

Max-PAIR

PRE-REQUISITES  
AND  
INSTALLATION

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MaxVal



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## MAX-PAIR PRE-REQUISITES

Before installing Max-PAIR, you need to satisfy the following pre-requisites. Some of the pre-requisites are about information you need to have (such as email configuration information from your IT administrator).

### *Pre-requisites:*

1. .Net Framework 2.0: While installing Max-PAIR, it checks whether the machine has the .Net Framework installed, if not Max-PAIR downloads and installs it in that machine.
2. Windows XP, Windows Vista or Windows Server 2003: Max-PAIR has been tested and is supported on these two desktop Operating Systems. Windows Vista SP1 and latest updates: If you are running Windows Vista, ensure that you have all the required updates and Vista Service Pack 1 installed. Go to <http://support.microsoft.com/kb/935791/> to get these.
3. Browser Java plug-in: You can log in to the USPTO Private PAIR site with your certificate and password and make sure that you can view your applications and the IFW files. If java plug-in is not already installed, the USPTO site will prompt you to install the browser Java plug-in.
4. Administrator rights: Ensure that you have administrator rights on your computer.
5. Internet Explorer (IE) browser version 6 or 7 for accessing the Max-PAIR web site. Other browsers are not supported.
6. USPTO Private pair certificate (epf file)
7. Password for the above certificate. As described in step 3 above, ensure that you can use your certificate and password to log in to USPTO Private Pair and view your applications and IFW files.
8. If you want Max-PAIR to use your own outgoing Email (or SMTP = Simple Mail Transfer Protocol) server instead of the default MaxVal server you will need the following pieces of information (possibly from your IT administrator) for your SMTP server:
  - SMTP server fully-qualified domain name e.g. smtp.mycompany.com. This could also be an IP address e.g. 192.168.1.23
  - Port number. The default value is 25.
  - If your SMTP server requires SSL or not.

- Username and password to log in to the SMTP server if the server requires authentication

9. If you are going to use the new feature of "Application Settings", ensure that you have MS office installed and you should prepare Excel file (e.g. public.xls under My Documents) that contains the list of Public PAIR application numbers you would like Max-PAIR to watch. Similarly one can create Excel file (e.g. private.xls under My Documents) that contains the list of Private PAIR application numbers you would like Max-PAIR to watch.

The Excel file should contain application numbers (except '/' or ',', no other special characters are allowed) in first column of the first sheet (one application number per cell) and also it should be saved with .xls extension.

## SIGN UP FOR THE MAX-PAIR SERVICE

**Step 1:** Go to <http://maxpair.maxval-ip.com/Login.aspx> and click on the "Sign Up" button in the top right corner of the page.

**Step 2:** Fill in the Registration page:

- A field with a "\*" next to it, is a mandatory field.
- Make sure you put your correct email address in the "Logon Email" field. This email address will be used by Max-PAIR to send registration confirmation email to you. Also your email address is the "Customer ID" you use to log in to the Max-PAIR desktop tool.
- The password you enter has to be at least 6 characters long and should include both alphabetic and numeric characters. You will use this password to log in to the Max-PAIR desktop tool.

**Step 3:** After you click on "Register", a registration confirmation email is sent (provided registration was successful) to the email address you specified as your Logon Email address.

**Step 4:** Go to your email client (account) to read the registration confirmation email. Click on the link included in the email. You should see a registration successful page. At that point you are also automatically logged in to the Max-PAIR web account.

## DOWNLOAD AND INSTALL THE MAX-PAIR DESKTOP TOOL


**Step 1:** Once you are logged in to the Max-PAIR web account you will be able to download the desktop tool. In the home page, click on the "Download" button on the right hand side (under the caption "Experience the difference today").

**Step 2:** You will be redirected to the download page. Click on the link labeled Max-PAIR in the first column of the table.

**Step 3:** You will be prompted to download the file Max-PAIR.msi. Download and save this file in a folder.

**Step 4:** Double click on the file Max-PAIR.msi you just downloaded to run the installer.

**Step 5:** Follow the installation prompts: Max-PAIR will be installed on your machine.

**Step 6:** You will be able to launch Max-PAIR from Start -> All Programs -> MaxVal -> Max-PAIR. Once Max-PAIR is running you will be able to see the Max-PAIR icon in your System tray (  yellow box with a thick blue arrow pointing downwards).

## CONFIGURE YOUR MAX-PAIR DESKTOP TOOL

**Step 1:** Right click on the Max-PAIR System tray icon and select the menu option "Manage". Log in to the screen using your email address in the "Customer ID" field and the password you provided on the registration page.

**Step 2:** Once you are in, click on the Settings button at the top.

**Step 3:** To use the new feature of "Application Settings" (top right panel)

- Third Party Applications (Public PAIR Application).

Enter or browse the location of the file that contains the Public PAIR application numbers you want to watch. You should have prepared this file as per the pre-requisite#9 mentioned above.

- Applications Associated with Certificate (Private PAIR Application).

Select the radio button "Retrieve only applications of interest from the attached Excel". Enter or browse the location of the Excel file with Private PAIR application numbers you would like to watch. You should have prepared this file as per the pre-requisite#9 mentioned above.

Also note that you need to do this step before filling in any other information in the Settings screen.

**Step 4:** In the settings screen, provide the path to your USPTO Private PAIR certificate using the browse button. Also provide the password for this certificate.

**Step 5:** In the Mail server settings section enter the following information (unless you have your own SMTP server in which case you can enter the information for that server):

- **Maxval Server Settings:** Server = mail.maxval-soft.com, port = 25, Requires SSL should be unchecked, Username = maxpair@maxval-soft.com, password = Maxvalpair



- **Gmail Server Settings:** Server = smtp.gmail.com, port = 587, Requires SSL should be checked, Username = maxpair@gmail.com, password = Maxvalpair
- You can enter your own email address as "From Mail Id". Similarly you can enter your actual name in the "Name" field. The Max-PAIR alert emails will show up as coming from the name and email address you specify here.

**Step 6:** You can change the update time (daily update start time).

**Step 7:** To use new feature of "Advanced Settings" (bottom right panel)

- **E-mail Attachment**  
Check the box "E-mail Attachment", if you would like to receive updates mails with Excel file attachment. This Excel file will be populated with updates of the particular customer in a predefined format.
- **Status Changes**  
Check the box "Status Changes", if you would like to receive update mail based on USPTO "Applications with status changes" option. This will reduce the application's scraping time.

**Step 8:** After first time setting, please click Save & Start Update. Max-PAIR will download your Private PAIR and Public PAIR information (as per your settings) from the USPTO site. This will take some time depending on the number of clients and applications associated with your certificate and Excel file (if any). Progress is shown in the progress bar as well as the system tray icon.



**Step 9:** Once all the application data is downloaded, go to the Private PAIR -> Unwatched Private PAIR Applications to see the clients and applications associated with your certificate. You can select the Private PAIR applications you want to monitor and click the Add Applications button. This will move the applications from the current display and will add in the Watched Private PAIR Applications tab. Similarly you can select the Public PAIR applications from Public PAIR tab. Sum of the watched Private & Public PAIR applications should not be more than the Total Number of Applications allotted to your Max-PAIR account (Home -> Your Subscription -> Total Applications).

**Step 10:** Go back to the Settings page and click on the Recipients tab. You can create a list of recipients (name and email address) that should be getting Max-PAIR alerts.

**Step 11:** Go to Settings -> Email Association tab to specify which recipients should get which client's Max-PAIR alerts. Select a client from the drop down list at the top and for that client move the email addresses from the left to the right pane to add (using the right arrow between the panes). Select Email frequency and specify the Email subject line. Click Save to save the information for this client. Repeat this exercise for other clients if required.