



Multipay Tool

User guide

Software version 3.10

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2 Overview of the Multipay Tool

The Multipay Tool allows you to prepare batch payment files to pay fees for multiple patent applications from a deposit account with the EPO. The Multipay Tool generates XML files with the payment and account information in offline mode. By uploading an XML file to the EPO's Online Fee Payment service, you create the debit orders for all applications and fees contained in this batch payment.

Workflow with the Multipay Tool

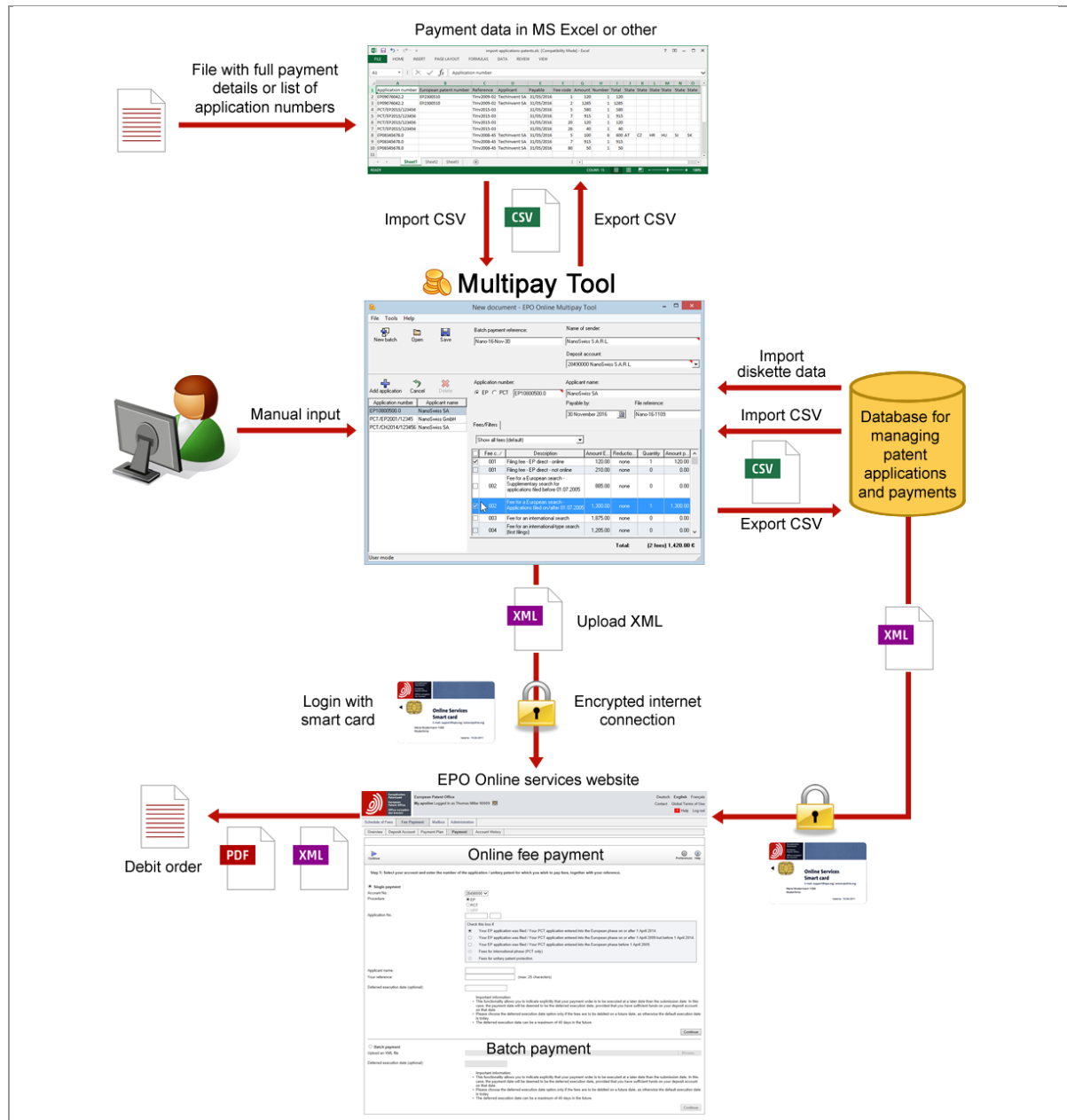


Figure 1: Data flow with the Multipay Tool – overview

Benefits of the Multipay Tool

The Multipay Tool software is available free of charge. You can install it on any number of individual PCs or on a central server in your network. When the EPO publishes fee updates, these are distributed via the Live Update function. Thus, working with the Multipay Tool ensures that you always have the latest schedule of fees installed.

The Multipay Tool allows you to

- create fee debit orders for one or more applications
- modify fee details (e.g. amounts, quantities and reductions)
- preview and/or print payment files for final approval

- save payment files on a shared server
 - to allow your finance department to transmit the order to the EPO
 - 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 for further processing

3 Getting started

The Multipay Tool software is available for download from the EPO website free of charge.

➔ Go to **Applying for a patent > Online services > Online fee payment > Multipay Tool** (<http://www.epo.org/applying/online-services/fee-payment/multipay.html>).

➔ Download the **Multipay-installer.exe** file and save it to your computer.

To use the Online Fee Payment service, you need an EPO deposit account and a smart card registered for the EPO online services. Please visit the EPO website for detailed information:

- Request to open a deposit account: **Service & support > Ordering > Deposit account** (<https://forms.epo.org/service-support/ordering/deposit-order-form.html>)
- Applying for a smart card: **Applying for a patent > Online services > Security > Smart cards** (<http://www.epo.org/applying/online-services/security/smart-cards.html>)

3.1 System requirements

You can install the Multipay Tool on standard office PCs running Microsoft Windows. The Multipay Tool cannot be installed on computers running other operating systems, e.g. Mac OS or Linux.

Supported operating systems

- Microsoft Windows Vista (SP2), 32-bit and 64-bit
- Microsoft Windows 7 (SP1), 32-bit and 64-bit
- Microsoft Windows 8/8.1, 32-bit and 64-bit
- Microsoft Windows 10, 32-bit and 64-bit
- Microsoft Windows Server 2008, 32-bit
- Microsoft Windows Server 2008 R2, 64-bit
- Microsoft Windows Server 2012/2012 R2, 64-bit
- Microsoft Windows Server 2016, 64-bit

Additional software

- Adobe Reader version 11.x and above
- up-to-date internet browser (e.g. Microsoft Internet Explorer 11, Mozilla Firefox, Google Chrome)

3.2 Installing the software

You need administrator rights in Windows to install the Multipay Tool.

- Log on to the computer as a Windows administrator.
- To start the installation, double-click the **Multipay-installer.exe** file.
- To allow the installation, click **Yes** in the **User Account Control** window.
- In the first window, select the language for installation (English, French or German).
- In the **Welcome to the EPO Online Multipay Tool Installation Wizard** window, click **Next**.



Figure 2: Starting installation of the Multipay Tool

In the **User Information** window, you can personalise your installation.

- Enter your name and organisation if appropriate.
- Select whether to install the software for all users of the computer or only for your personal user account.
- Click **Next**.

In the **Destination Folder** window, you can change the folder where the software will be installed. The default program folder is **C:\Program Files (x86)\Multipay** on a 64-bit operating system and **C:\Program Files\Multipay** on a 32-bit operating system.

- To select a different folder for installation, e.g. on another drive, click **Browse** and select the appropriate folder.
- Click **Next** to use the selected folder or the default destination folder.

In the **Ready to Install the Application** window, you have three options:

- **Back** – check (and where necessary change) settings
- **Next** – start installation
- **Cancel** – cancel installation without copying files to your computer

- Click **Next** to continue.

The **Updating System** window appears and indicates the installation progress.

When the installation process has terminated, the window **EPO Online Multipay Tool has been successfully installed** appears.

- If you do not want to start the Multipay Tool immediately, clear the relevant check box.
- Click **Finish**.

If you selected to start the Multipay Tool, the program will automatically run Live Update; see [Updating the Multipay Tool](#) (p. 38).

Otherwise, you will see the final installation window.

- Click **Finish**.

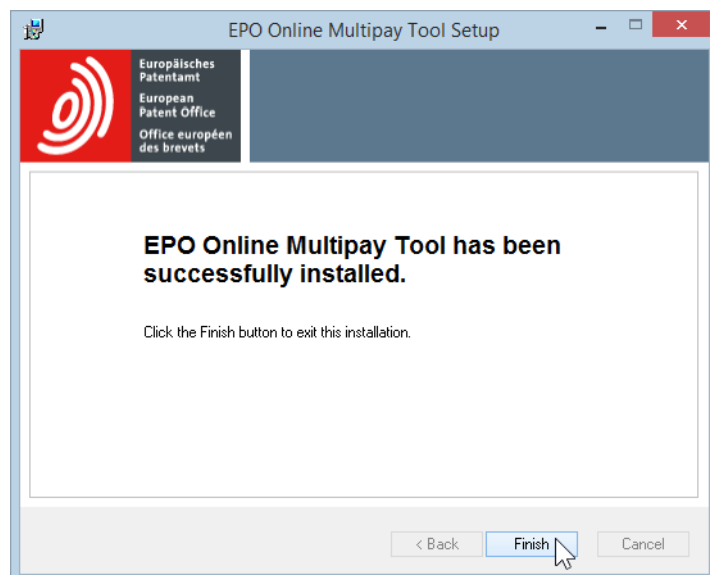


Figure 3: Installation successful

i If a compatibility error message appears during or after installation, close it by clicking **The program was correctly installed**. The Multipay Tool will run without problems.

3.3 Using the Multipay Tool in a network

The Multipay Tool can be used by more than one person in your company at the same time.

- Choose the appropriate set-up for your working environment:
 - Install the software on a particular PC and give users access to the program files by sharing the **Multipay** program folder in your network.
 - Install the software on any PC and copy the complete **Multipay** program folder to other workstations.
- Create a shared working folder for saving the XML files containing the batch payments; see [Defining global settings](#) (p. 9).

This way, you will ensure that only one user at a time can edit a batch payment, i.e. an XML file.


3.4 Uninstalling the software

You can uninstall the Multipay Tool if you do not need it anymore.

- Open the Windows **Control Panel**.
- Go to **Programs and Features > Uninstall or change a program**.
- Select **EPO Online Multipay Tool** and click **Uninstall**.
The program is removed from your computer.
- Verify that the **Multipay** program folder has been deleted, and, if not, delete it manually.
The default program folder is **C:\Program Files (x86)\Multipay** on a 64-bit operating system and **C:\Program Files\Multipay** on a 32-bit operating system.

3.5 Starting the software

The installation program creates shortcuts on your desktop, in the **Start** menu (Windows 7 and Windows 10) and on the **Apps** screen (Windows 8.1).

- To start the Multipay Tool, do one of the following:
 - Double-click the **Multipay Tool** icon on your desktop.
- 
- Multipay
Tool
- Select **Programs > EPO Online Filing > Multipay Tool** in the Start menu.
 - Go to the **Apps** screen, locate the **EPO Online Filing** group and click **Multipay Tool**.
- If the **Live Update** window pops up, click **Yes** or **No** as appropriate; see [Updating the Multipay Tool](#) (p. 38).

When you start the software for the first time following installation, the **Global Settings** window opens in front of the Multipay Tool's main window.

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

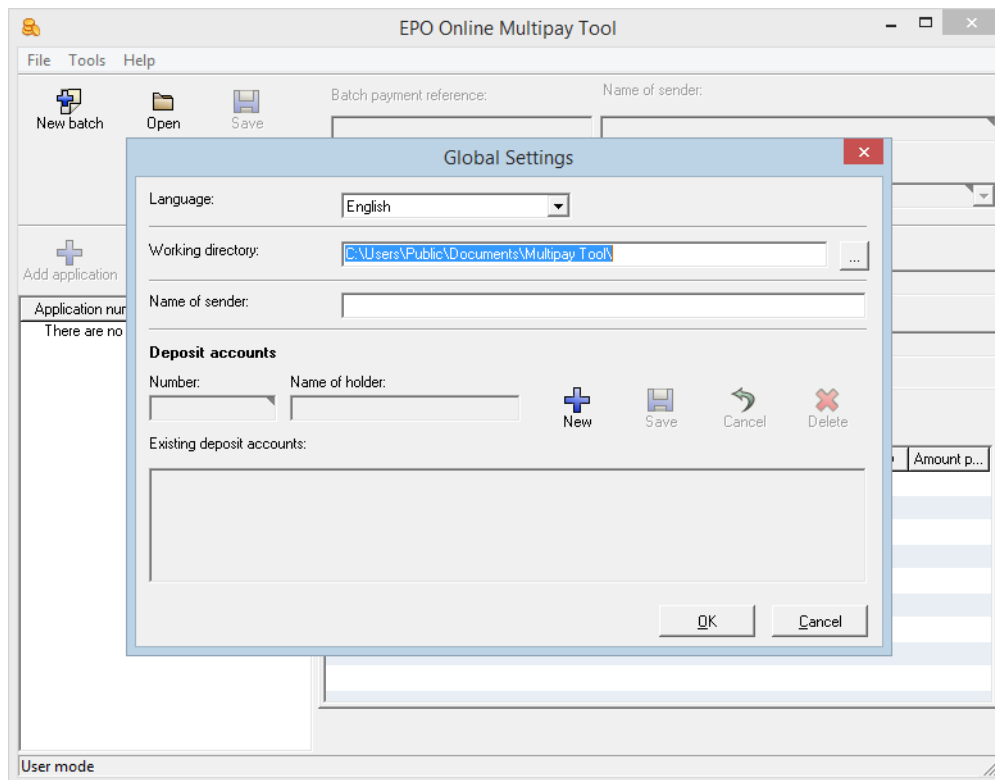


Figure 4: Starting the Multipay Tool for the first time

The **Global Settings** window will appear every time you start the software until you enter and save at least one deposit account number; see [Defining global settings](#) (p. 9).

3.6 Defining global settings

If you did not enter your data in the **Global Settings** window when you started the Multipay Tool, you can do so later via the menu.

- Select **Tools > Global Settings** from the menu.
The **Global Settings** window opens.

Program language


- To change the display language, select the appropriate option from the **Language** drop-down list.

The languages available are English, French and German.

The language change takes effect the next time you start the Multipay Tool.

Working directory

The default working directory is **C:\Users\Public\Public Documents\Multipay Tool**. This folder is created during installation and is immediately available to other users in your network, because Windows enables sharing for all data in the **Public** folder.

- To select a different folder for saving your batch payment XML files, click the  button to the right of the **Working directory** field.
- Navigate to the appropriate folder on your PC or to a shared folder on a network drive.

Default sender

- To define a default sender for all batch payments, enter the **Name of sender**.

Deposit accounts

You can specify multiple deposit accounts in **Global Settings**. When you create a new batch payment, you can select one of these accounts from a list.

- To add a new deposit account, click the **New** icon.



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

- To save the deposit account, click the **Save** icon.



- To discard the new account or the changes made to an existing account, click the **Cancel** icon.



- To delete one of your accounts, select the relevant item and click the **Delete** icon.

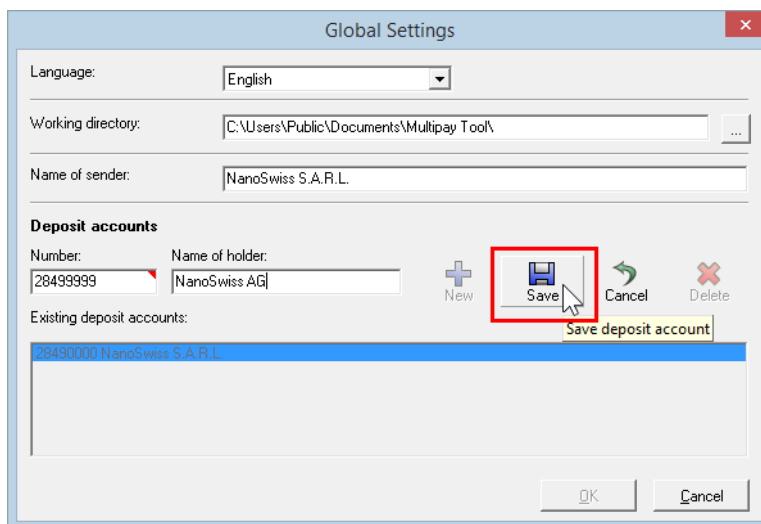


Figure 5: Adding deposit accounts

Applying the global settings

- To save all global settings, including the deposit accounts, click **OK**.
The **OK** button is only available if you have clicked the **Save** icon after editing the deposit accounts.

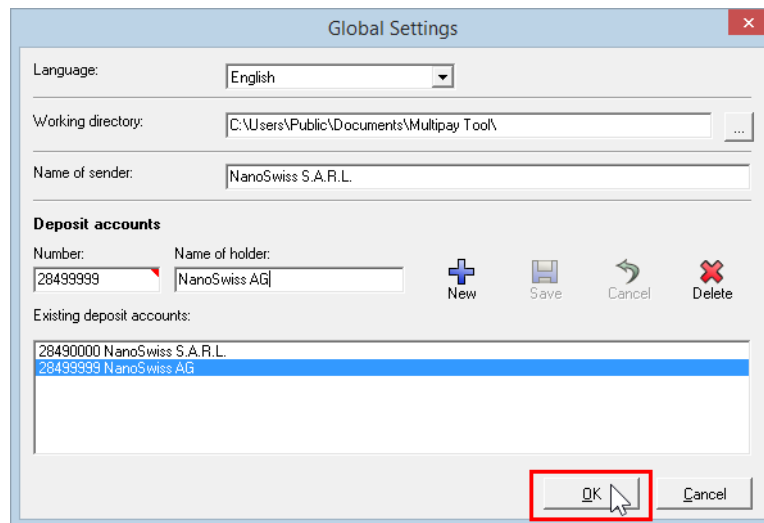


Figure 6: Saving the global settings

4 Creating batch payments

When you have entered the name of sender and the deposit accounts in Global Settings, you are ready to create your batch payments with the Multipay Tool. Make sure that you have all the necessary information at hand before you start, because you can only save a new batch payment if you add at least one application and select at least one fee for each application.

- To create a new batch payment, do one of the following:
 - Click the **New batch** icon.



- Select **File > New batch** from the menu.
- Press **Ctrl+N**.

The input fields become available and **New document** appears in the title bar of the Multipay Tool window. Some fields are mandatory – e.g. **Name of sender** and **Application number** – and 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.
- Select the **Deposit account** from which the fees are to be debited.

The list of deposit accounts provides the accounts that you added in the global settings.

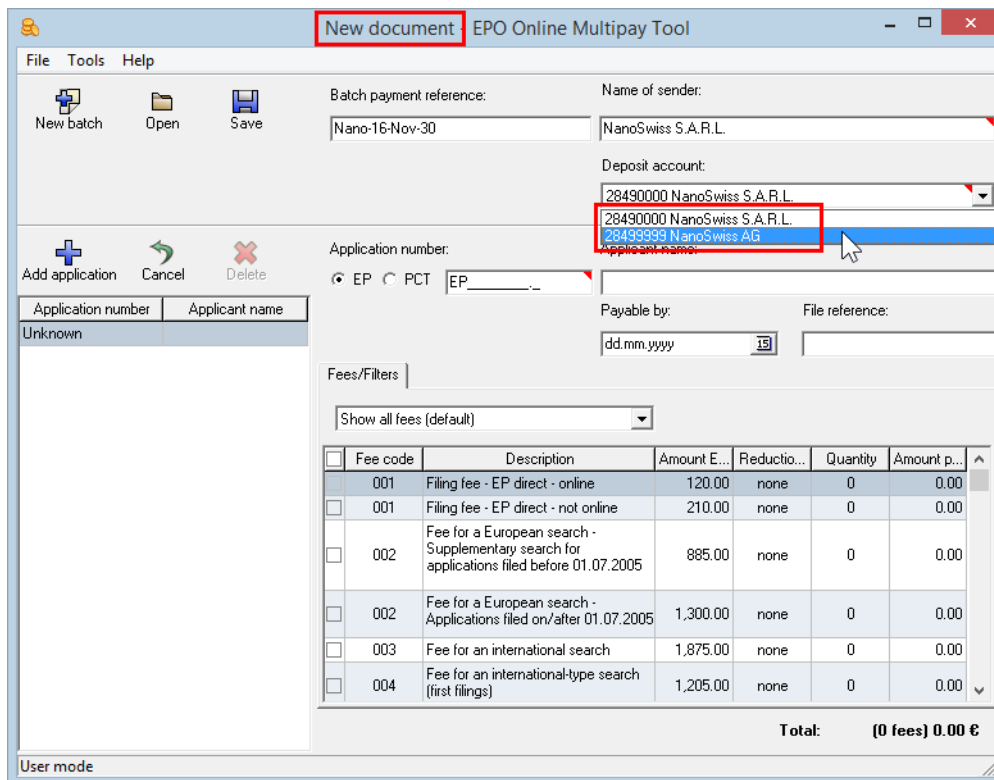


Figure 7: Selecting the deposit account for a new batch payment

4.1 Adding application numbers

If you have not yet added an application to your new batch payment, the first entry in the pane on the left-hand side reads **Unknown**.

- ➔ Select the relevant procedure for the application number: **EP** (default) or **PCT**. This loads the pattern for the required application number format into the **Application number** field:
 - **EP**: The letters **EP** and the dot are provided by the software and cannot be deleted.
 - **PCT**: The letters **PCT** and the slashes are provided by the software and cannot be deleted.
- ➔ Enter the application number.
 - EP application numbers: seven digits plus the check digit, e.g. **09076042.2**.
 - PCT applications filed **on or after 01.01.2004** have the new PCT number format **CCYYYYnnnnnn**: two-letter country code, four-digit year and six-digit serial number, e.g. **CH2014123456**.
 - PCT applications filed **before 01.01.2004** have the old PCT number format **CCYYYYnnnnn**: two-letter country code, four-digit year and five-digit serial number, e.g. **EP200112345**. If the year is equal to or less than **2003**, the Multipay Tool automatically limits the serial number to five digits.

- Enter the **Applicant name** (optional).
- To enter a due date (optional) in the **Payable by** field, enter it in the format **dd.mm.yyyy** or click the calendar icon to select the day from the calendar.



Entering the due date is optional and is for your own information only. The due date also appears in the debit order confirmation that you can download from Online fee payment; see [Uploading batch payments to Online Fee Payment](#) (p. 25).



The due date is not the payment date. The **payment date** is the date of receipt of the debit order by the EPO or the deferred execution date that you specify when submitting your batch payment in Online Fee Payment, provided that there are sufficient funds in your deposit account on that date.

- To validate the application number, click the **Unknown** row in the pane on the left-hand side.

Figure 8: Validating the first application number entered in a new batch payment

The Multipay Tool checks if the application number conforms to the required format. If the application number is correct, it will appear in the list.

Figure 9: Application details entered

If the application number is not correct, you will see an error message to that effect.

- To close the error message and correct the application number, click **OK**.

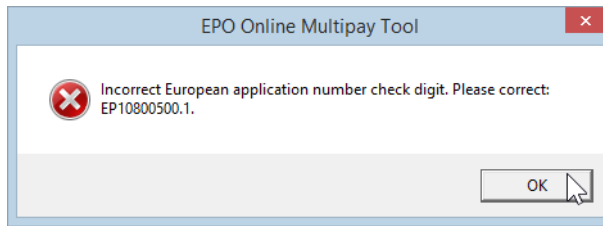


Figure 10: Error message: incorrect EP application number

- To add the next application to the batch payment, click the **Add application** icon.



A new row with **Unknown** as the application number is appended to the list.

- To remove this incomplete application from the list, click the **Cancel** icon.



- To proceed, enter the details for this application as appropriate.

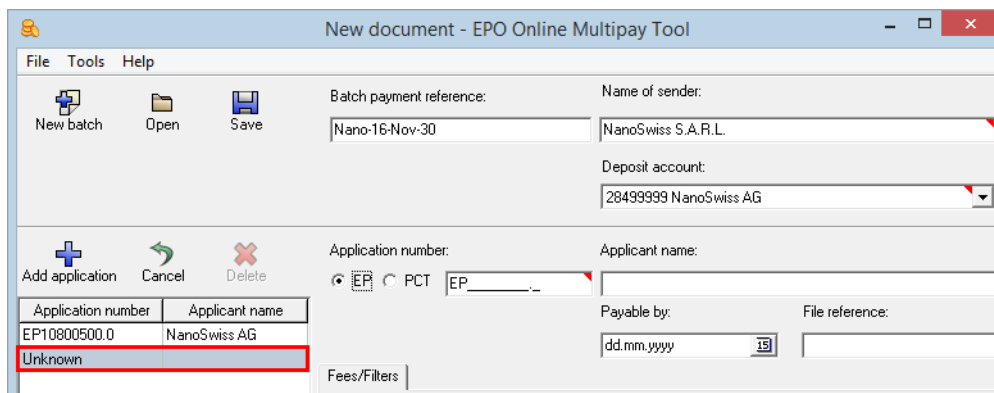


Figure 11: Adding the next application number in a new batch payment

4.2 Selecting fees

The fee list on the right-hand side provides a drop-down list to select a fee filter. The initial setting is **Show all fees (default)**, i.e. all the fees included in the latest EPO schedule of fees. You can create your own filters to restrict the list to fees required for particular cases; see [Applying customised fee filters](#) (p. 22).

Selecting fees

- To select a fee, select the relevant check box.

The list of fees contains some fees that appear twice, i.e. fees with the same fee code but different descriptions and amounts. These fee pairs are mutually exclusive. For example, if you select fee **001 Filing fee - EP direct - online** and then select fee **001 Filing fee - EP direct - not online**, the check box of the first fee **001** will be cleared.

- Select all the fees you wish to pay in respect of this application.
The **Total** of the fees to be paid is automatically calculated and shown at the bottom of the window.

Application number: EP10800500.0 Applicant name: NanoSwiss SA

Payable by: 30 November 2016 File reference: Nano-16-1109

Fees/Filters

Show all fees (default)

Fee c.//	Description	Amount E...	Reductio...	Quantity	Amount p...
<input checked="" type="checkbox"/>	001 Filing fee - EP direct - online	120.00	none	1	120.00
<input type="checkbox"/>	001 Filing fee - EP direct - not online	210.00	none	0	0.00
<input type="checkbox"/>	002 Fee for a European search - Supplementary search for applications filed before 01.07.2005	885.00	none	0	0.00
<input checked="" type="checkbox"/>	002 Fee for a European search - Applications filed on/after 01.07.2005	1,300.00	none	1	1,300.00
<input type="checkbox"/>	003 Fee for an international search	1,875.00	none	0	0.00
<input type="checkbox"/>	004 Fee for an international-type search (first filings)	1,205.00	none	0	0.00

Total: (2 fees) 1,420.00 €

Figure 12: Selecting fees for an application

Verifying the fee selection

For a better overview you can reduce the fee list to the fees you selected.

- In the drop-down list, change the filter to **Show selected fees**.

Application number: EP10800500.0 Applicant name: NanoSwiss SA

Payable by: 30 November 2016 File reference: Nano-16-1109

Fees/Filters

Show selected fees

Fee c.//	Description	Amount E...	Reductio...	Quantity	Amount p...
<input checked="" type="checkbox"/>	001 Filing fee - EP direct - online	120.00	none	1	120.00
<input checked="" type="checkbox"/>	002 Fee for a European search - Applications filed on/after 01.07.2005	1,300.00	none	1	1,300.00
<input checked="" type="checkbox"/>	013 Fee for re-establishment, reinstatement, restoration (EPC, PCT)	640.00	none	1	640.00

Total: (3 fees) 2,060.00 €

Figure 13: Filtering the fee list to show only the selected fees

Cancelling the fee selection

- To cancel the selection of an individual fee, clear the relevant check box.
- To cancel all fee selections, first select the check box in the column heading and then clear it.

Fee c. /	Description	Amount E...	Reductio...	Quantity	Amount p...
<input checked="" type="checkbox"/>	501 Additional filing fee for the 36th and each subsequent page	15.00	none	1	15.00
<input checked="" type="checkbox"/>	520 Additional filing fee for the 36th and each subsequent page - entry into EP phase	15.00	none	1	15.00
<input checked="" type="checkbox"/>	552 Add. fee for divisional 2nd generation	210.00	none	1	210.00
<input checked="" type="checkbox"/>	553 Add. fee for divisional 3rd generation	425.00	none	1	425.00
<input checked="" type="checkbox"/>	554 Add. fee for divisional 4th generation	635.00	none	1	635.00
<input checked="" type="checkbox"/>	555 Add. fee for divisional 5th or subsequent generation	850.00	none	1	850.00

Figure 14: Cancelling all fee selections

Sorting the fee list

The list of fees can be sorted by any of the columns in ascending or descending order. In the default setting, the list is sorted by **Fee code** in ascending order.

→ To sort by a different column, click the column heading, e.g. **Amount EUR**.

The list is sorted by amounts in ascending order. This is indicated by a small grey triangle in the column heading.

Note the fees with negative amounts: if selected, these will be subtracted from the total of the fees to pay.

→ To reverse the sort order, click the column heading again.

Fee code	Description	Amount /	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	319 PCT - XML reduction	-275.00	none	0	0.00
<input type="checkbox"/>	318 PCT - PDF reduction	-183.00	none	0	0.00
<input checked="" type="checkbox"/>	316 PCT - Web-form filing reduction	-92.00	none	0	0.00
<input type="checkbox"/>	123 Fee for further processing (late payment of a fee - 50% of the relevant fee)	0.00	none	0	0.00
<input type="checkbox"/>	059 Additional charge per page for transmission by fax in Europe	4.75	none	0	0.00
<input type="checkbox"/>	059 Additional charge per page for transmission by fax - outside Europe	6.25	none	0	0.00

Figure 15: Sorting the fee list

4.3 Editing fees

Entering fee quantities

There are a number of fees for which you must specify a quantity yourself, e.g. **016 - Claims fee**, **055 - Add. copy of docs cited in search report** or **501 - Additional filing fee for the 36th and each subsequent page**.

→ Select the check box for the relevant fee.

→ Click the cell in the current row's **Quantity** column.

The cell becomes editable and its colour changes to white.

→ Enter the required value.

Show all fees (default)						
<input type="checkbox"/>	Fee c./	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	011	Fee for appeal	1,880.00	none	0	0.00
<input checked="" type="checkbox"/>	013	Fee for re-establishment, reinstatement, restoration (EPC, PCT)	640.00	none	1	640.00
<input type="checkbox"/>	014	Conversion fee	75.00	none	0	0.00
<input checked="" type="checkbox"/>	015	Claims fee - For the 16th to the 50th claim	235.00	none	12	235.00
<input type="checkbox"/>	015	Claims fee - For the 51st and each subsequent claim	585.00	none	0	0.00
<input type="checkbox"/>	016	Claims fee in accordance with R. 71(4) - For the 16th to the 50th claim	235.00	none	0	0.00
Total:			(4 fees) 2,295.00 €			

Figure 16: Entering the quantity for the claims fee

→ In the table row of the fee concerned, click one of the cells that are not editable, e.g.

Description.

The values in the **Amount payable** column and the **Total** are automatically recalculated.

Show all fees (default)						
<input type="checkbox"/>	Fee c./	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	011	Fee for appeal	1,880.00	none	0	0.00
<input checked="" type="checkbox"/>	013	Fee for re-establishment, reinstatement, restoration (EPC, PCT)	640.00	none	1	640.00
<input type="checkbox"/>	014	Conversion fee	75.00	none	0	0.00
<input checked="" type="checkbox"/>	015	Claims fee - For the 16th to the 50th claim	235.00	none	12	2,820.00
<input type="checkbox"/>	015	Claims fee - For the 51st and each subsequent claim	585.00	none	0	0.00
<input type="checkbox"/>	016	Claims fee in accordance with R. 71(4) - For the 16th to the 50th claim	235.00	none	0	0.00
Total:			(15 fees) 4,880.00 €			

Figure 17: The fees are recalculated based on the quantity

Modifying fee amounts

Under certain conditions, the EPO grants applicants a reduction on specific fees. If this applies to your application, you can edit the values in the **Amount EUR** and **Reduction (%)** column for the fee concerned.

- Select the check box for the relevant fee.
- Click the cell you want to edit in the current row, e.g. **Reduction (%)**.
The cell becomes editable and its colour changes to white.
- Enter the required value.

Show all fees (default)						
<input type="checkbox"/>	Fee c./	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	005	For all Contracting States designated for applications filed on/after 01.04.2009	585.00	none	0	0.00
<input checked="" type="checkbox"/>	006	Examination fee - For applications filed on/after 01.07.2005	1,635.00	65	1	1,635.00
<input type="checkbox"/>	006	Examination fee - For applications filed before 01.07.2005 and for international applications filed on/after 01.07.2005 without supplementary European search report	1,825.00	none	0	0.00
Total:			(16 fees) 6,515.00 €			

Figure 18: Entering a fee reduction

- In the relevant fee row, click one of the uneditable cells, e.g. **Description**.
The values in the **Amount payable** column and the **Total** are automatically recalculated.

Show all fees (default)						
<input type="checkbox"/>	Fee c./	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	005	For all Contracting States designated for applications filed on/after 01.04.2009	585.00	none	0	0.00
<input checked="" type="checkbox"/>	006	Examination fee - For applications filed on/after 01.07.2005	1.635.00	65	1	572.25
<input type="checkbox"/>	006	Examination fee - For applications filed before 01.07.2005 and for international applications filed on/after 01.07.2005 without supplementary European search report	1.825.00	none	0	0.00
Total:					(16 fees)	5,452.25 €

Figure 19: The fee reduction is applied and the amount to pay is recalculated

Resetting fee amounts to default

- To discard all changes for the selected application including the modification of fee amounts and quantities, click the **Cancel** icon.



This will cancel the fee selection and reset the fee amounts to their default values.

4.4 Selecting designation fees and states

The designation fees for EP applications are calculated based on the filing date. These two options are mutually exclusive:

- **(A) 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 not possible to designate individual states.
- **(B) 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 is calculated from the number of states designated.

- Select the appropriate designation fee for the application concerned.
 - **005 – For all Contracting States designated for applications filed on/after 01.04.2009**

The **Quantity** is set to **1** and cannot be modified.

Fees/Filters						
Show all fees (default)						
<input type="checkbox"/>	Fee c./	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	004	Fee for an international-type search - all other cases	1,890.00	none	0	0.00
<input type="checkbox"/>	005	Designation fee for each state designated (max. 7x) for applications filed before 01.04.2009	100.00	none	7	700.00
<input checked="" type="checkbox"/>	005	For all Contracting States designated for applications filed on/after 01.04.2009	585.00	none	1	585.00
<input checked="" type="checkbox"/>	006	Examination fee - For applications filed on/after 01.07.2005	1,635.00	65	1	572.25
Total:					(3 fees)	1,277.25 €

Figure 20: Selecting fee for all designated states - for applications filed on or after 1 April 2009

- **005 – Designation fee for each state designated (max. 7x) for applications filed before 01.04.2009.**

The **Quantity** is set to **7** and the **States** tab appears to the right of the **Fees/Filters** tab.

Fees/Filters States						
Show all fees (default)						
<input type="checkbox"/>	Fee c./	Description	Amount E...	Reductio...	Quantity	Amount p...
<input type="checkbox"/>	004	Fee for an international-type search - all other cases	1,890.00	none	0	0.00
<input checked="" type="checkbox"/>	005	Designation fee for each state designated (max. 7x) for applications filed before 01.04.2009	100.00	none	7	700.00
<input type="checkbox"/>	005	For all Contracting States designated for applications filed on/after 01.04.2009	585.00	none	0	0.00
<input checked="" type="checkbox"/>	006	Examination fee - For applications filed on/after 01.07.2005	1,635.00	65	1	572.25
Total:					(9 fees)	1,392.25 €

Figure 21: Selecting the designation fee for each designated state - applies only to applications filed prior to 1 April 2009

Selecting designated states

If you select fee **005 – Designation fee for each state designated (max. 7x) for applications filed before 01.04.2009**, you can select up to six designation states individually instead of designating all states (default).

- Click the **States** tab.
- Select the option you require:
 - **All States - ie more than 6 countries:** all check boxes are selected and locked (default).
 - **Selected States - ie not more than 6 countries:** the check boxes are unlocked, allowing you to select up to six countries.

The number of fees and the **Total** are automatically recalculated.

The screenshot shows a 'Fees/Filters' dialog box with the 'States' tab selected. There are two radio buttons at the top: 'All States - ie more than 6 countries.' (unselected) and 'Selected States - ie not more than 6 countries.' (selected). A small box next to the second radio button says '4 selected.'. Below are three columns of checkboxes for various countries. The following countries are checked: CH/LI Switzerland/Liechtenstein, DE Germany, FR France, and IT Italy. At the bottom right, a 'Total:' field displays '[6 fees] 1,092.25 €'.

Figure 22: Selecting designation states for an application filed prior to 1 April 2009

4.5 Saving the XML file

Once you have added all the payment details for an application, you should save your new batch payment.

→ To save the batch payment as an XML file, do one of the following:

- Click the **Save** icon.



- Select **File > Save** from the menu.
- Press **Ctrl+S**.

The **Save file as** window opens. The **Save in** field shows the working directory you specified in the global settings.

- To select a different folder, navigate to the required location on your computer.
- If required, edit the **File name**, which is generated by the Multipay Tool using the date.

→ Click **Save**.

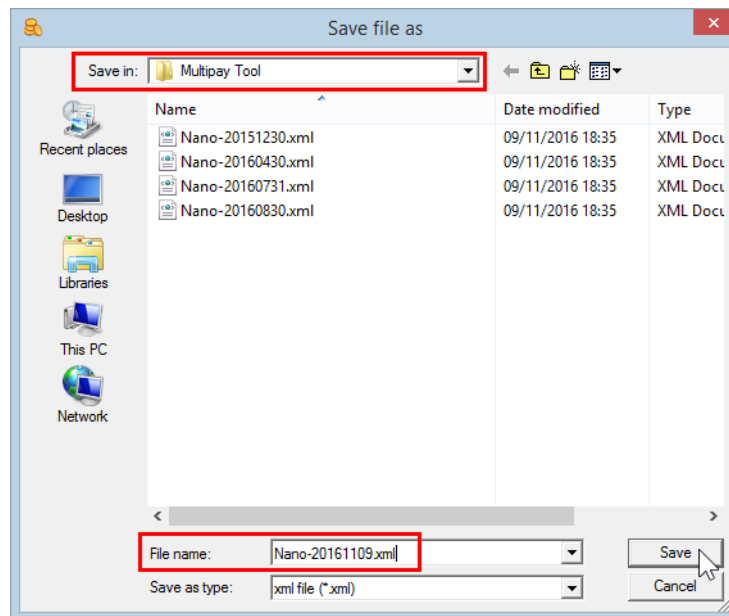


Figure 23: Editing the XML file name for the batch payment

Your batch payment will remain open in the Multipay Tool.

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

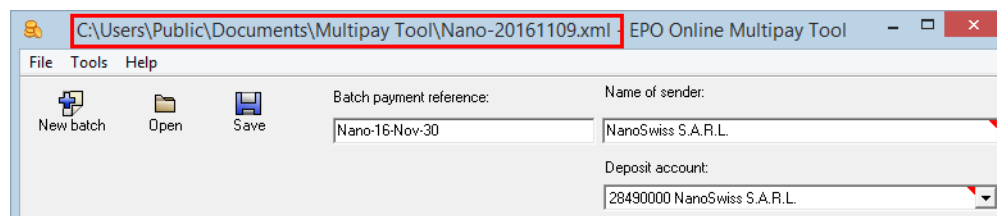


Figure 24: XML file for batch payment saved

4.6 Modifying a batch payment

You can modify an existing batch payment or save it as a new file and edit it further.

Opening a batch payment

- To open an existing batch payment (XML file), do one of the following:
 - Select **File > Open** from the menu.
 - Press **Ctrl+O**.
 - Click the **Open** icon.



The **Select file** window opens and shows the contents of your working directory.

- If required, navigate to a different file location.
- Select the XML file you want to work with and click **Open**.

Saving a copy of the batch payment

- To save a copy of the batch payment you have currently open with a different file name, select **File > Save as** from the menu.
The **Save file as** window opens and shows the contents of your working directory.
- If required, navigate to a different file location.
- Enter the file name for the new XML file and click **Save**.

Adding more applications to the batch payment

- To add another application to the list in the batch payment you have currently open, do one of the following:
 - Press **Ctrl+Alt+N**.
 - Click the **Add application** icon.



- Enter the details and select the fees for the application.

If you enter an application number that is already in the list, a warning message will appear when you click the new row in the list or click the **Add application** icon once more.

- To add the application with the same application number, click **Yes**.
- To edit the application number, click **No**.
- To undo adding the application, first click **No** in the warning message and then click the **Cancel** icon.

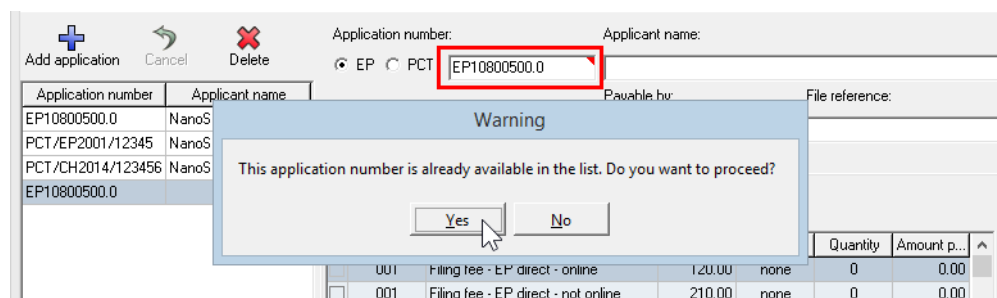


Figure 25: Warning message: the application number was already added to the batch payment

Deleting applications from the batch payment

- To remove an application from the list, select it and do one of the following:
 - Press **Ctrl+D**.
 - Click the **Delete** icon.



4.7 Applying customised fee filters

You can create your own filters to select a specific combination of fees for the applications in a batch payment. For example, if you have to pay the renewal fee for the third year plus the additional fee for the renewal fee for the third year, you can create a filter containing these two

fees. For an example of how to apply a filter to a batch payment, see [Importing a list of application numbers](#) (p. 34).

→ Select **Tools > Filter** from the menu.

→ Click the **New** icon.



→ Enter a **Filter name**.

Some characters are not allowed, e.g. the dot (.) and the hyphen (-).

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

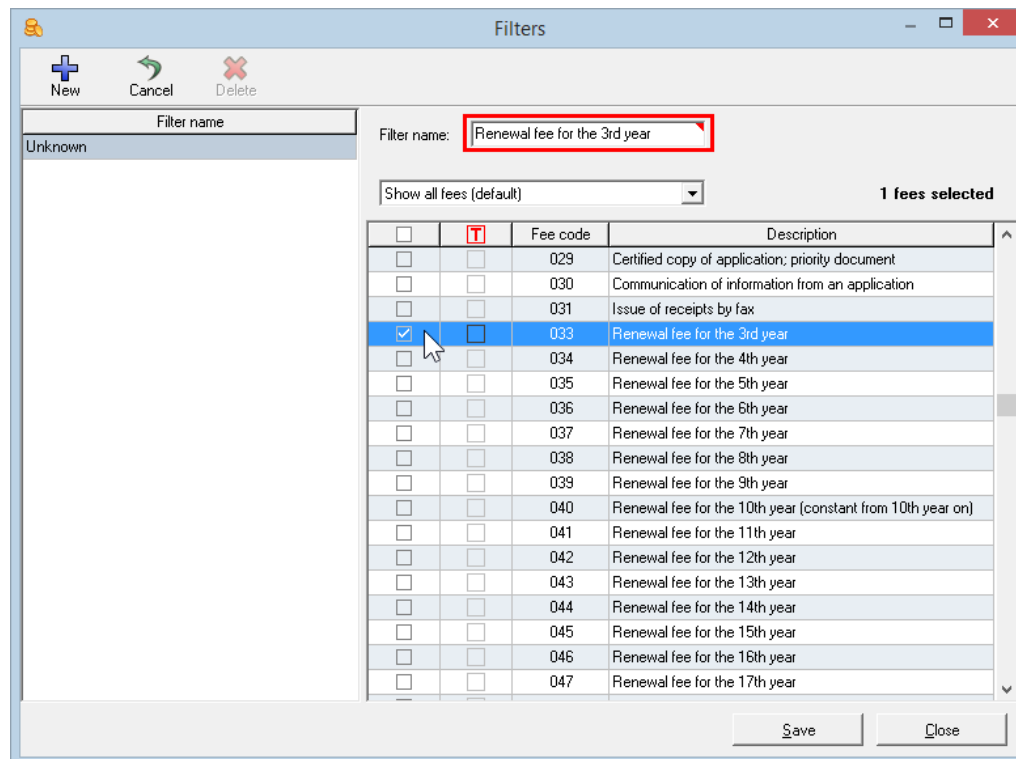


Figure 26: Selecting fees for a new filter

→ When you have selected all relevant fees, change the view to **Show selected fees** for a better overview.

→ Select how to apply the fees in your filter to your batch payment:

- Automatically selected

If you want the fee to be automatically selected when you apply the filter, click the cell in the second column (with the red **T** in the heading). A red **T** appears in the second column, and, if it was accidentally cleared, the check box in the first column is automatically selected.

- Not automatically selected

If you want the fee to be present but not automatically selected when you apply the filter, only select the check box in the first column.

→ To make the filter available, click **Save**.

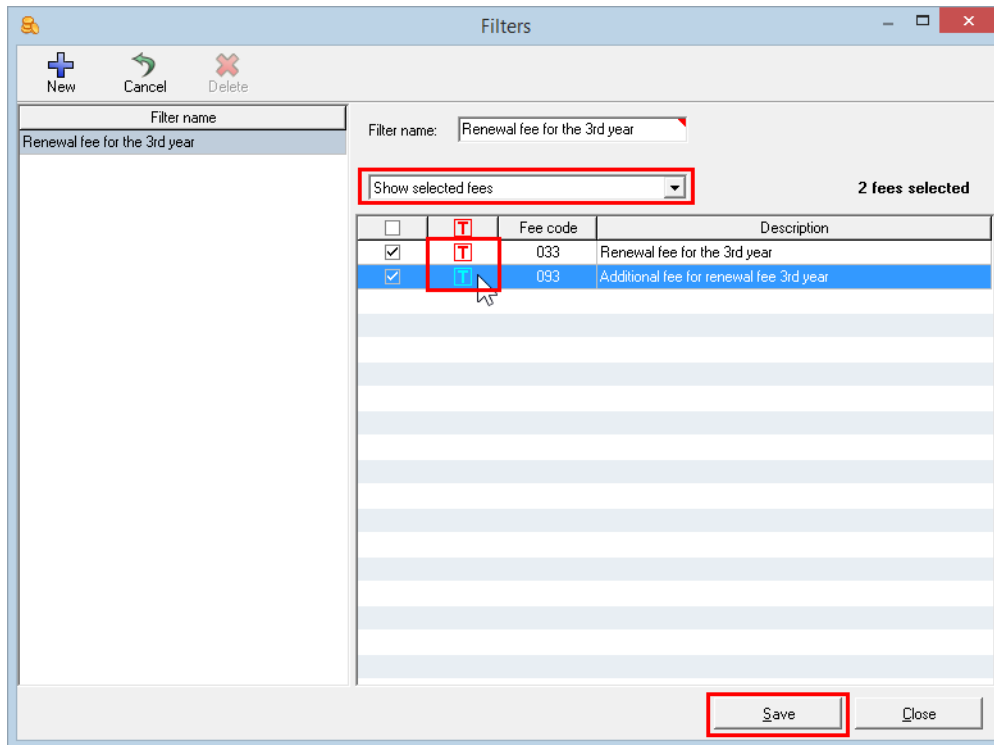


Figure 27: Selecting the options for applying a fee in the filter

4.8 Previewing a batch payment

Before uploading your XML file to Online Fee Payment, you can preview the details and print a copy if required.

→ Select **File > Print preview** from the menu, or press **Ctrl+P**.

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

The Multipay Tool renders the XML file as 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 the browser menu.

The screenshot shows the EPO Online Multipay Tool interface in Internet Explorer. The browser's menu is open, with 'Print...' highlighted. The page content is as follows:

EPO Online Multipay Tool - Batch Payment - Print Preview

Deposit account: 28490000
 Prepared by: NanoSwiss S.A.R.L.

Batch reference: Nano-16-Nov-30
 Number of applications: 3
 Total number of fees selected: 5
 Total Amount in EUR: 3322.25

Application No: EP10800500.0
 Reference: Nano-16-1109

Payable by	Fee Code	Description	Amount EUR
30.11.2016	001	Filing fee - EP direct - online	120,00
30.11.2016	005	For all Contracting States designated for applications filed on after 01.04.2009	585,00
30.11.2016	006	Examination fee - For applications filed on after 01.07.2005	572,25

Application No: PCT/EP01.12345
 Reference: Nano-01-0034

Payable by	Fee Code	Description	Amount EUR
30.11.2016	043	Renewal fee for the 13th year	1575,00

Application No: PCT/CH2014/123456
 Reference: Nano-14-0289

Payable by	Fee Code	Description	Amount EUR
30.11.2016	033	Renewal fee for the 3rd year	470,00

Figure 28: Batch payment print preview in Internet Explorer

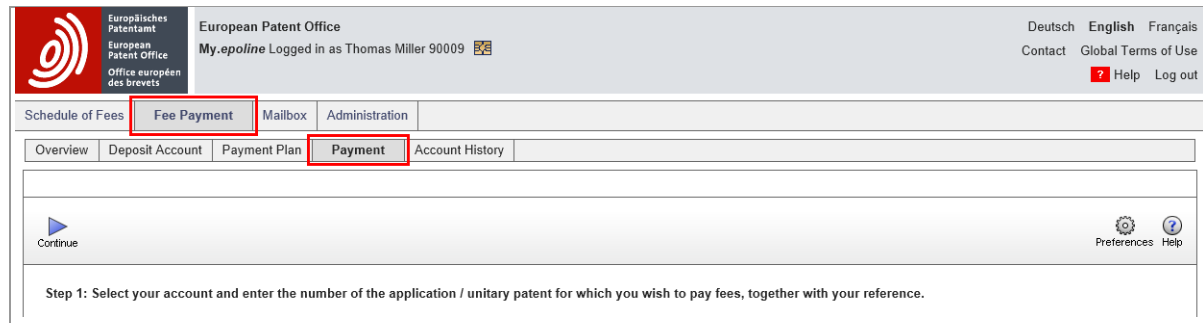
5 Uploading batch payments to Online Fee Payment

When your batch payment is ready, you can upload the XML file to the EPO's Online Fee Payment service. The selected fees for each of the applications in the batch will then be debited from the deposit account you indicated. For more information about creating debit orders via Online Fee Payment, please refer to the chapter **Payment** in the user guide or read the online help.

i Debit orders (standard or deferred execution) can only be revoked until 00.00 hrs CET on the date of submission (Arrangements for deposit accounts, 7).

- Open the EPO website and go to **Applying for a patent > Online services > Online fee payment** (<http://www.epo.org/applying/online-services/fee-payment.html>).
- Log on with your smart card.

→ Go to **Fee Payment > Payment**.



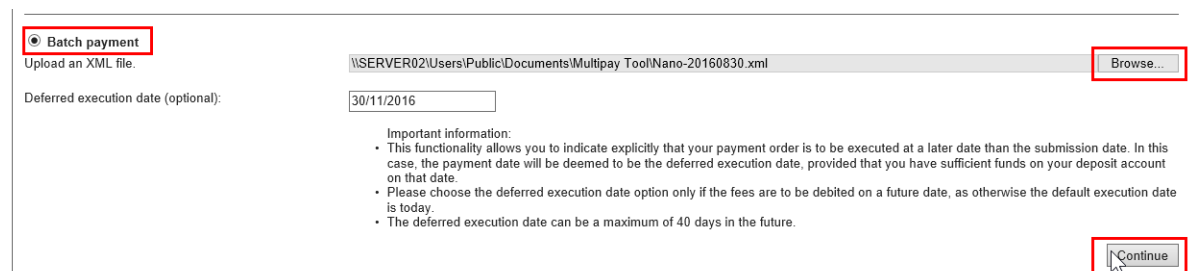
The screenshot shows the European Patent Office (EPO) My.epoline interface. The user is logged in as Thomas Miller 90009. The navigation menu includes 'Schedule of Fees', 'Fee Payment', 'Mailbox', and 'Administration'. The 'Payment' sub-tab is selected. Below the navigation, there are buttons for 'Overview', 'Deposit Account', 'Payment Plan', 'Payment', and 'Account History'. A 'Continue' button is visible on the left, and 'Preferences' and 'Help' are on the right. The main content area contains the instruction: 'Step 1: Select your account and enter the number of the application / unitary patent for which you wish to pay fees, together with your reference.'

Figure 29: Batch payments are uploaded in the "Payment" page in Online Fee Payment

- Select the **Batch payment** option at the bottom of the screen.
- Click **Browse** and navigate to the batch payment files on your computer
- Select the XML file for upload.
The XML file is uploaded to Online Fee Payment for validation. This can take a minute.
- If your debit order is to be executed at a later date, enter the **Deferred execution date** (can be a maximum of 40 days in the future).

i The **payment date** is the date of receipt of the debit order by the EPO (i.e. the date of submitting the batch payment) or the deferred execution date you specify, provided that there are sufficient funds in your deposit account on that date.

→ Click **Continue**.



The screenshot shows the 'Batch payment' form. The 'Batch payment' radio button is selected. The file path is '\\SERVER02\Users\Public\Documents\Multipay Tool\Nano-20160830.xml'. The deferred execution date is set to 30/11/2016. A 'Browse...' button is highlighted in red. Below the form, there is 'Important information' text and a 'Continue' button highlighted in red.

Important information:

- This functionality allows you to indicate explicitly that your payment order is to be executed at a later date than the submission date. In this case, the payment date will be deemed to be the deferred execution date, provided that you have sufficient funds on your deposit account on that date.
- Please choose the deferred execution date option only if the fees are to be debited on a future date, as otherwise the default execution date is today.
- The deferred execution date can be a maximum of 40 days in the future.

Figure 30: Uploading the XML file in Online Fee Payment

- In the next step, check the details of your batch payment.
- To correct your data, click **Back**.
This will remove the uploaded XML file and return you to the **Payment** page, where you can start again.

→ To proceed and submit the batch payment, click **Confirm**.

Step 2: Confirm your batch payment.

The EPO is hereby authorised to debit from deposit account No. 28490000 a total of EUR 3.322.25 on the 30.11.2016

Account holder:	Thomas Miller, NanoSwiss S.A.R.L., Genève, Switzerland
Number of applications and European patents with unitary effect:	3
Reference:	Nano-16-Nov-30
Number of fees selected:	5
Total amount in EUR:	3322.25

Back **Confirm**

Figure 31: Checking and confirming your batch payment

After successful transmission, you will see a summary of the batch payment.

→ To download the confirmation as a PDF file, click the **PDF** icon.

Your batch payment order was successfully transmitted.

On the basis of this debit order, the amount of EUR 3.322.25 will be debited from deposit account No. 28490000 with effect from 30.11.2016, subject to sufficient funds being available in the account.

Account holder:	Thomas Miller, NanoSwiss S.A.R.L., Genève, Switzerland
Number of applications and European patents with unitary effect:	3
Reference:	Nano-16-Nov-30
Number of fees selected:	5
Total amount in EUR:	3322.25

New payment **PDF** Download Preferences Help


Figure 32: Downloading the confirmation of the debit order as a PDF

→ To change the output format for the PDF confirmation, click the **Preferences** icon.

→ Select the option you require:

- **List confirmation (single pdf)**: The first page contains a header with the summary of the batch payment plus general payment and account information. The applications and the selected fees are displayed one after the other in a continuous list. There is one transaction code for all applications at the end of the PDF file.
- **Individual confirmations (single pdf)**: The data for each application starts on a new page. The header contains a summary of the application concerned plus the general payment and account information. The fees for the application are listed below. There is an individual transaction code for each application at the end of each page in the PDF.
- **PDF per application (multiple pdfs)**: The page layout is the same as in the individual confirmation, but you receive an individual PDF file for each application, packed as a ZIP file.

The example below shows a PDF confirmation downloaded with the setting **List confirmation (single pdf)**.



Europäisches Patentamt
 European Patent Office
 Office européen des brevets

Online Fee Payment - Debit Order

Thank you for your order of 10.11.2016 15:26 (GMT+1)

On the basis of this debit order, the amount of EUR 3.322,25 will be debited from deposit account No. 28490000 in respect of the fees listed below with effect from 30.11.2016 subject to sufficient funds being available in the account.

Deposit Account:	28490000
Deposit Account Holder:	NanoSwiss S.A.R.L.
Paid by:	Thomas Miller
Batch reference:	Nano-16-Nov-30
Number of applications:	3
Total number of fees selected:	5
Total Amount in EUR:	3.322,25

Application No.:	EP10800500.0
Reference:	Nano-16-1109

Fee code	Description	Amount EUR
001	Filing fee - EP direct - online	120,00 +
005	Designation fee - For all contracting States designated for applications filed on/after 01.04.2009	585,00 +
006	Examination fee - For applications filed on/after 01.07.2005	572,25 +

Application No.:	PCT/EP2011/223344
Reference:	Nano-01-0034

Fee code	Description	Amount EUR
043	Renewal fee for the 13th year	1.575,00 +

Application No.:	PCT/CH2014/123456
Reference:	Nano-14-0289


Fee code	Description	Amount EUR
033	Renewal fee for the 3rd year	470,00 +

66481D751F7419317D3E0

Figure 33: Viewing the debit order confirmation as a PDF file

If you select **Individual confirmation (single pdf)** or **PDF per application (multiple pdfs)**, the debit order confirmation will also show the due date for each fee. Remember: in the Multipay Tool, the due date is entered in the **Payable by** field and is for your own reference only.

If you entered a deferred execution date in Online Fee Payment, that date will appear in the text above the payment summary. If you did not enter a deferred execution date, the payment date will be identical to the date of submitting the debit order.



Online Fee Payment - Debit Order

Thank you for your order of **10.11.2016** 15:26 (GMT+1)

On the basis of this debit order, the amount of EUR 1.277,25 will be debited from **deposit account** No. 28490000 in respect of the fees listed below for application No. EP10800500.0 with effect from **30.11.2016** subject to sufficient funds being available in the account.

Deposit Account: 28490000
 Deposit Account Holder: NanoSwiss S.A.R.L.
 Paid by: Thomas Miller
 Batch reference: Nano-16-Nov-30

Application No.: EP10800500.0
 Applicant name: NanoSwiss SA
 File Reference: Nano-16-1109

Number of Fees: 3
 Total Amount in EUR: 1.277,25 +

Due date	Fee code	Description	Amount EUR
10.12.2016	001	Filing fee - EP direct - online	120,00 +
10.12.2016	005	Designation fee - For all contracting States designated for applications filed on/after 01.04.2009	585,00 +
10.12.2016	006	Examination fee - For applications filed on/after 01.07.2005	572,25 +

0A58002088503B7589703


Figure 34: The debit orders for each application start on a new page (or in a new PDF file)

6 Importing and exporting data

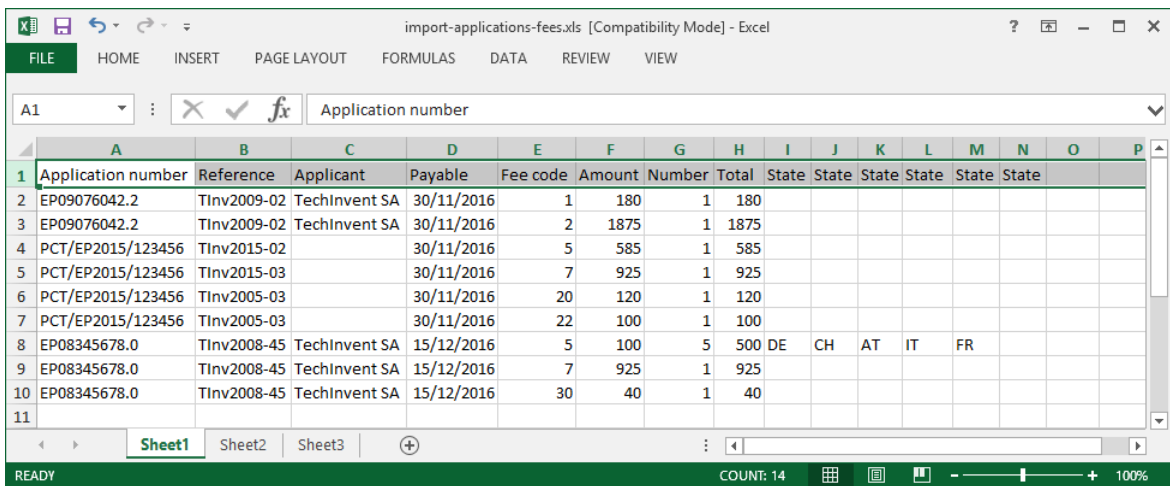
You can use the Multipay Tool to process payment data created with other programs or to export your batch payments for further processing in a patent management system. For example, you can save a Microsoft Excel spreadsheet as a CSV file, import it into the Multipay Tool, save it as an XML file and then upload it to Online Fee Payment.

6.1 Creating CSV files with Microsoft Excel

You can create a spreadsheet for payment data in Microsoft Excel and save it as a CSV file (CSV = comma separated values).

 You can use column headings of your choice in the first row of your Excel spreadsheet as this data is not imported into the Multipay Tool. What is important is to keep to the columns in the correct order.

- In the first 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 must be entered in a separate row, i.e. if more than one fee is to be paid for a particular application, each fee must be entered in a separate row together with the application number.
- Cells for which no information is available are left blank.
- Do not perform any calculations. Calculations are done automatically when the CSV file is imported into the Multipay Tool.
- It is not necessary to include the name of the sender or the deposit account number. This information is taken over from the global settings when the CSV file is imported into the Multipay Tool.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Application number	Reference	Applicant	Payable	Fee code	Amount	Number	Total	State	State	State	State	State	State		
2	EP09076042.2	TInv2009-02	TechInvent SA	30/11/2016	1	180	1	180								
3	EP09076042.2	TInv2009-02	TechInvent SA	30/11/2016	2	1875	1	1875								
4	PCT/EP2015/123456	TInv2015-02		30/11/2016	5	585	1	585								
5	PCT/EP2015/123456	TInv2015-03		30/11/2016	7	925	1	925								
6	PCT/EP2015/123456	TInv2005-03		30/11/2016	20	120	1	120								
7	PCT/EP2015/123456	TInv2005-03		30/11/2016	22	100	1	100								
8	EP08345678.0	TInv2008-45	TechInvent SA	15/12/2016	5	100	5	500	DE	CH	AT	IT	FR			
9	EP08345678.0	TInv2008-45	TechInvent SA	15/12/2016	7	925	1	925								
10	EP08345678.0	TInv2008-45	TechInvent SA	15/12/2016	30	40	1	40								
11																

Figure 35: Sample Excel table with payment details before saving as CSV file

When the data table is ready, you can proceed to save the Excel spreadsheet as a CSV file.

- ➔ In the Microsoft Excel menu, select **File > Save as**.
- ➔ Browse to the folder on your computer or in the network where you wish to store the file.
- ➔ In the **Save as type** list, select the option **CSV (Comma delimited) (*.csv)**.
- ➔ Click **Save**.

Only the first sheet of the Excel workbook is included in the CSV file.

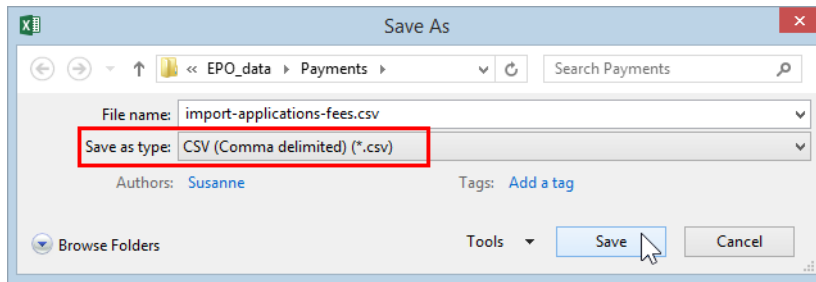


Figure 36: Saving the Excel file as CSV file

Order and formatting of columns in Excel sheets

Column No.	Contains	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	Number	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 Number column.	Text



The due date (in the **Payable** column) is presented on the debit order confirmations for information purposes only and does not correspond to the payment date.

6.2 Importing CSV files

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

→ Select **File > Import CSV** from the menu.

The **Import CSV** window appears.

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

i The default field separator in CSV files used by the EPO is the semicolon (;). If your computer is running with a German or French operating system and you save a CSV file with Excel, semicolons will be applied as field separators. However, if your operating system's language is English, Excel will normally use commas as separators.

→ To select your CSV file, click the  button.

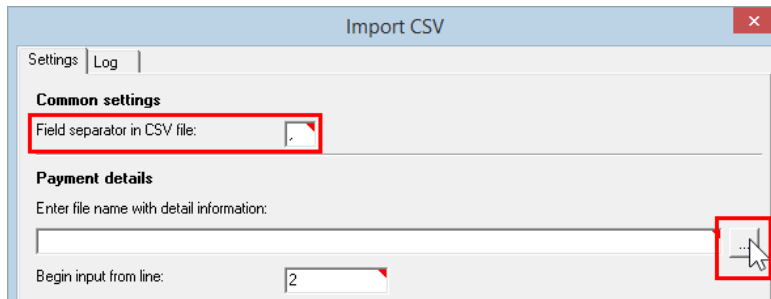


Figure 37: Import CSV window

The **Select file with detail info** window opens.

→ Navigate to the relevant CSV file and select it.

→ Click **Open**.


The full path to the CSV file is now shown in the **Import CSV** window.

→ If the data in your CSV file does not start in line 2, enter the correct line number in the **Begin input from line field**.

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

→ To store the resulting XML file in the working directory, enter a name of your choice in the **Save resulting xml file as** field.

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

→ To store the resulting XML file in a location different from the working directory, click the  button.

– In the **Save result as** window, navigate to the appropriate folder.

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

The full path to the resulting XML file is now shown in the **Import CSV** window.

→ Click **Import CSV**.

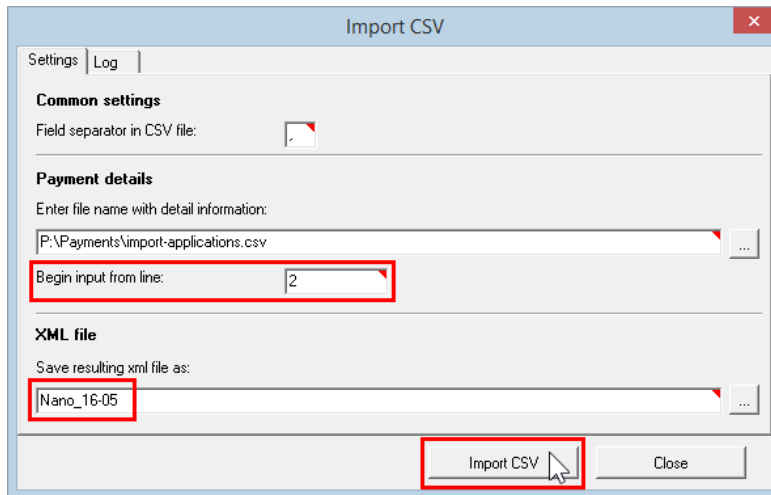


Figure 38: Full details of the CSV file import entered

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

→ Click **Close**.

The imported batch payment (i.e. the XML file) opens in the Multipay Tool and can be edited further.

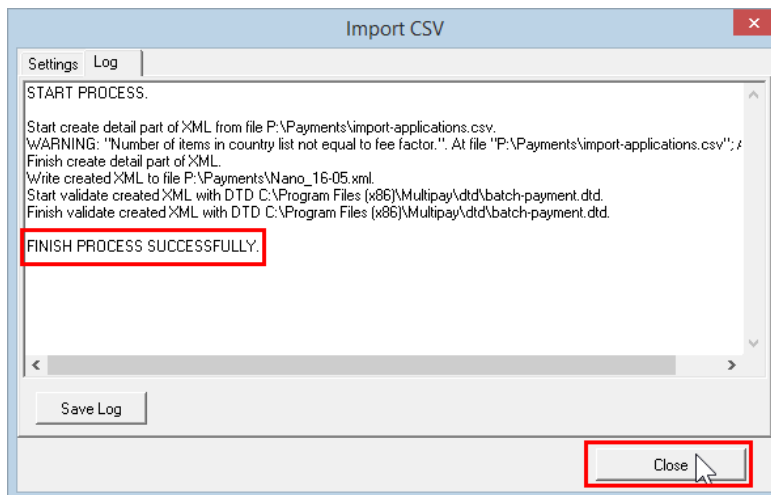


Figure 39: CSV file import successful

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 **Save Log**.

→ Select a folder and change the file name if required (default **C:\Program Files (x86)\Multipay\Multipaytool.log**).

Errors due to invalid field separator

If the field separator in your CSV file does not match the field separator that you indicated in the **Import CSV** window, the data in the CSV file cannot be processed by the Multipay Tool. In the example below, the application numbers appear as invalid because the fields in the CSV file are separated by semicolons and not by commas. The file appears as if it is empty and you will see a corresponding message.

→ Click **OK**.

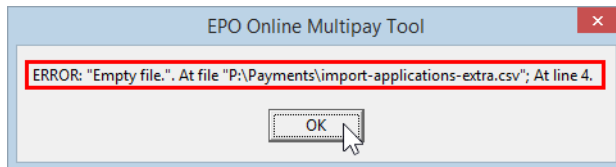


Figure 40: Error message: Empty file

The import process is terminated and the error log opens.

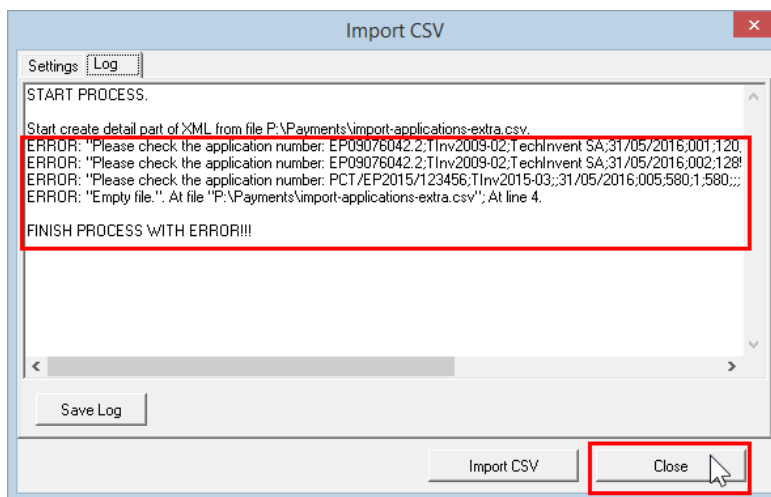


Figure 41: Error message in log

6.3 Importing a list of application numbers

Instead of importing payment details in full using a CSV file, you can import a list of application numbers and use the Multipay Tool to add the fee details. You can create the list with Microsoft Excel or, alternatively, with a plain text editor, e.g. Notepad.

→ Enter the application numbers in an Excel spreadsheet or in a plain text file using a new line for each number.

→ Save the list as a CSV file.

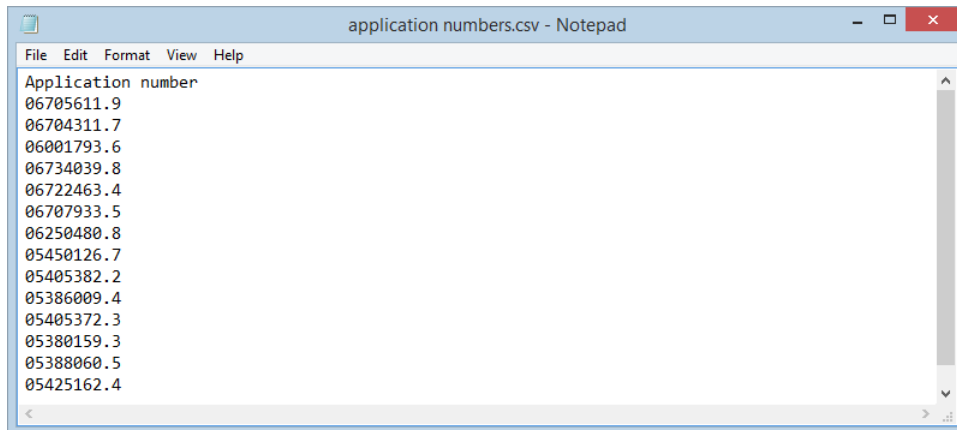


Figure 42: List of application numbers saved as a CSV file in Notepad

Applying 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 [Applying customised fee filters](#) (p. 22).
- Import the CSV file (containing your list of application numbers) 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 batch payment file.

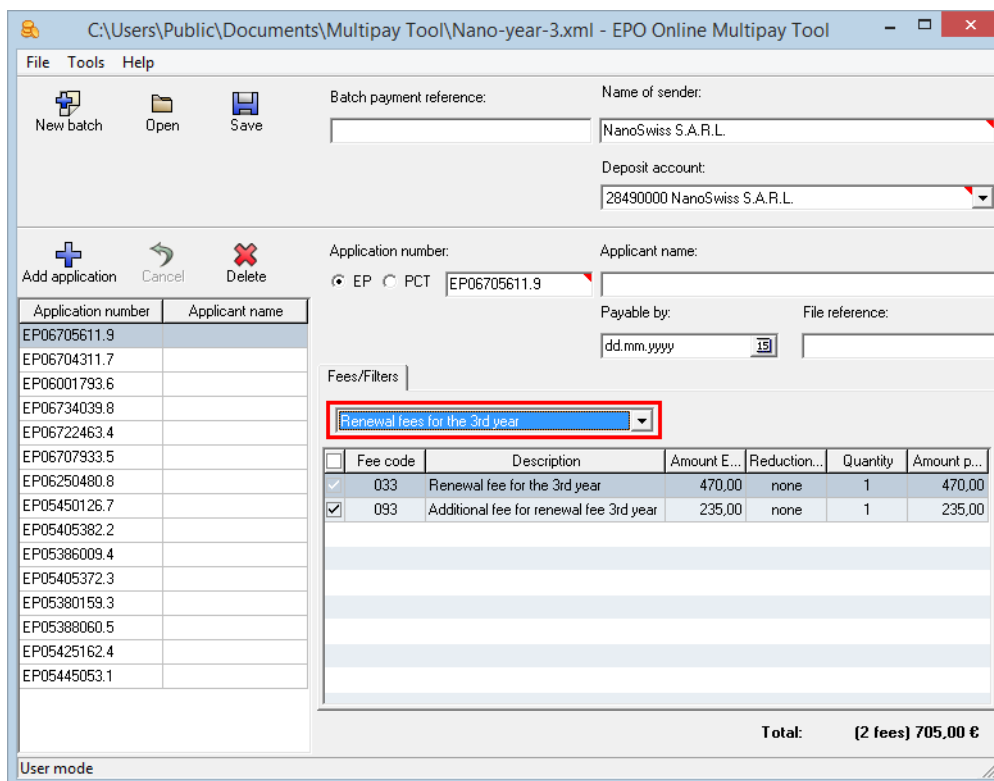


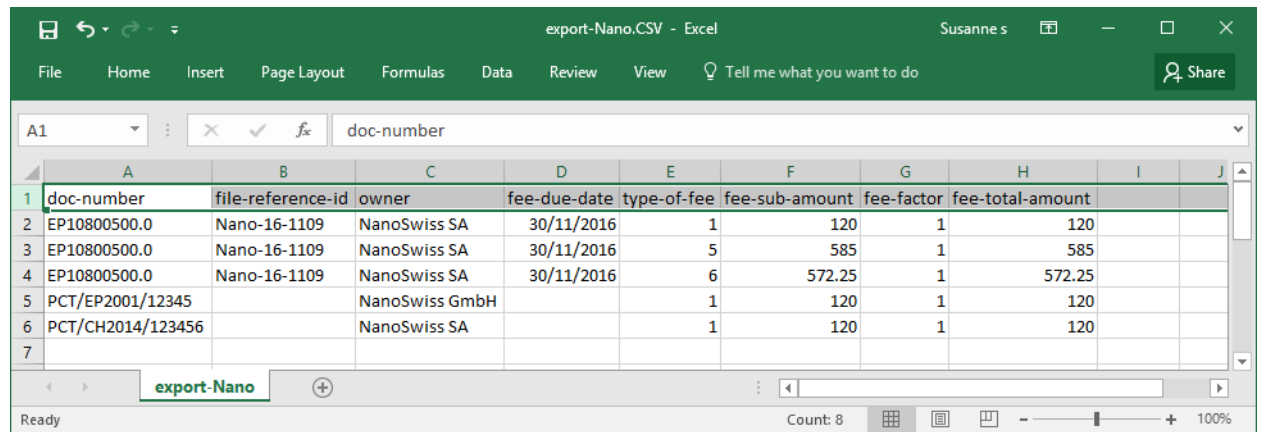
Figure 43: Selecting a customised fee filter

6.4 Exporting batch payments as CSV files

The Multipay Tool allows you to export your XML files as CSV files so that you can process them further in other programs.

- Open the batch payment to be exported.
- Select **File > Export CSV** from the menu.
- Save the file in a folder of your choice.
- Open the CSV file in a suitable program for further editing, e.g. 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	I	J
1	doc-number	file-reference-id	owner	fee-due-date	type-of-fee	fee-sub-amount	fee-factor	fee-total-amount		
2	EP10800500.0	Nano-16-1109	NanoSwiss SA	30/11/2016	1	120	1	120		
3	EP10800500.0	Nano-16-1109	NanoSwiss SA	30/11/2016	5	585	1	585		
4	EP10800500.0	Nano-16-1109	NanoSwiss SA	30/11/2016	6	572.25	1	572.25		
5	PCT/EP2001/12345		NanoSwiss GmbH		1	120	1	120		
6	PCT/CH2014/123456		NanoSwiss SA		1	120	1	120		
7										

Figure 44: Exported data as CSV file in MS Excel

6.5 Importing diskette data

The Multipay Tool allows you to import diskette data files and convert them into XML files. Diskette data files are plain text files coded in a specific format, e.g. created by patent management systems.

- Select **File > Import diskette** from the menu.
The **Import diskette** window opens.
- Click the button next to the **Enter file name with detail information** field.
The window **Select file with detail info** opens.
- Select the file you wish to import.
Possible file types include **TXT**, **DAT** and **CPA** (depending on the software used to create the file).

→ Click **Open**.

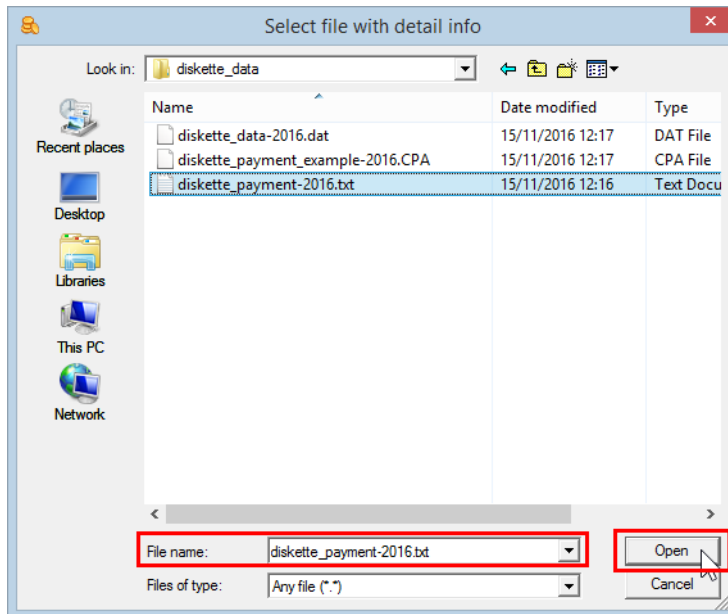


Figure 45: Selecting a file for diskette import

- In the **Save resulting xml file as** field enter the name of the new XML file.
The Multipay Tool will save the XML file in the default working directory. You can change the target file location; see [Importing CSV files](#) (p. 31).
- Click **Import diskette**.

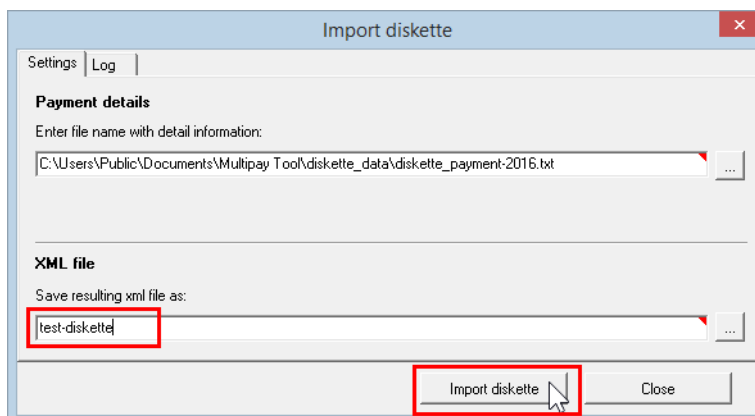


Figure 46: XML file name entered

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

→ Click **Close**.

The imported diskette data (i.e. the XML file) opens in the Multipay Tool where it can be edited further.

7 Updating the Multipay Tool

The Multipay Tool should be updated at regular intervals, particularly to install the most recent fee schedule or to apply software patches. The Live Update function in the Multipay Tool helps you to keep the software up to date.

In its default setting **Live Update** will automatically check for updates on the EPO's server every day. So each day, when you start the Multipay Tool for the first time, a dialog window opens.

→ Click **Yes** to run Live Update.

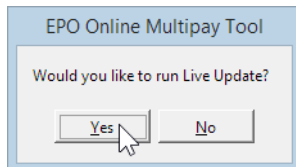


Figure 47: Run Live Update when the Multipay Tool is started

If you do not want to be reminded every day or if your company administrator controls all updates centrally, you can change the settings; see [Configuring Live Update](#) (p. 38). If required, you can start the live update manually at any time; see [Manual Live Update](#) (p. 39).

7.1 Configuring Live Update

You can change the settings for software updates in the Multipay Tool.

- Select **Tools > Live Update** from the menu.
The **Live Update** window opens.
- To disable Live Update, clear the **Enable software update system** check box.
This will stop the Live Update check from running when you start the Multipay Tool.
- To change the frequency for the Live Update check, enter the appropriate value (i.e. number of **days**) in the **Check for update every** field.
- If your PC connects to the internet via a proxy server, enter the details under **Proxy settings**.
 - Contact your IT department for details if you do not know the proxy settings.

→ To activate the new settings, click **Save**.

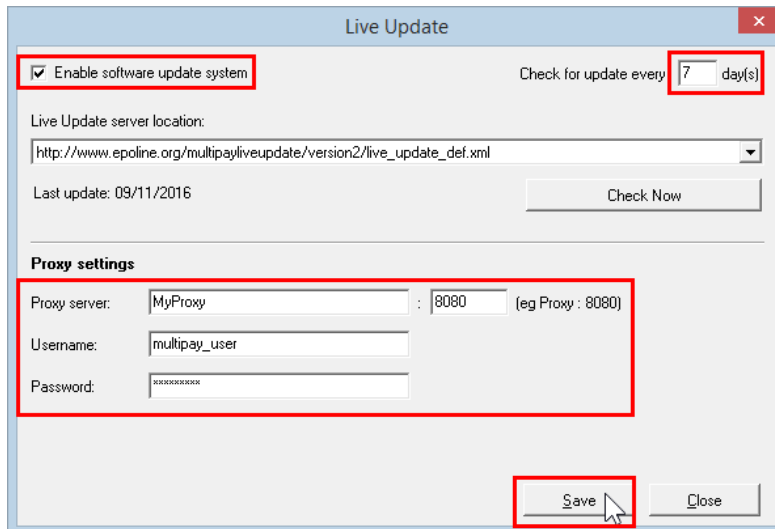


Figure 48: Settings for Live Update

7.2 Manual Live Update

Irrespective of your settings for the automatic Live Update, you can start the update manually at any time.

- Select **Tools > Live Update** from the menu.
- In the **Live Update** window, click **Check Now**.

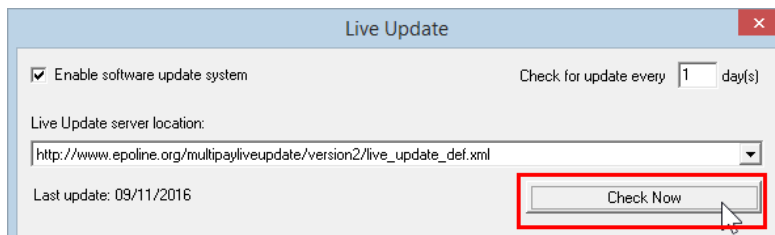


Figure 49: Performing a manual Live Update

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

- Proceed as described in [Performing Live Update](#) (p. 39).

7.3 Performing Live Update

If Live Update finds new updates on the EPO server, a message appears.

- To download the updates now, click **Yes**.

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

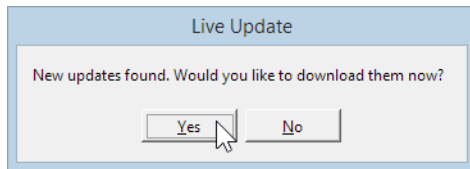


Figure 50: New updates available for download

The available updates are listed with the status **New**.

→ Select the relevant update and click **Download**.

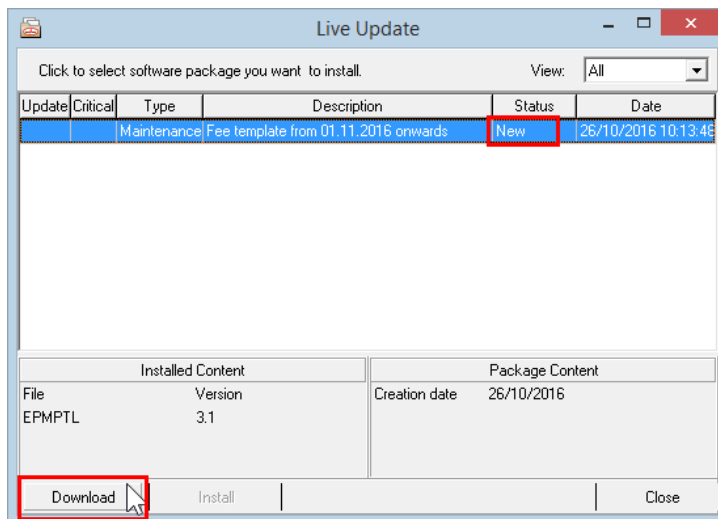


Figure 51: Downloading an update

- Click **OK** in the download complete message.
The update is now shown with the status **Downloaded**.
- If you do not want to install the update now, click **Close**.
You can install downloaded updates at a later date.
- To perform the update now, click **Install**.

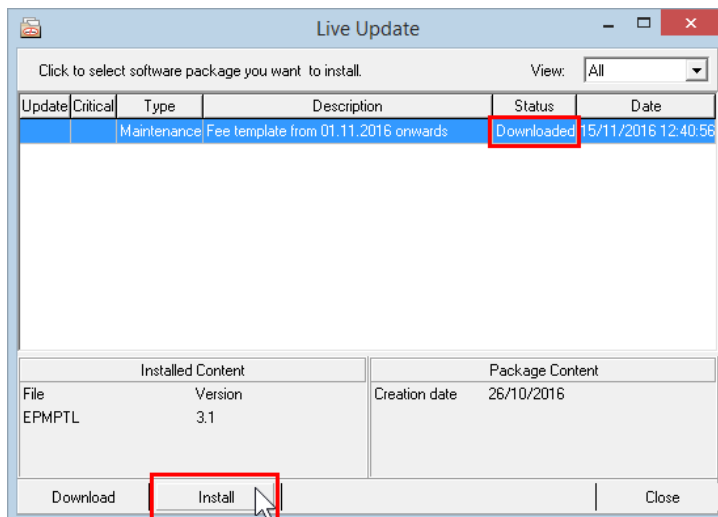


Figure 52: Installing a downloaded update

On successful completion of the installation a message appears.

→ Click **OK**.

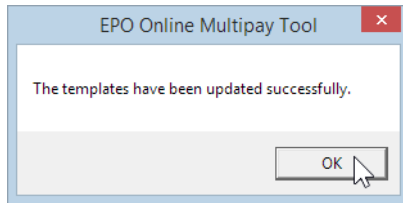


Figure 53: Update successfully completed

→ Back in the **Live Update** window click **Close**.

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