

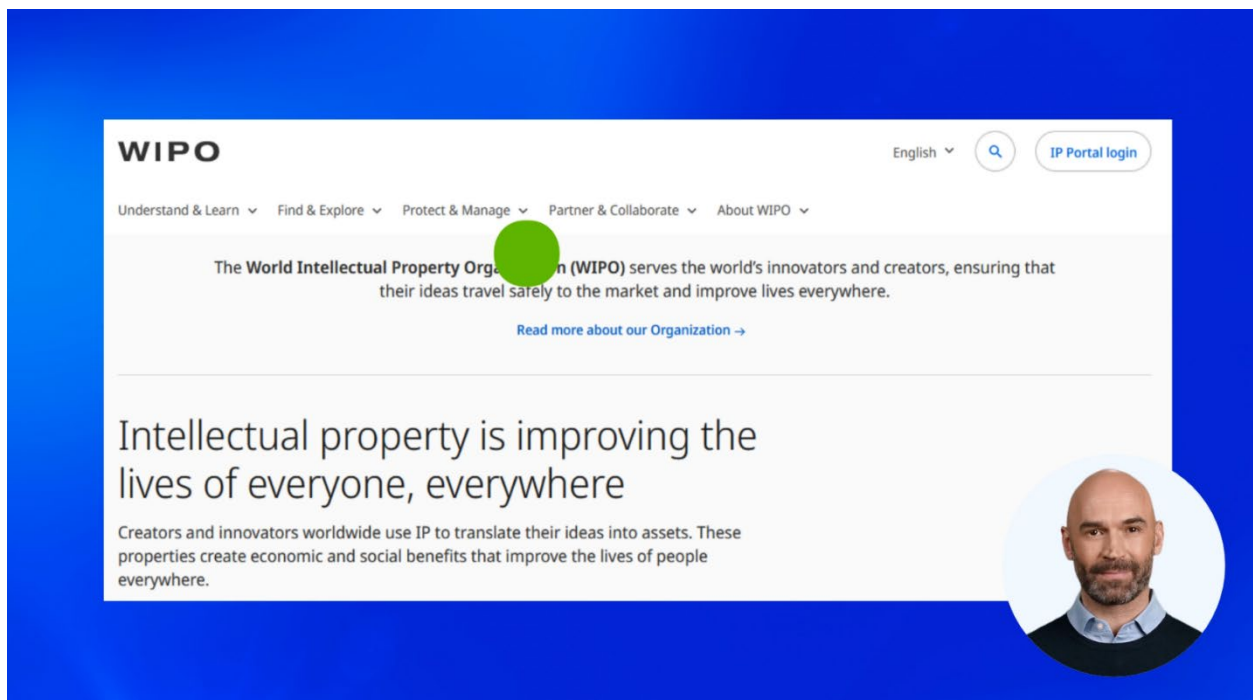
WIPO Wallet: Roles and Notifications

Hey there. Welcome to our tutorial. In this video you will learn how to manage your WIPO Wallet based on an assigned role.

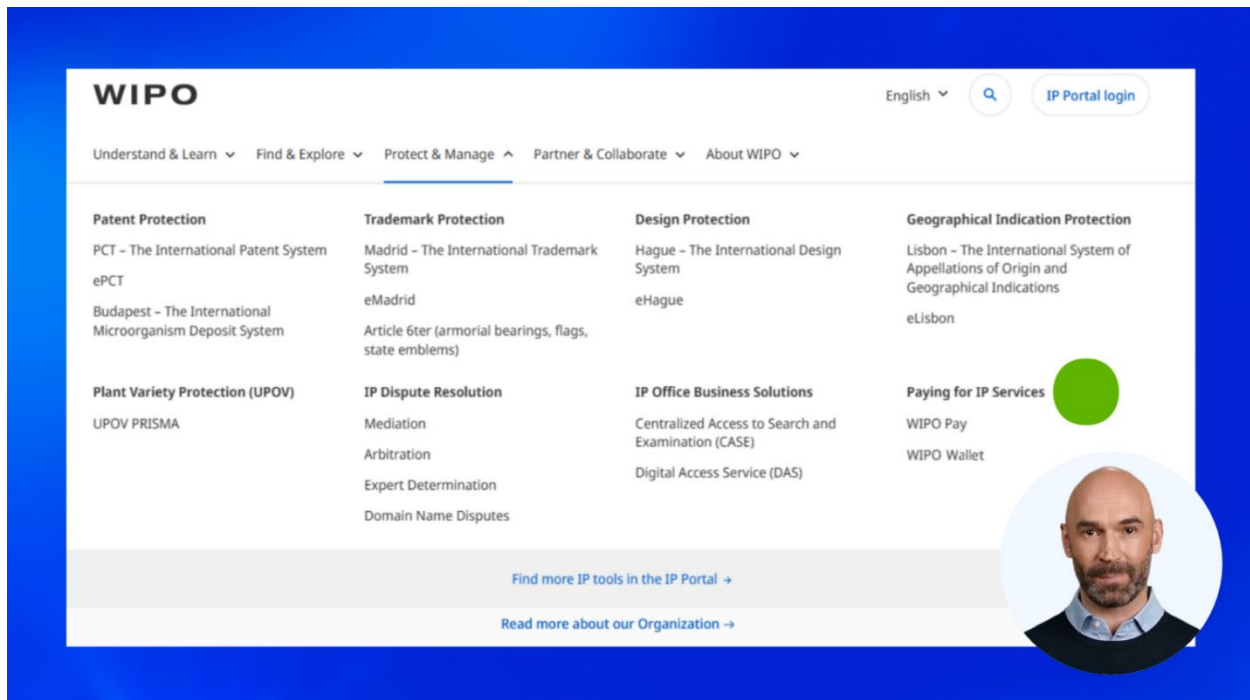
You can manage your WIPO Wallet taking on either a role of a **focal point** or of a **viewer**. Please note that whatever your role may be, you can pay WIPO fees with your WIPO Wallet.

Let's access your WIPO Wallet first.

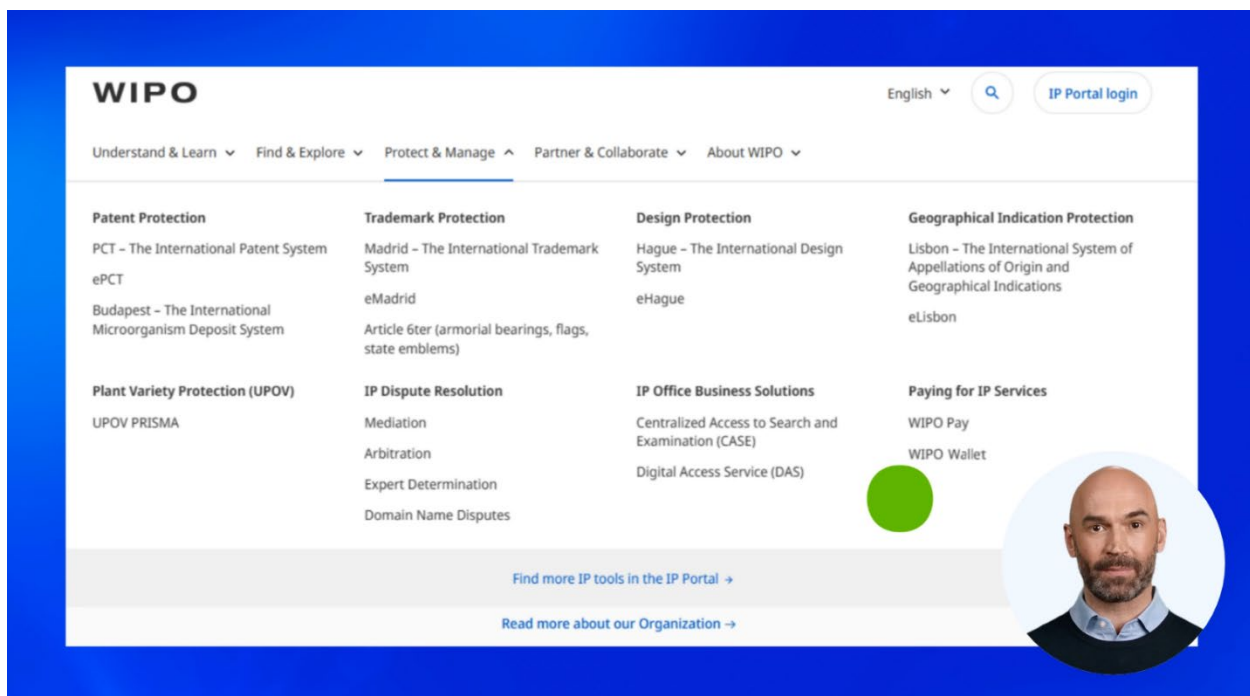
Go to “Protect and Manage”.



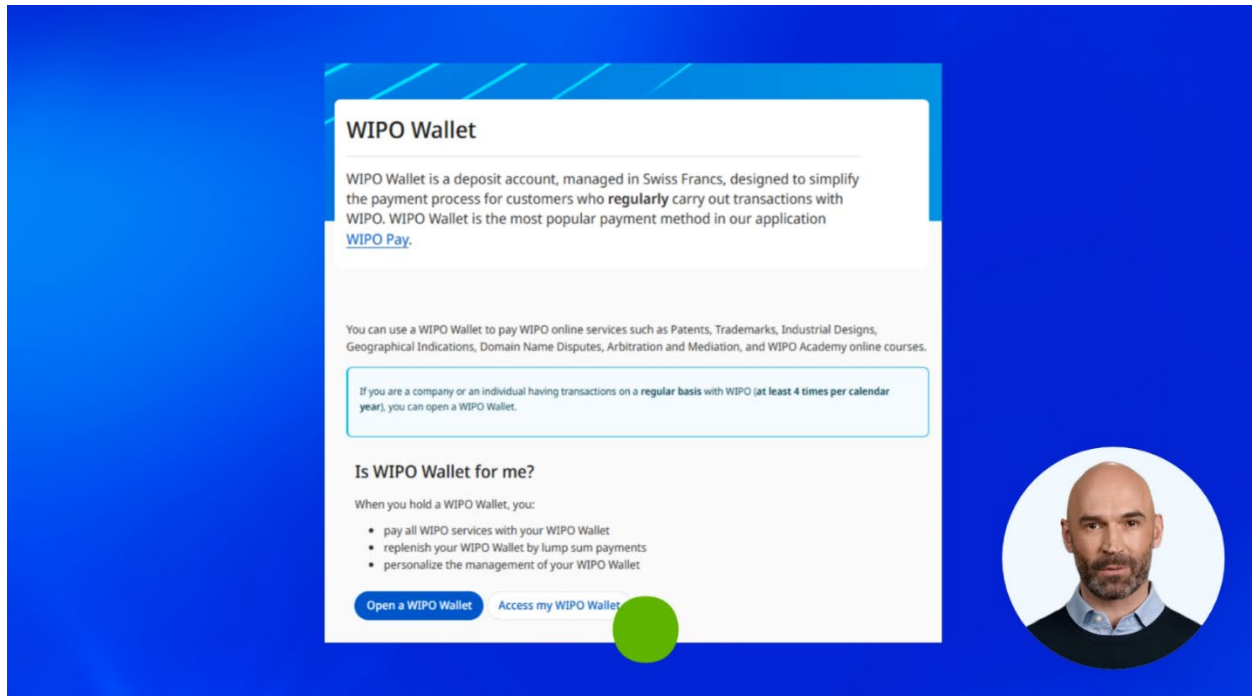
Find the menu title “Paying for IP Services”.



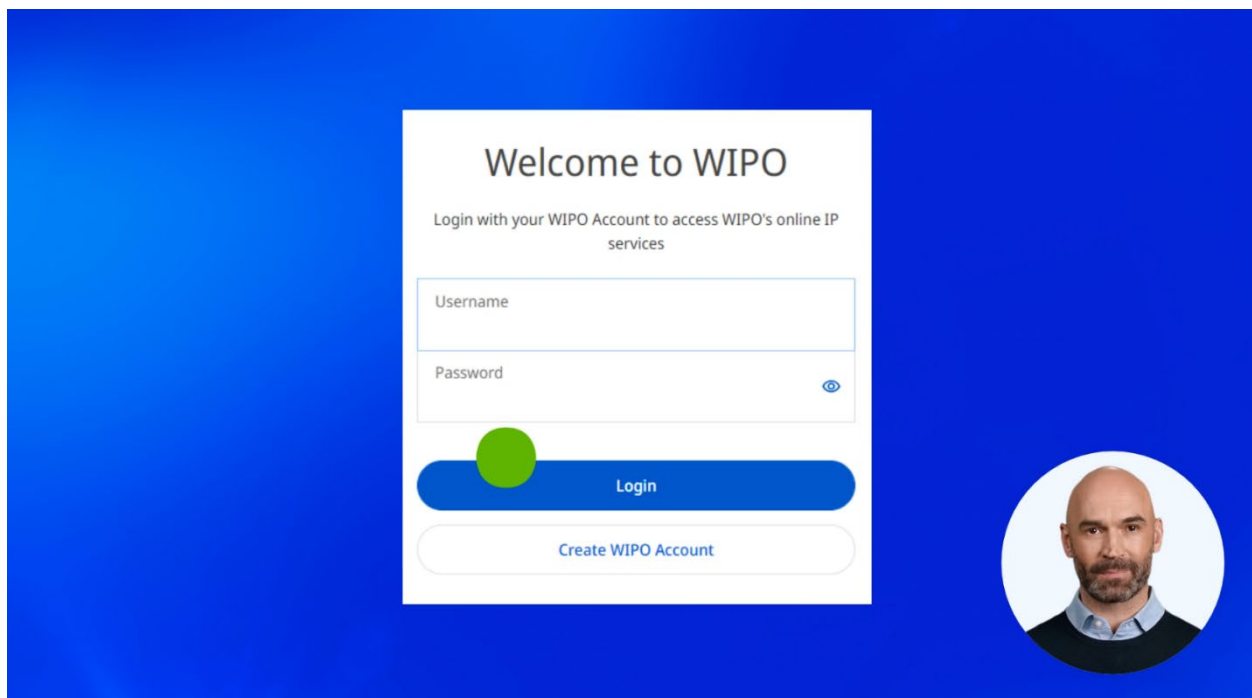
Click on “WIPO Wallet”.



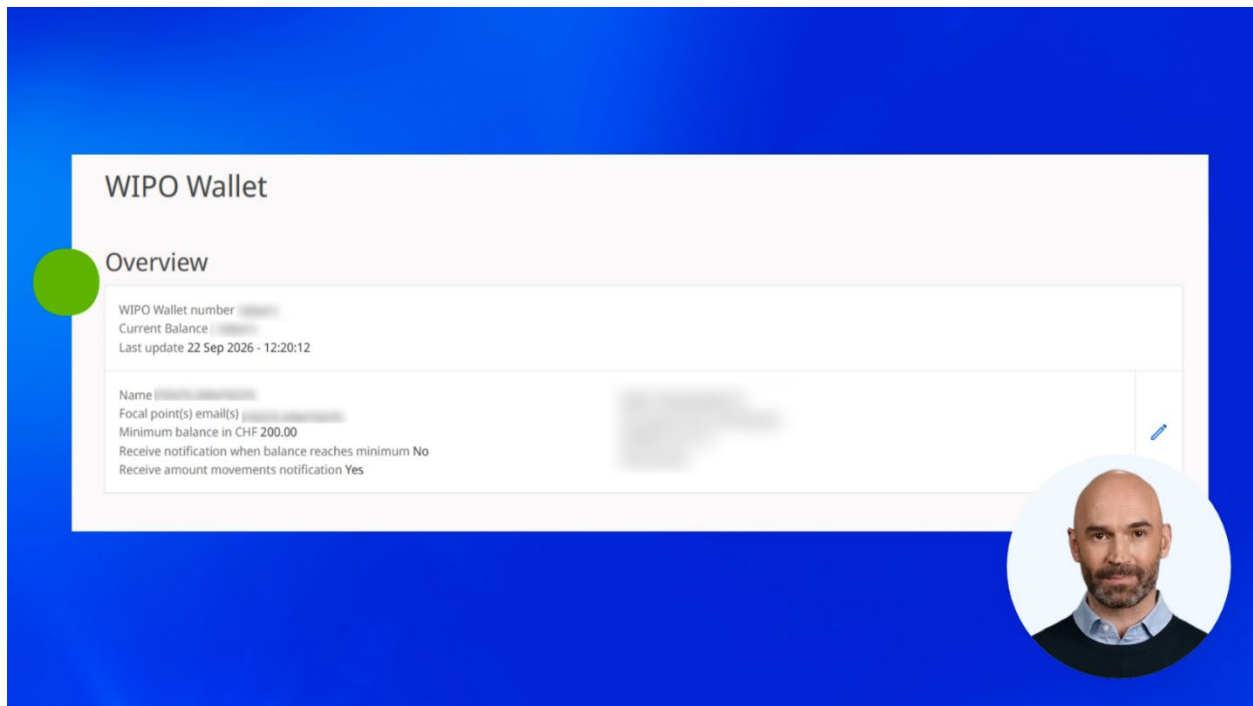
Then click on “Access my WIPO Wallet”.



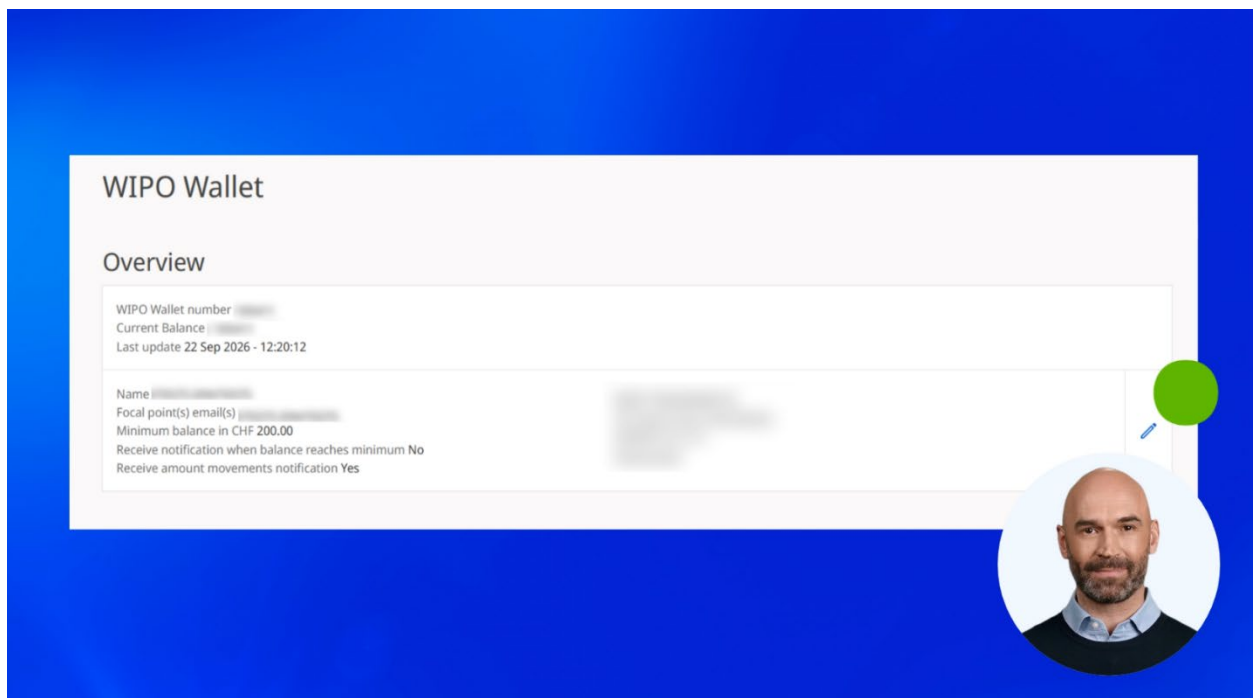
You will be asked to log in to your WIPO Account.



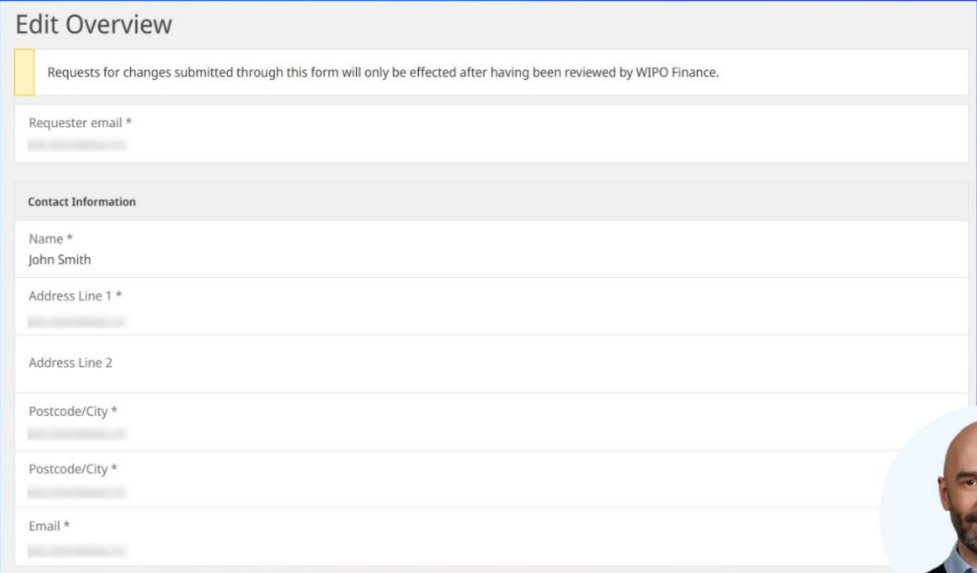
When your WIPO Account and WIPO Wallet are synchronized, you will see your WIPO Wallet information in the “Overview” section. If your WIPO Account and WIPO Wallet are still not synchronized, please check [one of our previous tutorials](#) on this topic.



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.



Edit Overview

Requests for changes submitted through this form will only be effected after having been reviewed by WIPO Finance.

Requester email *

Contact Information

Name *

John Smith

Address Line 1 *

Address Line 2

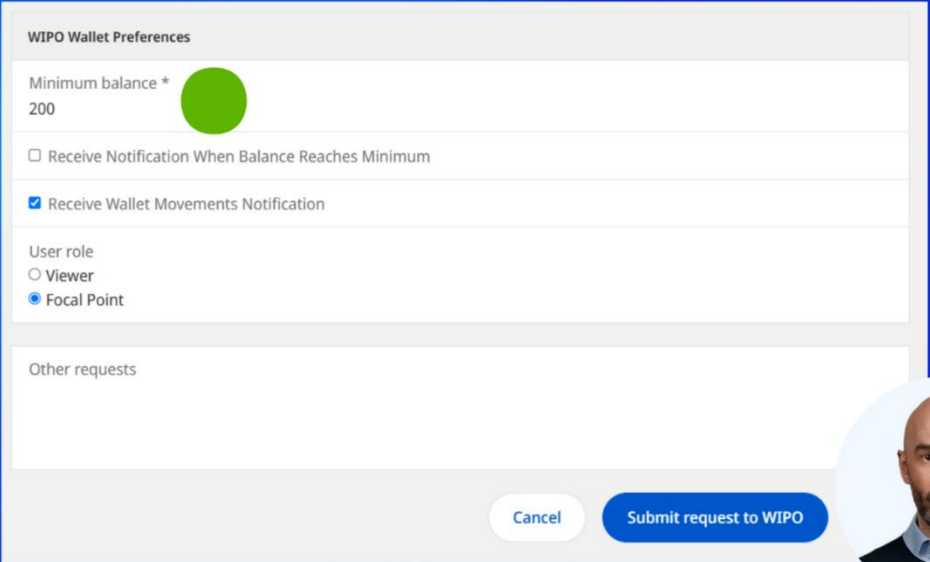
Postcode/City *

Postcode/City *

Email *



You can change the minimum balance here



WIPO Wallet Preferences

Minimum balance * 200

☐ Receive Notification When Balance Reaches Minimum

☒ Receive Wallet Movements Notification

User role

☐ Viewer

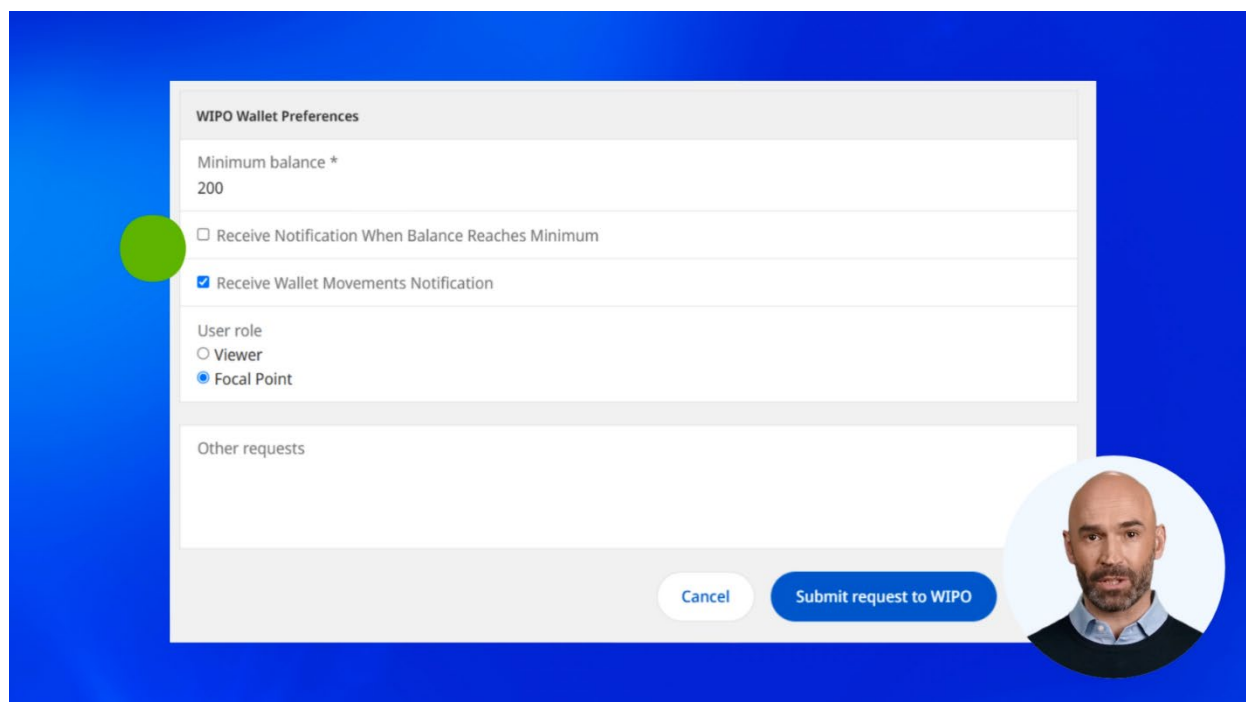
☒ Focal Point

Other requests

Cancel Submit request to WIPO



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 WIPO Wallet.

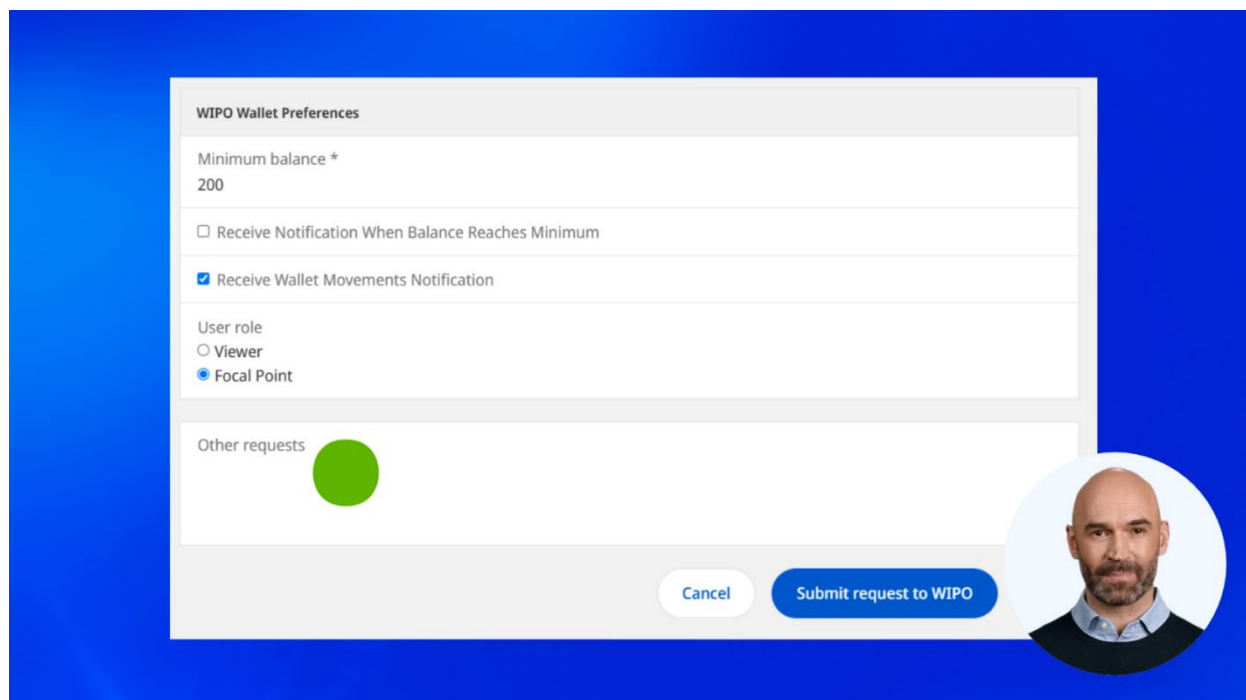


The image shows a screenshot of the 'WIPO Wallet Preferences' form. A green circle highlights the notification options. The form includes the following fields and options:

- WIPO Wallet Preferences**
- Minimum balance *: 200
- ☐ Receive Notification When Balance Reaches Minimum
- ☒ Receive Wallet Movements Notification
- User role:
 - ☐ Viewer
 - ☒ Focal Point
- Other requests
- Buttons: Cancel, Submit request to WIPO

A circular profile picture of a man is visible in the bottom right corner of the form area.

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.

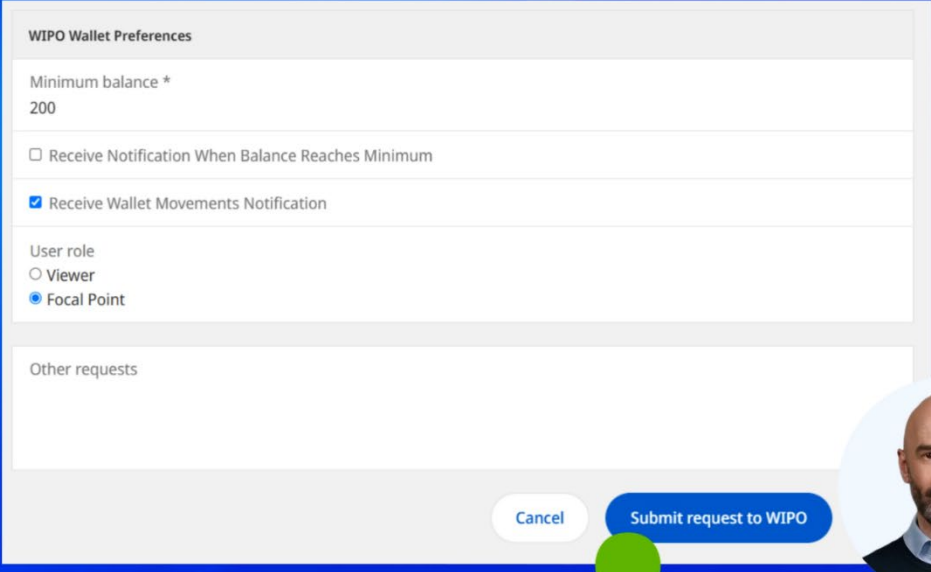


The image shows a screenshot of the 'WIPO Wallet Preferences' form, identical to the one above, but with a green circle highlighting the 'Other requests' field. The form includes the following fields and options:

- WIPO Wallet Preferences**
- Minimum balance *: 200
- ☐ Receive Notification When Balance Reaches Minimum
- ☒ Receive Wallet Movements Notification
- User role:
 - ☐ Viewer
 - ☒ Focal Point
- Other requests
- Buttons: Cancel, Submit request to WIPO

A circular profile picture of a man is visible in the bottom right corner of the form area.

Then submit your request.



The image shows a 'WIPO Wallet Preferences' form. It includes a 'Minimum balance *' field with the value '200'. There are two checkboxes: 'Receive Notification When Balance Reaches Minimum' (unchecked) and 'Receive Wallet Movements Notification' (checked). The 'User role' section has two radio buttons: 'Viewer' (unchecked) and 'Focal Point' (checked). Below these is a text area for 'Other requests'. At the bottom right, there are 'Cancel' and 'Submit request to WIPO' buttons. A green circle highlights the 'Submit request to WIPO' button. A circular profile picture of a man is visible on the right side of the form.

WIPO Wallet Preferences

Minimum balance *
200

☐ Receive Notification When Balance Reaches Minimum

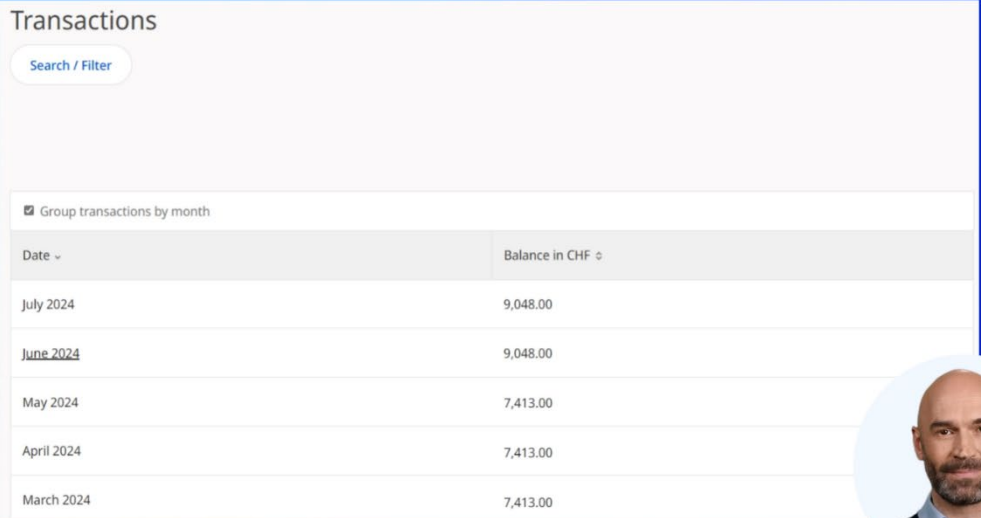
☒ Receive Wallet Movements Notification

User role
☐ Viewer
☒ Focal Point

Other requests

Cancel Submit request to WIPO

Under the “Overview” section, you can see the list of transactions.



The image shows a 'Transactions' section with a 'Search / Filter' button. Below it is a checkbox for 'Group transactions by month' which is checked. The table displays a list of transactions grouped by month, showing the date and the balance in CHF. The months listed are July 2024, June 2024, May 2024, April 2024, and March 2024. A circular profile picture of a man is visible on the right side of the table.

Transactions

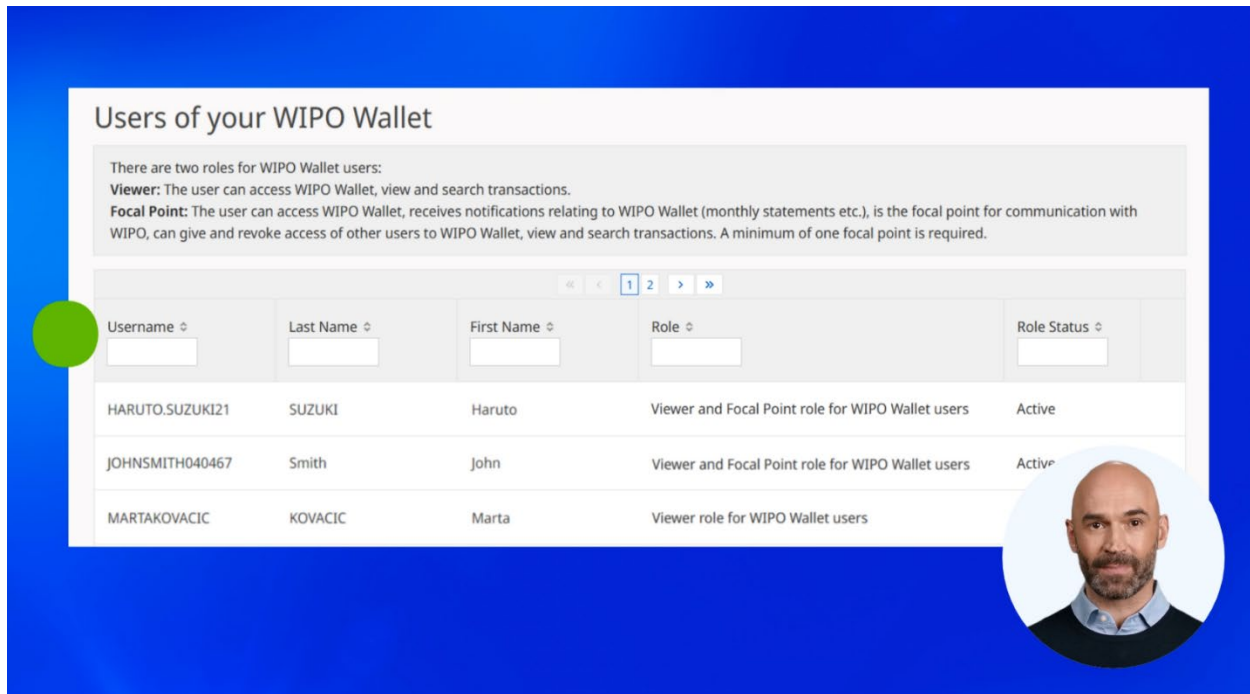
Search / Filter

☒ 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

Both focal points and viewers can visualize them, filter, and download filtered data in PDF or XLS format. Check our tutorial titled [WIPO Wallet: Understanding the statements](#) to know how to read your wallet data.

Only when you are a focal point, in the bottom of your WIPO Wallet you will see all the users connected to your WIPO Wallet. You can see their username, last and first name, roles, and role status.



Users of your WIPO Wallet

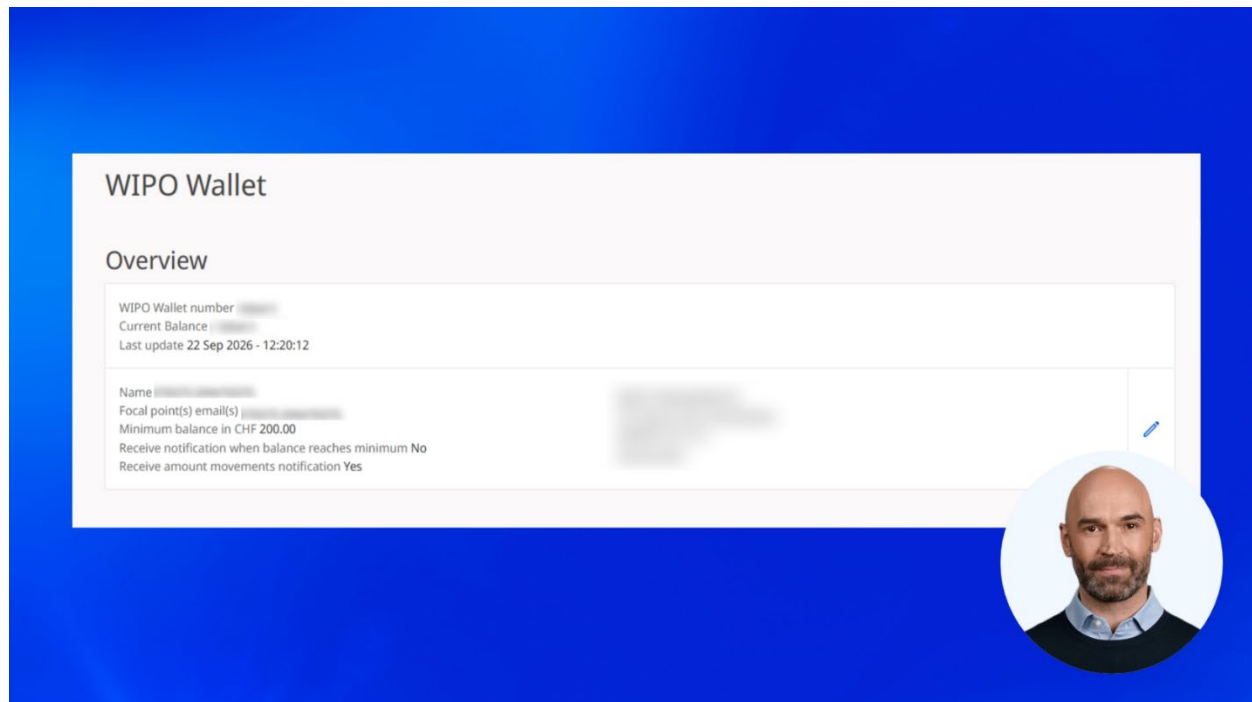
There are two roles for WIPO Wallet users:
Viewer: The user can access WIPO Wallet, view and search transactions.
Focal Point: The user can access WIPO Wallet, receives notifications relating to WIPO Wallet (monthly statements etc.), is the focal point for communication with WIPO, can give and revoke access of other users to WIPO Wallet, 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 WIPO Wallet users	Active
JOHNSMITH040467	Smith	John	Viewer and Focal Point role for WIPO Wallet users	Active
MARTAKOVACIC	KOVACIC	Marta	Viewer role for WIPO Wallet users	

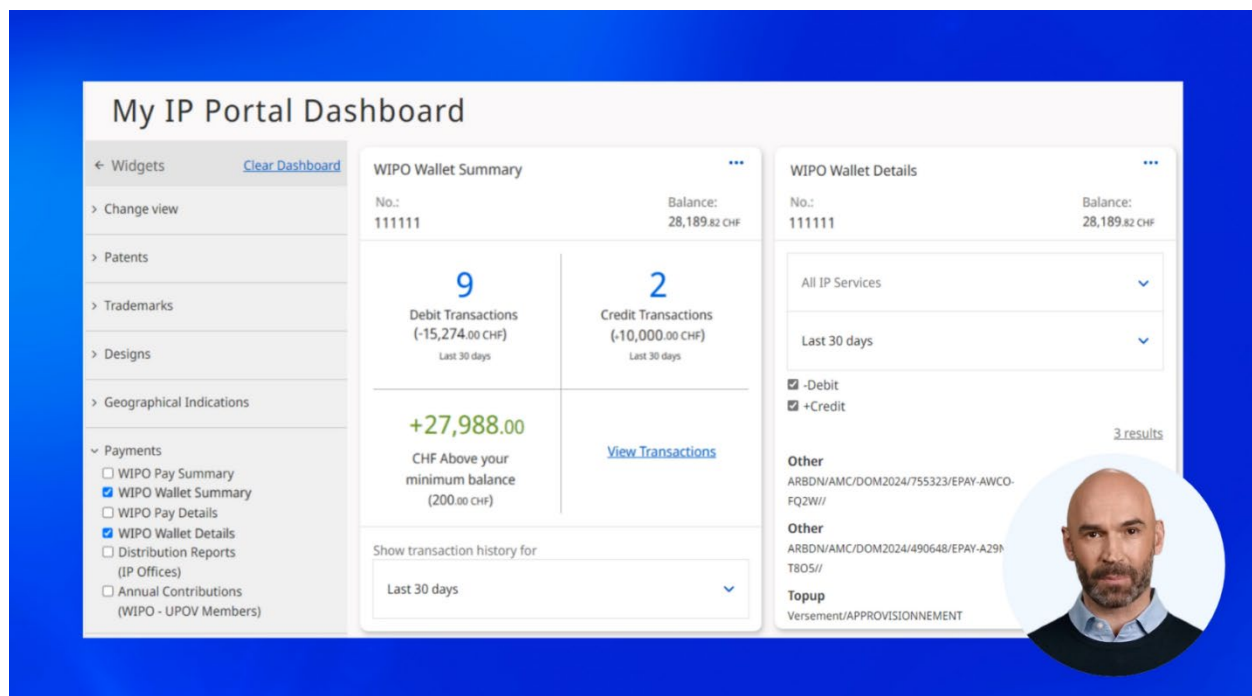
In our example, John Smith and Haruto Suzuki are the **focal points** of this WIPO Wallet, while Marta Kovacic assumes a **viewer** role.

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

Both focal points and viewers can access WIPO Wallet



and use its widgets.



To learn more about the WIPO Wallet widgets, [watch our tutorial](#) on this topic.

You can find this and other tutorials on our website – 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!