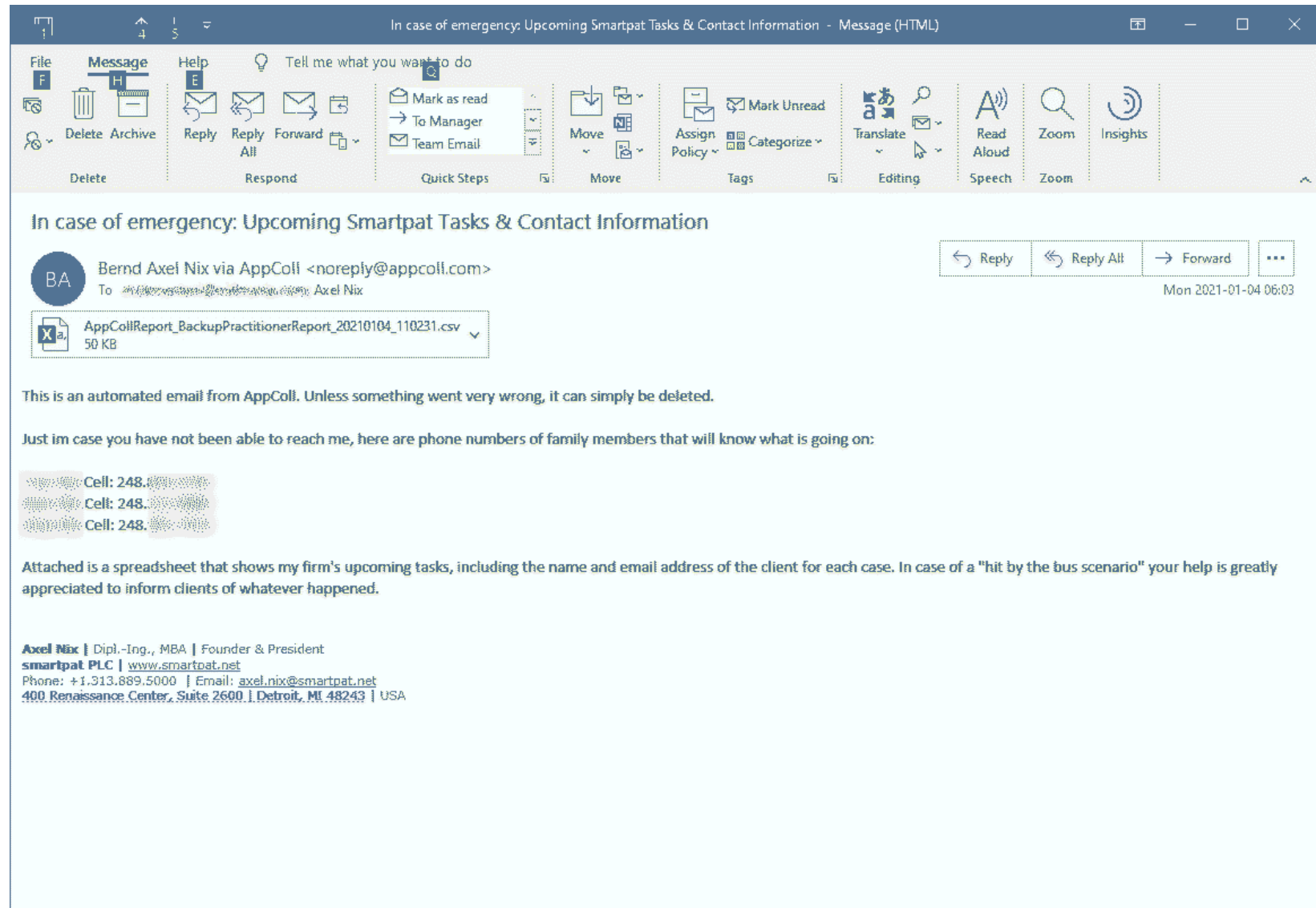




BACKUP PRACTITIONER

PRACTICAL IMPLEMENTATION WITH
APPCOLL

WEEKLY EMAIL SENT AUTOMATICALLY FROM APPCOLL TO BACKUP



The screenshot shows an email client window titled "In case of emergency: Upcoming Smartpat Tasks & Contact Information - Message (HTML)". The interface includes a ribbon with tabs for File, Message, and Help. The Message tab is active, showing options like Delete, Archive, Reply, Reply All, Forward, and Quick Steps. The email content is as follows:

In case of emergency: Upcoming Smartpat Tasks & Contact Information

Bernd Axel Nix via AppColl <noreply@appcoll.com>
To: Axel Nix

AppCollReport_BackupPractitionerReport_20210104_110231.csv
50 KB

This is an automated email from AppColl. Unless something went very wrong, it can simply be deleted.

Just in case you have not been able to reach me, here are phone numbers of family members that will know what is going on:

Cell: 248.889.5000
Cell: 248.889.5000
Cell: 248.889.5000

Attached is a spreadsheet that shows my firm's upcoming tasks, including the name and email address of the client for each case. In case of a "hit by the bus scenario" your help is greatly appreciated to inform clients of whatever happened.

Axel Nix | Dipl.-Ing., MBA | Founder & President
smartpat PLC | www.smartpat.net
Phone: +1.313.889.5000 | Email: axel.nix@smartpat.net
400 Renaissance Center, Suite 2600 | Detroit, MI 48243 | USA

UPCOMING TASKS

ATTACHED AS CSV FILE
TO WEEKLY EMAIL

AppCollReport_BackupPractitionerReport_20210104_110231.csv - Read-Only

Perform a montly IDS audit: Run Python Script to identify missed actions. Review AppColl for any application that have no IDS or unfiled IDS.

	A	B	C	D	E	F	G	H	I	J	K	L
1	TaskStatu	Matter.Ac	RespondBy	FinalDueC	Matter	TaskType	DeadlineType	Comments	Matter.ClientEmail	Matter.ClientContact		
2	Open	15/75	2020-12-28		MCH	Smartpat - Inform Client of Notice of Allowance	Internal Deadline		kanz	Dr.-In		
3	Open	16/43	2021-01-02		RSH	_Task (internal)	Internal Deadline		info	Dr. M		
4	Open	16/95	2021-01-03		HEC	Smartpat - Inform Client of Publication	Internal Deadline		info	Jan-D		
5	Open	16/95	2021-01-03		HEC	Smartpat - Inform Client of Publication	Internal Deadline		info	Jan-D		
6	Open	16/95	2021-01-03		IAVC	Review USPTO Status Change	Internal Deadline		geor	Geor		
7	Open	16/72	2021-01-03		LIM1	Smartpat - Inform Client of Publication	Internal Deadline		kont	Dr. Ac		
8	Open	16/72	2021-01-03		LIM1	Review USPTO Differences	Internal Deadline	AppColl Examiner: Jor	kont	Dr. Ac		
9	Open	15/75	2021-01-03		MCH	Review USPTO Status Change	Internal Deadline		kanz	Dr.-In		
10	Open	16/97	2021-01-03		RSH	Smartpat - Inform Client of Publication	Internal Deadline		info	Dr. M		
11	Open		2021-01-04			Smartpat - Monthly IDS Audit	General Reminder	Perform a montly IDS	audit	issid		any application that
12	Open	15/76	2021-01-04		ATF	Smartpat - Seek client instructions (08 week reminder)	General Reminder		gunt	Guntf		
13	Open	15/55	2021-01-04		ATF	_Task (internal)	Internal Deadline	2020-12-07 AN Spoke	gunt	Guntf		
14	Open	16/46	2021-01-04		HAR	Smartpat - Expect to receive ribbon copy	General Reminder		hans	Hans		
15	Open	16/30	2021-01-04		IHI-C	_Task (internal)	Internal Deadline	Sehr geehrter Herr Ni:	heet	Dr. Ar		
16	Open	16/22	2021-01-04		KAY	_Task (internal)	Internal Deadline	Prepare OA response	info	Chris		
17	Open	15/77	2021-01-04		KHP	File Assignment	General Reminder	Transfer to Compredic	mail	Dr. Se		
18	Open	16/34	2021-01-04		KHP	File Assignment	General Reminder	2020-11-25 AN Client	mail	Dr. Se		
19	Open	15/77	2021-01-04		KHP	Smartpat - Expect to receive ribbon copy	General Reminder		mail	Dr. Se		
20	Open	16/05	2021-01-04		KHP	Smartpat - Expect to receive ribbon copy	General Reminder		mail	Jan H		
21	Open	16/18	2021-01-04		KHP	Smartpat - Expect to receive ribbon copy	General Reminder		mail	Jan H		
22	Open	16/06	2021-01-04	#####	NITZ	Respond to Non-Final Office Action - 4 Month Deadline	Extendable External Deadline		astri	Dr. Ac		
23	Open	16/06	2021-01-04		NITZ	Smartpat - Email an Mandanten	General Reminder	2020-12-21 AN Email	astri	Dr. Ac		
24	Open	15/98	2021-01-04		PRIO	Smartpat - Expect to receive ribbon copy	General Reminder		tom	Tom I		
25	Open	16/15	2021-01-04		RSH	_Task (internal)	Internal Deadline	Have response. Revie	info	Dr. W		
26	Open	16/41	2021-01-04		RSH	Smartpat - Expect to receive ribbon copy	General Reminder		info	Dr. M		
27	Open	16/43	2021-01-04		RSH	_Task (internal)	Internal Deadline	2020-12-11 AN Schedu	info	Dr. M		
28	Open	16/34	2021-01-04		SCHI	Smartpat - Expect to receive ribbon copy	General Reminder		schu	Burkh		
29	Open	15/63	2021-01-04		SENI	Smartpat - Expect to receive ribbon copy	General Reminder		scho	Dr. Al		
30	Open	16/32	2021-01-04		SIPA	_Task (internal)	Internal Deadline	Received instructions	pate	Alexa		
31	Open	16/55	2021-01-04		TUM	_Task (internal)	Internal Deadline	Review OA and propo	n.alt	Nicol		
32	Open	16/54	2021-01-05		BUTI	Smartpat - Seek client instructions (08 week reminder)	General Reminder		dann	Dann		
33	Open	17/25	2021-01-05		HEC	_Task (internal)	Internal Deadline	Prepare translation of info		Jan-D		
34	Open	16/30	2021-01-06		IHI-C	Pay Issue Fee	Hard External Deadli	Sehr geehrter Herr Ni:	heet	Dr. Ar		
35	Open	16/30	2021-01-06		IHI-C	Respond to Notice of Allowance	Hard External Deadline		heet	Dr. Ar		
36	Open		2021-01-06		SIPA	Smartpat - Email foreign associate	General Reminder		pate	Alexa		

APPCOLL TRICK

DEFINE A CUSTOM MATTER FIELD

“CLIENTEMAIL” AND POPULATE IT AUTOMATICALLY WITH AN UPDATE TASK

The screenshot shows the AppColl web interface for configuring an 'Update Task Type'. The browser address bar shows the URL: `https://login.appcoll.com/TaskTypeDetails.aspx?plid=3101469&id=547`. The page title is 'Update Task Type: Update Matter:ClientEmail={Matter.ClientContact.Email}', which is circled in red. The interface includes a navigation menu with 'Tasks', 'Matters', 'Prior Art', 'Files', 'Billing', 'Reports', and 'Contacts'. A search bar is located above the breadcrumb. The main configuration area includes fields for 'Deadline Type' (set to 'Event'), 'Response Date' (set to 'Use the task creation date'), and 'Offset By' (0 months and 0 days). There are also sections for 'Email Reminders' (with checkboxes for days, weeks, and months before), 'Completion States', 'Auto Close State', 'Notifications', and 'Trigger Events'. A checkbox for 'Enable automatic task generation based on above trigger events' is checked. The 'Default Comment' field is empty. The footer contains the text: 'smartpat PLC. PM Account Administrator WEB4 202101060323 YMD A:0.9 N:0.3 © 2021 AppColl, Inc. PAIR EPO TSDR Google Service Agreement Privacy Policy'.