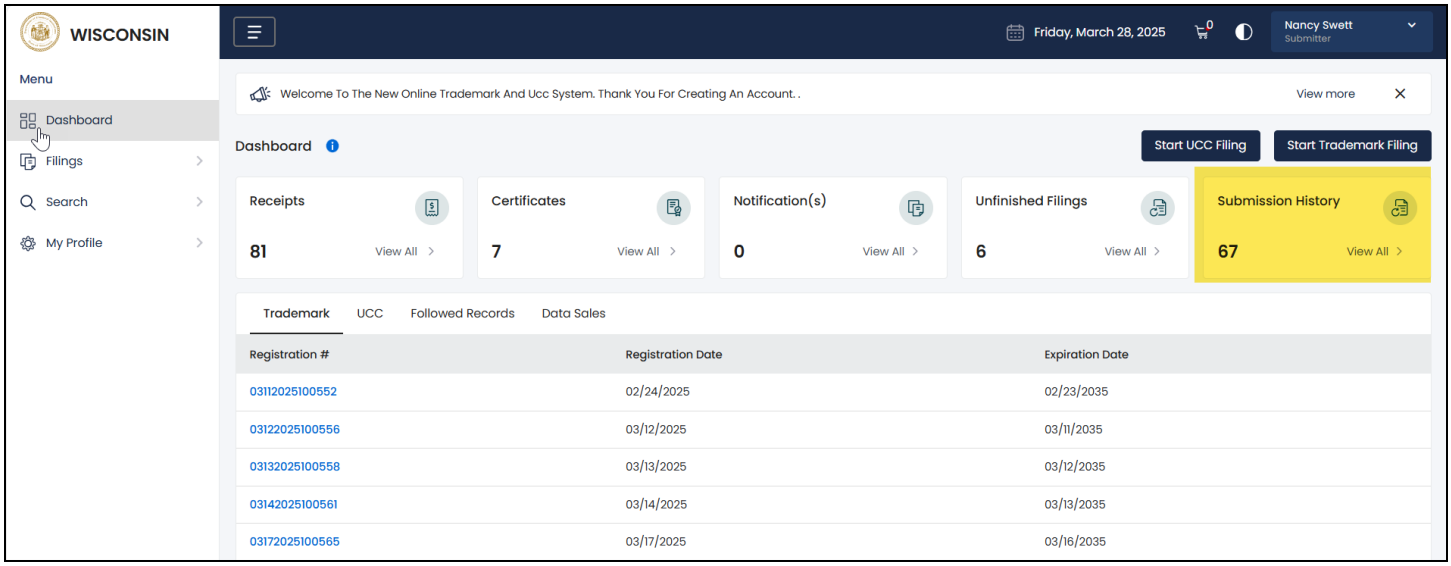


Submission History Tile

The Submission History tile will show every filing, search or certificate and copy request that you have submitted through your online user account. The only exception is bulk data sales.

On the main Dashboard, the Submission History widget will display the number of filings in your Submission History.

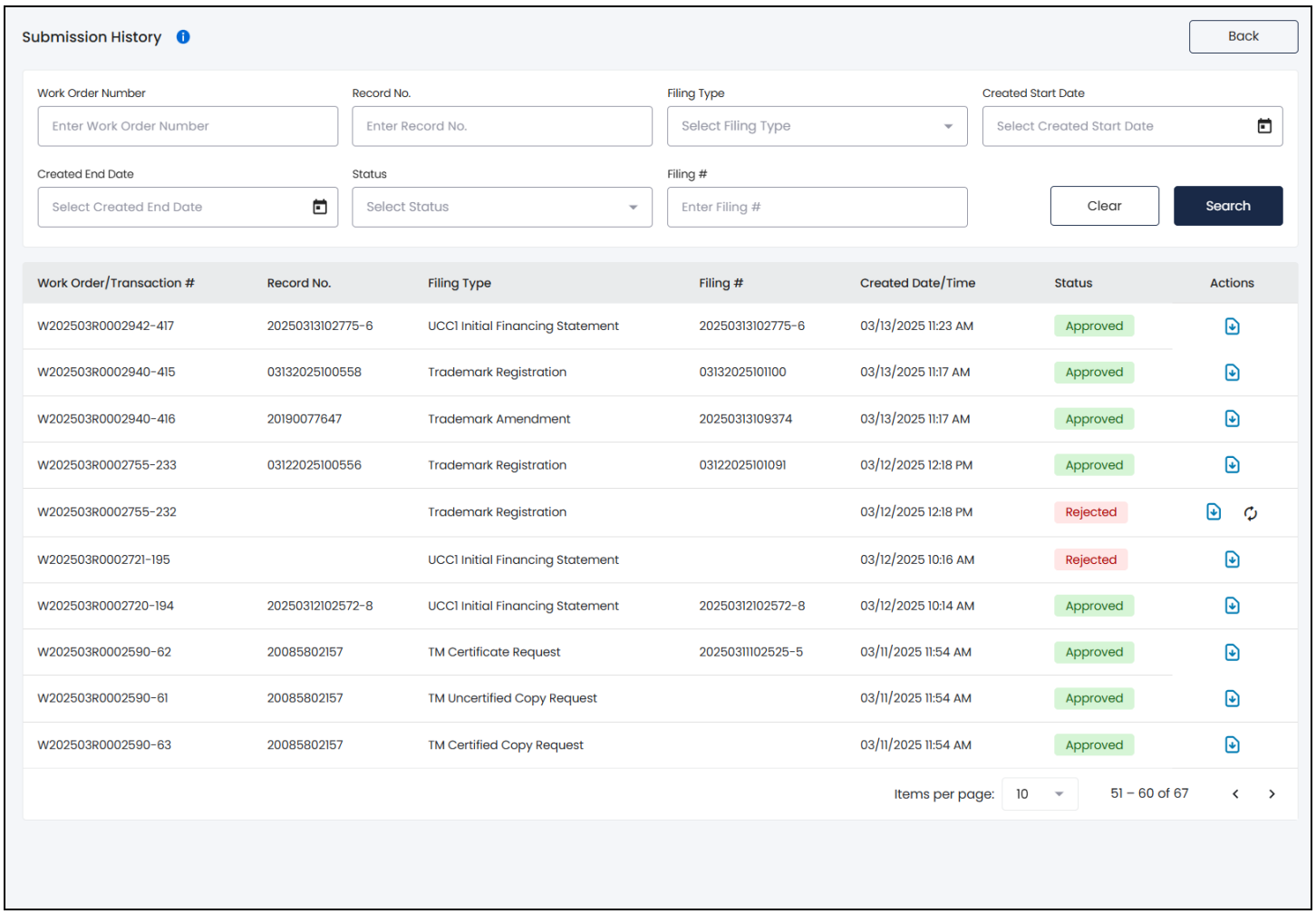
Clicking on View All will open the details.



Here, each submission will be listed with the related Work Order/Transaction #, Filing Type and the Date/Time that the item was submitted. If the submission has been approved, a Record No. and Filing # may be present.

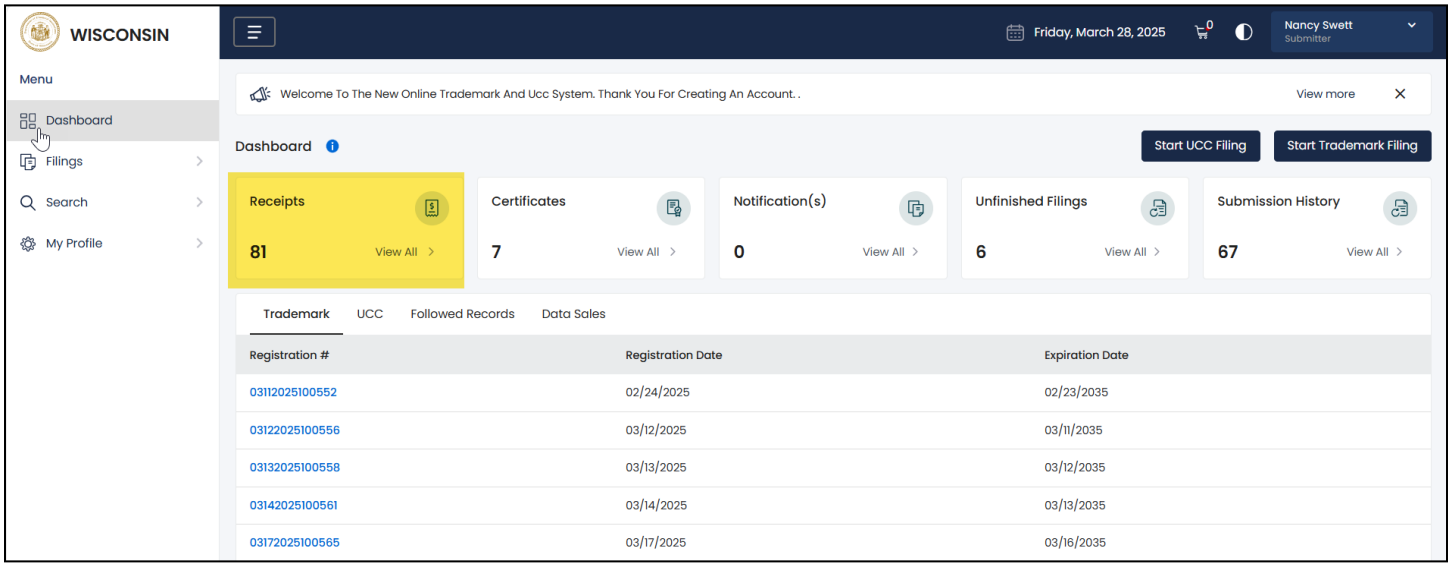
Some of your submissions are automatically approved when you submit them, others will need to be routed to a DFI staff member for review. You can easily view the status of each of your submissions in the Status column. You will see information such as Approved, Rejected or Pending. These statuses are updated in real time.

If your submission is approved, the completed documents can be downloaded from the Actions column. If it is rejected, you can download the rejection letter from the Action column and you may also resubmit from the icon in the Action column with your corrections. While in a Pending status, there are no action items available.



Receipts Tile

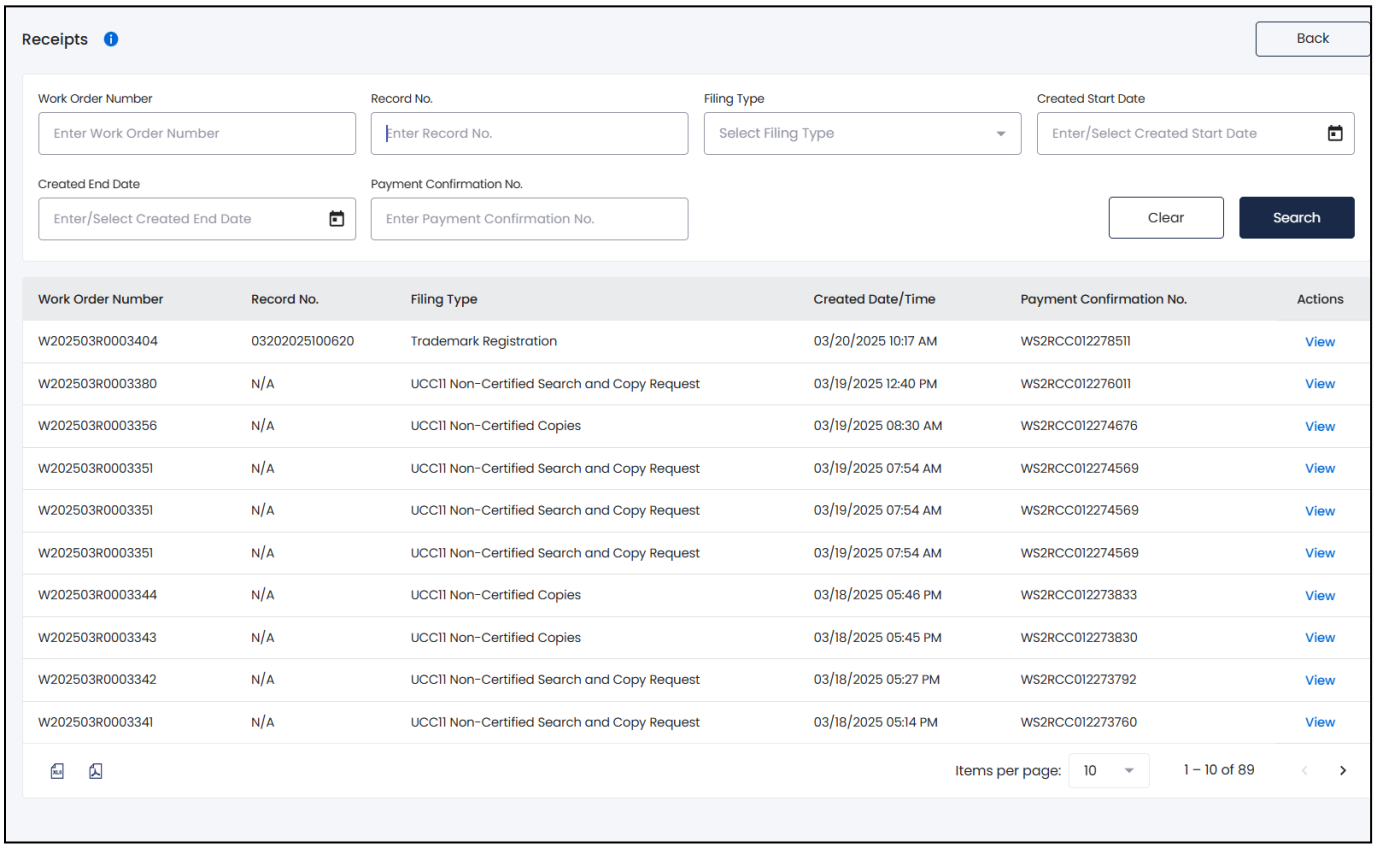
To locate payment receipts for any item that you have submitted from your online user account, go to the Receipts widget on your online dashboard. The widget will show the number of receipts that you have available. Click on the View All button to open the detailed list.



On the detailed page, all your payment receipts will be listed along with information to help you find the one that you are looking for.

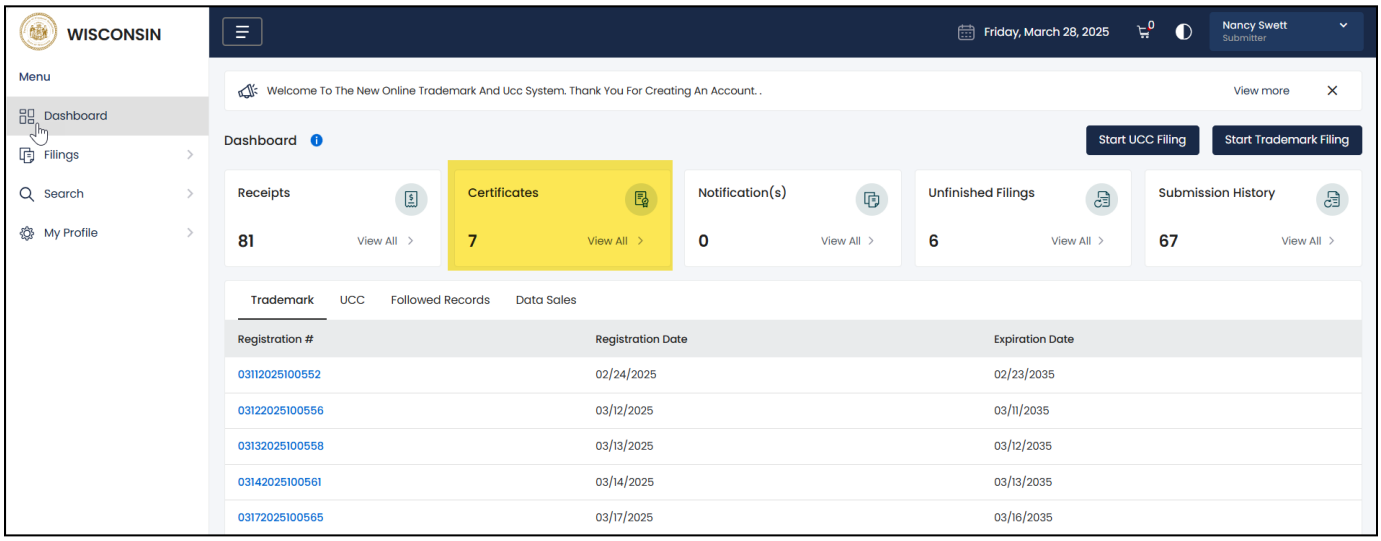
You can search this list using the search criteria available at the top of the page.

In the Actions column, there is a View option to open a pdf of the payment receipt.



Certificates Tile

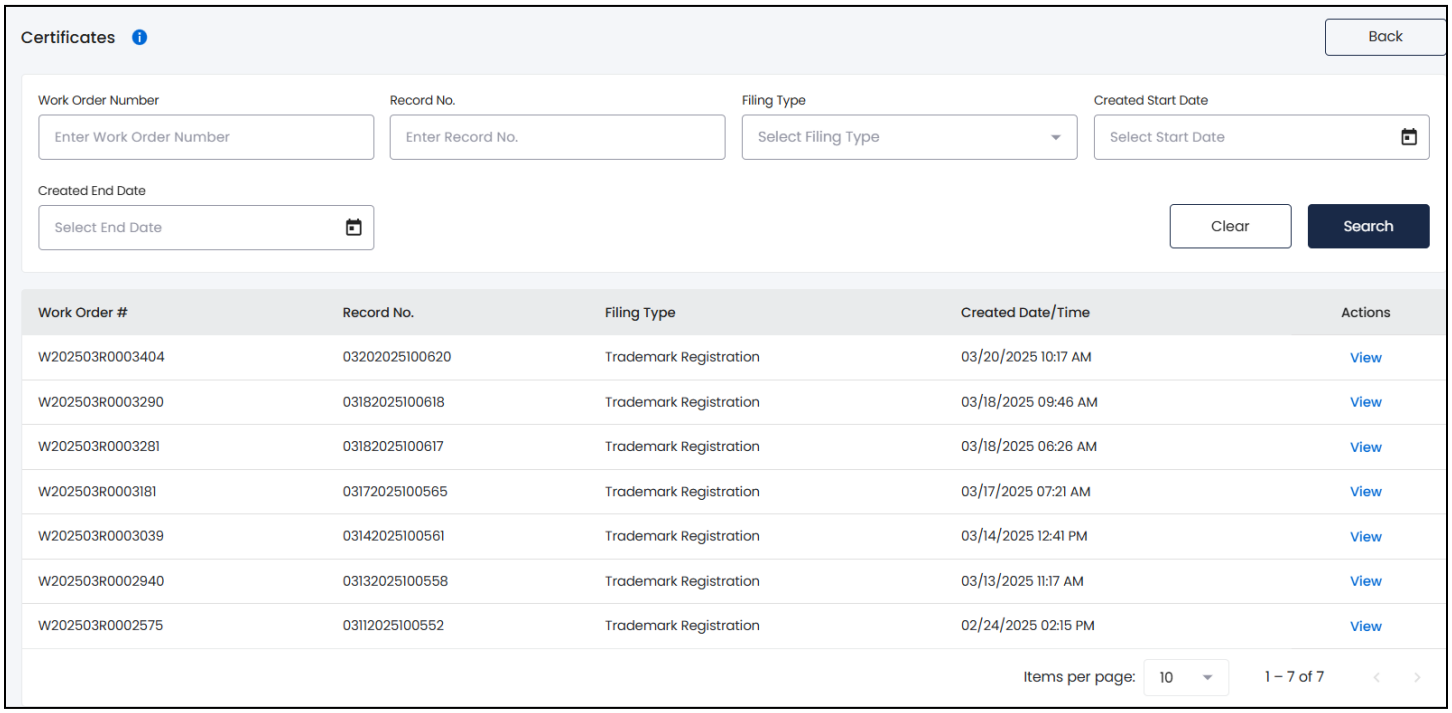
Some Trademark filings automatically produce a certificate when accepted. The Certificates widget shows the total number of certificates produced for filings that you have submitted using your online account. Click on View All to see the detailed listing.



On the detailed page, all your certificates will be listed along with information to help you find the one that you are looking for.

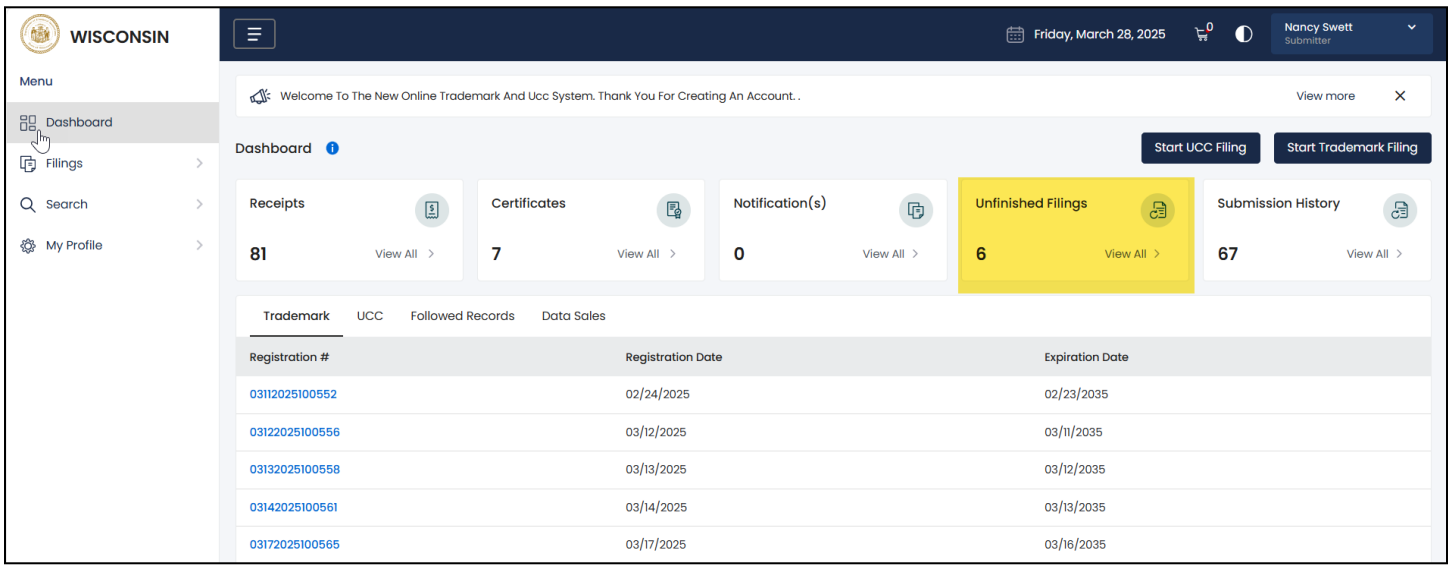
You can search this list using the search criteria available at the top of the page.

In the Actions column, there is a View option to open a pdf of the certificate.



Unfinished Filings Tile

If you have started a filing, but haven't yet completed it, the filing will appear in the Unfinished Filings section. The Unfinished Filings widget shows the total number of unfinished filings that you have in the system currently. Click on View All to see the detailed listing.



On the detailed page, you will see all items left unfinished for the last 14 days. After 14 calendar days, unfinished filings will automatically drop off the list. You can search this list using the search criteria available at the top of the page.

In the Actions column, there is a Process option to return to the filing workflow to complete submission of the filing. This will commonly be used when entering Trademark filings that require a notarized upload. You would enter the Trademark filing information and the system will produce the document for you to print. Once that document is notarized, you can come back to the unfinished filing, upload the notarized document and proceed to pay the fee and submit the filing.

