

GETTING THE BEST RESULTS  
FROM A  
USA TRADEMARK  
SCREENING SEARCH



innovationprocessworks

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## USA Trademark Screening Report

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*Are you thinking of starting a business? Have you been brainstorming new branding ideas? Are you curious about whether your current brand or trademark is being used by others? Do you want this information now?*

The USA Trademark Screening Report is the first search you should run while beginning the branding process. It gives you straight-to-the-point federal, state, common law, and

social media data that let you know whether your trademark or brand is clear for use or is currently being used.

# HOW ARE RECORDS FLAGGED FOR A MATCH?

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If the term searched matches...

- exactly
- plurals
- within a mark (partial)
- phonetically



IF THE TERM  
SEARCHED MATCHES...

**EXACTLY** or is the  
**PLURAL FORM** of  
the term:

EX:

**“FARMHOUSE NATURAL”**

**COULD FIND**

Farmhouses Natural  
Farmhouse Naturally  
Natural Farmhouse

**COULD NOT FIND**

Farmhouse  
Natural  
Farmhous Natural  
Farm House

Note: Search Terms that could not be found within  
Exact Search CAN be found in other searches, such  
as Similar.

IF THE TERM  
SEARCHED MATCHES...

**PARTIALLY** or  
as **PART OF**  
**ANOTHER MARK:**

EX:

**“FARMHOUSE NATURAL”**

**COULD FIND**

The Natural Farmhouse  
Natural and Best Farmhouse  
Natural Farmhouse Suites

**COULD NOT FIND**

The Best Farm House Nature  
Natur Farmhouse AI

Note: Search Terms that could not be found within  
Partial Search CAN be found in other searches, such  
as Similar.

IF THE TERM  
SEARCHED MATCHES...

**PHONETICALLY**  
or under **SIMILAR**  
**MATCHES:**

EX:

**“FARMHOUSE NATURAL”**

**COULD FIND**

Natural Pharmhous  
Naturlfarmhous  
Natrall Farm Haws

**COULD NOT FIND**

Natural  
Farmhouse  
Natural Farmhouse is the Best Brand

Note: Search Terms that could not be found within  
Similar Search CAN be found in other searches, such  
as Partial.



# LET'S DIG DEEPER.

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The system only looks for sets and super sets and NOT subsets unless the sub set sounds like the whole term being searched.

In that case, the result(s) will be in the “Similar Matches” portion of the report. So, adding spaces on compound words and using the smallest form of the word will give the most results.

# LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Screening report:

**A. EXACT MATCHES IN THE SAME CLASS:**

- i. Federal results
- b. Exact Matches in all other non-specified classes
- c. Partial Matches in the same class(es)
- d. Partial Matches in all other non-specified classes
- e. Similar Matches in the same class(es)
- f. Similar Matches in all other non-specified classes



# LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Screening report:

a. Exact Matches in the same class

**B. EXACT MATCHES IN ALL OTHER NON-SPECIFIED CLASSES:**

i. Federal results

ii. States

iii. Common Law

- D&B
- Domain Names
- Facebook
- Twitter
- Google Plus
- Google (web search)
- YouTube
- SEC

c. Partial Matches in the same class(es)

d. Partial Matches in all other non-specified classes

e. Similar Matches in the same class(es)

f. Similar Matches in all other non-specified classes

# LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Screening report:

- a. Exact Matches in the same class
- b. Exact Matches in all other non-specified classes
- C. PARTIAL MATCHES IN THE SAME CLASS(ES):**
  - i. Federal results
- d. Partial Matches in all other non-specified classes
- e. Similar Matches in the same class(es)
- f. Similar Matches in all other non-specified classes



# LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Screening report:

- a. Exact Matches in the same class
- b. Exact Matches in all other non-specified classes
- c. Partial Matches in the same class(es)

## **D. PARTIAL MATCHES IN ALL OTHER NON-SPECIFIED CLASSES:**

- i. Federal results
- ii. States
- iii. Common Law
  - D&B
  - Domain Names
  - Facebook
  - Twitter
  - Google Plus
  - Google (web search)
  - YouTube
  - SEC
- e. Similar Matches in the same class(es)
- f. Similar Matches in all other non-specified classes

# LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Screening report:

- a. Exact Matches in the same class
- b. Exact Matches in all other non-specified classes
- c. Partial Matches in the same class(es)
- d. Partial Matches in all other non-specified classes
- E. SIMILAR MATCHES IN THE SAME CLASS(ES):**
  - i. Federal results
- f. Similar Matches in all other non-specified classes



# LET'S DIG DEEPER.

If the search system didn't find a match in a certain category, then there will not be a section/place holder for that section. Below is a breakdown of the possible sections in a Screening report:

- a. Exact Matches in the same class
- b. Exact Matches in all other non-specified classes
- c. Partial Matches in the same class(es)
- d. Partial Matches in all other non-specified classes
- e. Similar Matches in the same class(es)

## **F. SIMILAR MATCHES IN ALL OTHER NON-SPECIFIED CLASSES:**

- i. Federal results
- ii. States
- iii. Common Law
  - D&B
  - Domain Names
  - Facebook
  - Twitter
  - Google Plus
  - Google (web search)
  - YouTube
  - SEC

# LET'S DIG DEEPER.

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All classes are searched, **but** by specifying a class(es) you can filter the more relevant results to the top.

Selecting different classes will adjust the gauges to the results found or not found in those selected classes.



# LET'S DIG DEEPER.

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Each search acts like a Boolean search. For example, if we search “Farmhouse Natural” the search would look like “\*Farmhouse\* AND \*Natural\*” query on our database. So, a better search would be “Farm House Natural” to get “\*Farm\* AND \*House\* AND \*Natural\*” query on our database.

EX:

**“FARMHOUSE NATURAL”**

=

“FARMHOUSE” + “NATURAL”

---

EX:

**“FARM HOUSE NATURAL”**

=

“FARM” + “HOUSE” + “NATURAL”  
+ “FARMHOUSE” + “NATURAL”



EX:

“**FARMHOUSE NATURAL**”

+ ROOT WORD “**FARM**”

+ ROOT WORD “**HOUSE**”

## LET’S DIG DEEPER.

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Root words allow for shorter or smaller words to be searched.

The use of these are critical for getting the best results every time.



## LET'S DIG DEEPER.

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Including dead trademarks allow for a much broader, comprehensive search. This is especially useful when a trademark has been abandoned only recently. Unless you're looking for more comprehensive data, we recommend leaving this alone for a Trademark Screening Search.

# LET'S DIG DEEPER.

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Excluding owner is useful for a Trademark Screening Search when you already know the owner of a mark (i.e., your brand or company) and are wanting to monitor for level of use. But, for the sake of a more comprehensive search, we recommend leaving this function alone.



# USA Trademark Screening Report

## Getting Started

**BRAND PDQ** Dashboard Archive Recurring Cart Account

### Cart

**Search It Products**

Global

**USA**

USA Trademark Screening Report \$99 **Add**

USA Trademark Comprehensive Search Report \$299 **Add**

Franchise

**Enforce It Products**

Trademark

Reputation

**USA Search It**

**USA Trademark Screening Report** \$99

Term: Entire Mark ⓘ

Class: -- Select One -- + ⓘ

Advanced Search **Remove**

Total: \$99

**Proceed to Checkout**

1. Under the “USA” tab below Search It Products, select “Add” next to USA Trademark Screening Report. Here you will find the option to search your mark by class number.

# USA Trademark Screening Report

## Getting Started

The screenshot shows the BRAND PDQ website interface. At the top, there is a navigation bar with links for Dashboard, Archive, Recurring, Cart, and Account. The main content area is titled 'Cart' and features a sidebar on the left with categories: Search It Products (Global, USA, Franchise) and Enforce It Products (Trademark, Reputation). The main cart area shows a single item: 'USA Trademark Screening Report' for \$99. The search term is 'Entire Mark' and the class is '-- Select One --'. There is an 'Advanced Search' link and a 'Remove' button. The total is \$99 and a 'Proceed to Checkout' button is visible.

2. (Optional) Select “Advanced Search” and in addition to term and class number, you’ll see options to search by Root Words. You’ll also have the option to Include Dead marks and Exclude Owner. For more information on Advanced Search options, please refer to pages 17-19.

# USA Trademark Screening Report

## Getting Started

The screenshot shows the BRAND PDQ website's cart interface. At the top, there are navigation links: Dashboard, Archive, Recurring, Cart, and Account. The main heading is "Cart". On the left, there are two sections: "Search It Products" and "Enforce It Products". Under "Search It Products", there are dropdown menus for "Global" and "USA", and two items: "USA Trademark Screening Report" for \$99 and "USA Trademark Comprehensive Search Report" for \$299, both with "Add" buttons. Under "Enforce It Products", there are dropdown menus for "Trademark" and "Reputation". The main cart area is titled "USA Search It" and contains a "USA Trademark Screening Report" for \$99. The form fields are: Term: "IP Watch"; Term Root(s): "IP" and "Watch"; Class: "42: Computer & Software Services and Scientific Services" (selected) and "35: Advertising, Business and Retail Services" (highlighted with a red 'x'); Include Dead: "Yes" and "No" (selected), with a note "Dead trademark results excluded."; Exclude Owner: "Limit one per box". There is a "Remove" button at the bottom right of the form. At the bottom right of the cart, it says "Total: \$99" and a "Proceed to Checkout" button.

3. Here you will search by your mark and select your International Class number from 1-45. It's important to note that class numbers 1-34 are products and 35-45 are services. Also note: the compound word "IPWatch" is searched as "IP Watch" (plus root words) to reflect the most accurate results. After completing this, select "Proceed to Checkout" and fill out all required details.

# USA Trademark Screening Report

## Getting Started

The screenshot displays the BRAND PDQ dashboard interface. At the top left is the BRAND PDQ logo. The top navigation bar includes links for Dashboard, Archive, Recurring, Cart, and Account, along with a Logout button. Below the navigation bar, the current plan is identified as 'Standard'. The dashboard is divided into two main sections: 'Search It Products' and 'Enforce It Products', each with a corresponding 'Reports' section.

**Search It Products:** This section contains three dropdown menus for selecting product categories: 'Global', 'USA', and 'Franchise'.

**Enforce It Products:** This section contains two dropdown menus for selecting enforcement categories: 'Trademark' and 'Reputation'.

**Search It Reports:** This section features a search bar and a table of reports. The table has columns for 'Type', 'Report Title', 'Term', and 'Date'. A 'PDF' column is also present, containing a document icon. The first row of the table shows a report with the following details:

Type	Report Title	Term	Date	PDF
Federal	USA Trademark Screening Report	IP Watch	01-22-2018	

Below the table, it indicates 'Showing 1 to 9 of 9 entries' and provides 'Previous' and 'Next' navigation options.

**Enforce It Reports:** This section is currently empty, showing only the search bar and column headers.

4. After loading, your PDF(s) will animate when ready. Click on the icon located below the PDF column.

# USA Trademark Screening Report

## Getting Started

<p><b>This term(s) has a MEDIUM level of use, meaning there is significant use of the term(s) in the marketplace by 3<sup>rd</sup> parties.</b></p> <p>Use of this term(s) provides less opportunity to enforce the use of the mark, brand, or name against a 3<sup>rd</sup> party and less opportunities for trademark registration. State or federal trademark registration is not required, but is recommended.</p>	 A semi-circular gauge with four segments: HIGH (red), MEDIUM (orange), LOW (yellow), and VERY LOW (green). The needle points to the MEDIUM segment.
<p><b>RISK OF 3<sup>RD</sup> PARTY CHALLENGE</b></p> <p><b>There is a HIGH level of risk of 3<sup>rd</sup> party challenge for the use of or registration of this mark, brand or name.</b></p> <p>There is an exact match for this mark with the USPTO in the same or related class of goods and services, business name use, domain name use, and any other common law use. This mark is not likely available for use or registration within this same class. Additional research is required to identify any defenses that could be used, such as date of first use or within different geographic markets or other factors. Seeking legal counsel is recommended to identify ways to overcome a 3<sup>rd</sup> party challenge.</p>	 A semi-circular gauge with four segments: HIGH (red), MEDIUM (orange), LOW (yellow), and VERY LOW (green). The needle points to the HIGH segment.
<p><b>RISK OF REJECTION OF USPTO REGISTRATION</b></p> <p><b>There is a HIGH level of risk of initial rejection to register this mark within this class or related classes.</b></p> <p>There is an exact match for this mark with the USPTO in the same or related class of goods and services. This mark is not likely available for use or registration within this same class. The mark is generic or highly descriptive. Additional research is required to identify any defenses that could be used, such as date of first use or within different geographic markets or other factors. Seeking legal counsel is recommended to identify ways to overcome an initial rejection from an examining attorney. Additional facts may present defenses to overcome descriptiveness objections, however USPTO registration is unlikely.</p>	 A semi-circular gauge with four segments: HIGH (red), MEDIUM (orange), LOW (yellow), and VERY LOW (green). The needle points to the HIGH segment.

5. You'll see your results on a new PDF. Your results will also include the BrandPDQ Insight Indicators.

HAPPY  
SEARCHING!



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