

GETTING THE BEST RESULTS
FROM A
USA TRADEMARK
COMPREHENSIVE SEARCH



innovationprocessworks

Table of Contents

| | |
|---|----|
| USA Trademark Comprehensive Report Overview | 3 |
| Understanding How the System Works | 4 |
| How are Records Flagged for a Match? | 4 |
| Search Terms | 5 |
| Let's Dig Deeper | 8 |
| Sets and Super Sets | 8 |
| Sections Within a Report | 9 |
| Classes | 15 |
| Boolean Search | 16 |
| Root Words | 17 |
| Dead Trademarks | 18 |
| Exclude Owner | 19 |
| How to Run a Search: Getting Started | 20 |

USA Trademark Comprehensive Report

So you've just run your initial straight-to-the-point USA Trademark Screening Report, but you'd like to know how and why we gave you the results.

The USA Trademark Comprehensive Report provides the same results as the Screening Report, but you receive a comprehensive set of federal, state, common law, and social media

data which allows you to dig even deeper into brand and trademark use.

HOW ARE RECORDS FLAGGED FOR A MATCH?

If the term searched matches...

- exactly
- plurals
- within a mark (partial)
- phonetically



IF THE TERM
SEARCHED MATCHES...

EXACTLY or is the
PLURAL FORM of
the term:

EX:

“FARMHOUSE NATURAL”

COULD FIND

Farmhouses Natural
Farmhouse Naturally
Natural Farmhouse

COULD NOT FIND

Farmhouse
Natural
Farmhous Natural
Farm House

Note: Search Terms that could not be found within
Exact Search CAN be found in other searches, such
as Similar.

IF THE TERM
SEARCHED MATCHES...

PARTIALLY or
as **PART OF**
ANOTHER MARK:

EX:

“FARMHOUSE NATURAL”

COULD FIND

The Natural Farmhouse
Natural and Best Farmhouse
Natural Farmhouse Suites

COULD NOT FIND

The Best Farm House Nature
Natur Farmhouse AI

Note: Search Terms that could not be found within
Partial Search CAN be found in other searches, such
as Similar.

IF THE TERM
SEARCHED MATCHES...

PHONETICALLY
or under **SIMILAR**
MATCHES:

EX:

“FARMHOUSE NATURAL”

COULD FIND

Natural Pharmhous
Naturlfarmhous
Natrall Farm Haws

COULD NOT FIND

Natural
Farmhouse
Natural Farmhouse is the Best Brand

Note: Search Terms that could not be found within
Similar Search CAN be found in other searches, such
as Partial.



LET'S DIG DEEPER.

The system only looks for sets and super sets and NOT subsets unless the sub set sounds like the whole term being searched. In that case, the result(s) will be in the “Similar Matches” portion of the report. So, adding spaces on compound words and using the smallest form of the word will give the most results.

LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Comprehensive report:

A. EXACT MATCHES IN THE SAME CLASS:

- i. Federal results
- b. Exact Matches in all other non-specified classes
- c. Partial Matches in the same class(es)
- d. Partial Matches in all other non-specified classes
- e. Similar Matches in the same class(es)
- f. Similar Matches in all other non-specified classes



LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Comprehensive report:

a. Exact Matches in the same class

B. EXACT MATCHES IN ALL OTHER NON-SPECIFIED CLASSES:

i. Federal results

ii. States

iii. Common Law

- D&B
- Domain Names
- Facebook
- Twitter
- Google Plus
- Google (web search)
- YouTube
- SEC

c. Partial Matches in the same class(es)

d. Partial Matches in all other non-specified classes

e. Similar Matches in the same class(es)

f. Similar Matches in all other non-specified classes

LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Comprehensive report:

- a. Exact Matches in the same class
- b. Exact Matches in all other non-specified classes
- C. PARTIAL MATCHES IN THE SAME CLASS(ES):**
 - i. Federal results
- d. Partial Matches in all other non-specified classes
- e. Similar Matches in the same class(es)
- f. Similar Matches in all other non-specified classes



LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Comprehensive report:

- a. Exact Matches in the same class
- b. Exact Matches in all other non-specified classes
- c. Partial Matches in the same class(es)

D. PARTIAL MATCHES IN ALL OTHER NON-SPECIFIED CLASSES:

- i. Federal results
- ii. States
- iii. Common Law
 - D&B
 - Domain Names
 - Facebook
 - Twitter
 - Google Plus
 - Google (web search)
 - YouTube
 - SEC
- e. Similar Matches in the same class(es)
- f. Similar Matches in all other non-specified classes

LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Comprehensive report:

- a. Exact Matches in the same class
- b. Exact Matches in all other non-specified classes
- c. Partial Matches in the same class(es)
- d. Partial Matches in all other non-specified classes
- E. SIMILAR MATCHES IN THE SAME CLASS(ES):**
 - i. Federal results
- f. Similar Matches in all other non-specified classes



LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Comprehensive report:

- a. Exact Matches in the same class
- b. Exact Matches in all other non-specified classes
- c. Partial Matches in the same class(es)
- d. Partial Matches in all other non-specified classes
- e. Similar Matches in the same class(es)

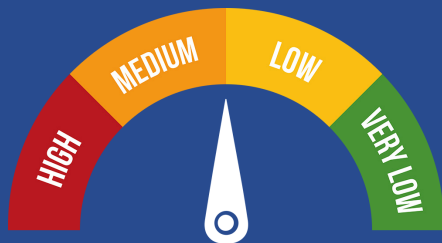
F. SIMILAR MATCHES IN ALL OTHER NON-SPECIFIED CLASSES:

- i. Federal results
- ii. States
- iii. Common Law
 - D&B
 - Domain Names
 - Facebook
 - Twitter
 - Google Plus
 - Google (web search)
 - YouTube
 - SEC

LET'S DIG DEEPER.

All classes are searched, **but** by specifying a class(es) you can filter the more relevant results to the top.

Selecting different classes will adjust the gauges to the results found or not found in those selected classes.



LET'S DIG DEEPER.

Each search acts like a Boolean search. For example, if we search “Farmhouse Natural” the search would look like “*Farmhouse* AND *Natural*” query on our database. So, a better search would be “Farm House Natural” to get “*Farm* AND *House* AND *Natural*” query on our database.

EX:

“FARMHOUSE NATURAL”

=

“FARMHOUSE” + “NATURAL”

EX:

“FARM HOUSE NATURAL”

=

“FARM” + “HOUSE” + “NATURAL”
+ “FARMHOUSE” + “NATURAL”



EX:

“**FARMHOUSE NATURAL**”

+ ROOT WORD “**FARM**”

+ ROOT WORD “**HOUSE**”

LET’S DIG DEEPER.

Root words allow for shorter or smaller words to be searched.

The use of these are critical for getting the best results every time.



LET'S DIG DEEPER.

Including dead trademarks allow for a much broader, comprehensive search. This is especially useful when a trademark has been abandoned only recently. For a more comprehensive search, we recommend you allow dead trademarks in your results.

LET'S DIG DEEPER.

Excluding owner is useful for a Trademark Comprehensive Search when you already know the owner of a mark (i.e., your brand or company) and are wanting to monitor for level of use. But, for the sake of a more comprehensive search, we recommend leaving this function alone.



USA Trademark Comprehensive Report

Getting Started

The screenshot shows the BRAND PDQ website interface. At the top, there are navigation links: Dashboard, Archive, Recurring, Cart, and Account. The main content area is titled 'Cart' and is divided into two main sections: 'Search It Products' and 'Enforce It Products'. Under 'Search It Products', there are tabs for 'Global', 'USA', and 'Franchise'. The 'USA' tab is active, showing a list of products. The 'USA Trademark Comprehensive Search Report' is selected, with an 'Add' button highlighted. The price for this report is \$299. Below the 'Enforce It Products' section, there are tabs for 'Trademark' and 'Reputation'. The cart summary shows a total of \$299 and a 'Proceed to Checkout' button. The search details for the selected report are: Term: Entire Mark, Class: -- Select One --, and a 'Remove' button.

1. Under the “USA” tab below Search It Products, select “Add” next to USA Trademark Comprehensive Report. Here you will find the option to search your mark by class number.

USA Trademark Comprehensive Report

Getting Started

The screenshot shows the BRAND PDQ website interface. At the top, there is a navigation bar with links for Dashboard, Archive, Recurring, Cart, and Account. The main content area is titled "Cart" and features a sidebar on the left with categories: Search It Products (Global, USA, Franchise) and Enforce It Products (Trademark, Reputation). The main cart area displays a "USA Search It" item titled "USA Trademark Comprehensive Search Report" priced at \$299. The item details include a "Term" field with "Entire Mark" and a "Class" dropdown menu set to "-- Select One --". There is an "Advanced Search" link and a "Remove" button. The total price is \$299, and a "Proceed to Checkout" button is visible.

2. (Optional) Select “Advanced Search” and in addition to term and class number, you’ll see options to search by Root Words. You’ll also have the option to Include Dead marks and Exclude Owner. For more information on Advanced Search options, please refer to pages 17-19.

USA Trademark Comprehensive Report

Getting Started

The screenshot displays the BRAND PDQ website interface. At the top, there is a navigation bar with links for Dashboard, Archive, Recurring, Cart, and Account. The main content area is titled 'Cart' and features a 'USA Search It' header. On the left, there are two main sections: 'Search It Products' and 'Enforce It Products'. Under 'Search It Products', there are dropdown menus for 'Global' and 'USA', and a list of products including 'USA Trademark Screening Report' (\$99) and 'USA Trademark Comprehensive Search Report' (\$299), each with an 'Add' button. Under 'Enforce It Products', there are dropdown menus for 'Trademark' and 'Reputation'. The main cart area shows a 'USA Trademark Comprehensive Search Report' for \$299. The search configuration includes: Term: IP Watch; Term Root(s): IP, Watch; Class: 42: Computer & Software Services and Scientific Services; Class: 35: Advertising, Business and Retail Services; Include Dead: Yes (selected), No; Exclude Owner: Limit one per box. A 'Remove' button is located at the bottom right of the search configuration. At the bottom right of the cart, the total price is \$299, and a 'Proceed to Checkout' button is visible.

3. Here you will search by your mark and select your International Class number from 1-45. It's important to note that class numbers 1-34 are products and 35-45 are services. Also note: the compound word "IPWatch" is searched as "IP Watch" (plus root words) to find the most accurate results. After completing this, select "Proceed to Checkout" and fill out all required details.

USA Trademark Comprehensive Report

Getting Started

The screenshot displays the BRAND PDQ dashboard. At the top left is the logo, and navigation links for Dashboard, Archive, Recurring, Cart, and Account are at the top center. A Logout button is at the top right. Below the navigation, it states 'Current plan for Brand PDQ: Standard'. The dashboard is divided into two main sections: 'Search It Products' and 'Enforce It Products', each with a corresponding 'Reports' table.

Search It Products: Includes dropdown menus for Global, USA, and Franchise.

Search It Reports: Features a search bar, a 'Show 10 entries' dropdown, and a table with columns: Type, Report Title, Term, Date, and PDF. A single entry is visible: Federal, USA Trademark Comprehensive Search Report, IP Watch, 01-22-2018. A PDF icon is highlighted with a mouse cursor. Below the table, it says 'Showing 1 to 9 of 9 entries' and includes 'Previous' and 'Next' navigation arrows.

Enforce It Products: Includes dropdown menus for Trademark and Reputation.

Enforce It Reports: Features a search bar, a 'Show 10 entries' dropdown, and a table with columns: Type, Report Title, Term, Date, and PDF. The table is currently empty.

4. After loading, your PDF(s) will animate when ready. Click on the icon located below the PDF column.

USA Trademark Comprehensive Report

Getting Started

COMPREHENSIVE REPORT

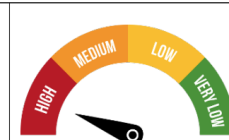
Class(es) Searched: 41, 35
Date Of Search: 2018-01-22

INSIGHT INDICATORS

LEVEL OF USE

This term(s) has a **HIGH** level of use, meaning the term(s) is widely used in the marketplace by 3rd parties.

This is a weak brand, name, or mark. Use of this term(s) provides little to no opportunity to enforce the use of the mark, brand, or name against a 3rd party and minimal opportunity for trademark registration.



RISK OF 3RD PARTY CHALLENGE

There is a **HIGH** level of risk of 3rd party challenge for the use of or registration of this mark, brand or name.

There is an exact match for this mark with the USPTO in the same or related class of goods and services, business name use, domain name use, and any other common law use. This mark is not likely available for use or registration within this same class. Additional research is required to identify any defenses that could be used, such as date of first use or within different geographic markets or other factors. Seeking legal counsel is recommended to identify ways to overcome a 3rd party challenge.



RISK OF REJECTION OF USPTO REGISTRATION

There is a **HIGH** level of risk of initial rejection to register this mark within this class or related classes.

There is an exact match for this mark with the USPTO in the same or related class of goods and services. This mark is not likely available for use or registration within this same class. The mark is generic or highly descriptive. Additional research is required to identify any defenses that could be used, such as date of first use or within different geographic markets or other factors. Seeking legal counsel is recommended to identify ways to overcome an initial rejection from an examining attorney. Additional facts may present defenses to overcome descriptiveness objections, however USPTO registration is unlikely.



5. You'll see your results on a new PDF. The search will also include the BrandPDQ Insight Indicators. Scroll down to see your results.

HAPPY
SEARCHING!



innovationprocessworks