ALT LEGAL

Trademark Docketing Software Features Checklist

Evaluating and comparing IP docketing software can be complex. For this reason, we've created this checklist to help you evaluate and select a system that goes beyond traditional docketing functionality to include features that will increase your competitive advantage. The checklist is organized into categories, with specific capabilities listed, to help guide your evaluation. Let's get started!

→ Be sure to also check out our article Top 5 Trademark Docketing "Must Haves."

Automation

	ALT LEGAL	Other Provider
Captures trademark data from 180+ global IP offices to populate and update matters and calculates global use and renewal deadlines.	✓	
Automatically adds new or updated USPTO filings to your docket based on correspondent email, as well as adds and clears deadlines.	✓	
Sends consolidated daily emails notifying responsible attorneys and paralegals of upcoming deadlines and other important changes to their dockets.	✓	
Syncs docketed deadlines and reminders to your Outlook or Google Calendars.	✓	

Ease of Use

Quickly access the information you need using search fields, filters, or tags.	✓	
Well-organized, minimizing the need to switch between screens and click multiple times to get the information you need.	✓	
Intuitive, so that you can easily navigate to find what you need without backtracking.	✓	
Modern and has a pleasing interface.	✓	
Built using the latest technology, allowing software to be fast and responsive.	✓	
Simple to understand so that new users can quickly get up to speed and begin using the software with minimal or no training.	✓	

Reporting

Generate a report in just a few clicks.	✓	
Create custom reports.	✓	
Save frequently-run reports that automatically update each time you view the report.	✓	
Export reports to Excel and PDF.	✓	
Use custom email templates to send reports to colleagues and clients.	✓	

Advanced Features

Provides one-click downloads of all USPTO trademark documents.	✓	
Upload your own documents, and keep everything organized and in one place.	✓	
Inform clients and colleagues about the statuses of their filings with one-click pre-populated emails and letters.	✓	
Provide unlimited access to colleagues and clients (including foreign agents).	✓	
Trademark application intake form that allows you to collaborate with clients and automatically import completed applications to the USPTO for filing.	✓	
§2(d) Trademark Watch which monitors new trademark applications where your marks are referenced in office actions citing §2(d) likelihood of confusion, allowing you to take quick action and protect your marks against infringement.	✓	

Migration

Offers free or low-cost initial and ongoing data migration in and out of the docketing system.	✓	
Takes no longer than two weeks to complete after receiving your data.	✓	
Gives you the flexibility to migrate in stages if you choose (all USPTO marks, all international marks, all other matter types, etc.)	✓	
Executed by a US-based team.	✓	
Allows for customization so that data is mapped exactly how you want it.	✓	
Includes free data clean-up.	✓	

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Customer Support

Free and unlimited training.   ✓

Free and unlimited US-based support via phone, email, or live chat.   ✓

Channels to accept and implement customer feedback to improve software functionality.   ✓

Knowledgeable and caring staff that reliably answers your questions and takes accountability for their product.   ✓

Pricing

Month-to-month subscriptions.   ✓

30-day money back guarantee.   ✓

Zero sign on costs. No set-up, migration, or training and support fees.   ✓

Includes unlimited user access (seat licenses) for edit and read-only access, internal users, and external users.   ✓

No additional fees for modules or wizards that handle other types of IP matters.   ✓

No additional fees for special features such as client access, document storage, or billing, email, or calendar integration.   ✓