

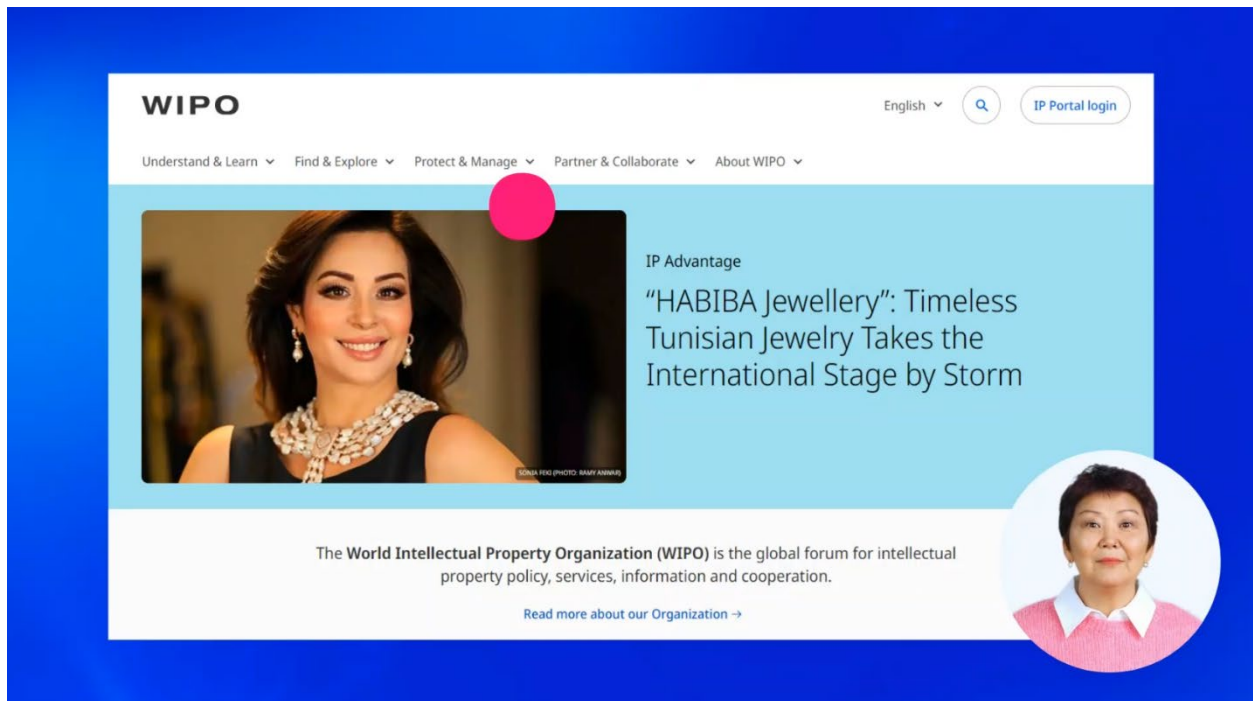
## CURRENT ACCOUNT AT WIPO: MANAGING THE ROLES

Hey there! Welcome to our tutorial.

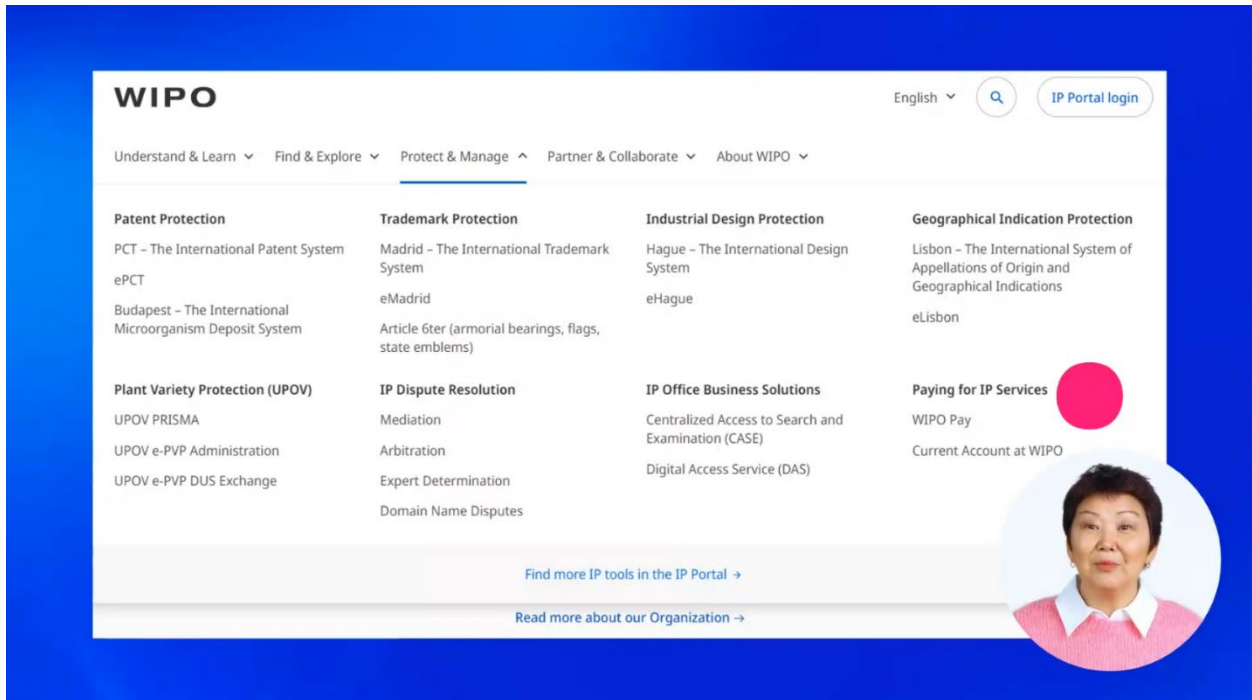
In this video you will learn how to manage your Current Account at WIPO based on an assigned role.

You can manage your Current Account at WIPO taking on either a role of a **focal point** or of a **viewer**. Please note that **whatever your role may be, you can pay WIPO fees with your Current Account at WIPO**.

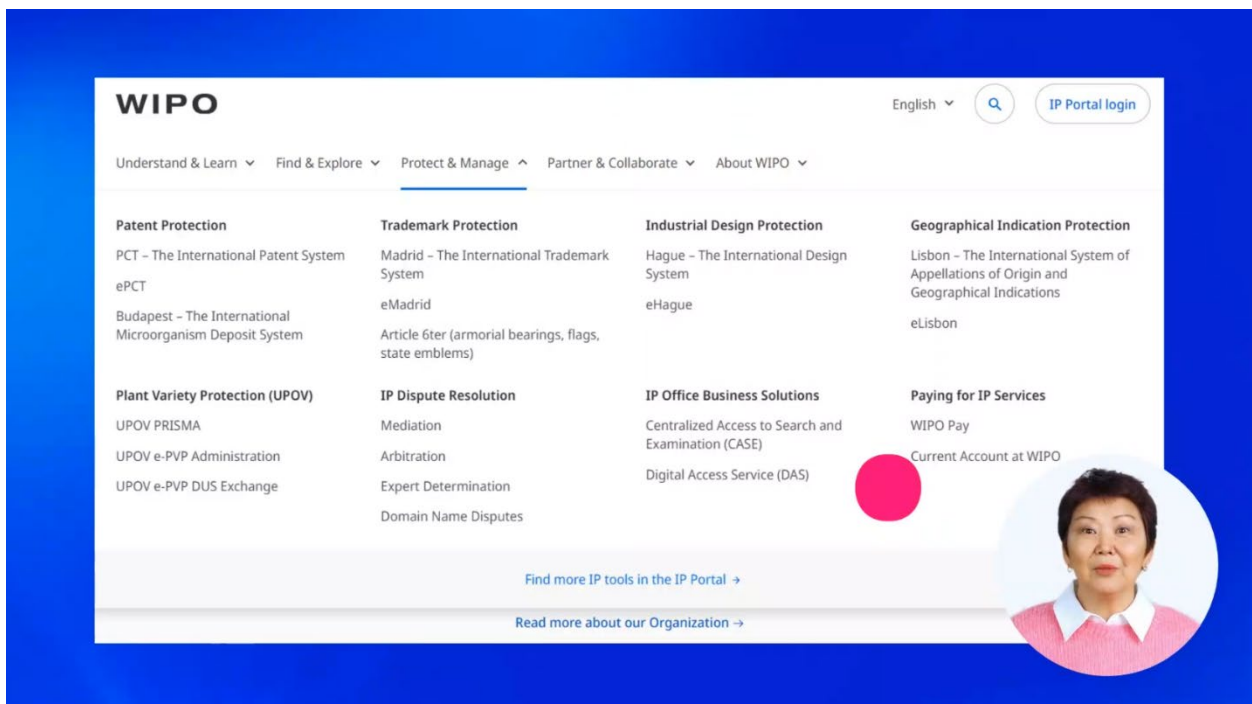
Let's access your Current Account at WIPO first. Go to "Protect and Manage".



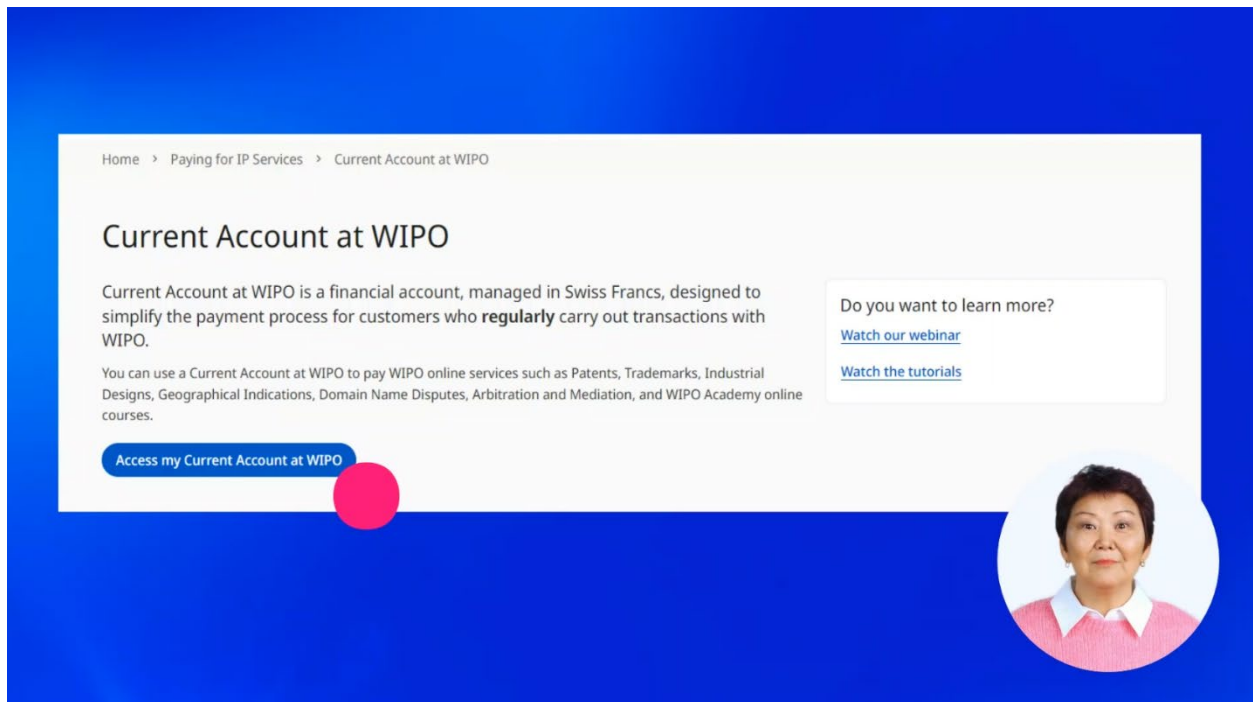
Find the menu title "Paying for IP Services".



Click on "Current Account at WIPO".



Then click on "Access my Current Account at WIPO".



Home > Paying for IP Services > Current Account at WIPO


## Current Account at WIPO

Current Account at WIPO is a financial account, managed in Swiss Francs, designed to simplify the payment process for customers who **regularly** carry out transactions with WIPO.

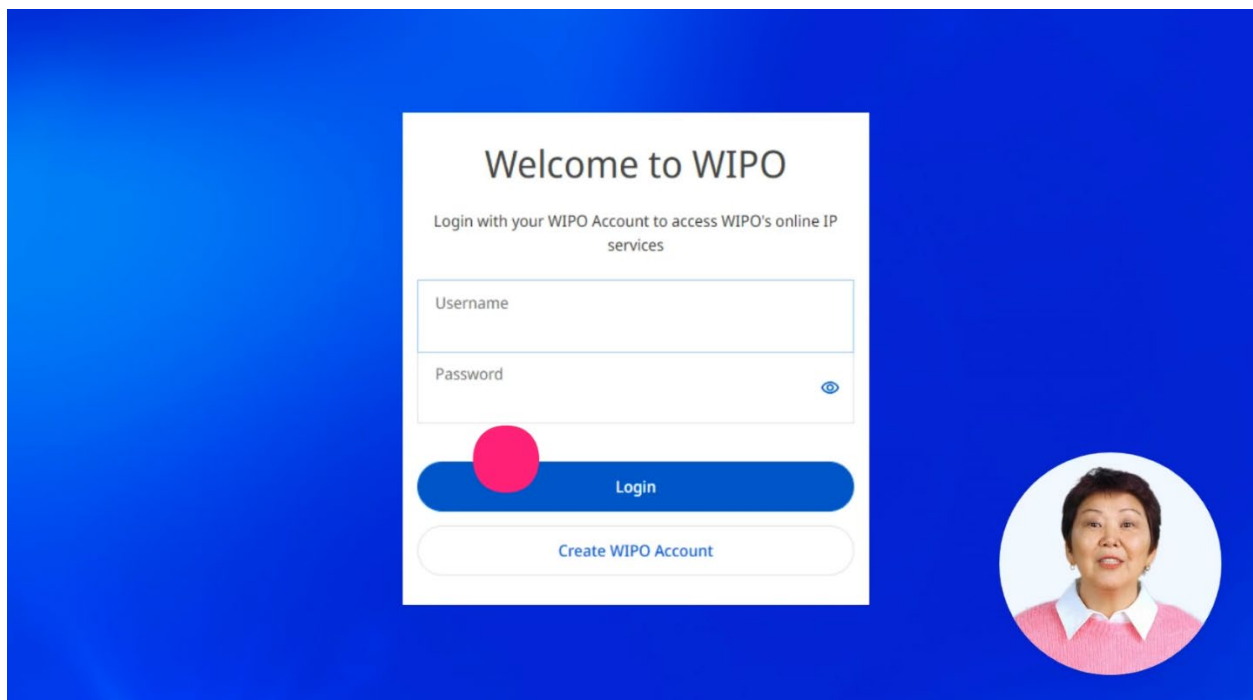
You can use a Current Account at WIPO to pay WIPO online services such as Patents, Trademarks, Industrial Designs, Geographical Indications, Domain Name Disputes, Arbitration and Mediation, and WIPO Academy online courses.

Do you want to learn more?  
[Watch our webinar](#)  
[Watch the tutorials](#)

[Access my Current Account at WIPO](#)




You will be asked to log in to your WIPO Account.



## Welcome to WIPO


Login with your WIPO Account to access WIPO's online IP services

Username

Password 

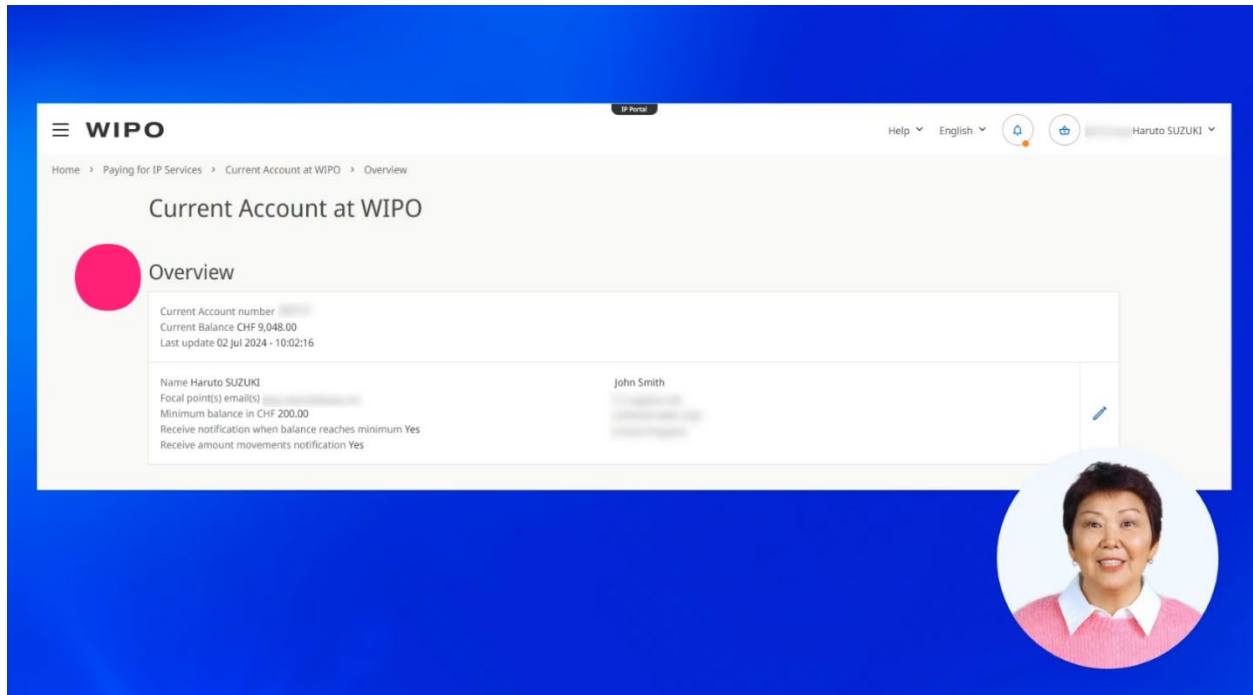
[Login](#)

[Create WIPO Account](#)



When your WIPO Account and Current Account at WIPO are synchronized, you will see your Current Account at WIPO information in the Overview section of your financial account.

If the two accounts are still not synchronized, please check one of our previous tutorials on this topic.




If you scroll down the webpage, you can see the list of transactions. Both focal points and viewers can visualize them, filter, and download filtered data in PDF or XLS format. Check our tutorial titled "Current Account at WIPO: Understanding the statements" to know how to read your account data.

**Transactions**

Search / Filter

Group transactions by month

Date ▾	Balance in CHF ◯
July 2024	9,048.00
<u>June 2024</u>	9,048.00
May 2024	7,413.00
April 2024	7,413.00
March 2024	7,413.00
February 2024	7,413.00
January 2024	7,413.00




Only when you are a focal point, in the bottom of your Current Account at WIPO webpage you will see all the users connected to your Current Account.

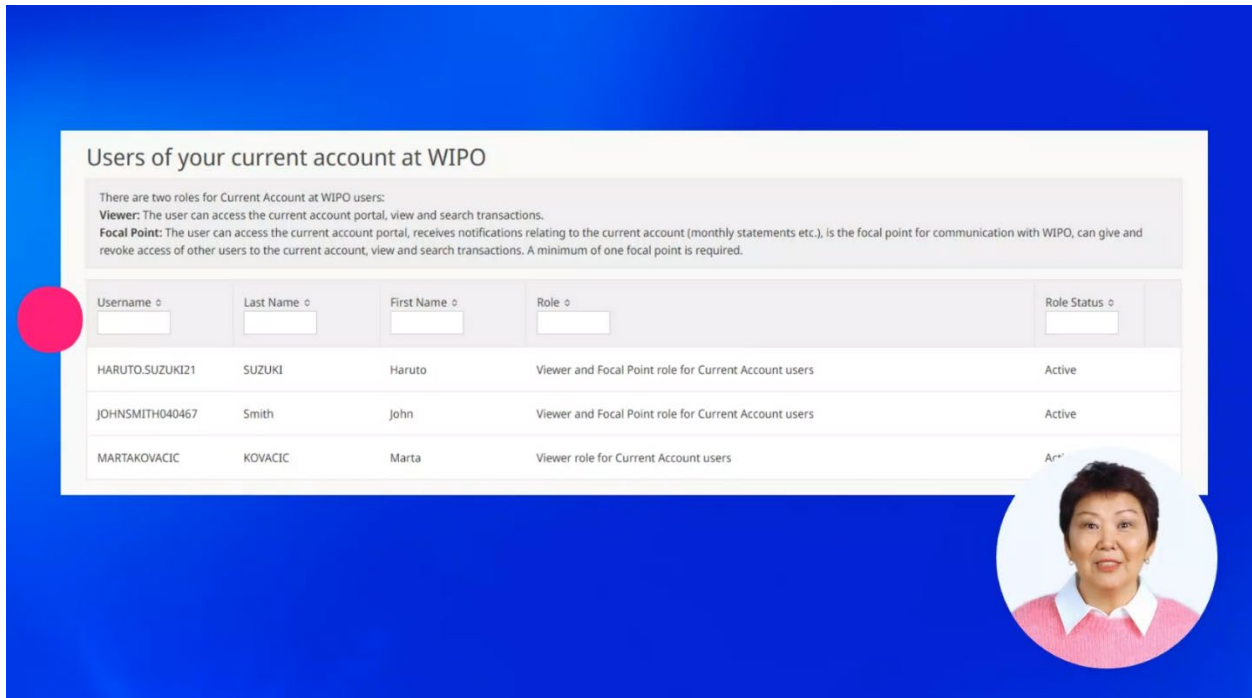
**Users of your current account at WIPO**

There are two roles for Current Account at WIPO users:  
**Viewer:** The user can access the current account portal, view and search transactions.  
**Focal Point:** The user can access the current account portal, receives notifications relating to the current account (monthly statements etc.), is the focal point for communication with WIPO, can give and revoke access of other users to the current account, view and search transactions. A minimum of one focal point is required.

Username ◯	Last Name ◯	First Name ◯	Role ◯	Role Status ◯
HARUTO.SUZUKI21	SUZUKI	Haruto	Viewer and Focal Point role for Current Account users	Active
JOHNSMITH040467	Smith	John	Viewer and Focal Point role for Current Account users	Active
MARTAKOVACIC	KOVACIC	Marta	Viewer role for Current Account users	Ar...




You can see their username, last and first name, roles, and role status.

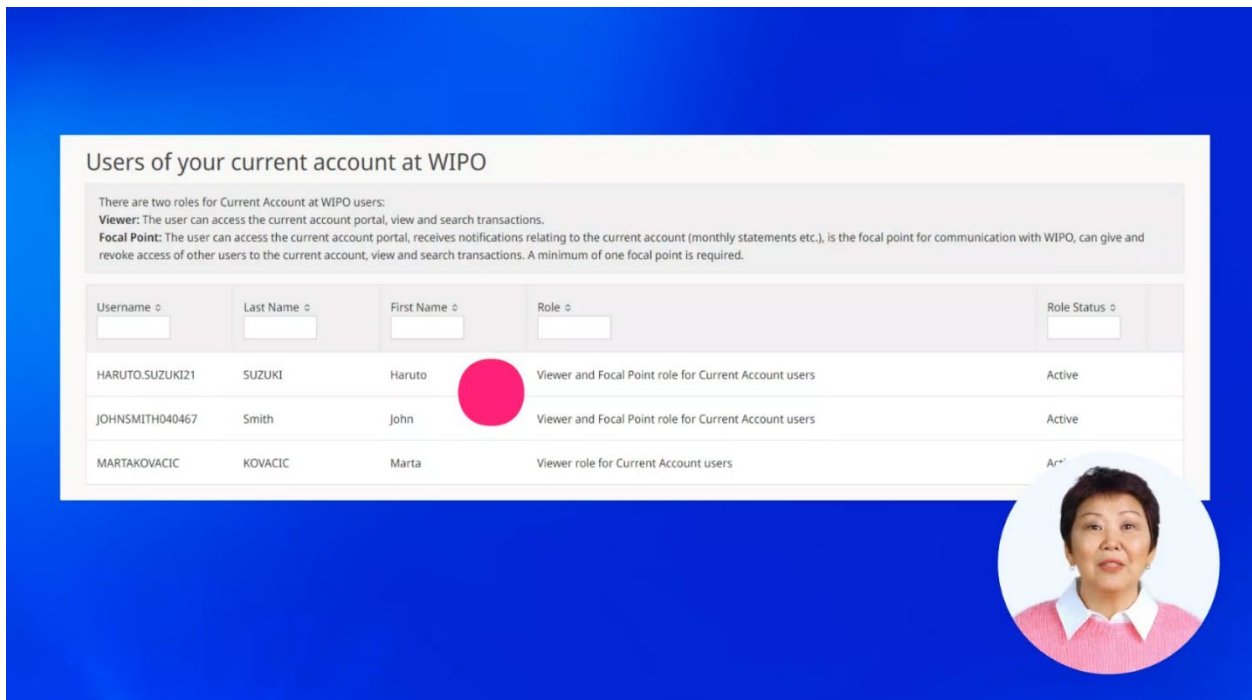


The screenshot shows a web interface titled "Users of your current account at WIPO". Below the title, there is explanatory text about roles: "There are two roles for Current Account at WIPO users: **Viewer:** The user can access the current account portal, view and search transactions. **Focal Point:** The user can access the current account portal, receives notifications relating to the current account (monthly statements etc.), is the focal point for communication with WIPO, can give and revoke access of other users to the current account, view and search transactions. A minimum of one focal point is required." Below this text is a table with five columns: Username, Last Name, First Name, Role, and Role Status. The table lists three users: Haruto Suzuki (Viewer and Focal Point role), John Smith (Viewer and Focal Point role), and Marta Kovacic (Viewer role). A red circle highlights the 'Role' column header.

Username	Last Name	First Name	Role	Role Status
HARUTO.SUZUKI21	SUZUKI	Haruto	Viewer and Focal Point role for Current Account users	Active
JOHNSMITH040467	Smith	John	Viewer and Focal Point role for Current Account users	Active
MARTAKOVACIC	KOVACIC	Marta	Viewer role for Current Account users	Ar...

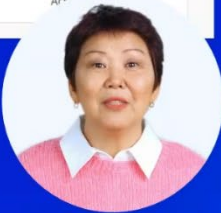


In our example, John Smith and Haruto Suzuki are the focal points of this Current Account at WIPO,



The screenshot shows the same web interface as above. A red circle highlights the 'First Name' column header.

Username	Last Name	First Name	Role	Role Status
HARUTO.SUZUKI21	SUZUKI	Haruto	Viewer and Focal Point role for Current Account users	Active
JOHNSMITH040467	Smith	John	Viewer and Focal Point role for Current Account users	Active
MARTAKOVACIC	KOVACIC	Marta	Viewer role for Current Account users	Ar...

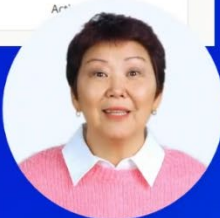


while Marta Kovacic assumes a viewer role.

### Users of your current account at WIPO

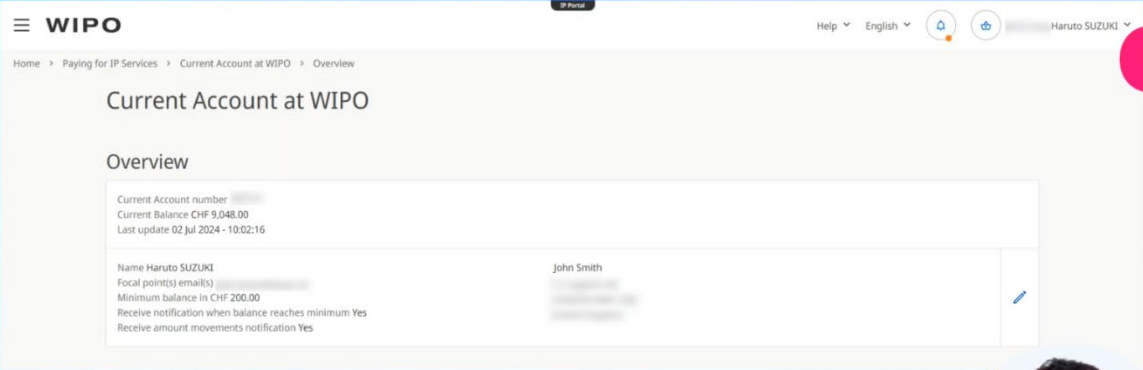
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Username	Last Name	First Name	Role	Role Status
HARUTO.SUZUKI21	SUZUKI	Haruto	Viewer and Focal Point role for Current Account users	Active
JOHNSMITH040467	Smith	John	Viewer and Focal Point role for Current Account users	Active
MARTAKOVACIC	KOVACIC	Marta	Viewer role for Current Account users	Ar...



Remember that **at least one focal point** is required for a Current Account at WIPO. You can ask to set up **as many focal point roles as you want**.

Both focal points and viewers can access Current Account at WIPO portal and use its widgets. To do so, click on your name in the upper right corner of the webpage.



WIPO

Home > Paying for IP Services > Current Account at WIPO > Overview


### Current Account at WIPO

#### Overview

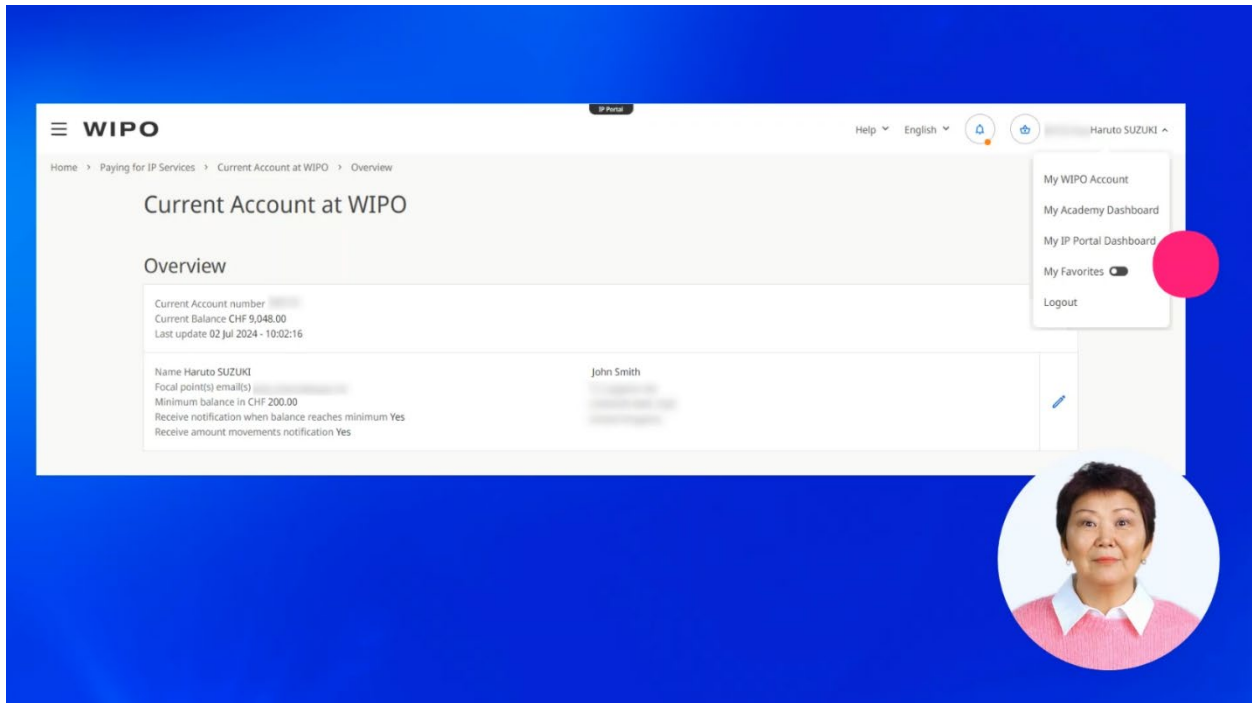
Current Account number [redacted]  
 Current Balance CHF 9,048.00  
 Last update 02 Jul 2024 - 10:02:16

Name Haruto SUZUKI      John Smith  
 Focal point(s) email(s) [redacted]  
 Minimum balance in CHF 200.00  
 Receive notification when balance reaches minimum Yes  
 Receive amount movements notification Yes

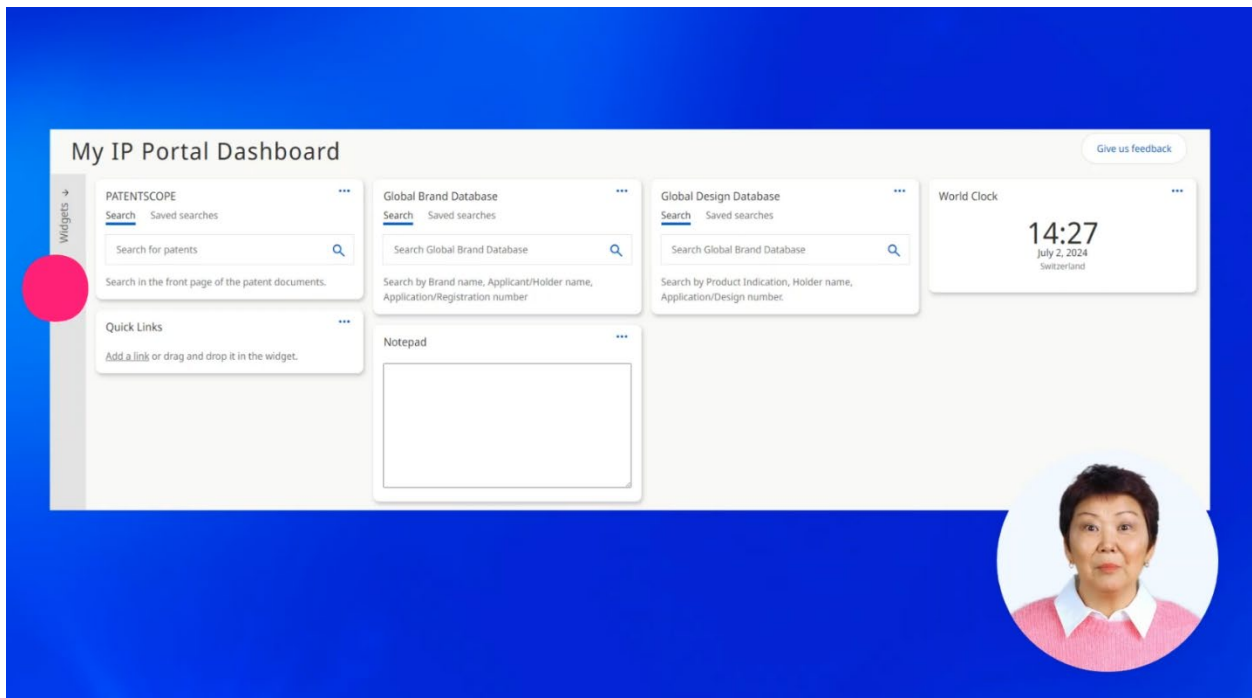
Help English [notification icons] Haruto SUZUKI



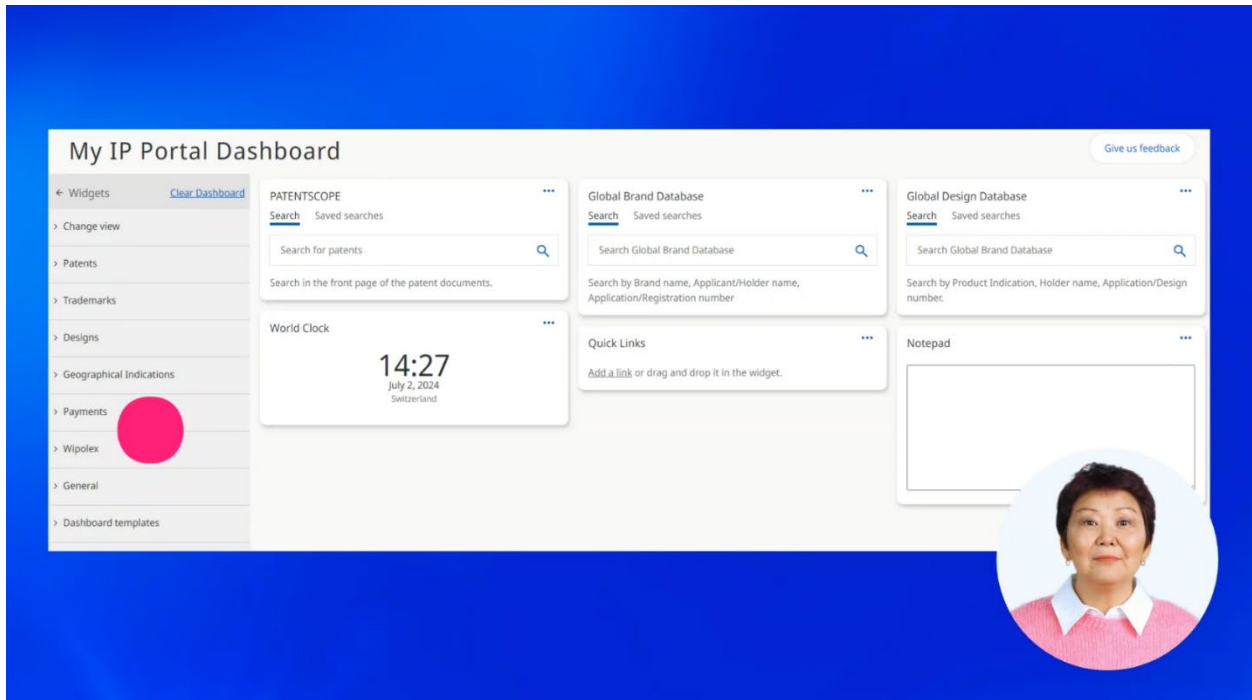
A menu will open. Click on "My IP Portal Dashboard".



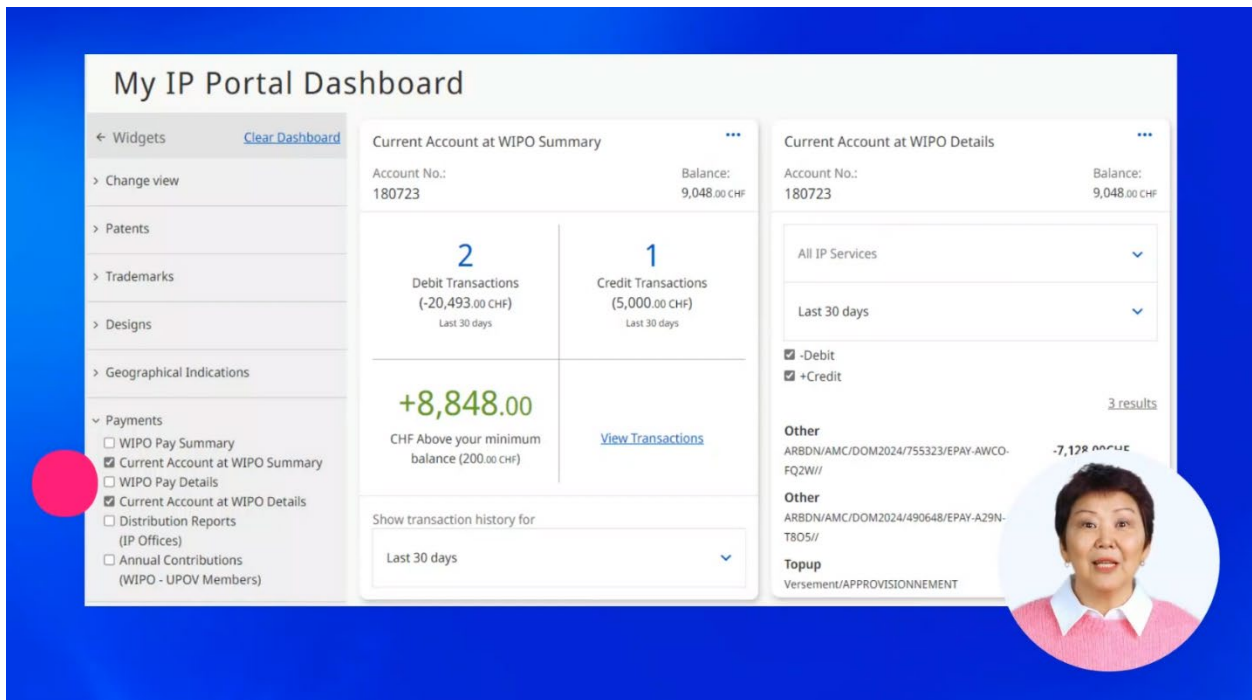
This is your IP Portal Dashboard where all the widgets are. You can find the list of widgets by clicking on "Widgets" on the left side of the page.



Then click on "Payments"

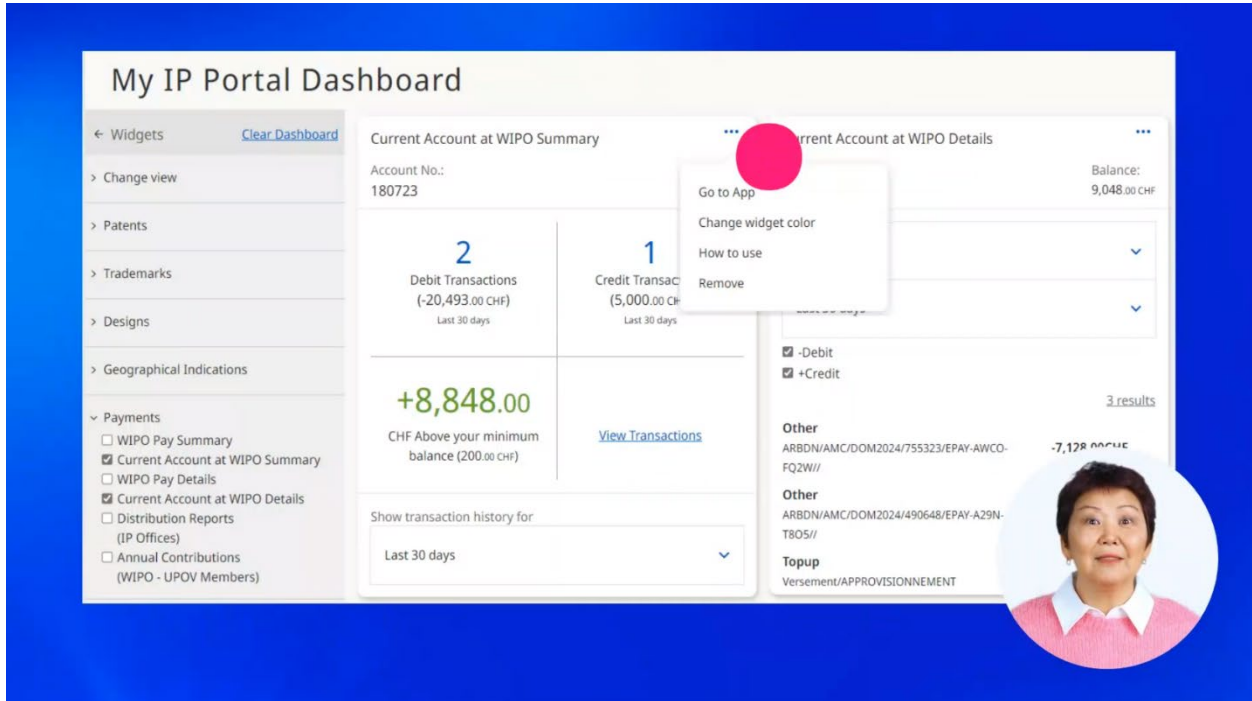


and check the boxes "Current Account at WIPO Summary" and "Current Account at WIPO Details".

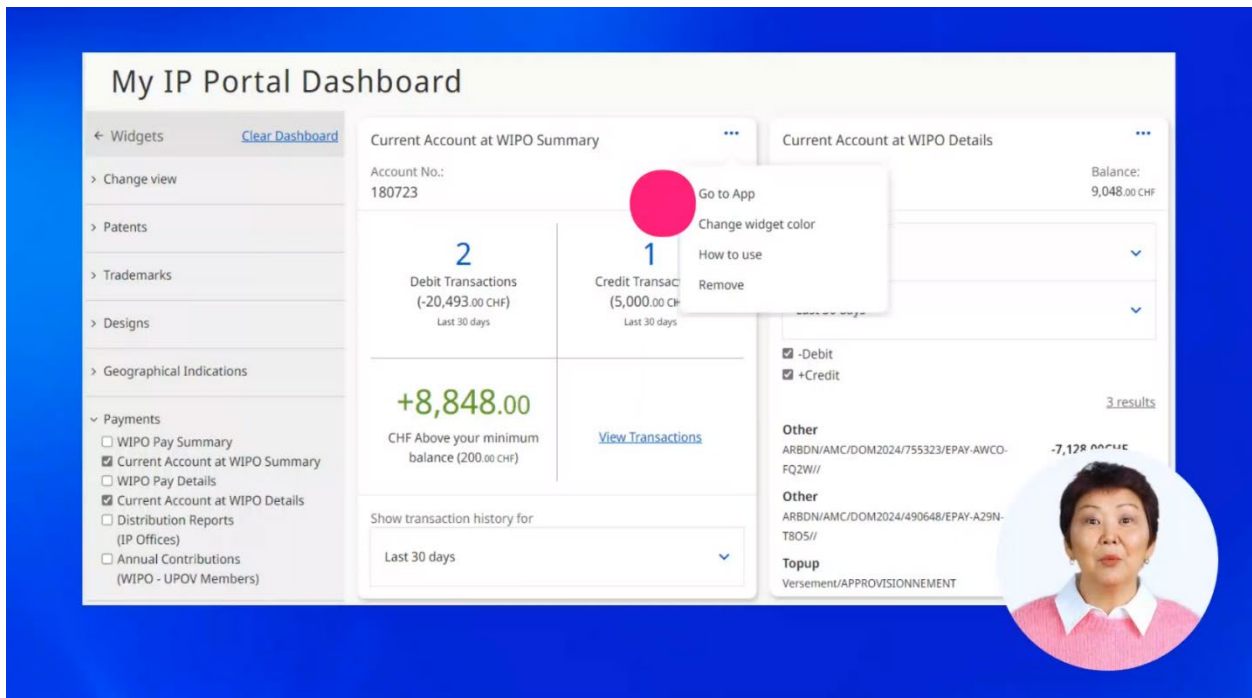


Now you have Current Account widgets on your IP Portal Dashboard. Here you can view balance, search and view your transactions. These functions are available for both viewers and focal points.

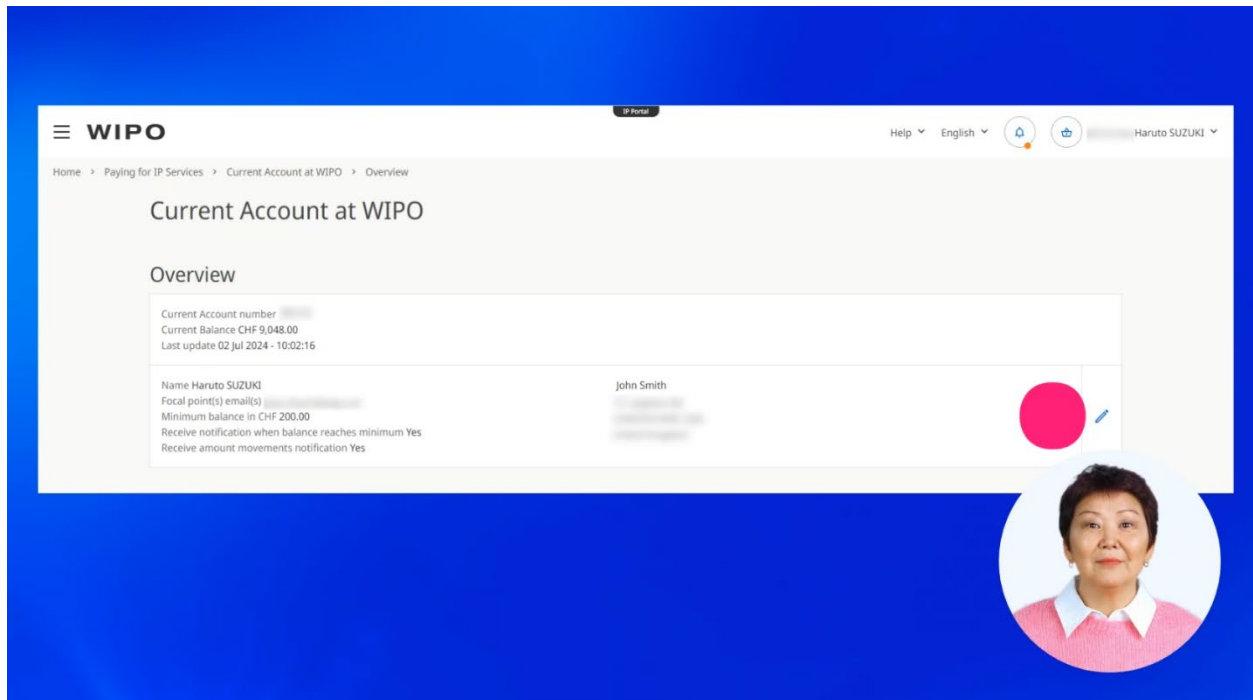
You can also customize your widgets by clicking on the 3 dots that each widget has.



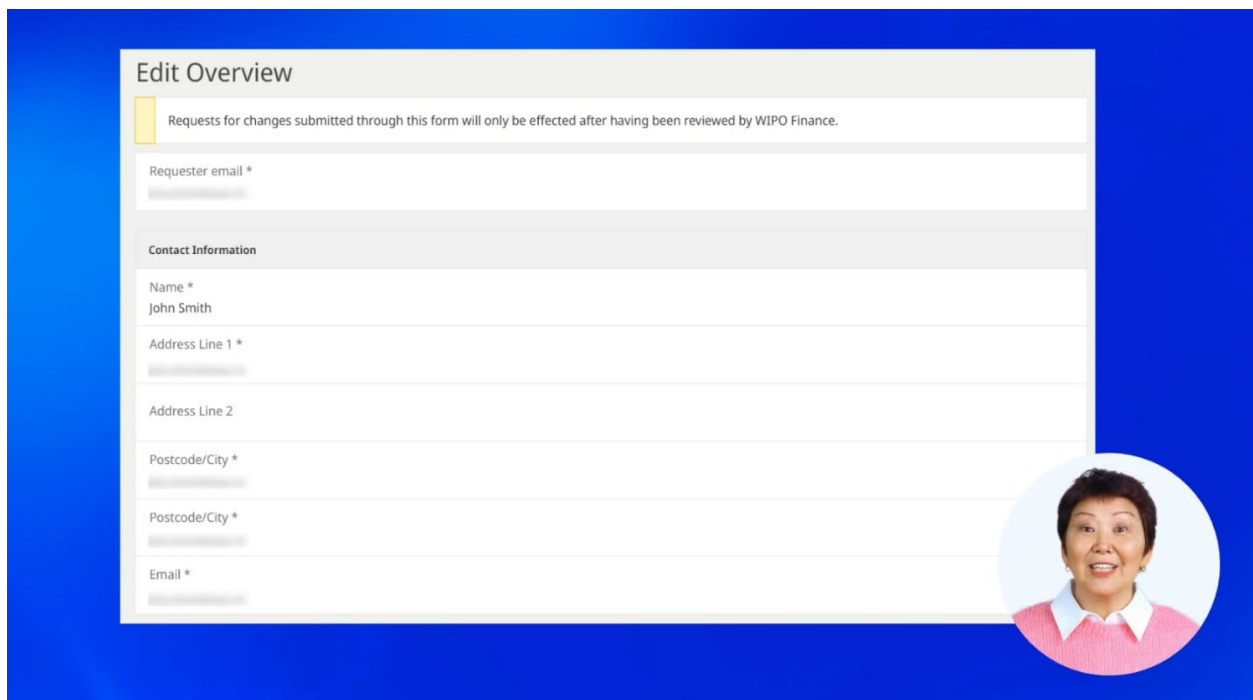
Click on "Go to App" to go back to the Current Account at WIPO webpage.



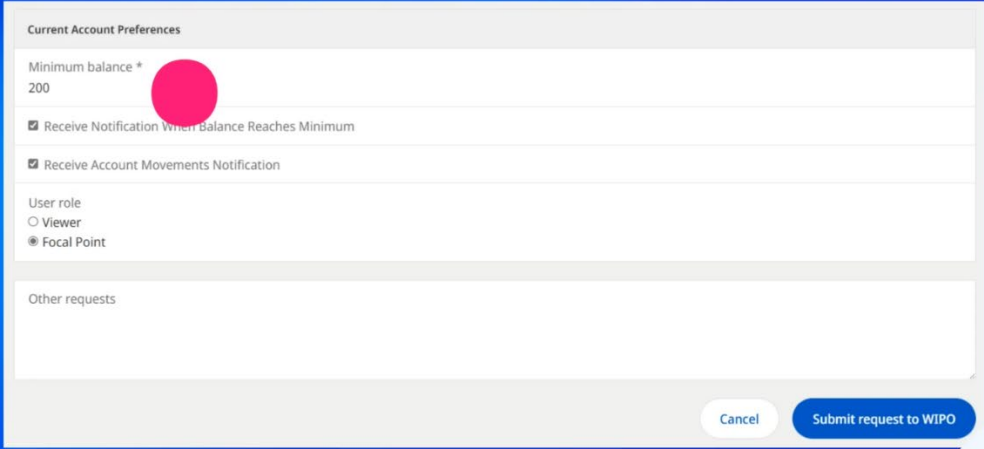
If you are a focal point, you can edit the information indicated in the overview section.  
Click on the pencil on the right.



Update your contact information in this section.

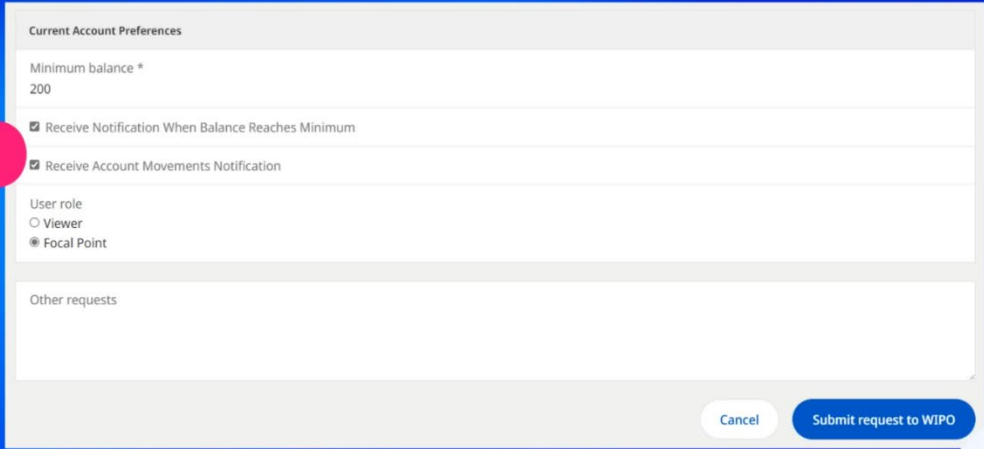


You can change the minimum balance here



The screenshot shows a form titled "Current Account Preferences" on a blue background. The form has several sections: "Minimum balance \*" with the value "200" (highlighted by a red circle), "Receive Notification When Balance Reaches Minimum" (checked), "Receive Account Movements Notification" (checked), "User role" with radio buttons for "Viewer" and "Focal Point" (selected), and "Other requests" (empty). At the bottom right are "Cancel" and "Submit request to WIPO" buttons. A circular profile picture of a woman in a pink top is visible on the right side of the form.

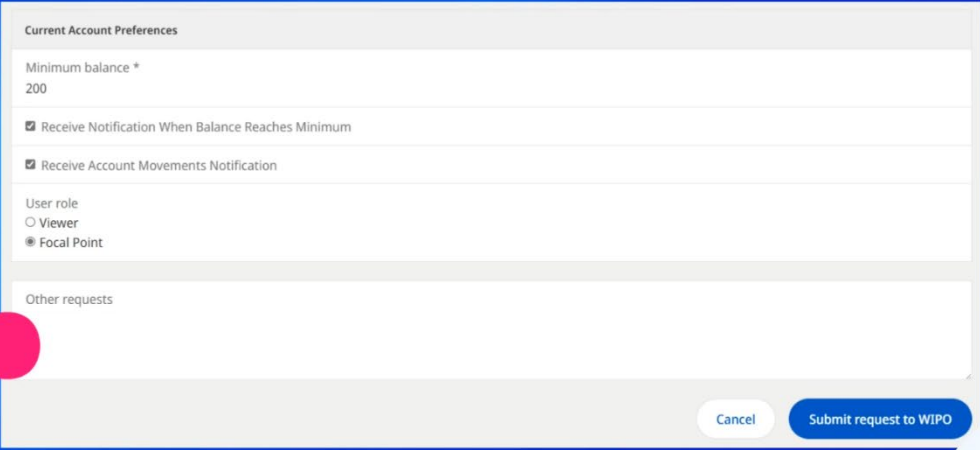
and choose to receive notifications when the balance reaches your chosen minimum. Remember that 200 Swiss Francs is the lowest amount you can choose as a minimum balance for your Current Account.



This screenshot is identical to the one above, showing the "Current Account Preferences" form. However, a red circle highlights the two notification checkboxes: "Receive Notification When Balance Reaches Minimum" and "Receive Account Movements Notification". The "Minimum balance" field is now "200". The "User role" section shows "Focal Point" selected. The "Other requests" field is empty. The "Cancel" and "Submit request to WIPO" buttons are at the bottom right. The circular profile picture of the woman is also present.

As a focal point you can ask to change the role and give or revoke the access of other users. Specify your request about user access in the blank space.


Note that only if you are a focal point, you receive notifications relating to the transactions made with your Current Account at WIPO.



The image shows a screenshot of a web form titled "Current Account Preferences". The form has a white background and is set against a blue background. It contains the following fields and options:

- Minimum balance \***: 200
- Receive Notification When Balance Reaches Minimum**
- Receive Account Movements Notification**
- User role**:
  - Viewer
  - Focal Point
- Other requests**: A large empty text area for entering requests. A pink circle highlights this field.

At the bottom right of the form, there are two buttons: "Cancel" and "Submit request to WIPO".



You can find more tutorials on our website - [wipo.int](http://wipo.int).

Finally, a reminder to **be aware of possible scam attempts** by phone, email, or text message. You can learn more about how to protect yourself from different types of scams on the dedicated webpage on our website.

Thank you for watching our tutorial. See you next time!