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(12) **EX PARTE REEXAMINATION CERTIFICATE** (6109th)
United States Patent
Lockwood

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

(52) **U.S. Cl.** **705/27; 705/26; 235/381**
(58) **Field of Classification Search** **705/26-27; 235/381**

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See application file for complete search history.

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Reexamination Certificate for:
Patent No.: **5,576,951**
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Filed: **Mar. 16, 1994**

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(Continued)

Primary Examiner—Robert M. Pond

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

(57) **ABSTRACT**

Certificate of Correction issued Feb. 10, 1998.

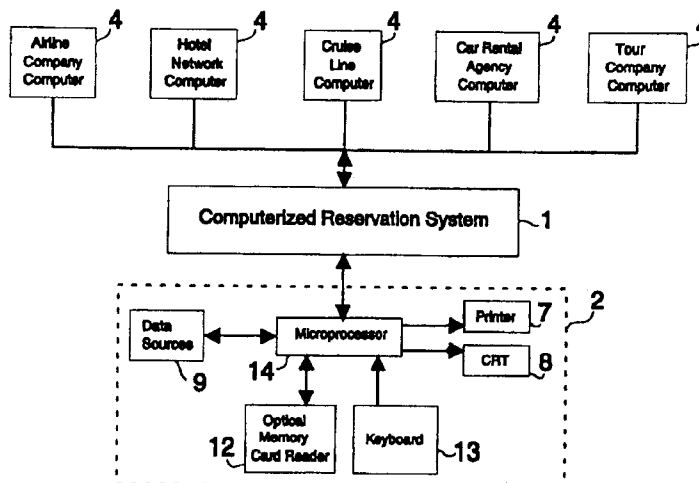
A system for composing individualized sales presentations created from various textual and graphical information data sources to match customer profiles. The information search and retrieval paths sift through a hierarchy of data sources under multiple operating programs. The system provides the means 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 inter-related 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.

Certificate of Correction issued Jun. 9, 1998.

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. 90/006,625, which is a continuation of application No. 08/116,654, filed on Sep. 3, 1993, now Pat. No. 5,309,355, and a continuation of application No. 08/096,610, filed on Jul. 23, 1993, now abandoned, application No. 90/006,625, which is a continuation-in-part 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.**
G06F 17/30 (2006.01)



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

THE PATENT IS HEREBY AMENDED AS
INDICATED BELOW.

Matter enclosed in heavy brackets [] appeared in the patent, but has been deleted and is no longer a part of the patent; matter printed in italics indicates additions made to the patent.

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

The patentability of claims 1–10 is confirmed.

New claims 11–32 are added and determined to be patentable.

11. The search system of claim 1, wherein said means for storing includes means for storing audio data.

12. The search system of claim 11, wherein said audio data is stored at a plurality of remote locations linked by a computerized telecommunication network to exchange said data.

13. The search system of claim 1, wherein said indicating means for indicating a pathway comprises a menu of program choices related to said search results, for accessing other information.

14. The search system of claim 1, which further comprises address codes of pathways to information related to one of said inquiries.

15. The search system of claim 1, which further comprises means for selectively requesting and retrieving specific information sequences from a personal computer at a site remote from said computer search system.

16. The search of claim 1, which further comprises means for feeding to said output means, a non-requested marketing message.

17. The search system of claim 1, which further comprises program means for presenting information in a hierarchical arrangement of topics and sub-topics.

18. The search system of claim 1, which further comprises program means for providing said related information in audio and video forms.

19. The search system according to claim 1, wherein said graphical information and textual information are stored on a mass memory device.

20. The system of claim 10, wherein said batches of data comprise audio data.

21. The system of claim 10, which further comprises means for displaying at said station, a non-requested marketing message.

22. The system of claim 10, wherein said textual information comprise words, phrases, numbers, and letters.

23. The system of claim 10, wherein said graphical information comprises maps, charts, pictures, and moving images.

24. The system of claim 10, wherein one of said graphical information and textual information comprise audio information.

25. The system of claim 10, wherein said graphical information and textual information are stored on a mass memory disc.

26. The system of claim 10, wherein said entry path means include informing means for assisting a user searching said textual and graphical information.

27. The system of claim 10, wherein said entry path means comprise a topic tree entry path for dividing said textual and graphical information into topics and sub-topics.

28. The system of claim 10, which further comprises title finder entry paths for assisting a user in uncovering titles stored in said mass memory device.

29. The system of claim 10, wherein said station is remotely located from said installations.

30. The system of claim 29, wherein said station and installations are linked by a computerized telecommunication network.

31. The system of claim 30, wherein said services comprise the transfer to said computerized station of textual, graphical, audio, and audio-visual data; and said data related to said answer comprise availability and identification of services to be ordered.

32. The system of claim 10, which further comprises a plurality of operating program choices related to said retrieved data, for accessing other data.

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