AppColl

START TO FINISH IP MANAGEMENT



# AppColl Prosecution Manager Plus

PM Plus is AppColl's full IP management platform for legal professionals. It automatically dockets US patent and trademark deadlines from USPTO e-Office Action emails, downloads the associated documents and data, manages prior art and IDS filings, handles client correspondence, conflicts, signatures and billing, and keeps every record in one secure, searchable place.

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DOCKETING, AUTOMATED

# Stop logging into Patent Center

A USPTO e-Office Action email arrives. PM Plus reads it, creates the tasks, calculates the dates, downloads the documents, and updates the matter before anyone opens it.

Plus

## Auto-docketing for US patents & trademarks

Hundreds of task types cover US patent, trademark and PCT law through national phase entry. Each rule uses triggering events to create the docket item and calculate the due date for you. US Trademarks are auto-updated.

Plus

## Automatic document and XML download

Documents attached to the e-Office Action land on the generated tasks automatically, and the matter's bibliographic data refreshes at the same moment. No manual retrieval, no re-keying.

Plus

## 892 form processing

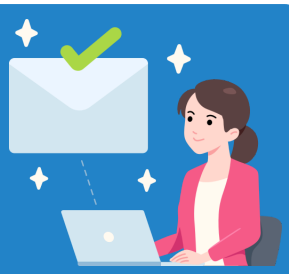
References cited on an 892 are added as prior art that should be cited, with the reference documents downloaded and attached to the 892 task. No spreadsheet imports, no manual entry.

## Prior art & IDS generation

Manage references across complex matter families and generate accurately populated Information Disclosure Statements in seconds, ready to upload to the USPTO, with reference documents stored alongside.

## Auto populate USPTO forms

Dozens of official USPTO forms, including the Application Data Sheet, filled from your database. Build custom form letters and emails the same way, and use the Form Field Explorer to preview every available field before you insert it.



**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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RUN THE PRACTICE

# Additional features

Plus

## 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.

Plus

## 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.

Plus

## Signatures



Send inventor assignments, declarations or engagement letters for signature, include reminders, and store the executed document, all within one location. Integrates with Adobe Acrobat Sign and DocuSign.

Plus

## Conflict checking



Search every matter and contact, adverse party relationships, keywords, technologies, using full Boolean expressions to surface conflicts before they become one.

Plus

## Custom & graphical reports



Filter any data into a report, schedule it by email in the format you need, and build line, bar and pie charts in a customizable dashboard. Control access to reports with AppColl's query language or make personal reports for a single user.

Plus

## AppColl Tandem



Save time on reporting with our no-cost, secure account that lets a corporate client see a read-only view of their own portfolio, fed automatically from your AppColl data.

## Billing that already has your data

FULLY INTEGRATED

### Billing module

Track time, invoice clients and record payments; corporations load law-firm billing and track spend. Nothing gets re-entered.

### Trust account reporting

Plus

Reconcile bank balances against retainer debits and credits, generated automatically from retainer billing items.

### QuickBooks Online

Plus

Push invoices with line-item detail and a PDF attached, then sync payments back. Two systems, one number.

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THE REST OF THE PLATFORM & SUPPORT

# And everything else you would otherwise buy separately

### Secure document storage
Every document in one encrypted cloud location, backed up to multiple physical sites. Anyone with a login has immediate access.

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

Plus

### PM Invent
Send an inventor a disclosure form link in a few clicks, then work the built-in discussion workflow between inventor and attorney.

### 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.

### User management
Fine-grained permissions per module and per action, with the option to restrict a user to their own matters, tasks and billing items.

### Form Field Explorer
List every available form field, preview its value, and insert the correct field name into an email or document template.

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

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COMING SOON TO PM PLUS

## 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

Patent law outside the US, 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**

## See PM Plus in action

Book a demo for a 1:1 walkthough of how AppColl PM Plus can streamline your portfolio management.

**appcoll.com · sales@appcoll.com**

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