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Lockwood

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(54) **AUTOMATED SALES AND SERVICES SYSTEM**

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(*) **Notice:** This patent is subject to a terminal disclaimer.

Related U.S. Application Data

(63) Continuation-in-part of application No. 08/116,654, filed on Sep. 3, 1993, now Pat. No. 5,309,355, which is a continuation of application No. 07/396,283, filed on Aug. 21, 1989, now abandoned, which is a continuation-in-part of application No. 07/152,973, filed on Feb. 8, 1988, now abandoned, which is a continuation-in-part of application No. 06/822,115, filed on Jan. 24, 1986, now abandoned, which is a continuation-in-part of application No. 06/613,525, filed on May 24, 1984, now Pat. No. 4,567,359, application No. 08/210,301, which is a continuation of application No. 08/116,654, and a continuation of application No. 08/096,610, filed on Jul. 23, 1993, now abandoned, which is a continuation of application No. 07/752,026, filed on Aug. 29, 1991, now abandoned, which is a continuation of application No. 07/168,856, filed on Mar. 16, 1988, now abandoned, which is a continuation of application No. 06/822,115, filed on Jan. 24, 1986, now abandoned, which is a continuation-in-part of application No. 06/615,525, filed on May 24, 1984, now Pat. No. 4,567,359.

(51) **Int. Cl.**
G06Q 30/00 (2006.01)

(52) **U.S. Cl.**
USPC **705/26.62; 705/26.81; 235/381**

(58) **Field of Classification Search**
None
See application file for complete search history.

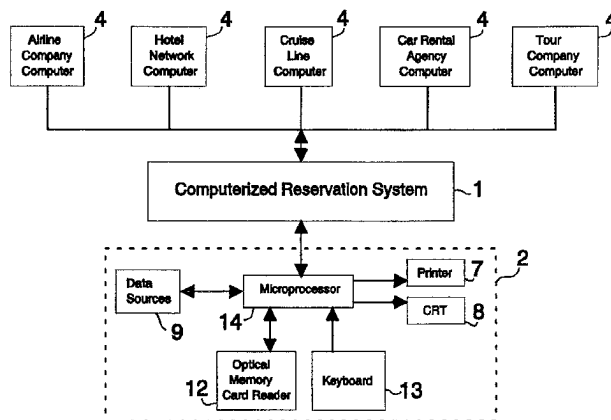
(56) **References Cited**

To view the complete listing of prior art documents cited during the proceeding for Reexamination Control Number 90/012,685, please refer to the USPTO's public Patent Application Information Retrieval (PAIR) system under the Display References tab.

Primary Examiner — K. M. Reichle

(57) **ABSTRACT**

A system for composing individualized sales presentations created from various textual and graphical information data sources to match customer profiles. The information search and retrieval paths sift through a hierarchy of data sources under multiple operating programs. The system provides the means for synergistically creating and displaying customized presentations in a convenient manner for both the customer and salesperson to achieve a more accurate, efficient and comprehensive marketing presentation. Organizational hierarchies of data sources are arranged so that an infinite number of sales presentation configurations can be created. Multiple micro-programs automatically compose the sales presentations initiated by determinants derived from customer profile information, sales agent assessment data and operator's entries including the retrieval of interrelated textual and graphical information from local and remote storage sources. A similar system can be used for filing applications with an institution from a plurality of remote sites, and for automatically processing applications in response to each applicant's qualifications. Each multimedia terminal comprises a video screen and a video memory which holds co-related image-and-sound-generating information arranged to simulate the aspect and speech of an application loan officer on the video screen. The simulated loan officer is used to acquire personal loan data from the applicant by guiding him through an interactive sequence of inquiries and answers.



**EX PARTE
REEXAMINATION CERTIFICATE
ISSUED UNDER 35 U.S.C. 307**

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NO AMENDMENTS HAVE BEEN MADE TO
THE PATENT

AS A RESULT OF REEXAMINATION, IT HAS BEEN
DETERMINED THAT:

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The patentability of claims **1-32** is confirmed.

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