DemandFlow Patent Management

DEMANDFLOW®

Portfolio, docketing, renewals, costs, inventors and Patent Box on one record set

DATA SHEET

Most in-house IP teams run the portfolio from a spreadsheet and an inbox. Deadlines are worked out by hand from the rules the clerk remembers, renewal fees arrive as agent invoices nobody has questioned, the five-year cost is a guess, and the finance team asks for the Patent Box evidence every year as if for the first time.

DemandFlow® holds every patent, family, application, inventor, claim, deadline, renewal, cost, document and instruction as linked records. A shared library of versioned docketing rules turns each filing, publication, office action and grant date into the deadlines it creates, a daily sweep reminds and escalates, the renewal board puts the cost to expiry and the products protected beside every renew or abandon decision, and finance sees budget against actual, a forecast by jurisdiction and a Patent Box pack for the accounting period.

What it is

A patent management module for in-house IP managers, paralegals and finance teams: patent, family and jurisdiction application records with a full lifecycle from disclosure to grant and expiry; a 47-rule docketing library covering EP, GB, US and PCT with tenant approval and internal offsets; server-side deadline recomputation and two-person verification; daily reminders at 90, 60, 30 and 7 days with escalation to the manager and the IP lead; office imports from EPO OPS and USPTO ODP with a review inbox; renewal decisions with chasing and an instruction file for the renewal agent; costs, fee library, annuity forecast and pruning; inventor reward schemes with statutory regimes; a UK Patent Box pack; a counsel portal and an inventor portal; and a portfolio export.

It sits inside DemandFlow, so inventors are your staff records, attorneys and renewal agents are your vendors, office actions raise tasks for the handler, and costs roll up in GBP with the same monthly rates the rest of the platform uses.

What an IP team gets

- **Deadlines from rules, not memory.** 47 versioned rules for EP, GB, US and PCT renewals, maintenance fees, national phase entry, priority, validation and office action responses, each with its calendar convention, extension, grace and surcharge.
- **Recomputed on every change.** When a filing, priority, publication, search report, office action or grant date changes, the deadlines are recomputed server side and patched in place, never duplicated.
- **Reminded and escalated.** A daily sweep emails at 90, 60, 30 and 7 days, on the due date and the first overdue day, then weekly; the manager is escalated after 1 day and the IP lead after 7.
- **Renewals decided with the facts in view.** Cost now, saving if abandoned to expiry, live family members, protected products and a pruning score beside every decision, then an instruction file for the agent.
- **Office data proposed, never imposed.** Imports and sync land in a review inbox as proposals with the source text; accepting records provenance and reruns the deadlines.
- **Money finance can use.** Budget against actual by patent, a five-year cost forecast by jurisdiction, a 10-year annuity forecast from the fee library, and everything in GBP.
- **Patent Box evidence in one click.** Qualifying patents linked to products, in-force dates and products at risk for any accounting period, exported to Excel or PDF.
- **Inventors rewarded by scheme.** Milestone awards at disclosure, filing and grant, apportioned by contribution and tracked against the statutory regime.

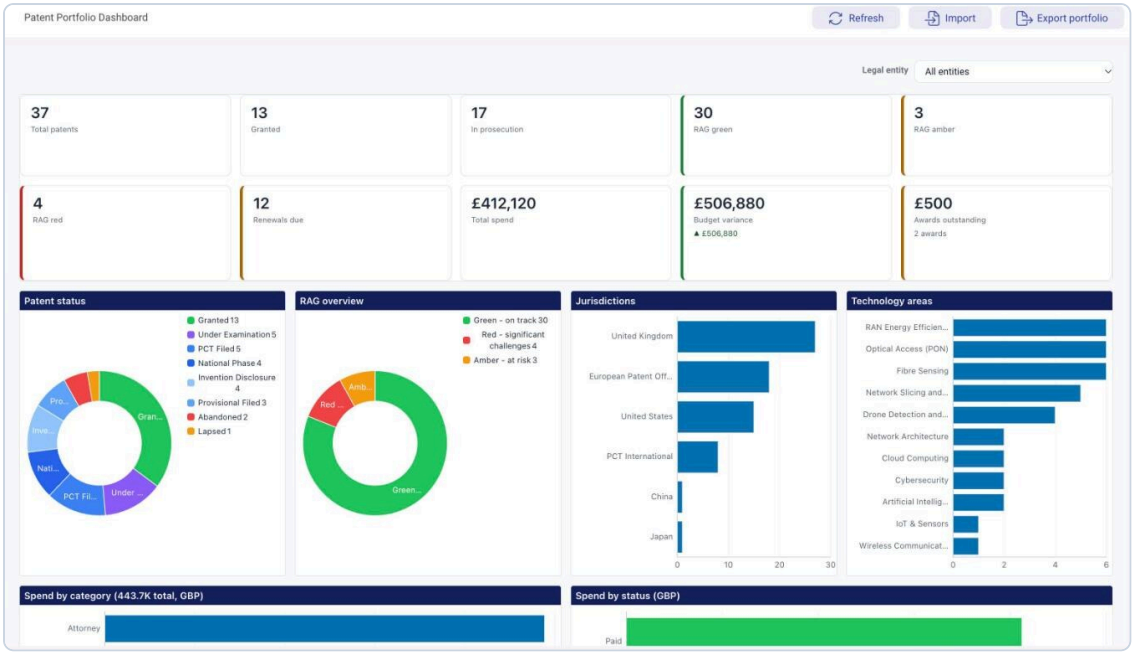


FIGURE 1. THE PORTFOLIO DASHBOARD: 37 PATENTS, 13 GRANTED AND 17 IN PROSECUTION, RAG COUNTS, RENEWALS DUE, TOTAL SPEND AND BUDGET VARIANCE, WITH STATUS AND RAG DONUTS, FILINGS BY JURISDICTION AND PATENTS BY TECHNOLOGY AREA, FILTERED BY LEGAL ENTITY

The patent record and its family

A patent carries its application, publication and grant numbers, priority date and country, filing date, IPC and CPC codes, keywords, up to five business drivers, legal entity, business unit, assignee, attorney, family, technology area and estimated and total cost. Its status runs disclosure, provisional, PCT, national, examination, granted, expired, abandoned or lapsed, with a Green, Amber or Red rating and a type of utility, design or plant. Disclosures are scored for novelty, commercial and strategic value from 1 to 5 with a computed average, so the pipeline is ranked before anything is filed.

Panels on the record hold inventors, documents, applications, claims, costs, payments, renewals, tasks, deadlines, office events, instructions to counsel, products and the lifecycle. Toolbar actions file the patent in another jurisdiction, clone it, generate its renewals and apply a reward scheme.

Each jurisdiction application is its own record with status filed, published, examination, granted, refused, withdrawn or lapsed; the dates that drive docketing (filing, search report, exam requested, office action, publication, grant, certificate and expiry); the attorney instructed, acknowledged and reviewed dates; and a relation to its parent as priority, PCT national phase, continuation, divisional, continuation in part or validation. Every field remembers where its value came from and when it was last synced.

Families hold the priority and the INPADOC and DOCDB family ids, with a family tree diagram, coverage, IDS and citation panels. Claims are recorded as independent or dependent with their dependency, status and text. Jurisdictions carry the office, right types, renewal frequency, start year, grace months, a fee schedule and the docketing rules that apply.

Docketing rules, deadlines and reminders

The rule library. 47 versioned rules: EP renewals for years 3 to 20 and GB renewals for years 5 to 20 anchored on filing, end of month, six months grace; US maintenance at 3.5, 7.5 and 11.5 years from grant on the next working day with six months grace; PCT national phase at 30 months and EP and GB at 31 months from priority; Paris priority at 12 months; EP validation three months from grant; office action responses at four

Recomputed server side. Changing a filing, priority, publication, search report, office action or grant date, or the jurisdiction, recomputes the deadlines through a server-side hook. Deadline ids are deterministic, so a rerun updates the existing records instead of creating new ones, and a preview shows what would change before anything is written.

months for EP and GB and three for US. Each rule has its trigger event, offset, calendar convention, extension, grace, surcharge and effective dates, and a review status from draft to approved. Your team approves the rule versions it works to and adds its own internal offsets, for example instruct counsel four weeks before the statutory date.

Deadlines. Every deadline records the rule and version that produced it, the trigger date, the due date, the extended due date and the grace end. It can be open, done, extended, missed or waived; it may have come from a rule, a manual entry, office data or AI intake; and it carries two-person verification with who entered it and who verified it. When a rule no longer applies the deadline is flagged for review rather than silently dropped.

The docketing screen. A calendar and worklist with tiles for Overdue, Due in 7 days, Due in 30 days, Unverified and Escalated, urgency buckets at 7, 30 and 90 days, and unpaid renewals merged in beside the statutory deadlines.

Reminders. A daily sweep scans deadlines, renewals, open office actions and statutory award claim dates across the portfolio and emails at 90, 60, 30 and 7 days, on the due date and the first overdue day, then weekly on Mondays while overdue. The manager is escalated after one day and the IP lead after seven. Eight in-app automations cover the disclosure approval gate, the move to provisional on first filing, filed and grant notifications, office actions raising a task for the handler, renewals marked paid or overdue and inventor awards paid.

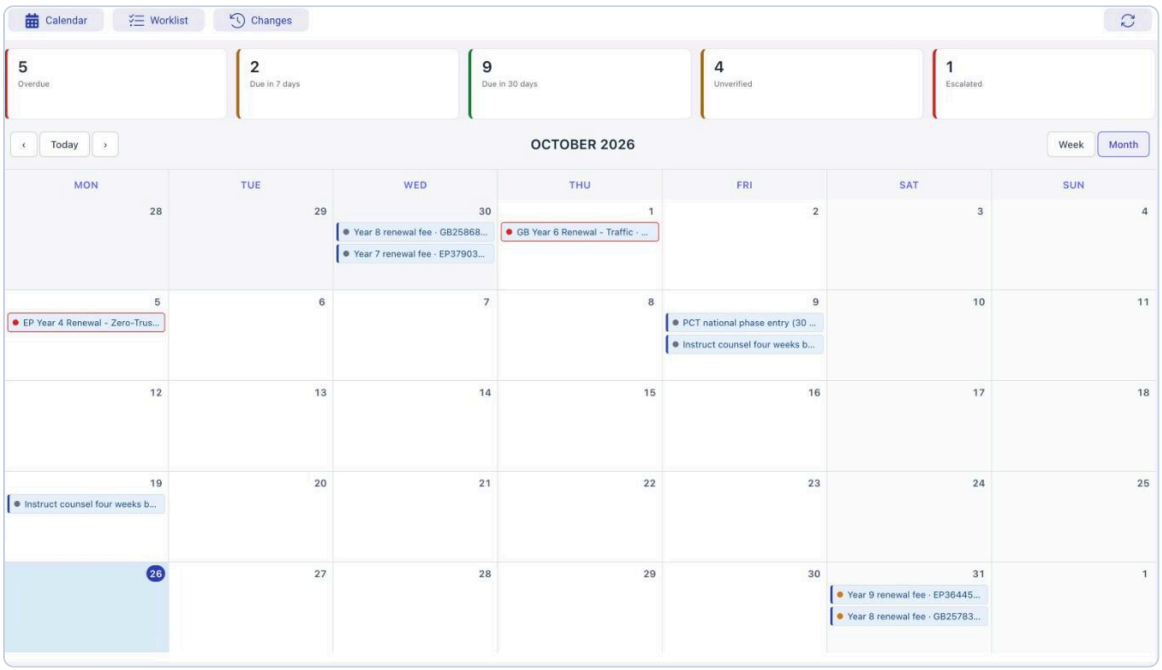


FIGURE 2. DOCKETING FOR OCTOBER 2026: 5 OVERDUE, 2 DUE IN 7 DAYS, 9 DUE IN 30 DAYS, 4 UNVERIFIED AND 1 ESCALATED, WITH RENEWAL FEES, A PCT NATIONAL PHASE ENTRY AND THE INTERNAL INSTRUCT COUNSEL FOUR WEEKS BEFORE OFFSETS ON THE CALENDAR

Office imports and the review inbox

Paste publication or application numbers, or upload a spreadsheet of internal references, owners and cost centres matched on number, and the import previews counts and conflicts before anything is written. Sources are EPO OPS and USPTO ODP, and every import is kept with its status, unresolved numbers and the reasons. Each patent records whether it came from an office, a spreadsheet, a disclosure or was entered by hand.

Once sync is switched on, daily office updates arrive in the review inbox as proposed field changes with the source text. Accepting a proposal records where the value came from and reruns the deadlines; rejecting leaves the record untouched. Office actions and counsel letters that arrive by upload, through the counsel portal or by the inbound email alias are read by AI into the same inbox as proposals with the document attached, and nothing is applied until a person accepts it.

Renewals, pruning and the agent

Each renewal carries its year, due date, grace end, amount, rule key and version, renewal agent and the agent's confirmation, and moves from upcoming through due to paid, overdue or lapsed. A daily job asks the owner for a renew or abandon decision ahead of the due date, chases, escalates and marks no response, with the lead and chase days set per tenant.

The renewal decisions board lays the decisions out in columns from not requested to escalated and no response. Every card shows the cost now, the saving if abandoned to expiry, the live family members, the products that depend on the patent and its pruning score, so the decision is made on evidence. The board builds the instruction file for the renewal agent.

The pruning screen weighs annuity liability against a strategic value score from 0 to 100 and lists abandonment candidates. The fee library per jurisdiction, fee type and year drives filing estimates and a 10-year annuity forecast, so the cost of keeping every family to term is known before the invoices arrive.

Costs are typed as filing, prosecution, annuity, attorney, translation, official, search, examination or other, in GBP, USD, EUR, CHF or JPY, linked to the application, the vendor and the instruction, with estimate and variance, invoice status and portal submission. Invoices submitted by counsel through the portal are checked against the estimate.

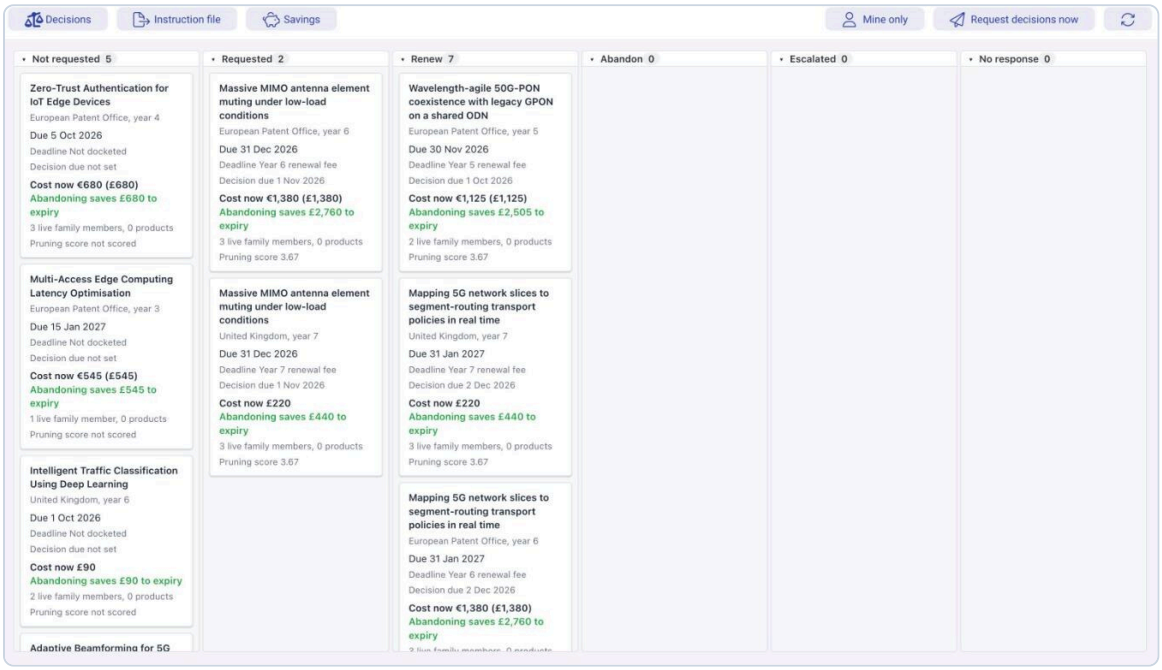


FIGURE 3. THE RENEWAL DECISIONS BOARD: NOT REQUESTED, REQUESTED, RENEW, ABANDON, ESCALATED AND NO RESPONSE, EACH CARD WITH COST NOW, THE SAVING IF ABANDONED TO EXPIRY, LIVE FAMILY MEMBERS, PRODUCTS AND PRUNING SCORE, AND THE INSTRUCTION FILE AND SAVINGS BUTTONS

Finance, coverage and expiry

Finance. Costs, renewals and awards roll up to GBP using the platform's monthly FX rates, with budget against actual by patent, a five-year cost forecast by jurisdiction, a cost waterfall and a forecast table by year and jurisdiction. Paid and outstanding are shown side by side, and the dashboard carries total spend, budget variance and awards outstanding.

Patent Box. For an accounting period, the pack lists the products with qualifying patents, the qualifying rights, their in-force dates and the products at risk from lapse or

Geographic coverage. A family by jurisdiction matrix marks each cell granted, pending or not filed, with the jurisdictions covered, average family size and largest gap as tiles, a world map and a coverage gaps list naming the missing jurisdictions per family.

Technology landscape. The technology tree shows where the portfolio is concentrated and where the white space is.

Expiry timeline. Granted patents and applications plotted over the 20-year term with how many lapse each year, the protection left at each year end, the next expiry and the

expiry, and exports to Excel or PDF for the finance team and the advisers.

Inventor rewards. A reward scheme names its statutory regime (none, Germany, China, Japan, Korea or UK), milestone amount, royalty percent and valuation method. Applying it creates award rows per contributor at disclosure, filing and grant, apportioned by contribution percentage, and the payment registry shows exposure by regime. Inventors are staff records; an inventor portal takes disclosures by emailed sign-in link.

average protection life across live grants.

Prosecution and inventors. Prosecution velocity and firm performance screens compare the attorneys you instruct; inventor analytics shows who is disclosing and what is being granted.

Documents and export. Filings, office actions, responses, search reports, certificates and counsel letters are held against the patent with their source, and US Information Disclosure Statements are recorded. The portfolio exports as an Excel workbook or JSON of 22 entities with a document index.

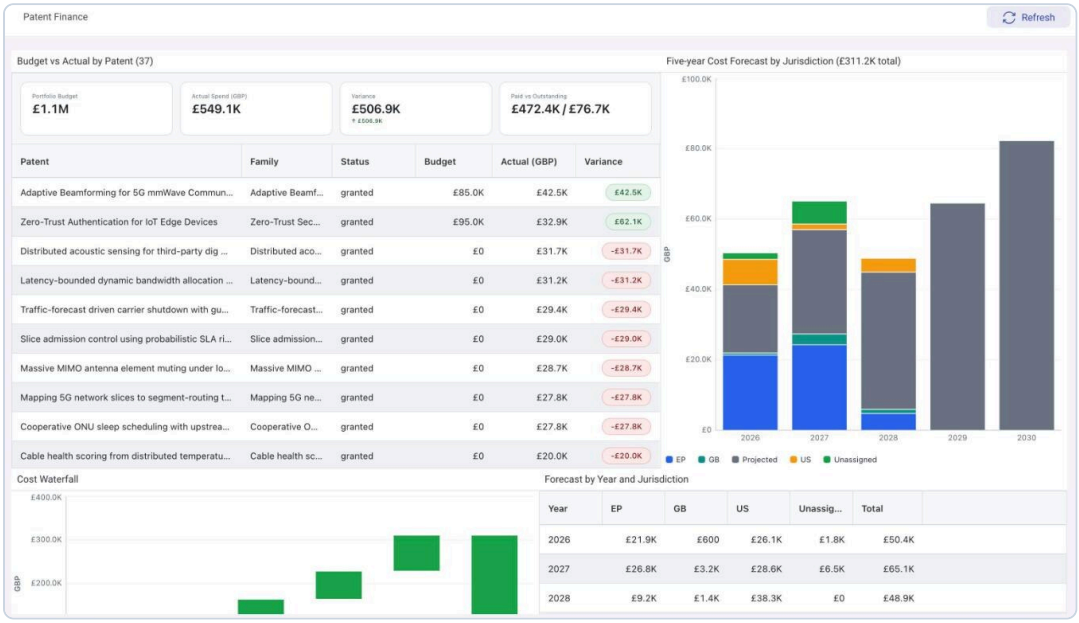


FIGURE 4. FINANCE: PORTFOLIO BUDGET, ACTUAL SPEND, VARIANCE AND PAID AGAINST OUTSTANDING, BUDGET AGAINST ACTUAL BY PATENT, THE FIVE-YEAR COST FORECAST BY JURISDICTION, THE COST WATERFALL AND THE FORECAST TABLE BY YEAR

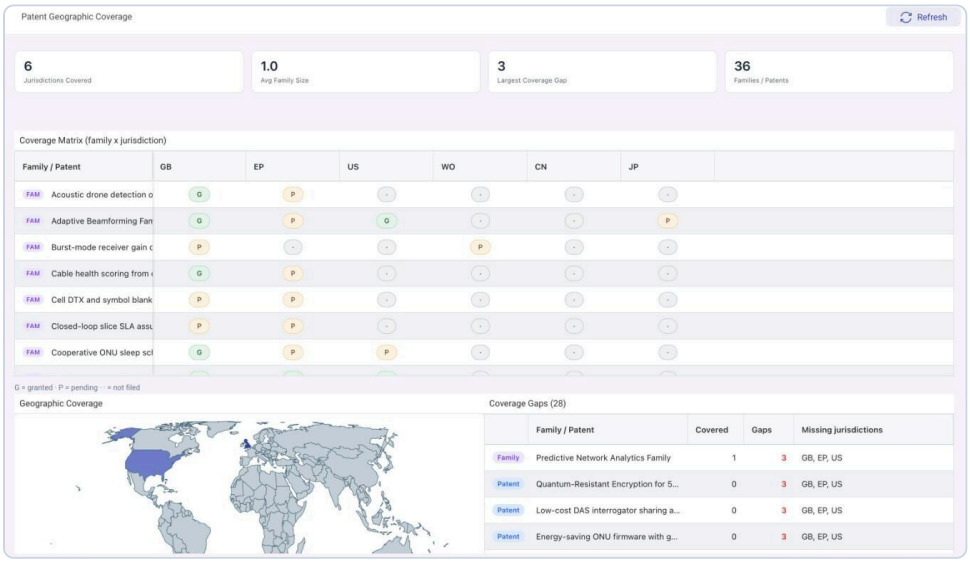


FIGURE 5. GEOGRAPHIC COVERAGE: THE FAMILY BY JURISDICTION MATRIX WITH GRANTED AND PENDING MARKS, THE WORLD MAP AND THE COVERAGE GAPS LIST WITH THE MISSING JURISDICTIONS PER FAMILY

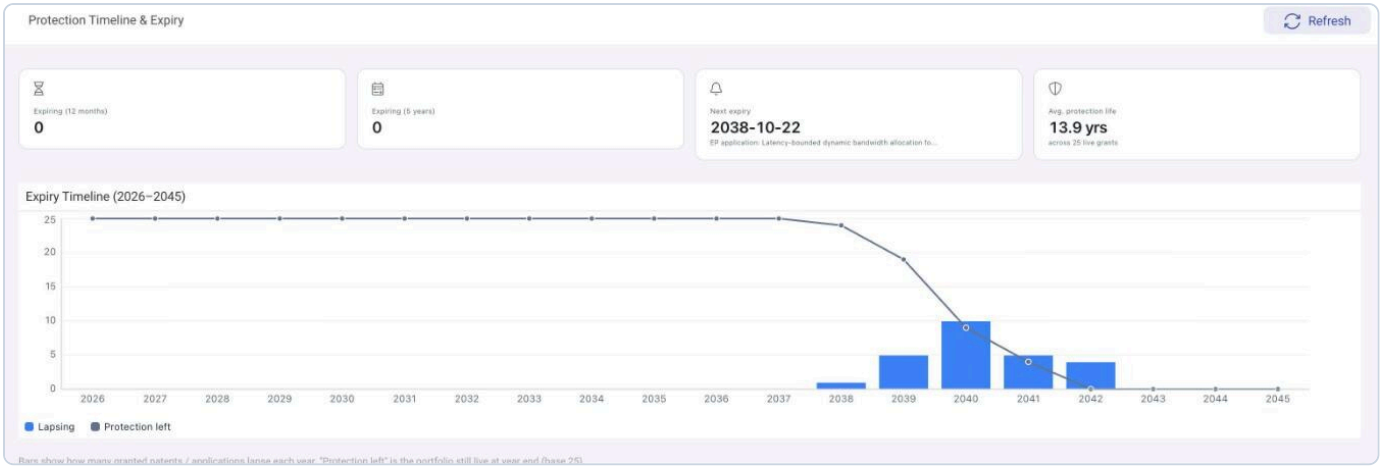


FIGURE 6. THE EXPIRY TIMELINE FROM 2026 TO 2045: PATENTS LAPSING PER YEAR AGAINST THE PROTECTION LEFT, WITH THE NEXT EXPIRY AND THE AVERAGE PROTECTION LIFE ACROSS LIVE GRANTS

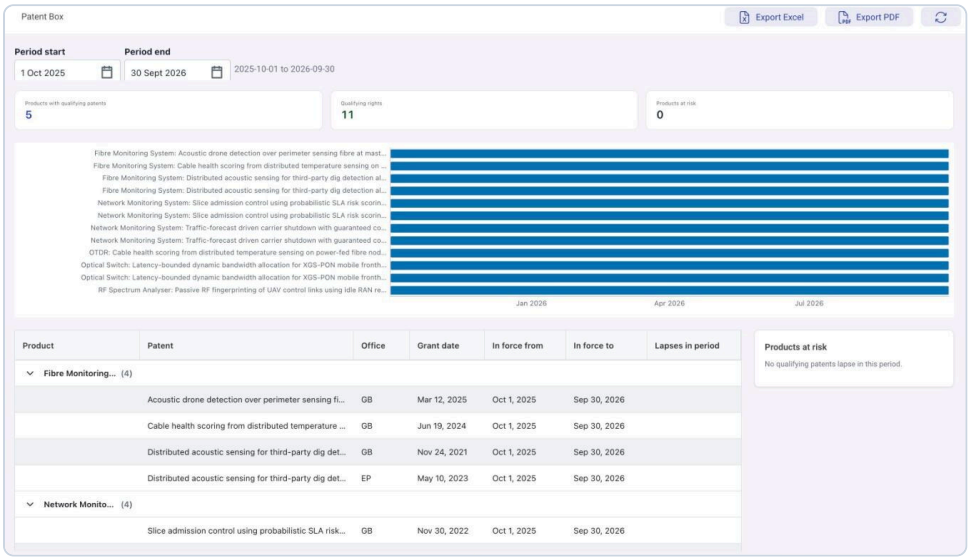


FIGURE 7. THE UK PATENT BOX PACK FOR AN ACCOUNTING PERIOD: PRODUCTS WITH QUALIFYING PATENTS, QUALIFYING RIGHTS, IN-FORCE DATES AND PRODUCTS AT RISK, WITH EXCEL AND PDF EXPORT

Summary of specifications

Item	Detail
Records	25 entities: patent, family, jurisdiction application, inventor, contribution, jurisdiction, technology, claim, cost, renewal, deadline, rule, own rule, rule approval, import, review event, document, citation, IDS, fee, reward scheme, award, instruction, Patent Box product link, settings
Patent lifecycle	Disclosure, provisional, PCT, national, examination, granted, expired, abandoned, lapsed; RAG; utility, design, plant; disclosure scoring 1 to 5 for novelty, commercial and strategic value
Applications	Filed, published, examination, granted, refused, withdrawn, lapsed; filing, search report, exam, office action, publication, grant, certificate and expiry dates; priority, PCT national, continuation, divisional, CIP and validation relations; field provenance and sync status
Docketing rules	47 versioned rules for EP, GB, US and PCT; trigger, offset, calendar convention, extension, grace, surcharge, effective dates, review status; tenant approval per version; internal offsets
Deadlines	Rule and version, trigger, due, extended due, grace end; open, done, extended, missed, waived; source rule, manual, office data or AI intake; two-person verification; escalation none, manager, IP lead; server-side recompute with deterministic ids and preview

Item	Detail
Reminders	Daily sweep across deadlines, renewals, open office actions and award claim dates; 90, 60, 30 and 7 days, due date, first overdue day, then weekly; escalation after 1 and 7 days; 8 in-app automations
Office data	Import by number or spreadsheet from EPO OPS and USPTO ODP with preview and history; daily sync into a review inbox as proposals; AI intake of office actions and counsel letters by upload, portal or email
Renewals	Year, due, grace end, amount, rule version, agent and confirmation; upcoming, due, paid, overdue, lapsed; decision workflow with request, chase, escalate and no response; decisions board; agent instruction file
Costs and finance	Nine cost types; GBP, USD, EUR, CHF, JPY rolled up at monthly rates; estimate and variance; fee library; 10-year annuity forecast; pruning score 0 to 100; budget against actual, five-year forecast by jurisdiction, waterfall
Patent Box	Per accounting period: products with qualifying patents, qualifying rights, in-force dates, products at risk; Excel and PDF export
Inventor rewards	Schemes with regime none, DE, CN, JP, KR, UK, milestone amount, royalty percent, valuation method; awards at disclosure, filing and grant by contribution percentage; payment registry by regime
Analytics	Dashboard, geographic coverage with map and gaps, technology landscape and white space, 20-year expiry timeline, prosecution velocity and firm performance, inventor analytics
Documents and portals	Document types filing, office action, response, search report, certificate, counsel letter; IDS records; counsel portal (acknowledge, upload, report events, submit invoices against estimate) and inventor portal (disclosures) by emailed sign-in link; portfolio export to Excel or JSON

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