AppColl

START TO FINISH IP MANAGEMENT

Prosecution Manager Corporate

PM Corporate gives in-house IP teams one secure place to docket US patents and trademarks, manage matters and documents, track legal expenses and forecast budgets, and report on the whole portfolio.



Deadlines docket themselves

Auto docketing for US patents and trademarks, with documents and XML data pulled from Patent Center.

A full suite of essential IP management functions

Task automation, document storage, financial management, e-signatures, matter management, contact management, prior art and IDS, and 892 processing.

Reports leadership can read

Scheduled custom reports and advanced graphical reporting on portfolio activity and spend.

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FINANCES

Track, forecast, and control your legal spend



- Review and approve law firm invoices
- Report on actuals by law firm, billing code, billing type (fee or expense), matter, or any other field
- Import historical and ongoing actuals data
- Forecast costs to predict future spending

Expense tracking
Monitor spending across law firms, matters, and tasks.

Forecasting
Predict future expenditures from matter properties and tasks.

Invoice management
Import, review, and approve invoices with configurable workflows.

Budget management
Set budgets and compare them with actuals and forecasts.

Signature authorities
Define approval workflows based on invoice amount, so the right person signs off every time.

SIGNATURES

Signed, reminded, and stored — automatically.

The Signatures module automates collecting signatures on the documents in your IP process. Designed for inventor assignments and declarations, it also handles any commonly signed document, such as engagement letters.

01 Send documents out for signature

02 Remind recipients their signature is due

03 Store the signed document on the matter

Comprehensive matter database. Patents, trademarks, copyrights and contracts in one module, with custom fields for your business and auto-population from public US and international databases.

Internal workflows. Create custom task rules for foreign patent law, internal reminders and client reminders. Add custom tasks to matters or automatically generate them from one or more triggering events.

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DATA, DOCUMENTS & REPORTING

Everything your matters touch, in one secure place

Custom and graphical reports,

Powerful filtering builds reports of exactly the data you need. Email them on a custom schedule and format and build a customized dashboard.

Prior art and 892 form processing

Manage references across complex matter families, generate accurate IDS's, 892 references, automatically cited and attached.

Secure document storage

One cloud home for every document. Files are encrypted and automatically backed up to multiple physical locations.

Automated email

CC or forward to a matter's unique address and the email saves itself to the right client or matter folder in Files. No manual uploads

Data import / export

CSV in and out of every module: migrate from another system, make bulk changes by spreadsheet, and keep local copies in a few clicks.

Contacts management

A full contact database for presecution, used to populate USPTO forms and form letters without retyping a single address.

Auto-populate USPTO forms

Fill dozens of official USPTO forms, including the Application Data Sheet. Build custom form letters and emails from your AppColl data.

Conversations tab

Messages sent to a matter's intake address read like an inbox: download attachments, view the thread, and reply without leaving the matter.

RESOURCE	HOURS	RESPONSE TIME
Live new user training support.appcoll.com/general-information/webinars-and-resources	Tuesdays, 9am PT / 12pm ET	45 min session
Help Center support.appcoll.com	24x7	Immediate
Learning Center learn.appcoll.com	24x7	Immediate
Premium customer support support@appcoll.com	M-F, 9am - 6pm EST	1 hour
Archived webinars support.appcoll.com/general-information/webinars-and-resources	24x7	Immediate
Community forum AppColl users only	24x7	Immediate

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COMING SOON TO PM CORPORATE



AI features

New capabilities inside AppColl include drafting, docketing, forecasting, and a conversational assistant that knows your matters.

AI Forecasting

Included at no additional cost, AppColl can use your existing fee and expense billing information to build an AI model that can predict future fees and expenses.

AI Assist

Usage-based add-on with a limit and per-month cost you set. Our conversational assistant is built directly into your AppColl account and can search, retrieve, summarize, and even update information across your Matters, Tasks, Contacts, Billing, Invoices, Files and Reports. Need assistance with drafting? It does that, too!

Foreign law

12 JURISDICTIONS **6** DEADLINES

International Patent Law, at no extra cost: 12 jurisdictions and 6 deadline types docketed — filing dates, requests for examination, office actions, grants and annuities.

Australia · Canada · China · European Union · Hong Kong · India · Israel · Japan · New Zealand · Republic of Korea · Taiwan · United Kingdom

More coming in Phase 2

Book a demo with our team

Book a demo to learn how we empower corporate IP professionals to confidently manage all aspects of their organization.

appcoll.com · sales@appcoll.com

AppColl

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