FINANCIAL MANAGER

## Quick Start Guide

Financial Manager

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Financial Manager is the USPTO's online fee payment management tool. It allows you to store and manage payment methods online, assign user permissions to allow others to access your payment methods, and create a variety of transaction reports. This guide outlines steps you'll take to get started in Financial Manager.

Financial Manager is designed to be intuitive and easy to use. We recommend the following workflow to get started:

1. Create a uspto.gov account and sign in
2. Store payment methods
3. Add users and assign permissions

Create a uspto.gov Account and Sign In

1 From https://fees.uspto.gov, navigate to the Financial Manager homepage.
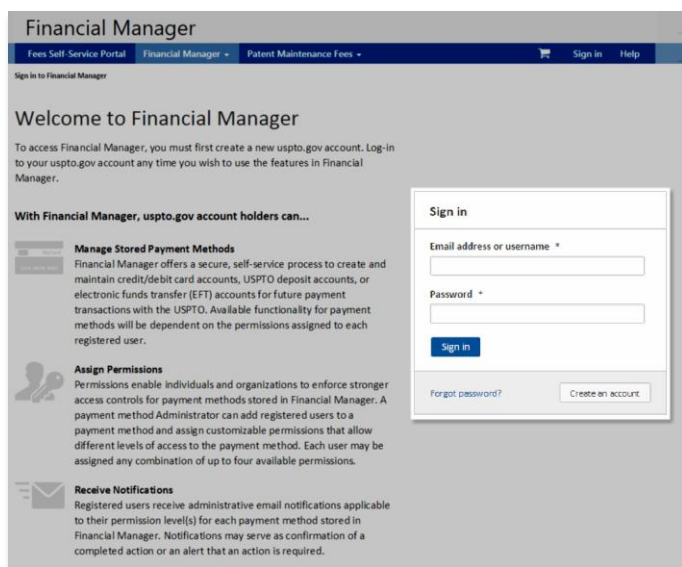
2 In the Sign in box, select the [Create an account] button and follow the instructions to create a uspto.gov account. You will be required to enter:

- First name
- Last name
- Email address

3 Once you've created your uspto.gov account, return to the Financial Manager homepage and sign in using your uspto.gov account credentials.

> While you may use any browser to access our new fee payment tools, Financial Manager works best in Google Chrome (version 46), Internet Explorer (version 11), and Firefox (version 42).

Store Payment Methods

> If multiple people in your organization will need access to your stored payment method(s), we recommend designating one Administrator to store your payment method(s) in Financial Manager first. The first user will receive all user permissions by default.

1 After signing in to Financial Manager, select the button to navigate to the Add a Payment Method page.
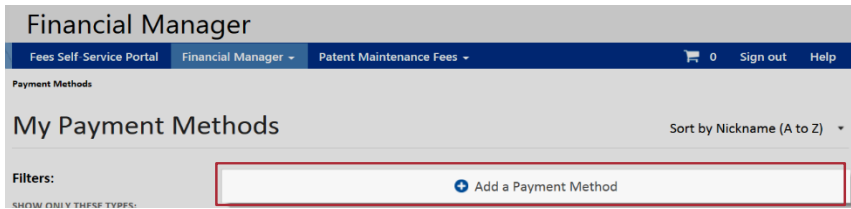
2 On the Add a Payment Method page, you can store credit/debit cards and electronic funds transfers. You can also open a deposit account. Select the add new button below your preferred payment method to get started.
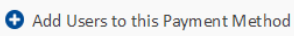

> Eliminate the need to submit a check, credit card, or other payment type each time a fee is due by opening a deposit account in Financial Manager for free. USPTO deposit accounts are pre-paid fund reserves that customers can establish to conveniently pay fees to the USPTO. Consider adding an electronic funds transfer (EFT) account to replenish your deposit account quickly online, and take advantage of our auto-replenishment option for even more flexible account management.

Add Users and Assign User Permissions

> When an Administrator adds someone to a payment method using the Users tab in Financial Manager, he/she will assign customizable user permissions. Please see our **Introduction to User Permissions** to help determine which user permissions to assign users within your organization. Each user must have their own uspto.gov account to be added to a payment method.

1 From your stored payment method's Summary page, navigate to the Users tab and select the ⊕ Add Users to this Payment Method button.

CREDIT / DEBIT CARD - ************8431

**IP Department's Amex**   Summary | Users | Administrative History

User Permissions ⓘ   edit permissions | remove users

Filter Options	First Name ▲	Last Name	Primary User Email	Administrator	Fee Payer	Reporter
FILTER BY USER'S NAME			⊕ Add Users to this Payment Method			
	Mark	Trade	marktradeesq@gmail.com	✔	✔	✔
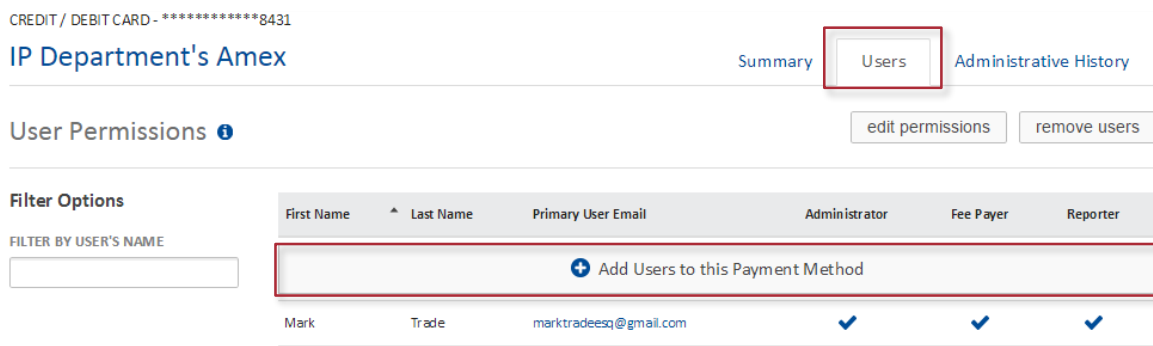
2 Enter the user's email address and select the **Find User** button. The search will generate a "Results" box that lists the matching user's email address, full name, and available permissions. You must enter the exact email address associated with the user's uspto.gov account.
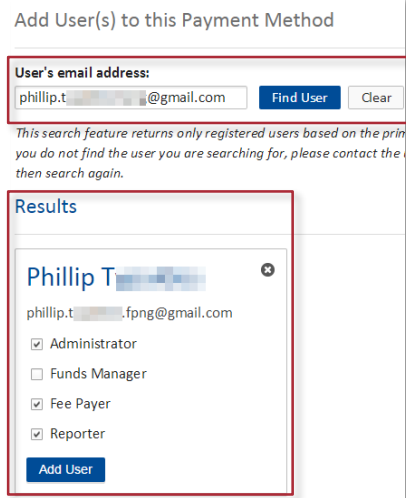
3 Select the checkboxes to assign appropriate permissions for the user.

4 Select the **Add User** button to add the individual to your payment method.

Add User(s) to this Payment Method

User's email address:
phillip.t_____@gmail.com   **Find User**   **Clear**

This search feature returns only registered users based on the prin you do not find the user you are searching for, please contact the then search again.

Results

Phillip T_____ ⊗

phillip.t_____.fpng@gmail.com

☑ Administrator
☐ Funds Manager
☑ Fee Payer
☑ Reporter

Add User

> Repeat this process for each of your payment methods. There is no limit to the number of users you can add to a stored payment method and multiple users can have the same permissions. We recommend assigning at least two Administrators to each payment method for back-up purposes.

> To learn more about Financial Manager, please review our **Financial Manager User Guide**. It includes step by step walkthroughs of how to use the capabilities in Financial Manager based on your user permissions.