



# **EPO Online Multipay Tool**

## **User Guide**

**Version 3.00**

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# 1 Legal notices

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## 2 Introduction

### 2.1 Overview

The EPO Online Multipay Tool has been designed to allow users to prepare batch payments for one or more applications offline in XML format. The XML file can be saved in your company network before being uploaded as a batch payment straight to the Online Fee Payment service for debiting from your EPO deposit account.

#### Registering for the EPO's online services

To use the Online Fee Payment service you will need a smart card, which can be obtained free of charge from the EPO. You can find more information about Online Fee Payment on our **Online Services website** (<http://www.epoline.org>) under **Products and services > Online Fee Payment**.

#### Using the software

The EPO Online Multipay Tool software is available free of charge from the EPO.

You can **install the EPO Online Multipay Tool** (see "Installing the software" p. 6) on any number of individual PCs or on a central server in your network. The **Live Update** function checks for updates at regular intervals so that you can download and install them wherever necessary. Users of the EPO Online Multipay Tool therefore always have the latest schedule of fees installed.

#### Main functions

The EPO Online Multipay Tool allows you to

- ◆ create a fee debit order for one or more applications
- ◆ modify fee details (e.g. amounts, quantities and reductions)
- ◆ preview and/or print out payment files for final approval
- ◆ save payment files on a server
  - to allow your finance department to transmit the order to the EPO, or
  - to allow other users to work with the files
- ◆ create fee filters for more efficient fee selection
- ◆ import and export CSV files
- ◆ import diskette files, i.e. convert them to XML and store them

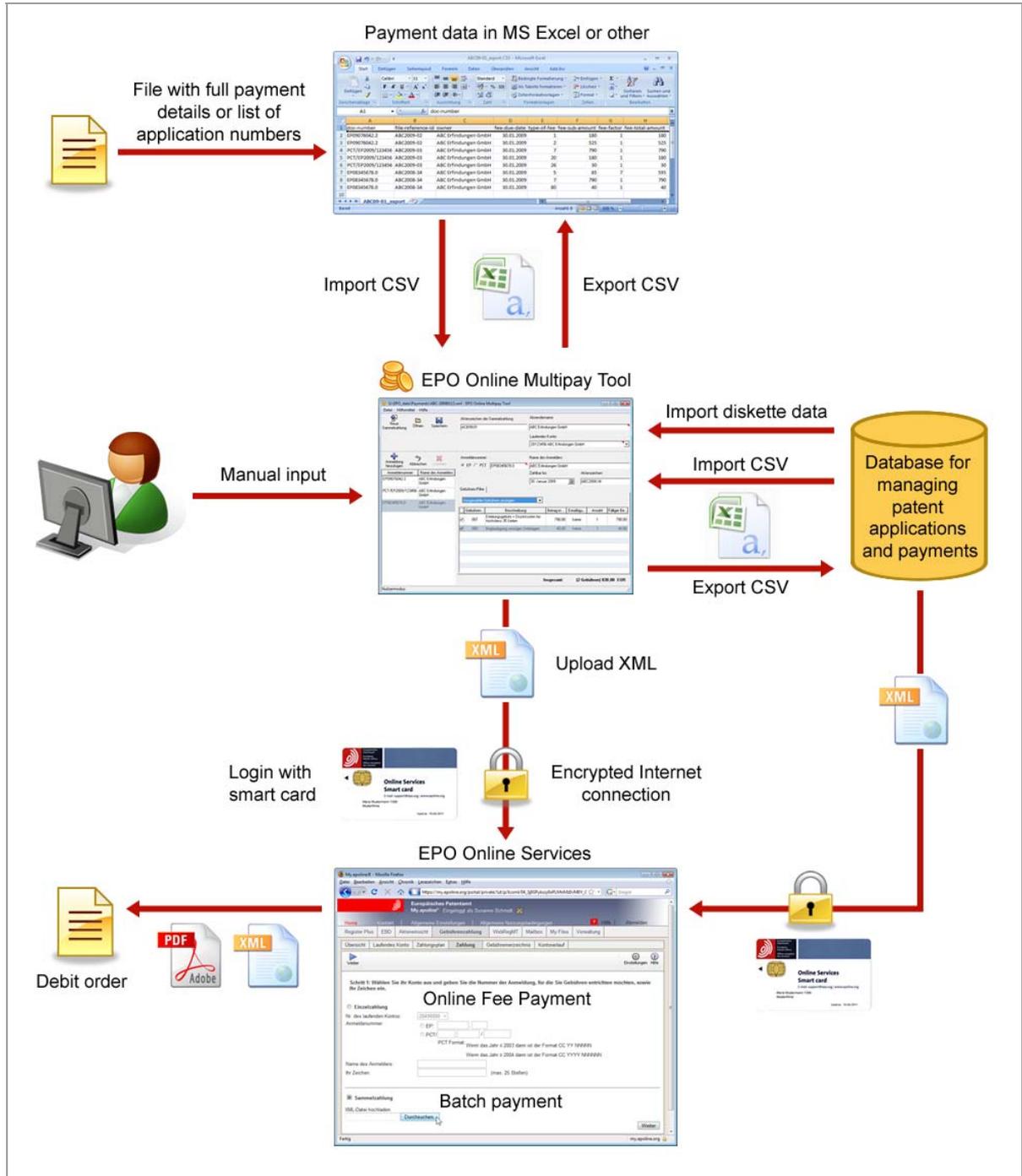


Figure 1: EPO Online Multipay Tool - overview

## 2.2 System requirements

All you need to use the EPO Online Multipay Tool is a conventional office PC.

Recommended operating systems:

- ◆ Windows 2000 SP4
- ◆ Windows XP SP2 or SP3 (32-bit version)
- ◆ Windows 2003 Server
- ◆ Windows Vista SP1 (32-bit version)

Additional software:

- ◆ up-to-date Internet browser (e.g. Microsoft Internet Explorer, Mozilla Firefox)
- ◆ Adobe Reader version 7.x and above

To access Online Fee Payment using a smart card you will also need a smart card reader and software.

## 2.3 Installing the software

To install the software go to the **Download centre** on the **EPO's Online Services website** (<http://www.epoline.org>). Under **Software** go to **Online Fee Payment related software**, where you can download the current installation file in EXE format.

**!** **Note for users of Windows Vista:**  
*You need to be logged in as an administrator in order to be able to install the Multipay Tool in Windows Vista. At the start of the installation process a security prompt will appear. You should confirm this message by clicking **Allow**. Compatibility error messages may also appear during installation. Close these messages by clicking the option **The program was correctly installed**. The EPO Online Multipay Tool will run without problem.*

### To install

- ➔ Double-click the **Multipay-installer.exe** file to start the installation program.
- ➔ Select the appropriate language (English, French or German).
- ➔ Click the **Next** button in the **Welcome to the EPO Online Multipay Tool Installation Wizard** window.
- ➔ Select the destination folder for the installation.  
The default program folder is **C:\Program Files\Multipay**.
- ➔ Click **Next** to select this folder.  
-OR-  
Click **Browse** to select another folder, e.g. on another drive.

If installation has been successful you will see the following window:

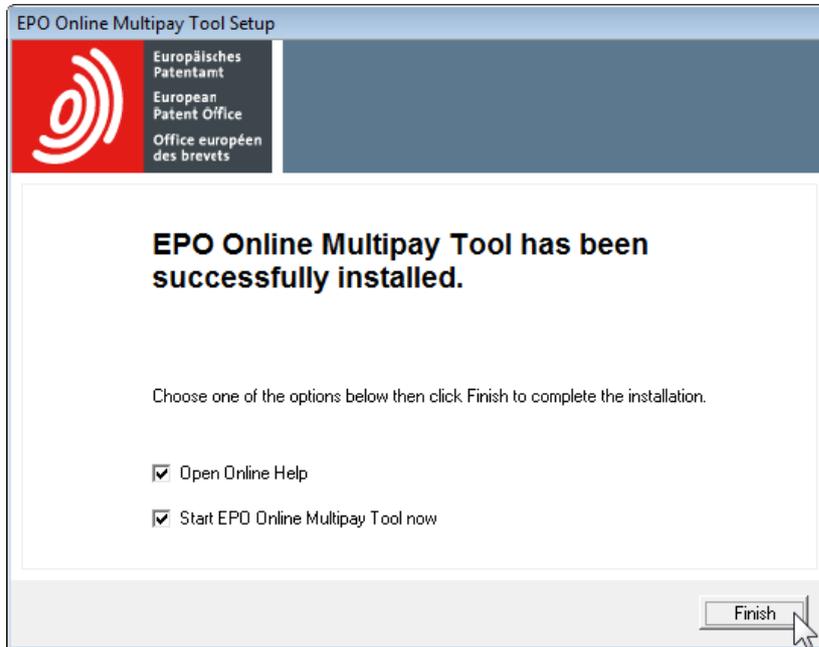


Figure 2: Successful installation of EPO Online Multipay Tool

- Uncheck the boxes if you do not want to open the online help or start the program straight away.
- Click the **Finish** button.

### Using the Online Multipay Tool in a network

The EPO Online Multipay Tool can be used by more than one person in your company at the same time. This can be set up in one of two ways:

- (1) You can install the software on a particular PC and give users access to it via your network.
  - (2) You can install the software on a PC and copy the **Multipay** directory to other workstations.
- ⓘ If you work in a network you should set up a **common directory** (see "Changing the global settings" p. 10) for saving XML files containing batch payments. In this way you will ensure that batch payments can only be worked on by one user at a time.

## 2.4 Uninstalling the software

You do not have to restart your PC after the EPO Online Multipay Tool has been removed.

### Uninstalling with the Multipay uninstaller

- In the Windows Start menu go to **Programs > EPO Online Filing > Uninstall Multipay tool**.

### Uninstalling via the Windows control panel

- Open the **Control Panel** in the Windows Start menu.

Uninstalling in Windows XP:

- Go to **Add or Remove Programs > Change or Remove Programs**.
- Select **EPO Online Multipay Tool** and click **Change/Remove**.

Uninstalling in Windows Vista:

- Go to **Programs and Features > Uninstall or change a program**.
- Select **EPO Online Multipay Tool** and click **Uninstall/Change**.



**Note:**

*On completion of the uninstall you should also delete the Multipay program directory which can normally be found under **C:/Program Files/Multipay**.*

### 3 How to use the EPO Online Multipay Tool

#### 3.1 Starting the software

The installation program automatically creates shortcuts on your desktop and in the Windows Start menu.

→ Double-click the **Multipay tool** icon.



Multipay tool

-OR-

Select **Programs > EPO Online Filing > Multipay tool** in the Windows Start menu.

You will be asked if you want to run **Live Update** (see "Using Live Update to perform updates" p. 39).

When you start the software for the first time following installation the **Global Settings** (see "Changing the global settings" p. 10) window will appear. In this window you can define your standard settings for the Multipay Tool, including, for example, your name, your deposit account details and the default directory for your XML files.

→ Click **Cancel** if you do not wish to change the settings now.

ⓘ The window will appear every time you start the software until you define your personal settings.

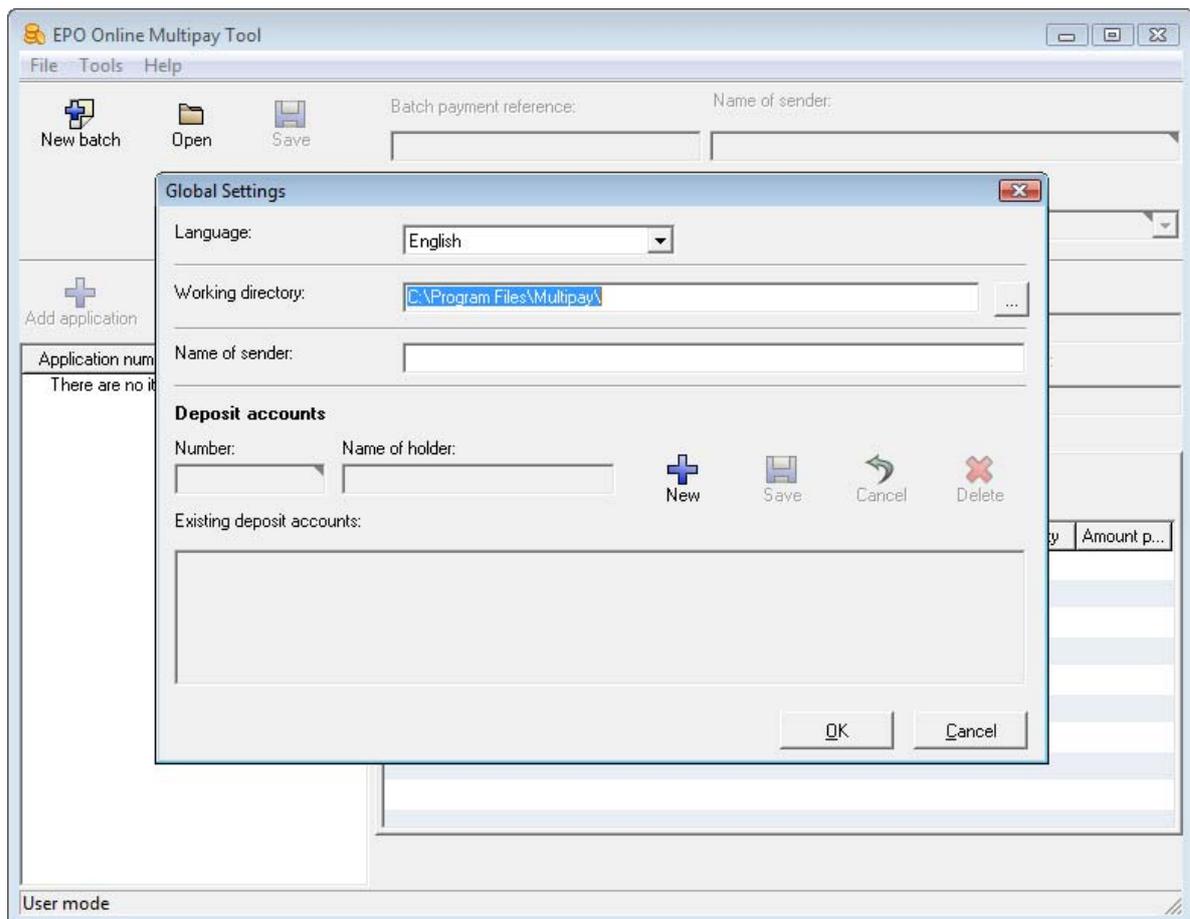


Figure 3: View when starting the EPO Online Multipay Tool for the first time

## 3.2 Changing the global settings

You can work with the **Global Settings** window either when you first start the Multipay Tool or later, via the menu:

- In the **Tools** menu select **Global Settings**.

The **Global Settings** window opens.

- Change the **Language** of the software (if required).

The available languages are English, French and German.

- Select the **Working directory** in which you wish to save your XML files for batch payments.

- Click the **Browse** button.



- Navigate to the directory you want to work with.

You can select a directory on a network drive available to certain users in your company, so that these users can access the fee payment files.

- Enter the **Name of sender**.

This will be the default sender for all batch payments.

Figure 4: Global settings for the EPO Online Multipay Tool

### Adding deposit accounts

You can add and edit deposit accounts for your company. These accounts will then appear in a list for selection when creating new batch payments.

- Click the **New** button to add a new deposit account.



- Enter the **Number** and the **Name of holder**.

→ Click the **Save** button to save your data.



→ To add additional accounts repeat the previous steps.

→ If you do not want to save the details of an account click the **Cancel** button.

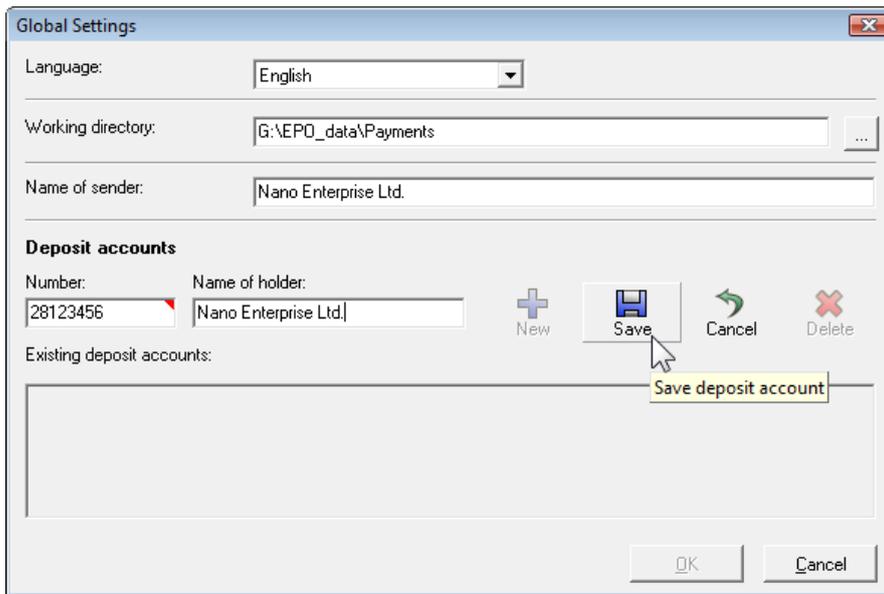


Figure 5: Adding deposit accounts

### Deleting deposit accounts

→ Select the account you wish to delete.

→ Click the **Delete** button.



### Saving changed settings

Finish working with global settings.

→ Click **OK**.

ⓘ The **OK** button does not become active until you have saved the last account you worked with.

You are now ready to create a new batch payment.

### 3.3 Working with batch payments

#### 3.3.1 Creating a new batch payment

In the Multipay Tool batch payments are created as new documents.

→ Click the **New batch** button.



-OR-

Select **File > New batch** from the menu.

-OR-

Press **CTRL+N**.

The input fields then become active and **New document** appears in the title bar of the window.

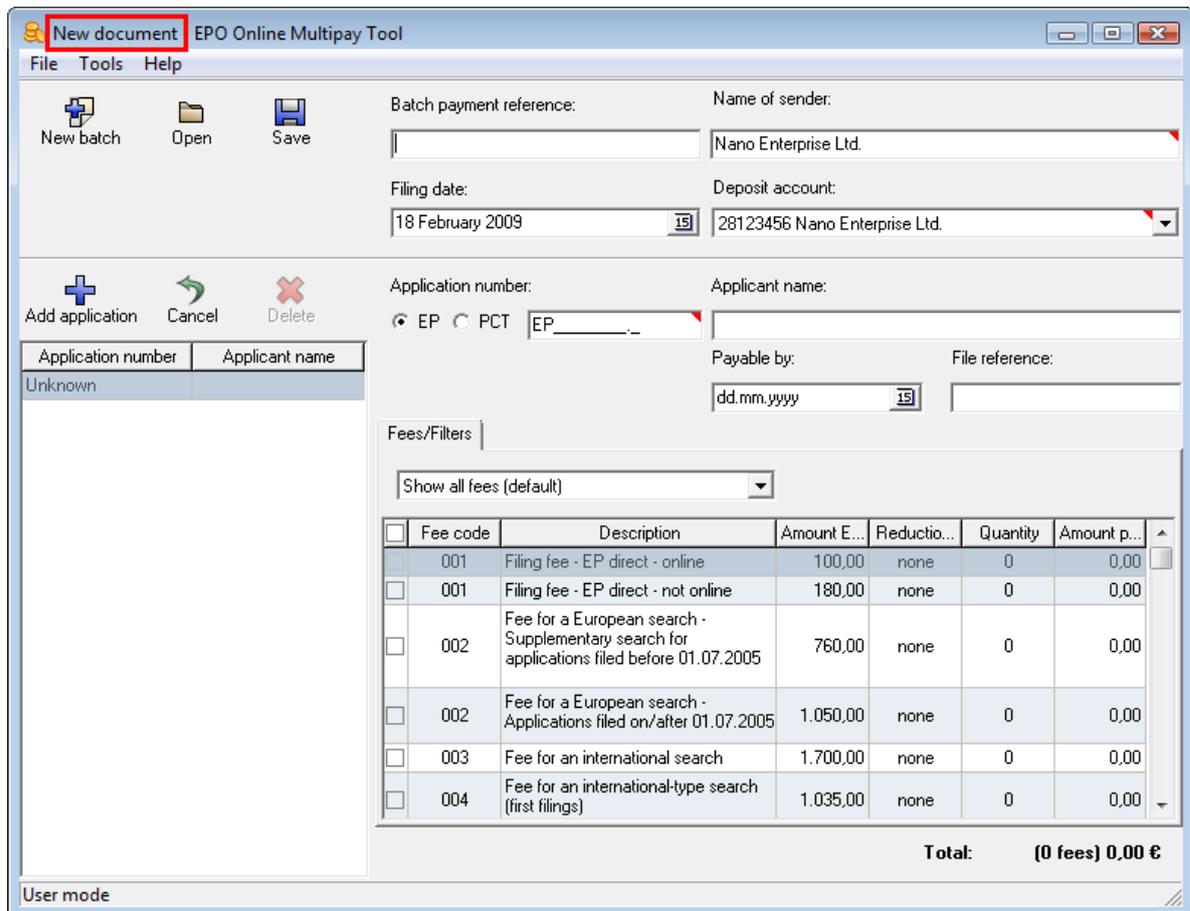


Figure 6: New batch payment created

## Entering information for your batch payment

**!** **Note:**  
*Some data fields are mandatory. These fields - e.g. **Name of sender** and **Application number** - are marked by a red triangle in the top right-hand corner.*

- Enter a **Batch payment reference** if required.
- Change the **Name of sender** if you do not wish to use the default information from the global settings.
- Enter the **Filing date** if you do not wish to use the current date.
  - ① The date is important because it is used to determine the correct amount of the fees for applications filed prior to 1 April 2009.
- Select the **Deposit account** from which the fees are to be debited.
  - The list of deposit accounts includes only those accounts which you added in the global settings.

## Adding an application number

You can only save your new batch payment if you have added at least one application and have selected at least one fee for each application.

- Select the relevant option for the application number: **EP** or **PCT**.
  - The default setting is **EP**.
- Enter the **Application number**.
  - EP application numbers must include the check digit, e.g. **09076042.2**
  - PCT application numbers up to 31.12.2003 have the format CCYYYYNNNNNN, e.g. **EP200300001**
  - PCT application numbers as of 01.01.2004 have the format CCYYYYNNNNNN, e.g. **EP2009000333**
- Enter the **Applicant name**.
- In the **Payable by** field enter the due date in the format dd.mm.yyyy.
  - OR-
  - Click the  button to select the date from the calendar.

**!** **Note:**  
*The due date is NOT the same as the date of payment. At the EPO the date of payment is considered to be the date of receipt of the debit order, **provided that sufficient funds are available in the account**.  
Entering the due date is optional and is for your own information only. The due date also appears in the debit order from Online Fee Payment if you checked the option **Individual batch payment confirmation** in your **personal settings** (see "Paying fees via EPO Online Services" p. 33).*

→ Click in the left-hand side of the table to include the details of the first application.

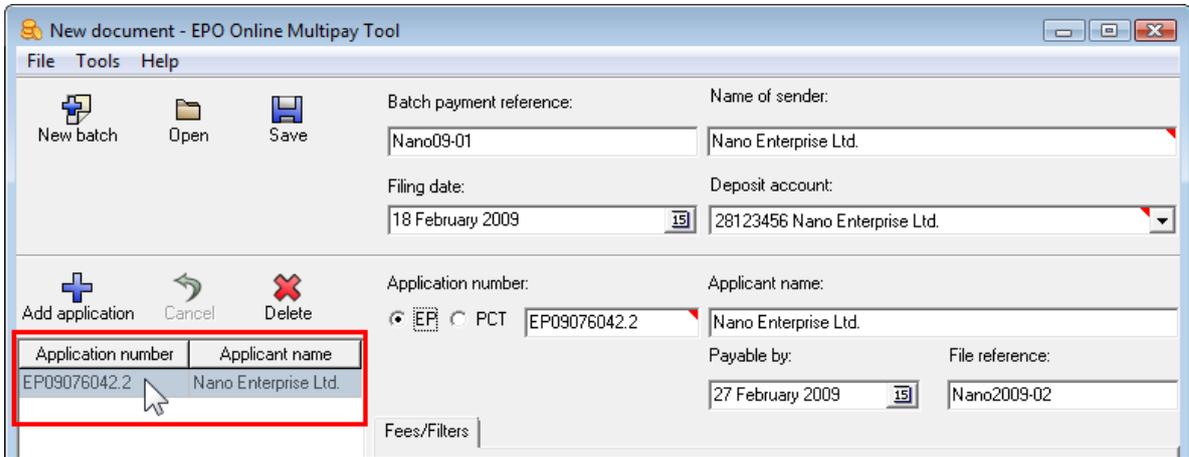


Figure 7: Application details entered

### 3.3.2 Selecting and changing fees

In the **Fees/Filters** tab the default setting is **Show all fees**, i.e. all the fees included in the latest EPO schedule of fees. You can create your **own filters** (see "Creating customised fee filters" p. 37) to restrict the list to fees required for particular cases. These filters will appear in the drop-down list.

#### Sorting the list of fees

The list of fees can be sorted in ascending or descending order. In the default setting fees are sorted according to the **fee code**.

→ Click a column heading, e.g. **Amount EUR**.

The list will be sorted with the fees in ascending order. This is indicated by a small grey triangle in the column heading.

→ Click again on the column heading.

The list will then be shown with the fees in descending order.

<input type="checkbox"/>	Fee code	Description	Amou... ▾	Reductio...	Quantity	Amount p...	▲
<input checked="" type="checkbox"/>	060	Fee for a technical opinion	3.345,00	none	0	0,00	
<input type="checkbox"/>	111	Fee for petition for review	2.500,00	none	0	0,00	
<input type="checkbox"/>	003	Fee for an international search	1.700,00	none	0	0,00	
<input type="checkbox"/>	021	Fee for preliminary examination of int. application	1.675,00	none	0	0,00	

Figure 8: Sorting the list of fees

## Selecting fees

→ To select a fee simply tick the corresponding check box.

① The list of fees contains some fees that appear twice, i.e. fees which have the same code but different descriptions and amounts. Such fees are mutually exclusive. This means that you can only select one fee with a particular code, for example fee 001 for an EP direct application or fee 002 for a European search.

→ Select all the fees you wish to pay in respect of this application.

The total amount is automatically calculated and shown at the bottom of the window.

Fees/Filters						
Show all fees (default) ▼						
<input type="checkbox"/>	Fee c.../	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	001	Filing fee - EP direct - online	100,00	none	0	0,00
<input checked="" type="checkbox"/>	001	Filing fee - EP direct - not online	180,00	none	1	180,00
<input type="checkbox"/>	002	Fee for a European search - Supplementary search for applications filed before 01.07.2005	760,00	none	0	0,00
<input checked="" type="checkbox"/>	002	Fee for a European search - Applications filed on/after 01.07.2005	1.050,00	none	1	1.050,00
<input type="checkbox"/>	003	Fee for an international search	1.700,00	none	0	0,00
<input type="checkbox"/>	004	Fee for an international-type search (first filings)	1.035,00	none	0	0,00
<b>Total:</b>						<b>(2 fees) 1.230,00 €</b>

Figure 9: Selecting fees for your application

## Deselecting fees

→ Click a ticked check box to deselect the fee concerned.

→ Click the check box in the column heading to select all fees.

→ Click the box again to deselect all fees.

<input checked="" type="checkbox"/>	Fee c.../	Description	Amount E...	Reductio...	Quantity	Amount p...
<input checked="" type="checkbox"/>	001	Filing fee - EP direct - online	100,00	none	1	100,00
<input checked="" type="checkbox"/>	001	Filing fee - EP direct - not online	180,00	none	0	0,00

Figure 10: Deselecting all fees

## Editing fees

Under certain circumstances the EPO grants applicants a reduction in the fees. If this applies to your application you can edit the fees in the fee list yourself.

→ Select the check box next to the desired fee.

→ Click in the table cell you want to edit, e.g. **Reduction (%)**. You can then edit the amount as required.

→ Enter the required amount.

Fees/Filters						
Show all fees (default) ▼						
<input type="checkbox"/>	Fee c.../	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	001	Filing fee - EP direct - online	100,00	none	0	0,00
<input checked="" type="checkbox"/>	001	Filing fee - EP direct - not online	180,00	none	1	180,00
<input type="checkbox"/>	002	Fee for a European search - Supplementary search for applications filed before 01.07.2005	760,00	none	0	0,00
<input checked="" type="checkbox"/>	002	Fee for a European search - Applications filed on/after 01.07.2005	1.050,00	50	1	1.050,00
<input type="checkbox"/>	003	Fee for an international search	1.700,00	none	0	0,00
<input type="checkbox"/>	004	Fee for an international-type search (first filings)	1.035,00	none	0	0,00
<b>Total:</b>						<b>(2 fees) 1.230,00 €</b>

Figure 11: Applying a fee reduction

→ Click anywhere else in the table.

The value in the **Amount payable** column and the total amount of the fees will be automatically adjusted.

Fees/Filters						
Show all fees (default) ▼						
<input type="checkbox"/>	Fee c.../	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	001	Filing fee - EP direct - online	100,00	none	0	0,00
<input checked="" type="checkbox"/>	001	Filing fee - EP direct - not online	180,00	none	1	180,00
<input type="checkbox"/>	002	Fee for a European search - Supplementary search for applications filed before 01.07.2005	760,00	none	0	0,00
<input checked="" type="checkbox"/>	002	Fee for a European search - Applications filed on/after 01.07.2005	1.050,00	50	1	525,00
<input type="checkbox"/>	003	Fee for an international search	1.700,00	none	0	0,00
<input type="checkbox"/>	004	Fee for an international-type search (first filings)	1.035,00	none	0	0,00
<b>Total:</b>						<b>(2 fees) 705,00 €</b>

Figure 12: Recalculated total fee amount following editing

→ Repeat this process to edit the amounts in the **Amount EUR** and **Quantity** columns.

❗ You cannot edit the amount of fee **022**.

❗ You cannot edit the amount of fee **005** if the filing date is prior to 1 April 2009.

### Cancelling changes

→ Click the **Cancel** button to cancel all changes.



This will deselect any fees you selected for the application concerned.

### 3.3.3 Selecting designation fees and states

Since the fee reform of 1 April 2009 there are two different classes of designation fees:

- ◆ (A) Applications filed **before 1 April 2009**

For applications filed before this date you can designate either all the contracting states to the EPC or up to six individual states. In the latter case, the total fee amount depends on the number of states designated.

- ◆ (B) Applications filed **on or after 1 April 2009**

For applications filed on or after this date there is only one flat fee payable, which covers all the contracting states. It is no longer possible to designate individual states.

The Multipay Tool automatically adjusts the fee depending on the filing date you enter.

→ Please check that the filing date is correct before proceeding with selecting your fees.

#### Selecting the designation fee

Applications filed before 1 April 2009:

→ In the **Fees/Filters** select fee **005 - Designation fee for each state designated (max. 1x)**.

The amount for seven states is shown, and the figure **7** appears in the **Quantity** column.

Fees/Filters		States				
Show all fees (default)						
<input type="checkbox"/>	Fee c.../	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	003	Fee for an international search	1.700,00	none	0	0,00
<input type="checkbox"/>	004	Fee for an international-type search (first filings)	1.035,00	none	0	0,00
<input checked="" type="checkbox"/>	005	Designation fee for each state designated (max. 7x)	85,00	none	7	595,00
<input type="checkbox"/>	006	Examination fee - For applications filed on/after 01.07.2005	1.405,00	none	0	0,00
<input type="checkbox"/>	006	Examination fee - For applications filed before 01.07.2005 and for international applications filed on/after 01.07.2005 without	1.565,00	none	0	0,00
<b>Total:</b>					<b>[9 fees] 1.455,00 €</b>	

Figure 13: Selecting the designation fee for each designated state - applies only to applications filed prior to 1 April 2009

Applications filed on or after 1 April 2009:

→ In the **Fees/Filters** tab select fee **005 - For all Contracting States designated**.

The amount for all states is shown, and the value **1** appears in the **Quantity** column.

Fees/Filters						
Show all fees (default)						
<input type="checkbox"/>	Fee c.../	Description	Amount E...	Reducti...	Quantity	Amount p...
<input checked="" type="checkbox"/>	002	Fee for a European search - Applications filed on/after 01.07.2005	1.050,00	none	1	1.050,00
<input type="checkbox"/>	003	Fee for an international search	1.700,00	none	0	0,00
<input type="checkbox"/>	004	Fee for an international-type search (first filings)	1.035,00	none	0	0,00
<input checked="" type="checkbox"/>	005	For all Contracting States designated	500,00	none	1	500,00
<input type="checkbox"/>	006	Examination fee - For applications filed on/after 01.07.2005	1.405,00	none	0	0,00
		Examination fee - For applications filed before 01.07.2005 and for				
<b>Total:</b>					<b>(3 fees) 1.650,00 €</b>	

Figure 14: Selecting fee for all designated states - for applications file on or after 1 April 2009

### Selecting designated states

Applications filed before 1 April 2009:

When you select fee **005** the **States** tab appears.

→ Click the **States** tab.

→ Select the option you require **All States** or **Selected States**.

- With the **All States** option all the check boxes are ticked and cannot be changed.
- With the **Selected States** option you can select up to six states.

The amount and number of the fees for fee **005** are automatically recalculated in the **Fees/Filters** tab.

Fees/Filters		States
<input type="radio"/> All States - ie more than 6 countries.		
<input checked="" type="radio"/> Selected States - ie not more than 6 countries.		3 selected.
<input type="checkbox"/> AT Austria	<input checked="" type="checkbox"/> GB United Kingdom	<input type="checkbox"/> MK Macedonia
<input type="checkbox"/> BE Belgium	<input type="checkbox"/> GR Greece	<input type="checkbox"/> MT Malta
<input type="checkbox"/> BG Bulgaria	<input type="checkbox"/> HR Croatia	<input type="checkbox"/> NL Netherlands
<input type="checkbox"/> CH/LI Switzerland/Liechtenstein	<input type="checkbox"/> HU Hungary	<input type="checkbox"/> NO Norway
<input type="checkbox"/> CY Cyprus	<input type="checkbox"/> IE Ireland	<input type="checkbox"/> PL Poland
<input type="checkbox"/> CZ Czech Republic	<input type="checkbox"/> IS Iceland	<input type="checkbox"/> PT Portugal
<input checked="" type="checkbox"/> DE Germany	<input type="checkbox"/> IT Italy	<input type="checkbox"/> RO Romania
<input type="checkbox"/> DK Denmark	<input type="checkbox"/> LT Lithuania	<input type="checkbox"/> SE Sweden
<input type="checkbox"/> EE Estonia	<input type="checkbox"/> LU Luxembourg	<input type="checkbox"/> SI Slovenia
<input type="checkbox"/> ES Spain	<input type="checkbox"/> LV Latvia	<input type="checkbox"/> SK Slovakia
<input type="checkbox"/> FI Finland	<input type="checkbox"/> MC Monaco	<input type="checkbox"/> TR Turkey
<input checked="" type="checkbox"/> FR France		
<b>Total:</b>		<b>(5 fees) 1.115,00 €</b>

Figure 15: Selected states designated - applies to applications filed prior to 1 April 2009

Applications filed on or after 1 April 2009:

The **States** tab does not appear because fee **005** covers all the contracting states. It is not possible to designate individual states.

### 3.3.4 Saving batch payments as XML files

Once you have added all the payment details for an application you should carry out an initial save action for your batch payment.

- Click the button.



-OR-

Select **File > Save** from the menu.

-OR-

Press **CTRL+S**.

The **Save file as** window opens.

The **Save in** field contains the directory which you specified in the global settings as your working directory. If you have not specified a working directory the file will be saved in the **Multipay** working directory.

- Accept the default **File name**, which is generated using the date, or change it if required.
- Click **Save**.

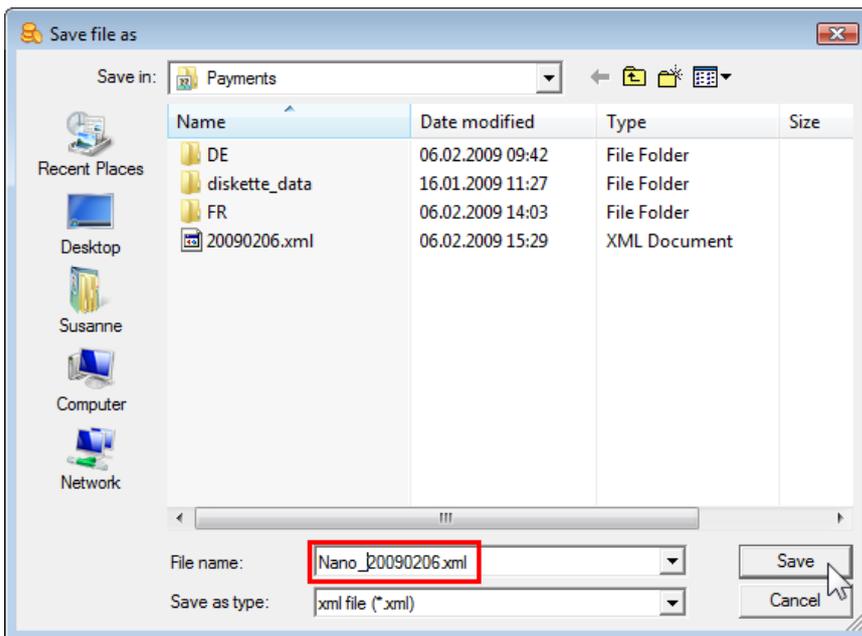


Figure 16: Entering directory and file name

Your batch payment will remain open in the Multipay Tool.

The new name of the XML file and the full directory path appear in the title bar.



Figure 17: XML file for batch payment saved

### 3.3.5 Working with batch payments

You can work with batch payments which you have already saved.

#### Opening a saved batch payment

- Start the Multipay Tool.
- Click the **Open** button.



- In the **Select file** window select the XML file you want to work with.
  - ① The Multipay Tool will show the contents of the directory which you selected as your working directory.
- Click **Open**.

#### Adding further applications

- In the open batch payment click the **Add application** button.



- Enter the details for each application.
- Select the fees for each application.
- Change the view to **Show selected files** in order to check the fees for each application.

The list on the left-hand side shows all the applications you have added.

The screenshot shows the Multipay Tool interface. At the top, there are buttons for 'Add application', 'Cancel', and 'Delete'. Below these is a table listing three applications:

Application number	Applicant name
EP09076042.2	Nano Enterprise Ltd.
PCT/EP2009/123456	Nano Enterprise Ltd.
EP08345678.0	Nano Enterprise Ltd.

Form fields include: Application number (EP08345678.0), Applicant name (Nano Enterprise Ltd.), Payable by (27 February 2009), and File reference (Nano2009-34). A 'Fees/Filters' section has a dropdown menu set to 'Show selected fees'. Below this is a table of fees:

<input type="checkbox"/>	Fee code	Description	Amount E...	Reduction...	Quantity	Amount p...
<input checked="" type="checkbox"/>	007	Fee for grant + printing not more than 35 pages	790,00	none	1	790,00
<input checked="" type="checkbox"/>	080	Certification of other documents	40,00	none	1	40,00

At the bottom right, a total is displayed: **Total: (2 fees) 830,00 €**

Figure 18: Multiple applications added to a batch payment

### Corrections and error messages

If you enter an application number which is already on the list, the next time you click the **Add application** button a prompt will appear.

- Click **Yes** to add the application with the same application number.
- Click **No** to change the application number.

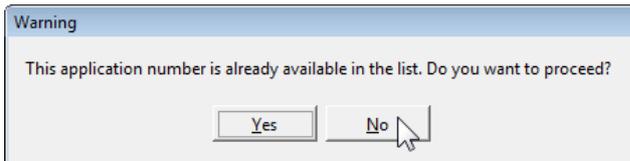


Figure 19: Prompt: application number already available

If you enter an EP or PCT application number incorrectly, the following message will appear:

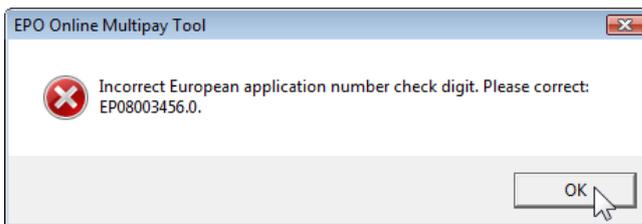


Figure 20: Error message: incorrect EP application number

The application number is shown as **Unknown** in the list.

- Click the **Cancel** button to cancel this application and remove it from the list.

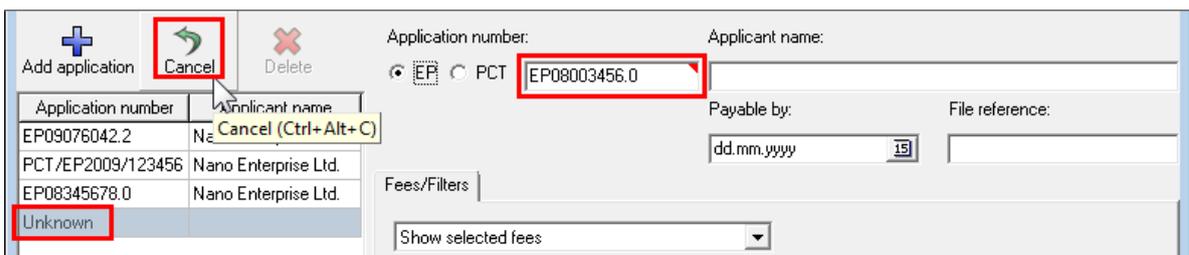


Figure 21: Cancelling an application

- Click the **Delete** button to delete any of the other applications from the list.

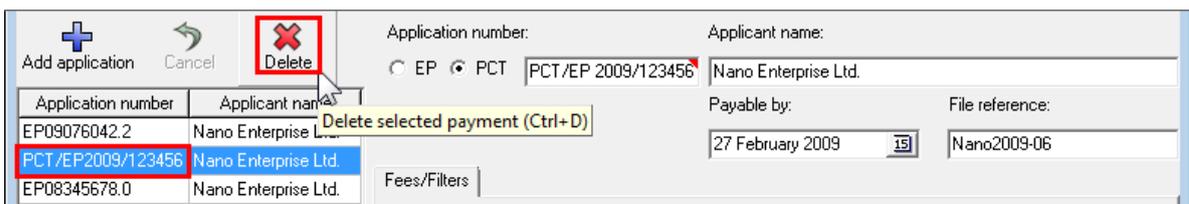


Figure 22: Deleting an application from the batch payment application list

### 3.3.6 Previewing and printing files containing payment details

Before you send your XML file to the EPO you can preview the details and print it out if required.

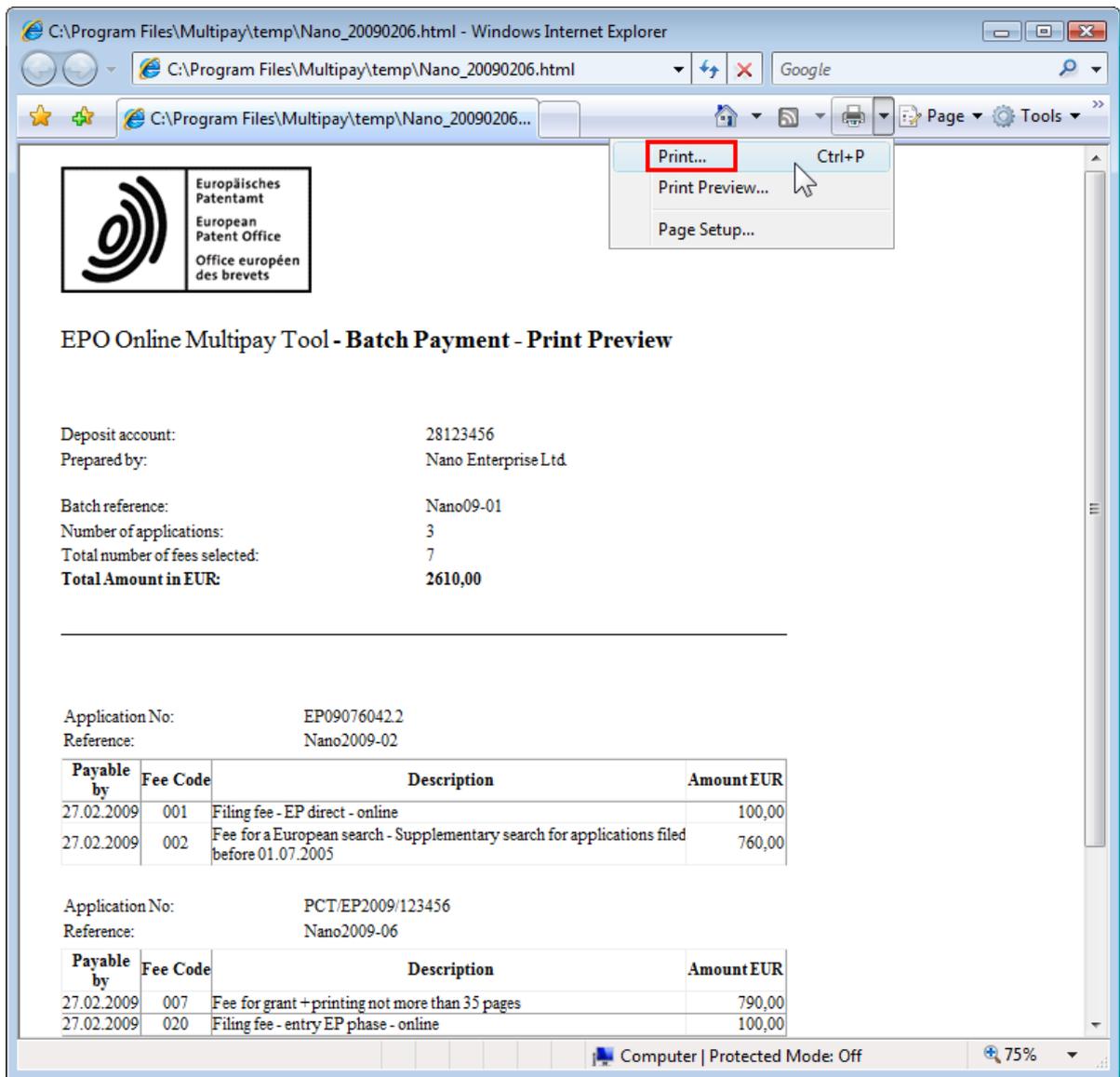
→ In the **File** menu select **Print preview**.

ⓘ If there is missing or incorrect data in the most recently added application a warning message will appear.

The Multipay Tool converts the XML file and its payment data into an HTML file and opens it in the default browser selected for your PC (e.g. Internet Explorer).

ⓘ If no suitable program is found to open the HTML file, an error message will appear.

→ Select the desired print option from your browser menu.



The screenshot shows a Windows Internet Explorer browser window displaying a print preview of an HTML file. The browser's address bar shows the file path: C:\Program Files\Multipay\temp\Nano\_20090206.html. The page content includes the EPO logo and the text 'EPO Online Multipay Tool - Batch Payment - Print Preview'. Below this, there are two sections of payment details, each with a table of fees.

**Section 1:**

Deposit account: 28123456  
 Prepared by: Nano Enterprise Ltd

Batch reference: Nano09-01  
 Number of applications: 3  
 Total number of fees selected: 7  
**Total Amount in EUR: 2610,00**

---

Application No: EP09076042.2  
 Reference: Nano2009-02

Payable by	Fee Code	Description	Amount EUR
27.02.2009	001	Filing fee - EP direct - online	100,00
27.02.2009	002	Fee for a European search - Supplementary search for applications filed before 01.07.2005	760,00

**Section 2:**

Application No: PCT/EP2009/123456  
 Reference: Nano2009-06

Payable by	Fee Code	Description	Amount EUR
27.02.2009	007	Fee for grant + printing not more than 35 pages	790,00
27.02.2009	020	Filing fee - entry EP phase - online	100,00

The browser's status bar at the bottom indicates 'Computer | Protected Mode: Off' and a zoom level of 75%.

Figure 23: Batch payment print preview in Internet Explorer

### 3.4 Importing data from CSV files

You can use the EPO Online Multipay Tool to send payment details created with other programs to the EPO via **Online Fee Payment** (see "Overview" p. 4).

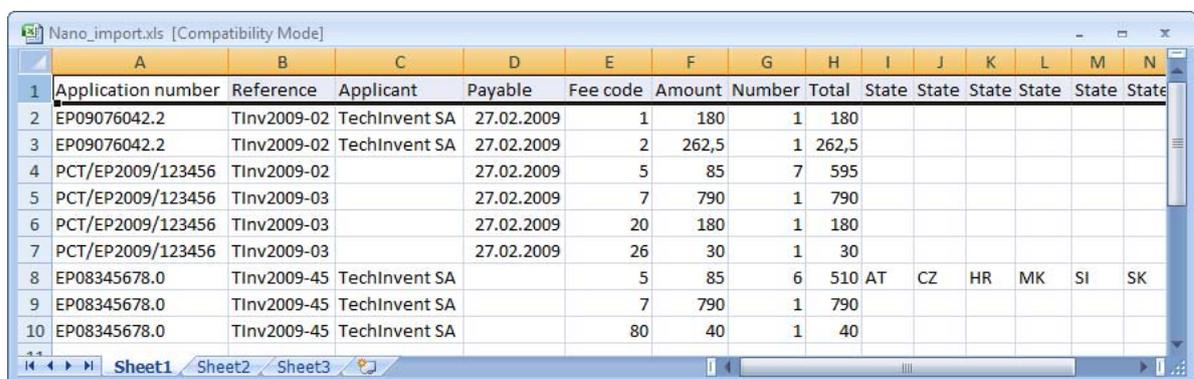
For example you can save a Microsoft Excel table in **CSV format** (see "Creating CSV files with Microsoft Excel" p. 23), import it into the Multipay Tool, save it as an XML file and then upload it in Online Fee Payment via the Internet.

Data in other file formats can be imported into the Multipay Tool using the **Importing diskette data** (p. 31) function.

#### 3.4.1 Creating CSV files with Microsoft Excel

You can create a table for payment data in Microsoft Excel like the one shown in the sample below.

- You can select column headings of your choice as these fields are not imported into the Multipay Tool. What is important is to keep to the columns in the same order.
  - In the application number column a valid application number must be entered in every row:
    - EP application numbers with or without the letters **EP**, but with the correct check digit
    - PCT application numbers in full, including all letters and forward slashes
  - Each fee should be entered in a separate row, i.e. if more than one fee is to be paid for a particular application, each fee should be entered in a separate row together with the application number.
  - Cells for which no information is available should be left blank.
  - Do not perform any calculations. Calculations are done automatically when the CSV file is imported into the EPO Online Multipay Tool.
  - It is not necessary to include the name of the sender or the deposit account number as this information is taken from the global settings when the file is imported in the Multipay Tool.
  - Save the Excel file in CSV format.
    - In the menu select **Save as > Other Formats**.
    - In the **Save as type** list select the option **CSV (Comma delimited) (\*.csv)**.
    - Click **Save**.
- ⓘ Only the first sheet of the Excel table is included in the CSV file.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Application number	Reference	Applicant	Payable	Fee code	Amount	Number	Total	State	State	State	State	State	State
2	EP09076042.2	TInv2009-02	TechInvent SA	27.02.2009	1	180	1	180						
3	EP09076042.2	TInv2009-02	TechInvent SA	27.02.2009	2	262,5	1	262,5						
4	PCT/EP2009/123456	TInv2009-02		27.02.2009	5	85	7	595						
5	PCT/EP2009/123456	TInv2009-03		27.02.2009	7	790	1	790						
6	PCT/EP2009/123456	TInv2009-03		27.02.2009	20	180	1	180						
7	PCT/EP2009/123456	TInv2009-03		27.02.2009	26	30	1	30						
8	EP08345678.0	TInv2009-45	TechInvent SA		5	85	6	510	AT	CZ	HR	MK	SI	SK
9	EP08345678.0	TInv2009-45	TechInvent SA		7	790	1	790						
10	EP08345678.0	TInv2009-45	TechInvent SA		80	40	1	40						

Figure 24: Sample Excel table with payment details

**!** **Tip:**  
If you experience any problems importing a CSV file we recommend starting again with a new Excel sheet.

#### Order and formatting of fields in Excel sheets

Column No.	Name	Remarks	Format
1	Application number	Mandatory	Text
2	Reference	Optional	Text
3	Applicant	Optional	Text
4	Payable	Optional, due date	Date
5	Fee code	EPO fee code	Number
6	Amount	Amount of the fee, including any reduction	Number
7	Fee factor	Number of fees to be paid	Number
8	Total	Total amount for this fee	Number
9 to 14	State	Only to be filled in if, for applications filed prior to 01.04.2009, fewer than seven states have been designated. Up to six columns are possible, to be completed using the country code. The number must correspond to the value in the <b>Fee factor</b> column.	Text

Note: The different amounts shown for fee codes 001, 002, 005, 007, 008, 015, 016, 020, 501 und 520 depend on the mode of submission (online/not online) or the date of filing. The current schedule of fees can be found on the **EPO Online Services website** (<http://www.epoline.org>).

### 3.4.2 Importing CSV files

You can import CSV files at any time into the Multipay Tool.

① If you are working in another XML file which you have not saved, a prompt will appear asking whether you wish to save the changes to the document you are working on.

→ In the menu select **File > Import CSV**.

The **Import CSV** window appears.

→ If necessary, change the **Field separator in CSV file**.

**!** **Note:**  
In **Common settings** the default separator is the semicolon (;), which is the separator used by the EPO. The semicolon is also generally used in German and French PC systems. In English systems, however, e.g. in the United Kingdom or the United States, a comma (,) is normally used.

If you do not specify a field separator the following error message will appear:



Figure 25: Error message: list separator not specified

→ Click **OK**.

The field separator from the system settings on your PC will appear in the input field.

→ Click the **Browse** button to select your CSV file.

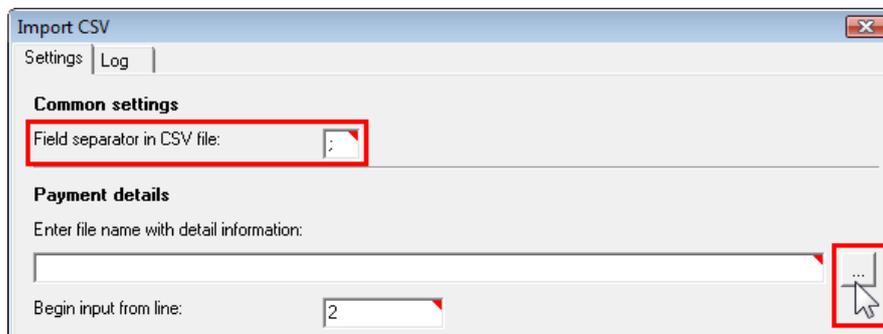


Figure 26: Import CSV dialogue

The Multipay Tool opens the **Select file with detail info** window and navigates automatically to the default working directory.

→ Select the CSV file you want.

→ Click **Open**.

The **Import CSV** window shows the full path to the source file.

→ If the data in your file does not start in line 2, enter the correct line number.

ⓘ The **Begin input from line** field default value is **2**. This means that the first line of the CSV file is not imported, as it normally contains the column headings.

→ Enter a name of your choice in the **Save resulting XML name as** field.

ⓘ You do not have to add the suffix **.xml**.

The Multipay Tool saves the XML file in the default working directory.

→ Click the **Browse** button to store the file in another location.



→ Browse to the folder.

→ Enter the file name and click **Save**.

The full path to the file will be shown in the **Import CSV** window.

→ Click the **Import CSV** button.

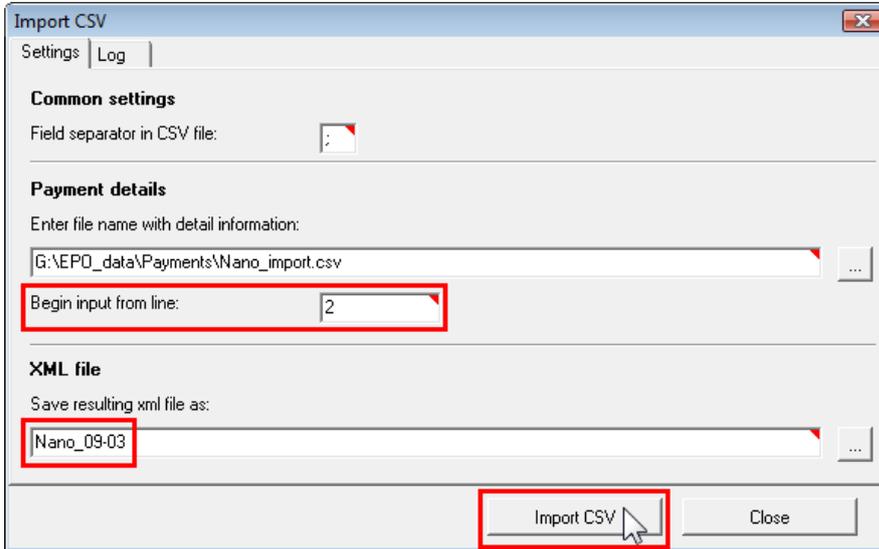


Figure 27: Full details of CSV file import entered

The Log tab is displayed. You can check the log to see whether the import was successful.

→ Click the **Close** button.

The XML file opens in the Multipay Tool and can be edited further.

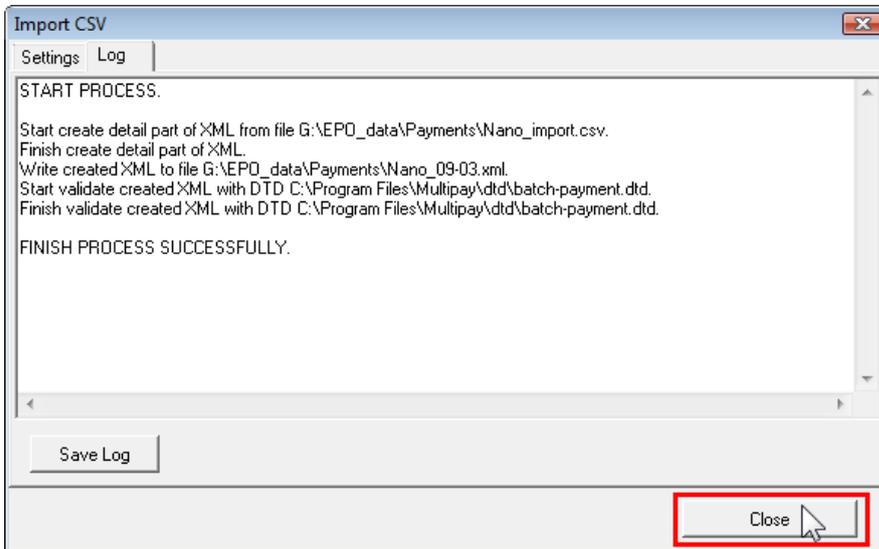


Figure 28: CSV file import successful

### Errors in the import process

If the import is not successful, the errors are shown in the log file.

- Correct these errors, if necessary in your CSV file, and try the import process again.

You can save the log file for further investigation.

- Click the **Save Log** button.

Select a directory and change the file name if required (default **C:\Program Files\Multipay\Multipaytool.log**).

### Errors due to invalid field separators

If you enter a field separator which is not recognised by the Multipay Tool, for example a minus sign (-), an incorrect application number error message will appear.

In the example below, the **Application number** field which is in the first column in the CSV file was incorrectly interpreted. It was not separated at the semicolon, but at the minus sign which appeared in the following **Reference** field.

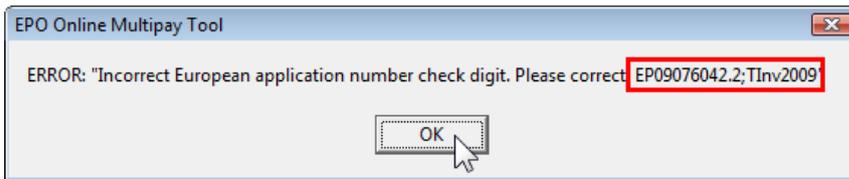


Figure 29: Error message: invalid field separator

- Click **OK**.

The import process is then stopped and an error is entered in the log.

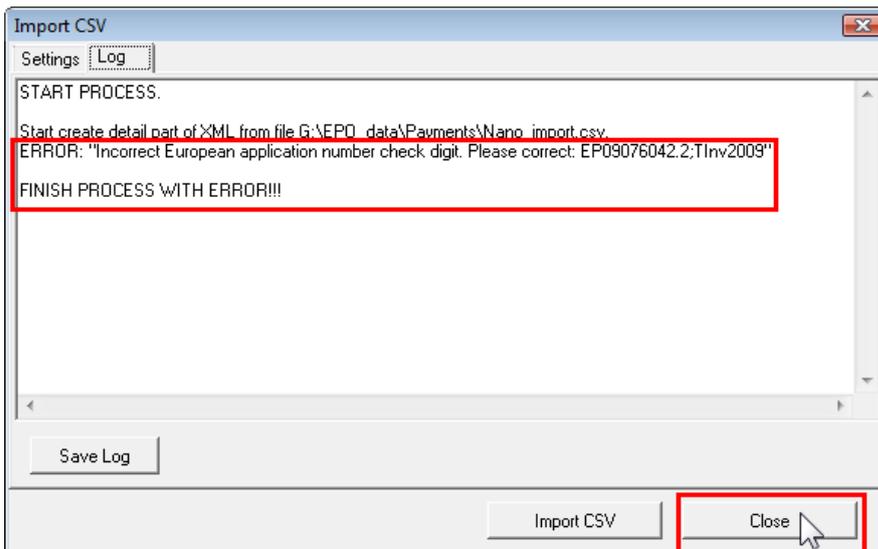
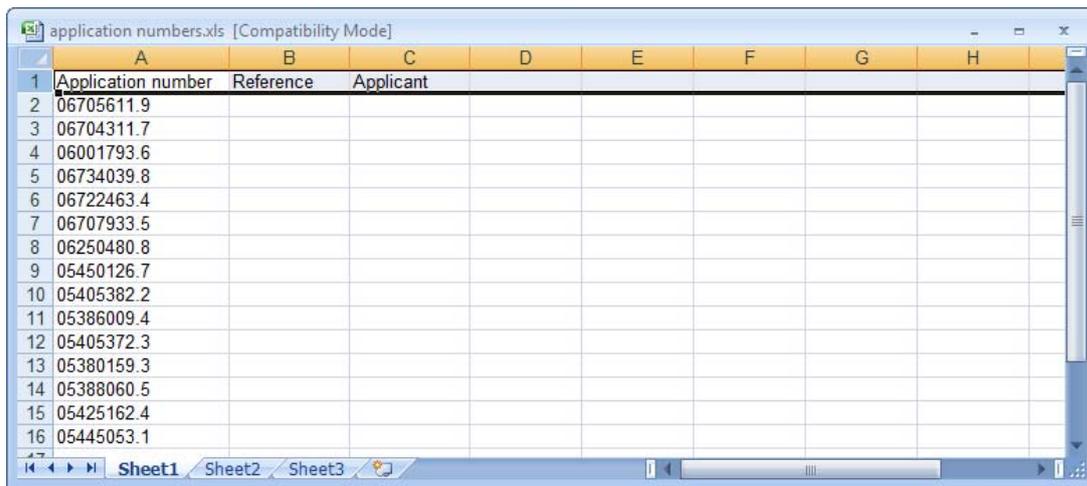


Figure 30: Error message in log

### 3.4.3 Importing a list of application numbers

Instead of importing payment details in full in a CSV file you can also import a list of application numbers and use the EPO Online Multipay Tool to add fee details.

- Enter the application numbers in an Excel spreadsheet using a new row for each number.  
You can enter a reference and the applicant's name if you wish.
- Save the Excel table in CSV format.



	A	B	C	D	E	F	G	H
1	Application number	Reference	Applicant					
2	06705611.9							
3	06704311.7							
4	06001793.6							
5	06734039.8							
6	06722463.4							
7	06707933.5							
8	06250480.8							
9	05450126.7							
10	05405382.2							
11	05386009.4							
12	05405372.3							
13	05380159.3							
14	05388060.5							
15	05425162.4							
16	05445053.1							

Figure 31: List of application numbers as Excel table

#### Tip: Apply a fee filter to a list of imported application numbers

If you have a list of applications for which you have to pay the same fee(s) (e.g. renewal fees for the third year), you can apply a fee filter once you have imported the file.

- Create a filter **for the third year** (see "Creating customised fee filters" p. 37).
- Import the list into the Multipay Tool.
- Select the fee filter **Renewal fee for the 3rd year**.

This automatically selects the renewal fees for all the application numbers in one step.

→ Add the rest of the information and save the file.

The screenshot shows the 'EPO Online Multipay Tool' window. The title bar indicates the file path: G:\EPO\_data\Payments\Nano\_2006\_year3.xml. The interface includes a menu bar (File, Tools, Help) and a toolbar with 'New batch', 'Open', and 'Save' buttons. The main form contains several input fields and sections:

- Batch payment reference:** Nano\_2006\_year3
- Name of sender:** Nano Enterprise Ltd.
- Deposit account:** 28123456 Nano Enterprise Ltd.
- Application number:** EP 033 (selected), EP05445053.1
- Applicant name:** (empty)
- Payable by:** dd.mm.yyyy (with a calendar icon)
- File reference:** (empty)

Below the form is a table of application numbers and applicant names:

Application number	Applicant name
EP06705611.9	Nano Enterprise Ltd.
EP06704311.7	
EP06001793.6	
EP06734039.8	
EP06722463.4	
EP06707933.5	
EP06250480.8	
EP05450126.7	
EP05405382.2	
EP05386009.4	
EP05405372.3	
EP05380159.3	
EP05388060.5	
EP05425162.4	
EP05445053.1	

The 'Fees/Filters' section is active, showing a dropdown menu with 'Renewal fee for the 3rd year' selected. Below this is a table of fees:

<input type="checkbox"/>	Fee code	Description	Amount E...	Reduction...	Quantity	Amount p...
<input checked="" type="checkbox"/>	033	Renewal fee for the 3rd year	400,00	none	1	400,00
<input checked="" type="checkbox"/>	093	Additional fee for renewal fee 3rd year	200,00	none	1	200,00

At the bottom right, the total is displayed as: **Total: (2 fees) 600,00 €**. The status bar at the bottom left shows 'User mode'.

Figure 32: Creating a fee filter for an imported list of application numbers

### 3.5 Exporting data as CSV files

The EPO Online Multipay Tool allows you to export your XML files in CSV format, so that you can open them using other programs and use them as you wish.

- In the menu select **File > Export CSV**.
- Save the file in a directory of your choice.
- Open the CSV file in a suitable program for further editing, e.g. MS Excel.

The Multipay Tool uses the internal field names for the column headings in the CSV file.

	A	B	C	D	E	F	G	H
1	doc-number	file-reference-id	owner	fee-due-date	type-of-fee	fee-sub-amount	fee-factor	fee-total-amount
2	EP09076042.2	Nano2009-02	Nano Enterprise Ltd.	27.02.2009	1	100	1	100
3	EP09076042.2	Nano2009-02	Nano Enterprise Ltd.	27.02.2009	2	760	1	760
4	PCT/EP2009/123456	Nano2009-06	Nano Enterprise Ltd.	27.02.2009	7	790	1	790
5	PCT/EP2009/123456	Nano2009-06	Nano Enterprise Ltd.	27.02.2009	20	100	1	100
6	PCT/EP2009/123456	Nano2009-06	Nano Enterprise Ltd.	27.02.2009	26	30	1	30
7	EP08345678.0	Nano2009-34	Nano Enterprise Ltd.	27.02.2009	5	85	7	595
8	EP08345678.0	Nano2009-34	Nano Enterprise Ltd.	27.02.2009	7	790	1	790
9	EP08345678.0	Nano2009-34	Nano Enterprise Ltd.	27.02.2009	80	40	1	40
10								

Figure 33: Exported data as CSV file MS Excel

### 3.6 Importing diskette data

The **Arrangements for deposit accounts** (<http://www.epo.org/patents/Grant-procedure/Filing-an-application/costs-and-fees/fee-payment-methods.html>) state that holders of EPO deposit accounts may be authorised to debit them by diskette. They also contain more detailed information about the structure and format of diskette data.

The EPO Online Multipay Tool allows you to convert diskette data into the commonly used XML format. You can use Online Fee Payment to submit your payments and immediately download a confirmation that the EPO has received your debit order.

→ Go to **File > Import diskette**.

The **Import diskette** window opens.

→ Click the **Browse** next to the **Enter file name with detail information** field.



→ Select the file you wish to import.

Possible file formats include **TEXT**, **DAT** und **CPA** (depending on the software used to create the file).

→ Click **Open**.

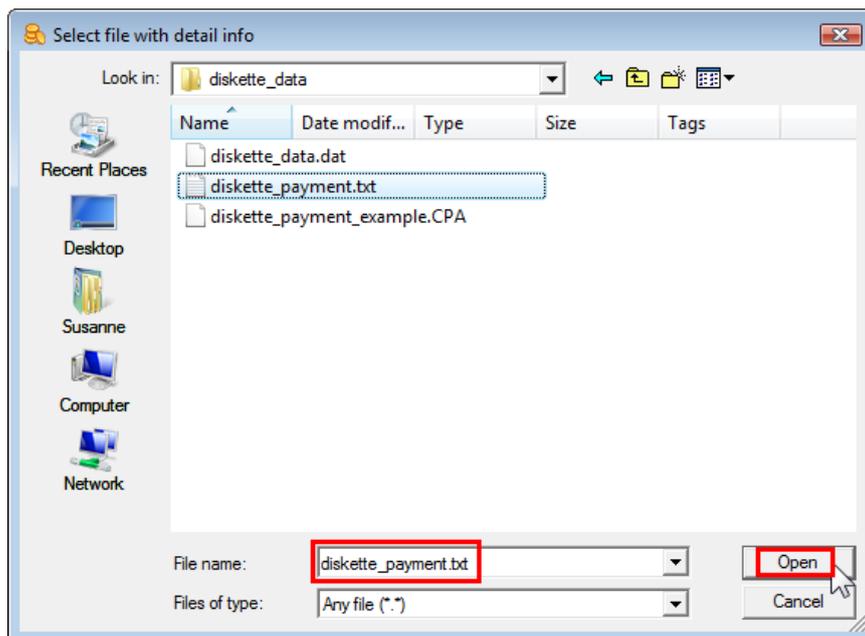


Figure 34: Selecting file for diskette import

- In the **Save resulting xml file as** field enter the name of the new XML file.
- OR-
- Click the **Browse** button, navigate to the desired directory and enter the file name.
- Click the **Import diskette** button.

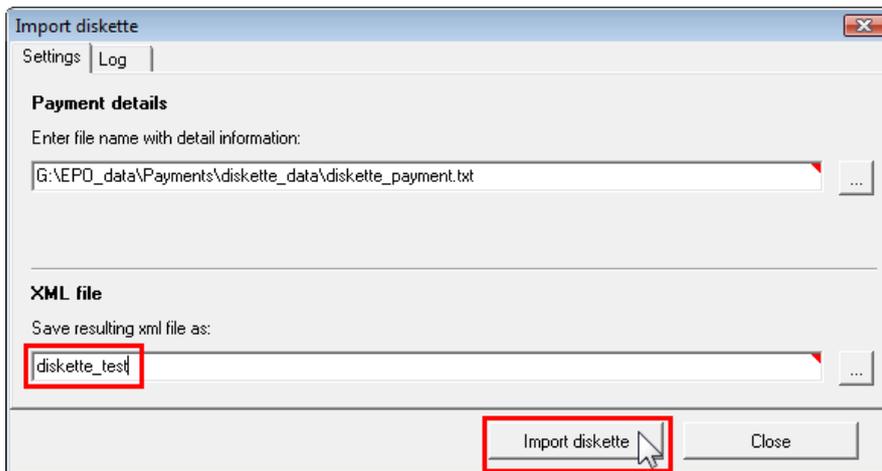


Figure 35: XML file name entered

- You can view the log to check whether the import was successful.
- Click **Close** to finish the import process and display the XML file in the Multipay Tool.

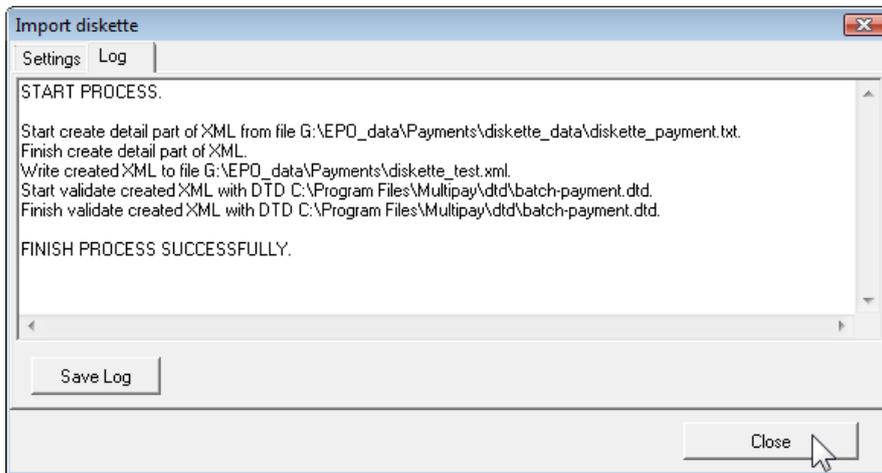


Figure 36: Diskette data import successfully completed

## 4 Paying fees via EPO Online Services

To pay fees go to the **EPO Online Services website** (<http://www.epoline.org>) and log on with your smart card.

① More information about Online Fee Payment can be found under **Products and services > Online Fee Payment** at the site.

- Click **Fee Payment**.
- Click **Payment**.
- Select the **Batch payment** option at the bottom of your screen.
- Click the **Browse** button.
- Browse to the place where you saved your payment data.
- Select the XML file containing your fee payment(s).
- Click the **Continue** button.

The screenshot shows the 'My.epoline' website interface in Internet Explorer. The user is logged in as 'Nano Enterprise Ltd.'. The 'Fee Payment' and 'Payment' tabs are highlighted. The 'Batch payment' radio button is selected. The 'Upload an XML file' section shows a file path 'G:\EPO\_data\Payments\...' and a 'Browse...' button. A 'Continue' button is also highlighted.

My.epoline® - Windows Internet Explorer  
 https://my.epoline.org/portal/private/lut/p/kcxml/04\_Sj9SPyI  
 My.epoline®  
 European Patent Office  
 My.epoline® Logged in as Nano Enterprise Ltd.  
 Home Contact Global Preferences Global Terms of Use Help Log out  
 Register Plus EBD File Inspection **Fee Payment** WebRegMT Mailbox My Files Administration  
 Overview Deposit Account Payment Plan **Payment** Schedule of Fees Account History  
 Continue Preferences Help  
 Step 1: Select your account and enter the number of the application for which you wish to pay fees and your reference.  
 Single payment  
 Account No.: 28490000  
 Application No.: EP: / PCT: /  
 PCT Format: If year ≤ 2003 the format is CC YY NNNNN  
 If year ≥ 2004 the format is CC YYYY NNNNNN  
 Applicant name:   
 Your reference: (max. 25 characters)  
 Batch payment  
 Upload an XML file  
 G:\EPO\_data\Payments\ Browse...  
 Continue

Figure 37: Uploading XML file in Online Fee Payment

The **Confirm your batch payment** screen is then displayed.

- Make a final check of the details of your batch payment.
- Click the **Confirm** button to continue.
- Click the **Back** button to make any corrections.

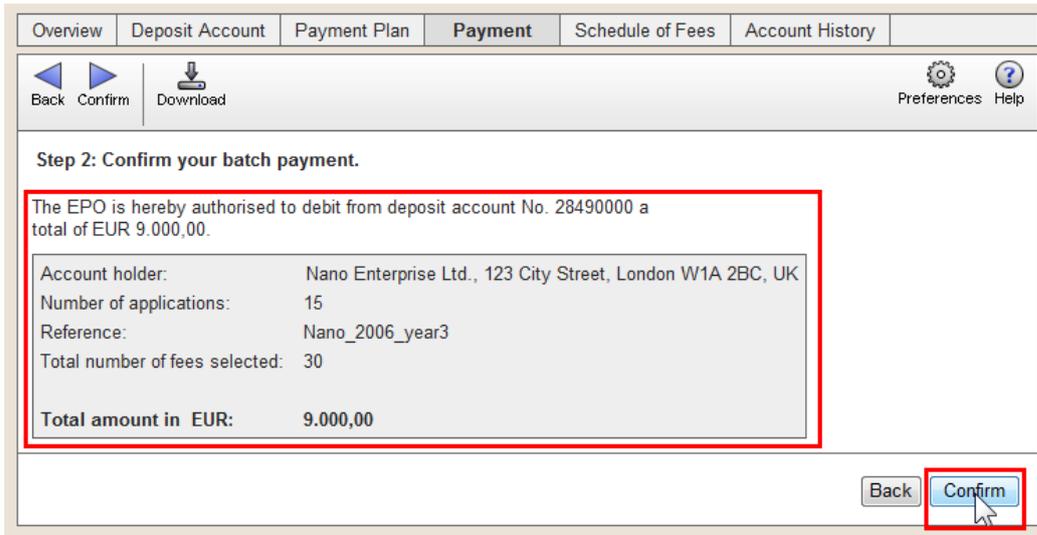


Figure 38: Checking and confirming your batch payment

You will then see a message confirming that your batch payment debit order was successfully transmitted.

You can now print/download this confirmation.

- Click the **PDF** button.

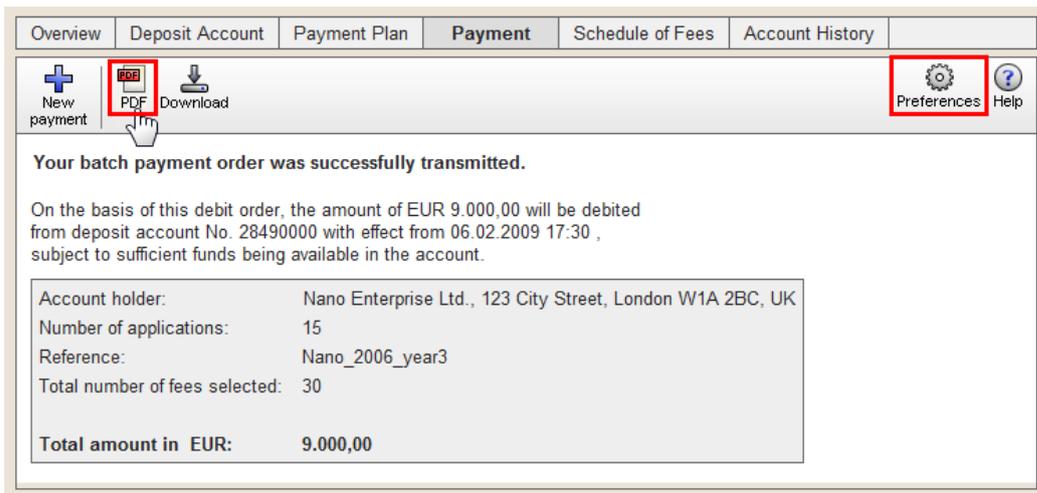


Figure 39: Showing debit order as PDF

→ In the dialogue window that follows, select **Save** or **Open** as required.

The debit order shows a list of all the applications covered, together with the relevant fees.

→ Click the **Print** button in the Adobe Reader tool bar to print the document.

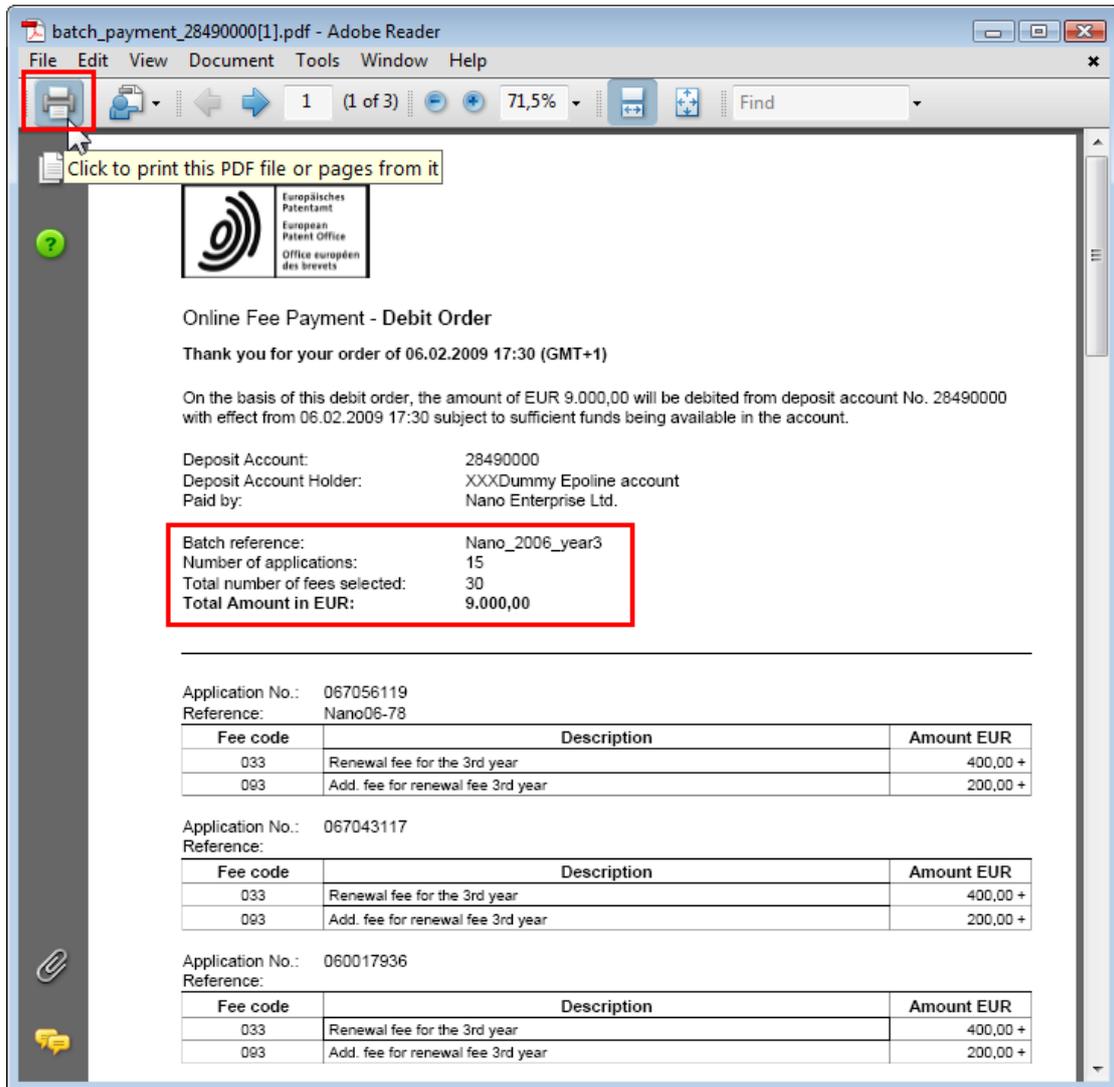


Figure 40: Debit order in PDF format

In Online Fee Payment you can opt to receive a separate payment confirmation for each application in a batch payment.

- Click the **Preferences** button.
- Tick the **Individual batch payment confirmation** check-box.
- Click **Save**.

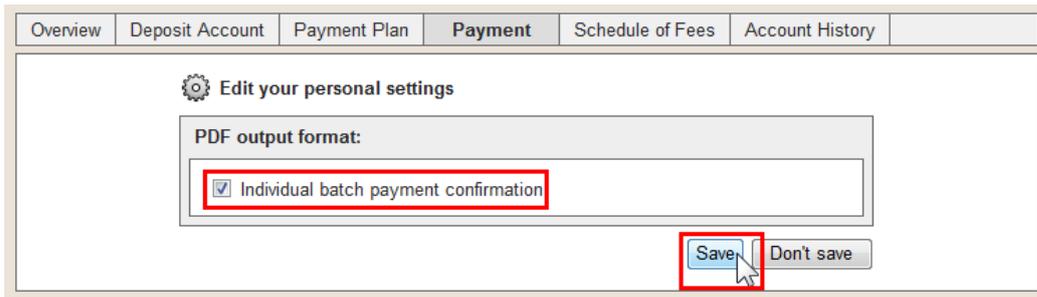


Figure 41: "Individual batch payment confirmation" option selected

- Click the **PDF** button.

The PDF file now contains individual debit orders for each application, with a new page for each one.

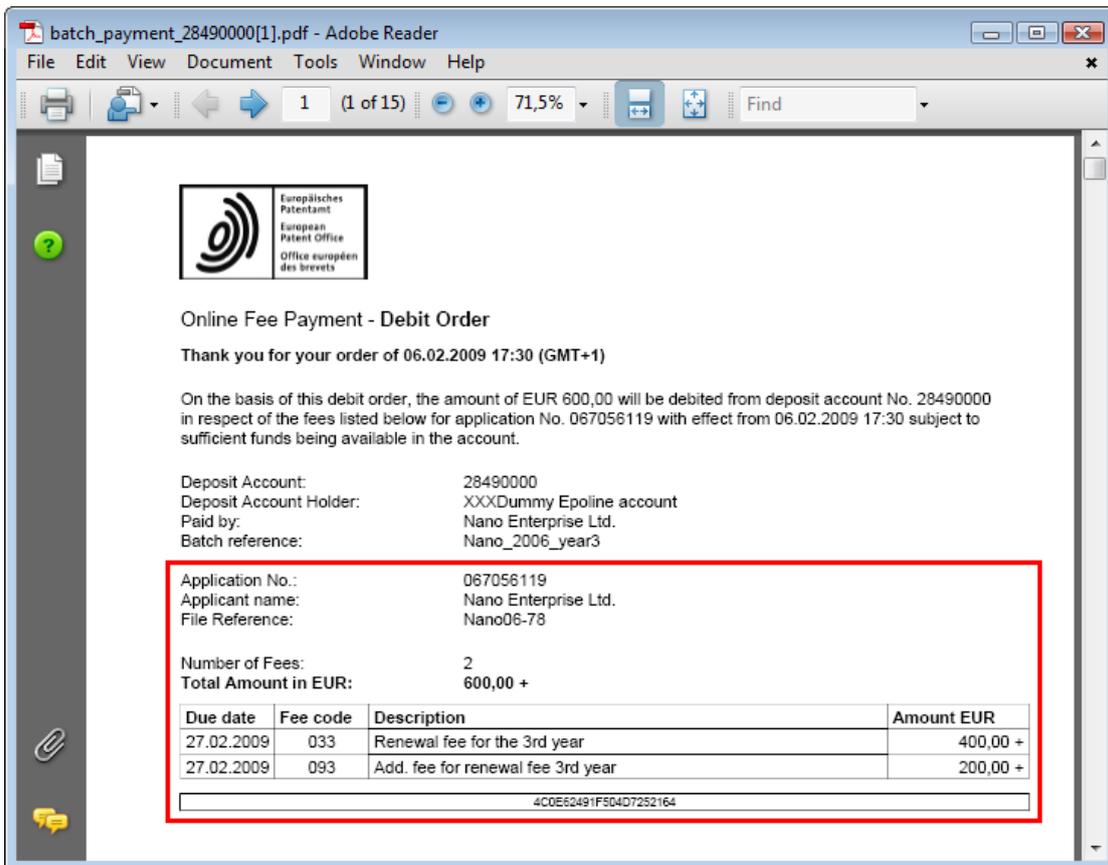


Figure 42: PDF file with separate debit orders for each individual application

## 5 Other functions in the EPO Online Multipay Tool

### 5.1 Creating customised fee filters

The EPO Online Multipay Tool is delivered with the current EPO schedule of fees and a set of built-in fee filters for **All fees** and **Selected fees**.

Users can also create their own filters. For example, if you have to pay the renewal fee for the third year for multiple applications, you can create a filter containing this fee only.

→ Go to **Tools > Filter**.

① If you are currently working on a batch payment you will be asked to save the changes to this document first before continuing.

→ Click the **New** button.



→ Enter a **Filter name**.

→ Select the fees you want to add to your filter.

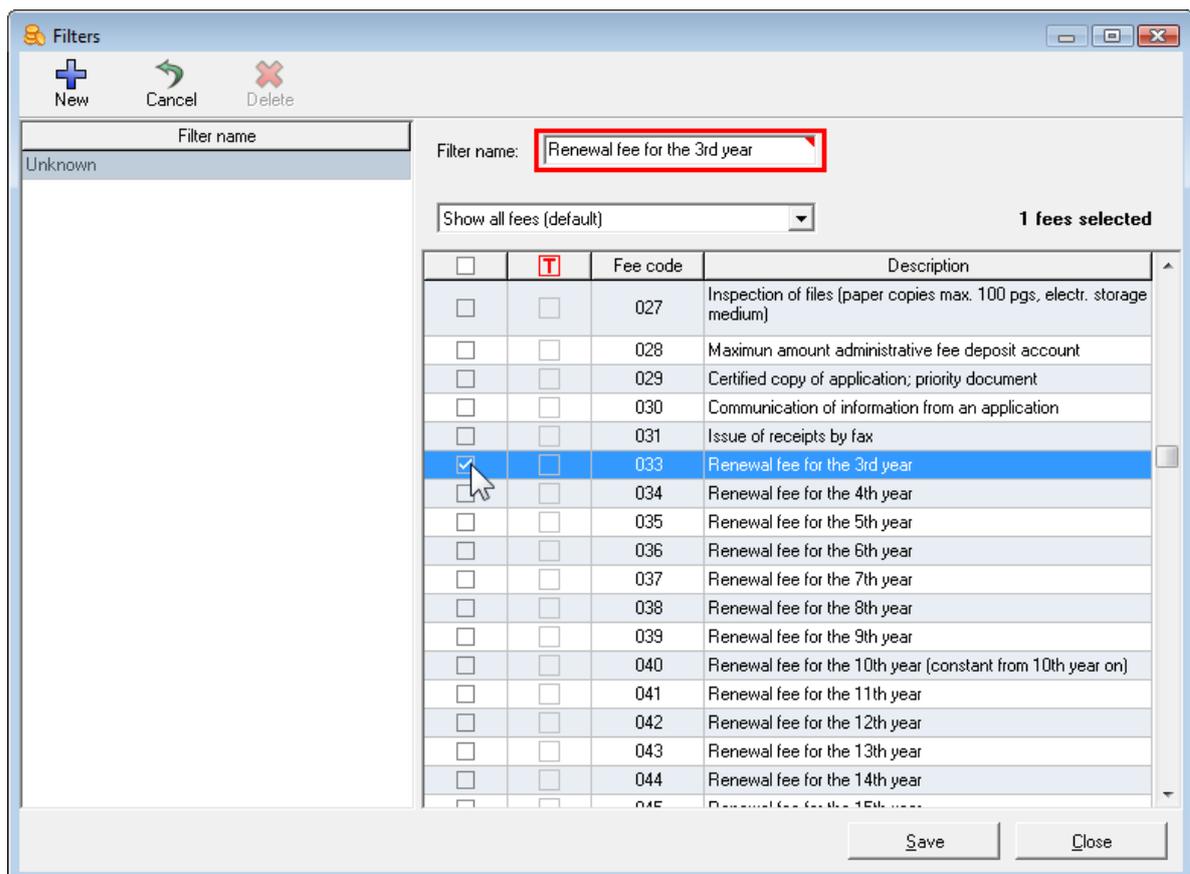


Figure 43: Selecting fees for a new filter

→ For a better overview change the view to **Show selected fees**.

You have two options when selecting how to apply the fees in your filter to your batch payment:

◆ **Not automatically ticked**

If you want the fee to be present but not automatically ticked when you use the filter, tick the box in the left-hand column.

◆ **Automatically ticked**

If you want the fee to be automatically ticked when you use the filter, tick the box in the **T** column next to the **Fee code** column. The box is ticked and a red T appears in the column.

→ Click **Save**.

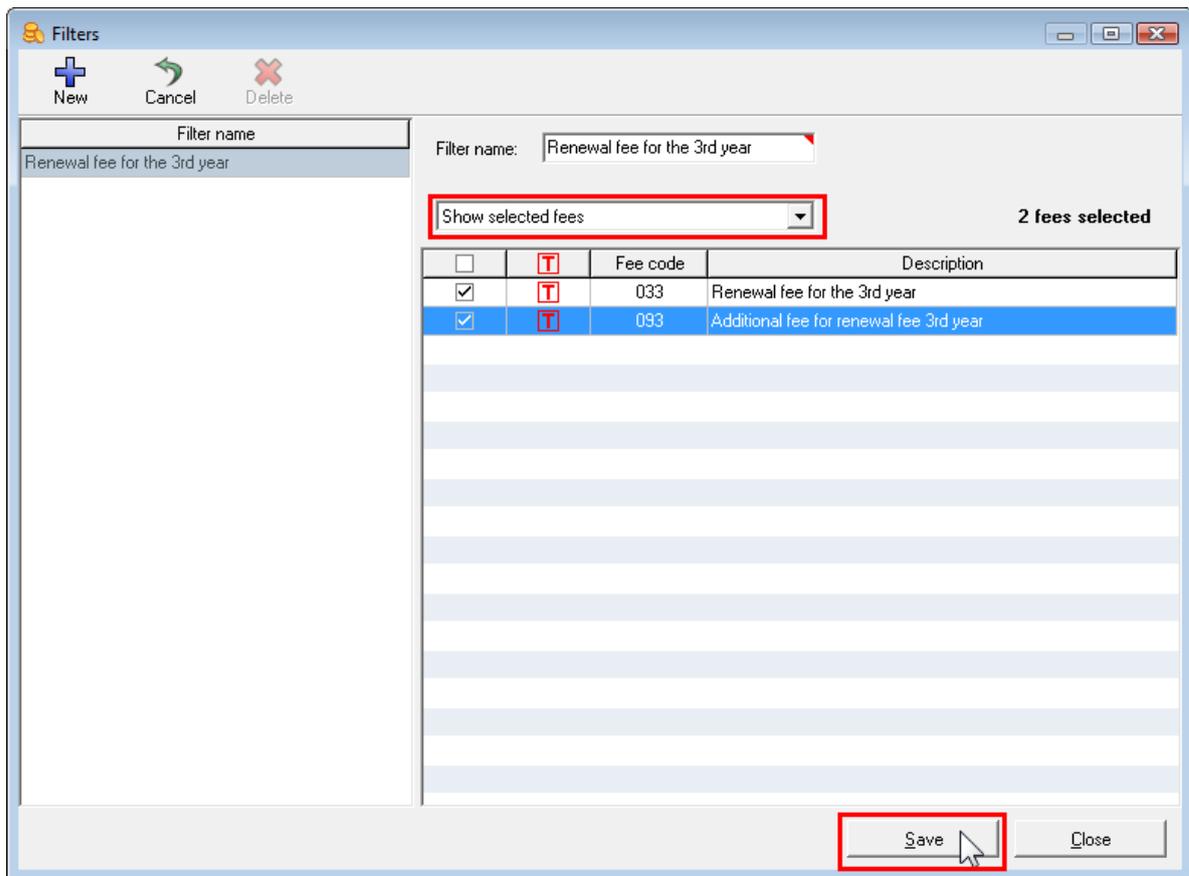


Figure 44: Settings for applying a filter

→ To create additional filters simply repeat the steps described above.

→ To leave the **Filter** window, click **Close**.

For an example of how to apply a filter to a batch payment see **Importing a list of application numbers** (p. 28).

## 5.2 Using Live Update to perform updates

Like all other software, the EPO Online Multipay Tool must be updated at regular intervals, for example to take account of changes to fees. The Multipay Tool therefore has a built-in **Live Update** function.

In its default setting **Live Update** will automatically check for updates on the EPO's server every day when the Multipay Tool is **started up** (see "Configuring automatic Live Update" p. 39). A dialogue window will therefore appear when you start the software.

→ Click **Yes** to run Live Update.

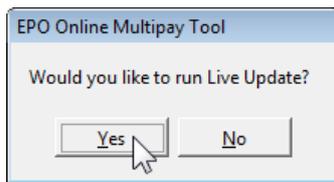


Figure 45: Dialogue window on starting the Multipay Tool

If you do not want to be reminded every day on starting up the Multipay Tool or if your company controls all updates centrally, you can change the Live Update options. If required you can also opt to perform **manual live updates** (see "Manual Live Update" p. 40).

### 5.2.1 Configuring automatic Live Update

You can change the settings for automatic updates to suit your requirements.

→ Go to **Tools > Live Update**.

❗ If you are currently working on a batch payment you will be asked to save the changes to this document first before continuing.

The **Live Update** window opens.

→ Uncheck the **Enable software update system** check box to disable the automatic Live Update option.

→ Enter a different value (= number of **days**) in the **Check for update every** field depending on how often you want to check for updates.

→ Under **Proxy settings** enter the details of your Internet connection.

❗ In company networks the Internet connection for individual workstations is usually via a proxy server. Contact your IT department for details.

→ Click **Save** to confirm the new settings.

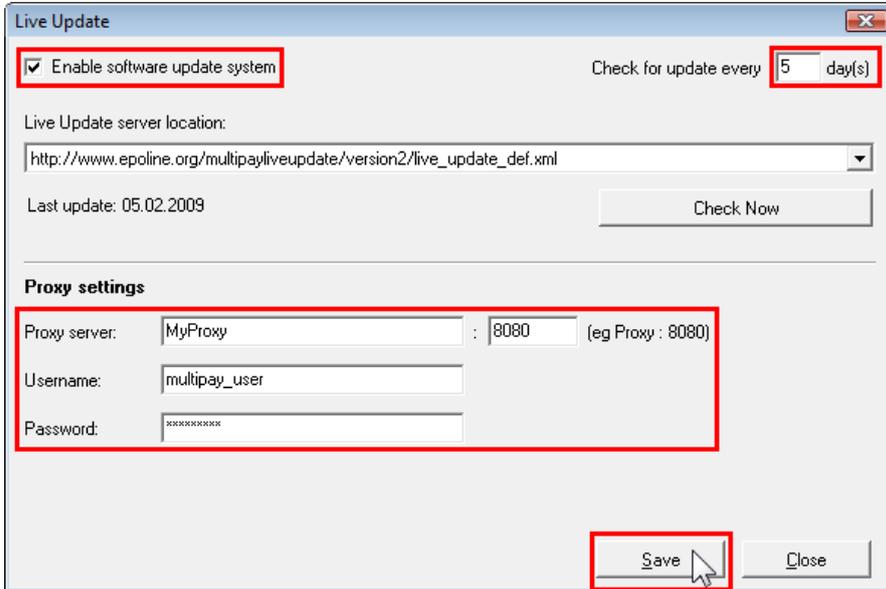


Figure 46: Settings for Live Update

## 5.2.2 Manual Live Update

Irrespective of your settings for automatic Live Update you can carry out a manual update at any time.

- Go to **Tools > Live Update**.
- Click the **Check Now** button in the **Live Update** window.

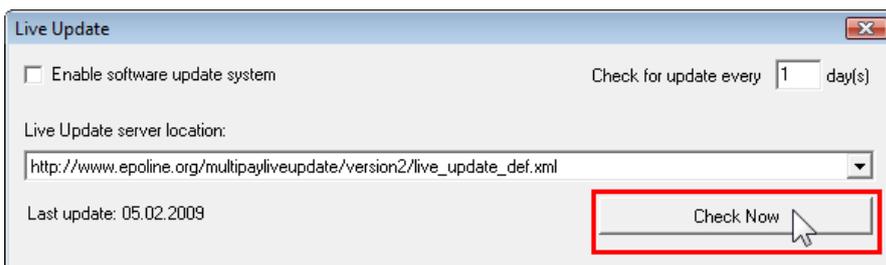


Figure 47: Performing a manual Live Update

If new updates are found on the EPO server, a prompt appears.

- Proceed as described in **Performing Live Update** (p. 41).

### 5.2.3 Performing Live Update

If you have answered **Yes** to the Live Update prompt on start-up, Live Update notifies you when it finds new updates.

→ In the dialogue window click **Yes** to download the updates.

① The updates are only downloaded at this point. Installation follows at a later stage.

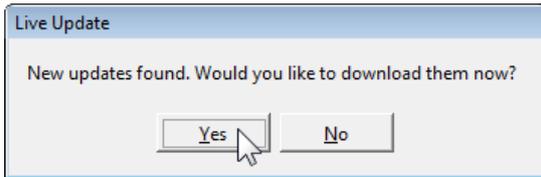


Figure 48: New updates available for download

The available updates are shown in a list as having the status **New**.

→ Select the update.

→ Click **Download**.

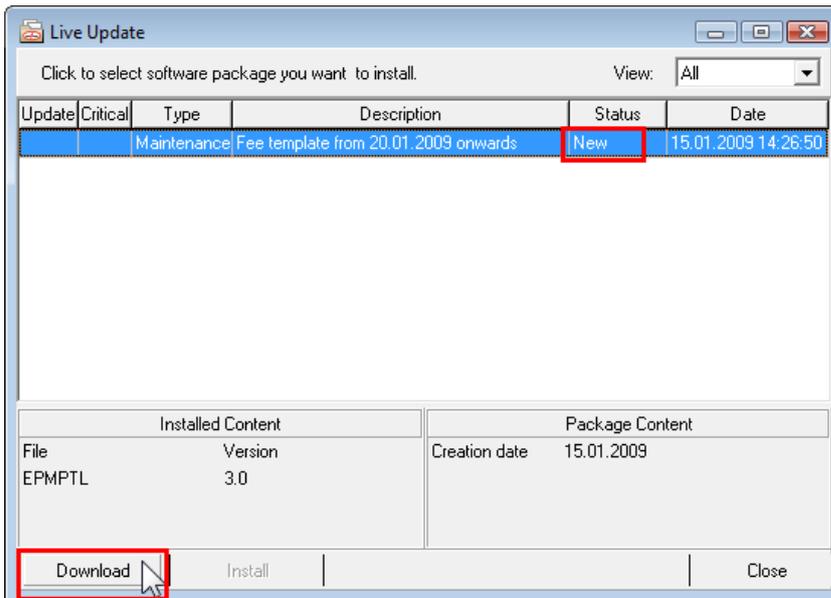


Figure 49: Downloading an update

→ Click **OK** in the **download complete** message.

The update is now shown with the status **Downloaded**.

→ Click **Close** if you do not want to install the update straight away.

You can install any updates you have downloaded at a later date.

→ Click **Install** to perform the update now.

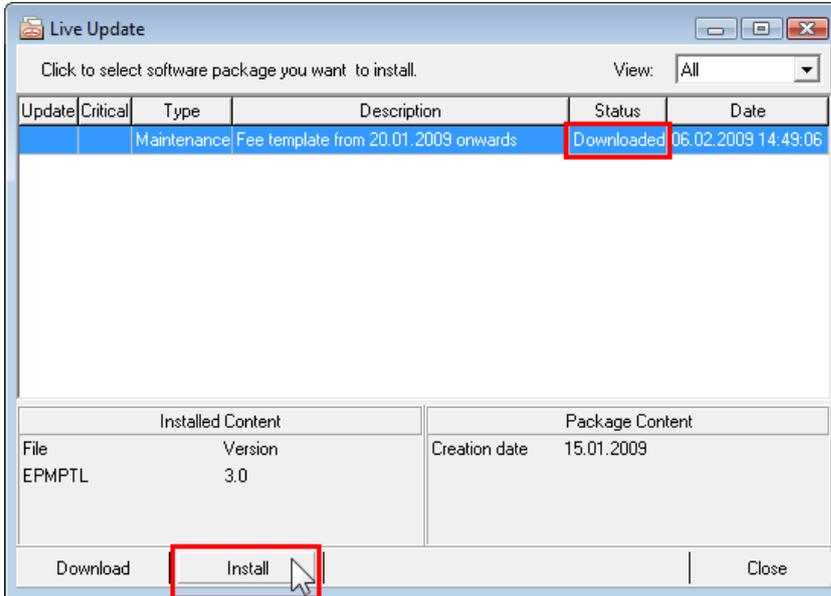


Figure 50: Installing a downloaded update

On successful completion of the installation a prompt appears.

→ Click **OK**.

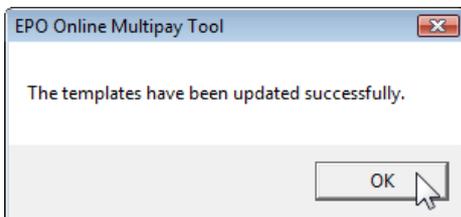


Figure 51: Update successfully completed

→ In the **Live Update** window click **Close**.

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