



Unified Patent Court
Einheitliches Patentgericht
Juridiction unifiée du brevet

GUIDE FOR EXTERNAL USERS

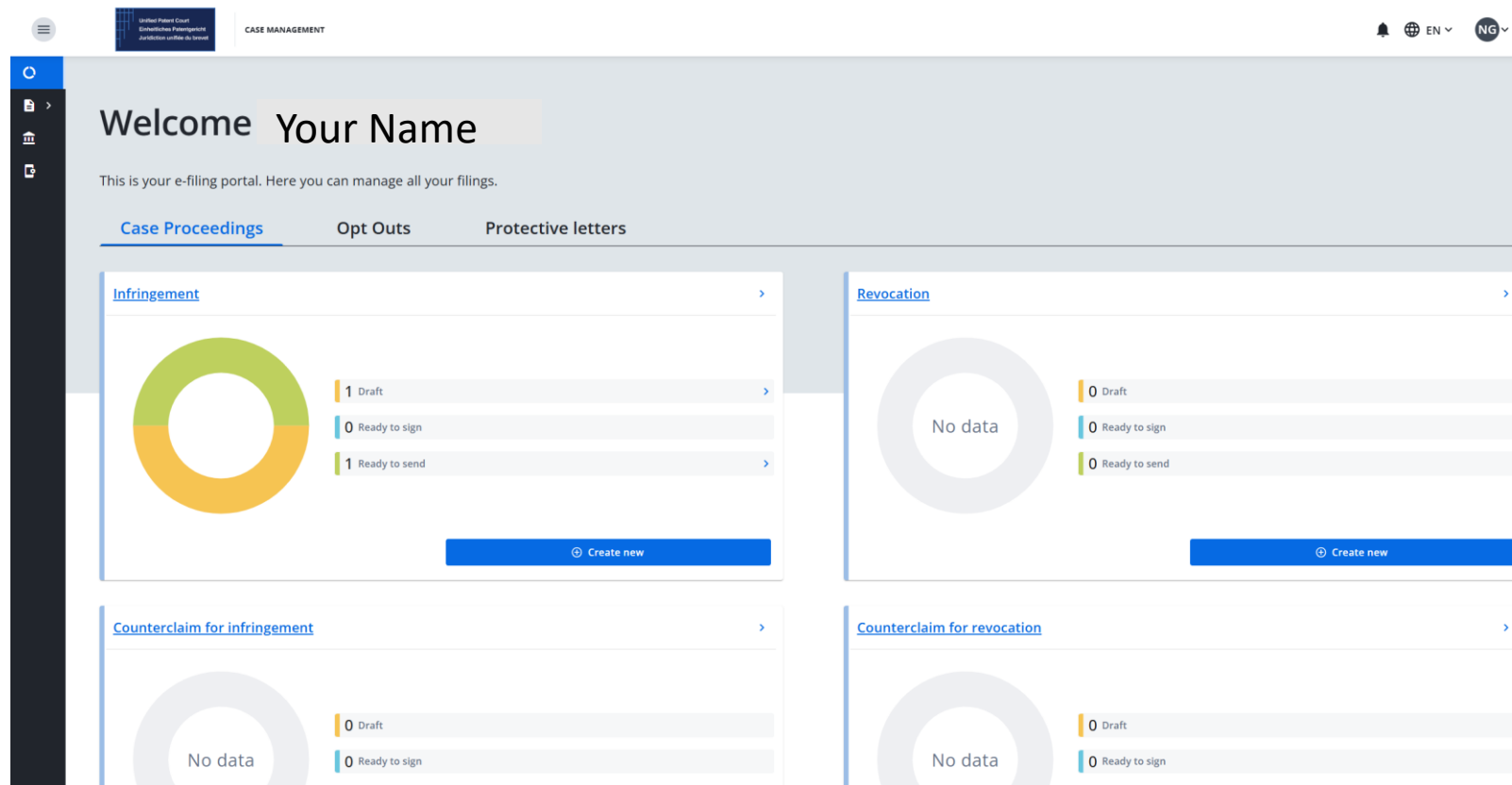
NEW CMS Training

How to create an organisation or a legal team

July 2025

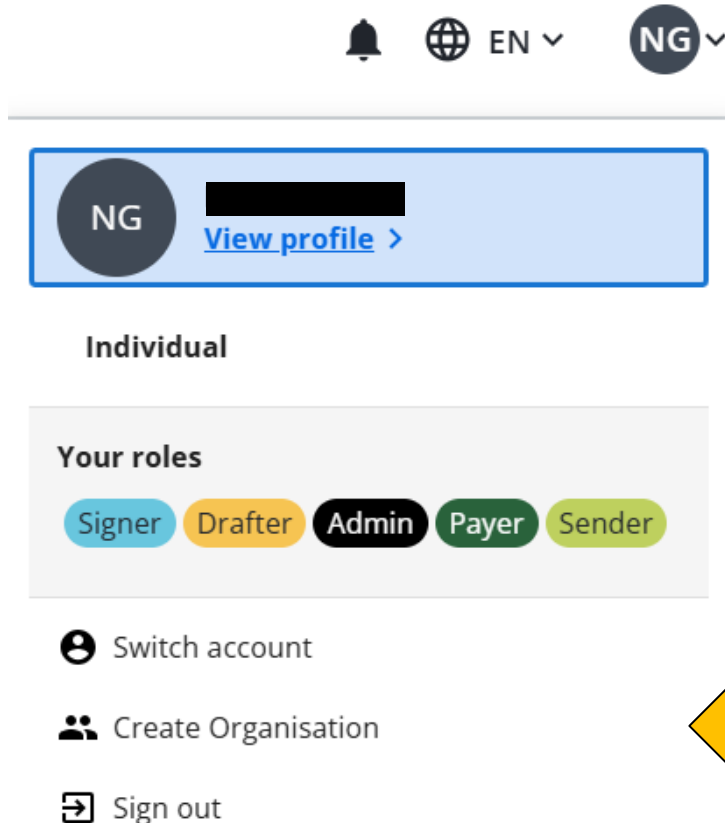
How to create an organisation or a legal team

When logging into your **e-filing** (Front Office) CMS account, you will have the following overview page:



Click on the symbol with your initials and expand it.

How to create an organisation



At first, you are logged in as an individual. You can now create your organisation so you will be able to work on cases together with your colleagues. To start, click on “Create organisation”.

The screenshot shows a web interface for creating a new organisation. At the top, there is a dark blue header with the text 'Unified Patent Court', 'Einheitliches Patentgericht', and 'Juridiction unifiée du brevet'. Below this, a navigation bar contains a hamburger menu icon, a 'CASE MANAGEMENT' tab, and a breadcrumb trail: 'Dashboard > User profile'. The main content area is titled 'New organisation' and includes a sub-header 'Organisation information'. Below this, there are two text input fields: 'Organisation information' and 'Description'. At the bottom, there is a section titled 'Choose accent colour' with a sub-note: 'This colour will be used to display your organisation name on the navigation bar.' Below the note are six colored circles: blue, pink, green, orange, yellow, and grey. The blue circle is selected.

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CASE MANAGEMENT

Dashboard > User profile

New organisation

On this page you can create a new organisation. You can later edit this information in the organisation page.

Organisation information

Organisation information

Description

Choose accent colour

This colour will be used to display your organisation name on the navigation bar.

● ● ● ● ● ●

How to create an organisation

Under “Organisation information”, you can add **the** name you wish to give to your organisation. Then, add a short description.

As an option, you can choose an accent colour to appear in your navigation bar.

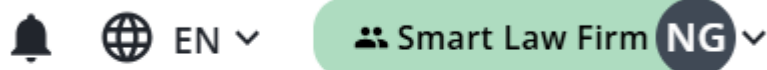
When finished, click “Create Organisation” in the bottom right corner.

How to create an organisation

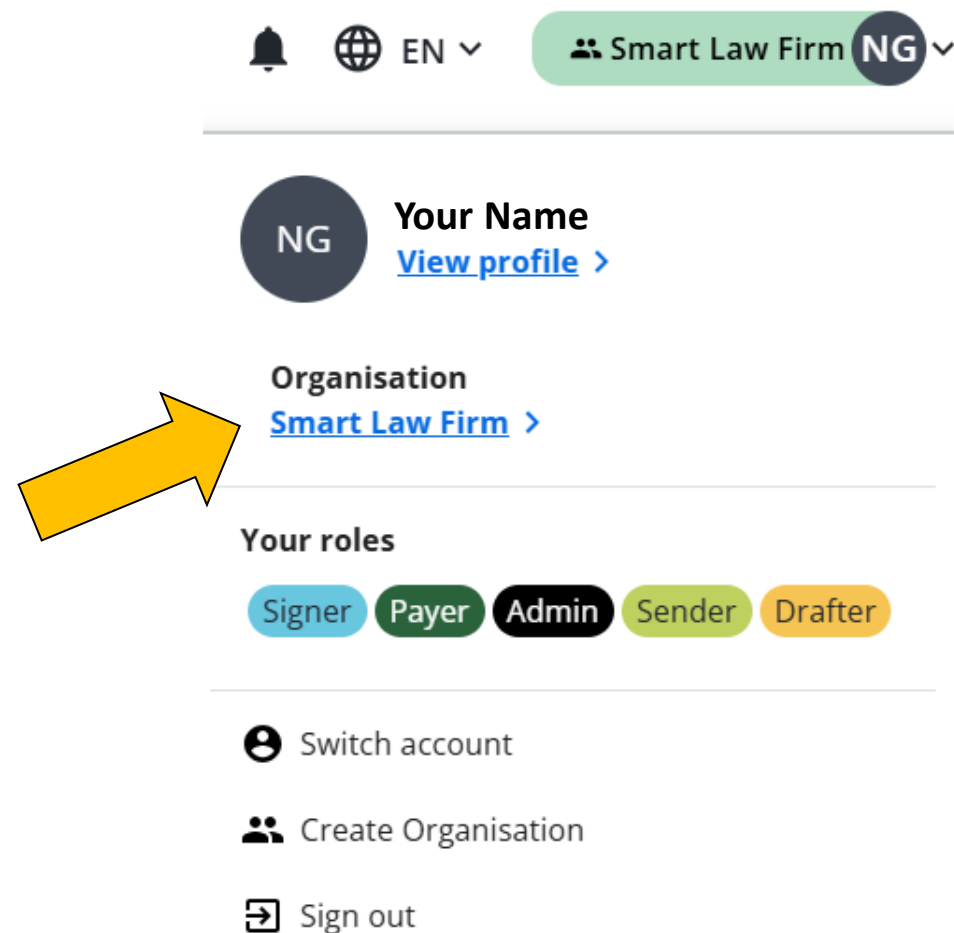
Manage your organisation

Now you can add members to your organisation.

To do so, click on the symbol in the top right corner of your screen.



Then click on the name of your organisation as pictured on the right.



How to create an organisation

Manage your organisation

You will now see an overview of your organisation with you as the only member so far.

The first step should be, if needed, to edit your own information. To do this, click on the pencil symbol.

My organisation

Smart Law Firm

Admin

NG

Your Name

Collaboration on Cases

Members

Manage invitations

Invite Members

Filters

Name	Email	Roles	Edit	Remove	View
		<div>Sender</div> <div>Signer</div> <div>Payer</div> <div>Admin</div> <div>Drafter</div>			

Rows per page 10 Showing 1-1 of 1 results

Edit Organisation



How to create an organisation

Edit your user profile

You will now see your user profile.

If you are eligible to be a representative before the Court, make sure to **first** file your registration request.

If you are already registered, you will see the "Representative" role, in your list of roles.

Representative

The screenshot shows the 'User profile' page of the Unified Patent Court system. The page has a dark sidebar on the left with icons for home, documents, and user profile. The main content area has a header with the court's name and 'CASE MANAGEMENT'. Below the header, there's a breadcrumb 'Dashboard > User profile' and a title 'User profile'. A sub-header states: 'On this page you can view and edit all the details regarding personal profile.' The main content is divided into two sections. The first section, 'User details', contains 'Personal information' with fields for 'First name' and 'Last name', both of which are redacted with black boxes. The second section, 'Account verification for eligibility to file with the UPC', contains a sub-header 'Verify your account for eligibility to file with the UPC' and a list of roles with checkboxes. The roles are: 'Article 48(1), Lawyer authorized to practice in contracting Member States', 'Article 48(2), Patent Attorney with EPLC-EPLC Decision Rule 1', 'Article 48(2), Patent Attorney with Law Diploma-EPLC Decision Rule 11', 'Article 48(2), Patent Attorney with other qualifications-EPLC Decision Rule 12.1 (a)', and 'Article 48(2), Patent Attorney who satisfies the requirement of EPLC Decision Rule 12.1 (b)'. All checkboxes are currently unchecked.

Unified Patent Court
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CASE MANAGEMENT

Dashboard > User profile

User profile

On this page you can view and edit all the details regarding personal profile.

User details

Personal information

First name [Redacted] Last name [Redacted]

Account verification for eligibility to file with the UPC

Verify your account for eligibility to file with the UPC

Select type of justification

- ☐ Article 48(1), Lawyer authorized to practice in contracting Member States
- ☐ Article 48(2), Patent Attorney with EPLC-EPLC Decision Rule 1
- ☐ Article 48(2), Patent Attorney with Law Diploma-EPLC Decision Rule 11
- ☐ Article 48(2), Patent Attorney with other qualifications-EPLC Decision Rule 12.1 (a)
- ☐ Article 48(2), Patent Attorney who satisfies the requirement of EPLC Decision Rule 12.1 (b)

How to create an organisation

Edit your user profile

When scrolling further down, you see your organisation and all the roles that have been automatically assigned to you when you created the organisation.

To edit your roles, click on the pencil on the righthand side.

Organisation

Organisation

[Smart Law Firm](#) >

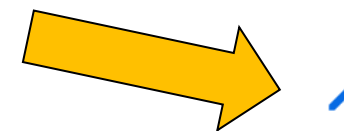
Roles

Sender Signer Payer Admin Drafter

Remove user from organisation

Removing this user from your organisation, will make him lose access to all the information linked to this organisation.

× Remove from organisation




How to create an organisation

Edit your user profile

Now you can remove the roles that you do not need and click “Save changes” once finished.

Organisation

 Save changes

Organisation

[Smart Law Firm](#) >

Roles

- ☒ Drafter
- ☒ Signer
- ☒ Sender
- ☒ Payer
- ☒ Admin

Remove user from organisation

Removing this user from your organisation, will make him lose access to all the information linked to this organisation.

Now you can invite colleagues to your team. You can assign roles to them when issuing the invitation. Please note: If you invite multiple people at once, they will all have the same roles. If this is not desired, you can either invite them individually or edit their roles later in the same way that you were able to edit yours in the previous step.

Please note you **cannot assign the "Representative's role"** as this can only be done via a formal registration procedure, as foreseen in the Agreement and relevant Rules.

How to create an organisation

Invite Members

Invite members

To invite members to join your organization in Front Office, please enter their email address and click enter. Please note that when adding multiple users, they will have the same roles.

Roles

- ☐ Drafter
- ☐ Signer
- ☐ Sender
- ☐ Payer
- ☐ Admin

Cancel

Confirm

How to create an organisation

Invite Members

After you have invited team members, you will find them under “Manage invitations”. As long as their invitation is still pending, you can resend or remove the invitation. Once they have accepted, you can edit their information under “Members”, provided you have admin rights.

My organisation

Smart Law Firm

Admin

NG

Natalie Gnass

Collaboration on Cases

MembersManage invitations

Invite Members

Filters

Email	Name	Roles	Status	Resend	Remove
<input type="checkbox"/> eurico.igreja@unifiedpatentcourt.org	eurico.igreja@unifiedpatentcourt.org		Pending	>	×
<input type="checkbox"/> frontoffice-test-1@test.epo.org	frontoffice-test-1		Pending	>	×

Rows per page 10 Showing 1-2 of 2 results

<<< 1 of 1 >>>

Edit Organisation

How to create an organisation

After creating your organisation(s), you can select the desired account you wish to start your filing from.

If you are planning to file sensitive information which should not be accessible to every member of your organisation, you are advised to use your individual account.

[Dashboard](#) > Switch account

Select an account to sign in

0 06b3f75e-14f2-4a7f-ad04-064321ac30f8

Individual account

Sender Signer Payer Admin Drafter

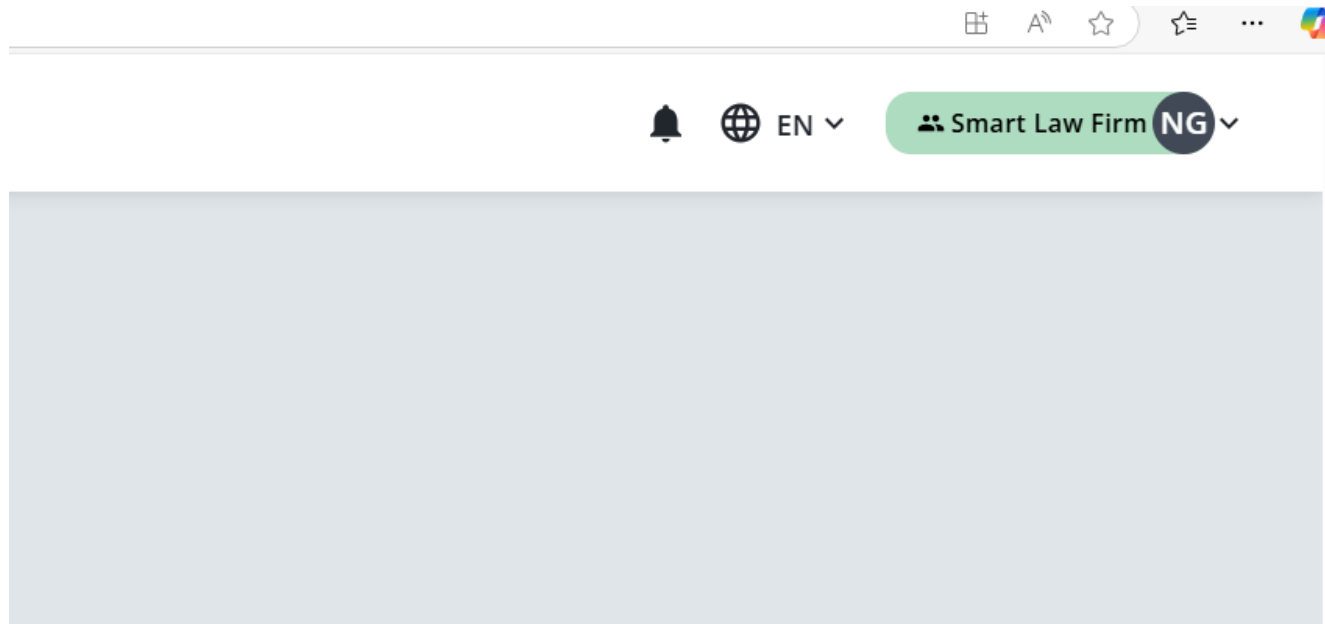
S Smart Law Firm

Organisation account

Sender Signer Payer Admin Drafter

How to create an organisation

After having chosen an account to log in with, you are redirected to your e-filing portal. You can see in the top right corner of the page which account you are currently using. **When navigating to your "Portfolio" view, you will view all cases managed by this chosen organisation/account.**



How to create an organisation

Invite External Members

If you are collaborating on a case with representatives from other companies or law firms, you can invite them to your organisation too.

In this case it is very important that you make sure you are using the right account when you are creating a new or working on an existing case. **Whichever action you perform while using an organisation's account, will be visible to all members of that organisation**, no matter if they usually work with you or for another law firm. An exception to this rule are documents filed by the opposing party and which have been classified as "restricted" (i.e. subject to a so-called "confidentiality club"). These documents are visible only to those members of an organisation **which are registered representatives**.

***Please note that more information will be provided on confidentiality codes at a later stage, in view of the full roll out of the new CMS.**

How to create an organisation

Create multiple organisations

Starting from your individual account, you can create multiple organisations as outlined above. Please take care at all times that you are using the desired one for a given filing . **Please note we strongly advise not to create more than 5 organisations.**

[Dashboard](#) > Switch account

Select an account to sign in

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Individual account

Sender Signer Payer Admin Drafter

S Smart Law Firm



Organisation account

Sender Signer Payer Admin Drafter

C Case 12345 Infringement Action



Organisation account

Sender Signer Payer Admin Drafter

General remarks:

- Please think about refreshing your page should you not find the same option to move forward with your applications as shown in this presentation.
 - UPC Website : [New CMS | Unified Patent Court](#)
 - New CMS Filing platform : Coming Soon
 - New CMS Portfolio : Coming Soon
-



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Thank you for your attention!
