

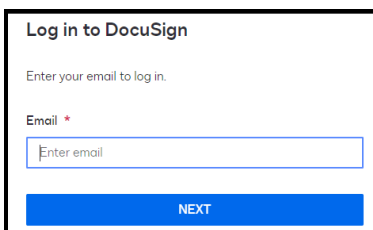
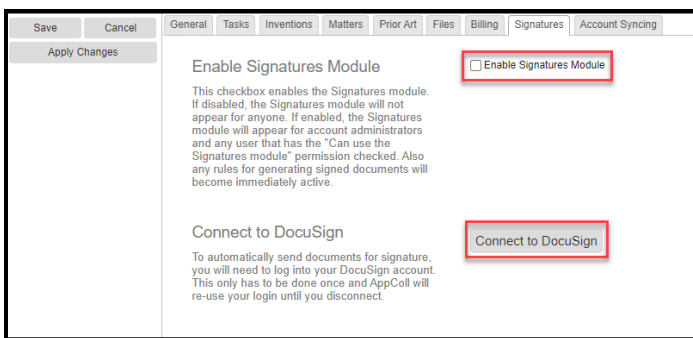
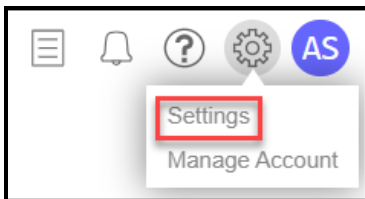
Getting Started with Signatures



AppColl's **Signatures** module automates the process of getting signatures on documents that are part of the IP management processes. Although specifically designed for collecting signatures for inventor assignments and declarations, it can also be used to manage any other documents that are commonly signed, such as client engagement letters. When setup, the process of sending documents out for signature, reminding the document recipients that their signature is required, and storing the signed document can be completely automated.

Quick Setup and Test

1. Enable DocuSign from the Settings > Signatures tab. Enable the Signatures module and Connect to DocuSign. Enter your DocuSign credentials.



2. Create a new test Matter with Country "United States" and Type "Utility: Non-Provisional". Add an Inventor (that has your email address), a Filing Date, and Application Number. Click Save.

• Title:
 • Attorney Ref: Client
 • Attorney:
 • Country:
 • Type: Will foreign file
 • Status:

Inventors:

3. From the Signatures module, check the record for the newly generated document. Click Send. Alternatively, click the Send link in the Status column.

ABA Associates									
powered by AppColl									
Tasks Matters Prior Art Files Signatures Billing Reports Conflicts Contacts									
Search matters and contacts <input type="text"/> Go									
Signatures (5)									
Make Changes		Last Modified	AttorneyRef	Matter Attorney	Sender	Recipient	Status	Status date	
<input type="button" value="Add"/>	<input checked="" type="checkbox"/>	6/7/24 9:40 AM	043210-1337-02	John D. Smith	John D. Smith	Alexander Bozmoski	Unsent (send)	6/7/2024 3:40:13 PM	043210-1337-0
<input type="button" value="Delete"/>	<input type="checkbox"/>	6/7/24 9:40 AM	043210-1337-02	John D. Smith	John D. Smith	Babe Ruth	Unsent (send)	6/7/2024 3:40:11 PM	043210-1337-0
<input type="button" value="Refresh"/>	<input type="checkbox"/>	6/7/24 9:40 AM	043210-1337-02	John D. Smith	John D. Smith	Dr. Adrian Flum	Unsent (send)	6/7/2024 3:40:10 PM	043210-1337-0
<input type="button" value="Send"/>	<input type="checkbox"/>	6/6/24 2:26 PM	043210-1337-02	John D. Smith	John D. Smith	Babe Ruth	Sent (cancel)	6/6/2024 8:26:04 PM	043210-1337-0
<input type="button" value="Download Zip File"/>	<input type="checkbox"/>	6/6/24 2:24 PM	043210-1337-02	John D. Smith	John D. Smith	Dr. Adrian Flum	Completed	6/6/2024 8:24:29 PM	043210-1337-0

4. Use the DocuSign link in your email to review the document. Click Adopt and Sign > Finish.

application (unless a non-publication request in compliance with 37 CFR 1.213(a) is made in the application patent. Furthermore, the record from an abandoned application may also be available to the public if the application is later referred to in a published application or an issued patent (see 37 CFR 1.14). Checks and credit card authorizations for PTO-2038 submitted for payment purposes are not retained in the application file and therefore are not published.

LEGAL NAME OF INVENTOR

Inventor: Date (Optional) : 6/11/2024

Signature:

Note: An application data sheet (PTO/SB/14 or equivalent), including naming the entire inventive entity, must accompany every application filed. Use an additional PTO/AIA/US 1 form for each additional inventor.

A Federal agency may not conduct or sponsor, and a person is not required to respond to, nor shall a person be subject to a penalty for failing to provide information to, unless it is specifically required to do so by a statute, regulation, or order of an executive or judicial agency or court.

5. In the AppColl Signatures module, ensure the Status of the sent document is Completed.

	6/7/24 9:40 AM	043210-1337-02	John D. Smith	John D. Smith	Dr. Adrian Flum	Unsent (send)
	6/6/24 2:26 PM	043210-1337-02	John D. Smith	John D. Smith	Babe Ruth	Sent (cancel)
	6/6/24 2:24 PM	043210-1337-02	John D. Smith	John D. Smith	Dr. Adrian Flum	Completed

Visit support.appcoll.com/signatures for more information