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United States Patent [19]

[11] Patent Number: **5,576,951**

Lockwood

[45] Date of Patent: **Nov. 19, 1996**

[54] **AUTOMATED SALES AND SERVICES SYSTEM**

4,648,037	3/1987	Valentino	364/408
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5,241,671	8/1993	Reed et al.	395/600
5,309,355	5/1994	Lockwood	364/401

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[21] Appl. No.: **210,301**

[22] Filed: **Mar. 16, 1994**

[57] ABSTRACT

Related U.S. Application Data

[63] Continuation of Ser. No. 116,654, Sep. 3, 1993, Pat. No. 5,309,355, and Ser. No. 96,610, Jul. 23, 1993, abandoned, and a continuation-in-part of Ser. No. 116,654, and Ser. No. 96,610, which is a continuation of Ser. No. 752,026, Aug. 29, 1991, abandoned, which is a continuation of Ser. No. 168,856, Mar. 16, 1988, abandoned, which is a continuation of Ser. No. 822,115, Jan. 24, 1986, abandoned, which is a continuation-in-part of Ser. No. 613,525, May 24, 1984, Pat. No. 4,567,359, said Ser. No. 116,654, is a continuation of Ser. No. 396,283, Aug. 21, 1989, abandoned, which is a continuation-in-part of Ser. No. 152,973, Feb. 8, 1988, abandoned, which is a continuation-in-part of Ser. No. 822,115.

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.

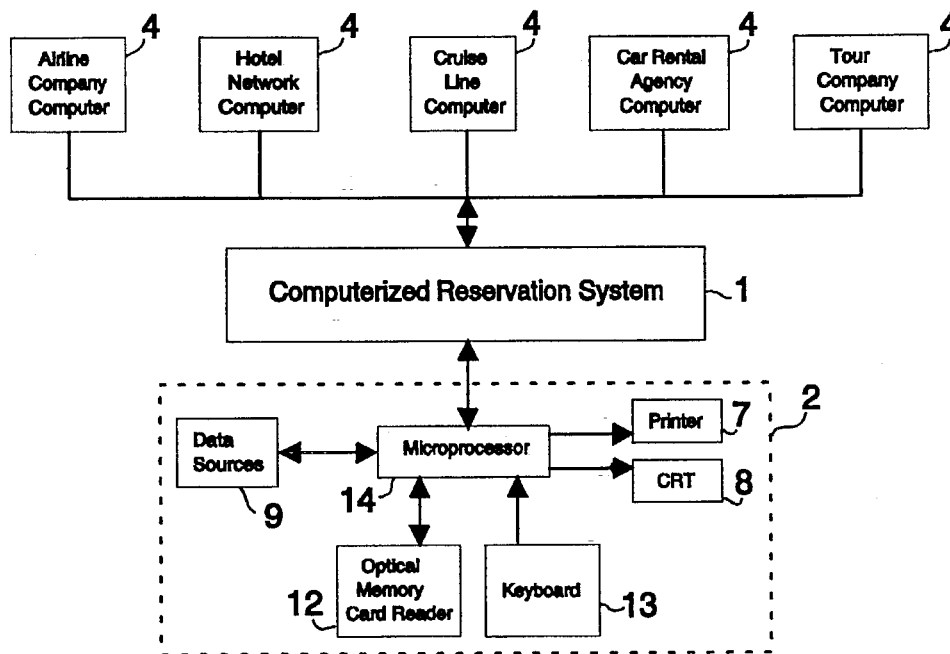
- [51] Int. Cl.⁶ **G06F 19/00**
- [52] U.S. Cl. **395/227; 235/381**
- [58] Field of Search 364/401, 407; 235/383, 385, 381; 395/600, 650

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10 Claims, 17 Drawing Sheets



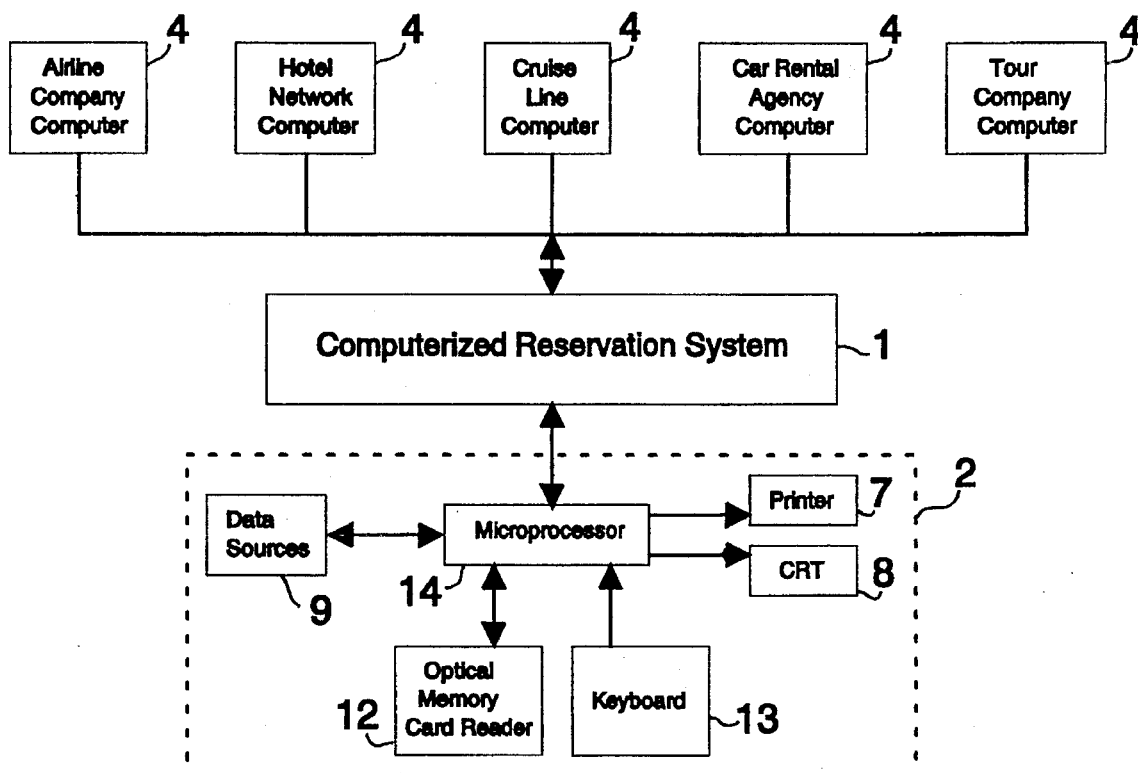


Figure 1

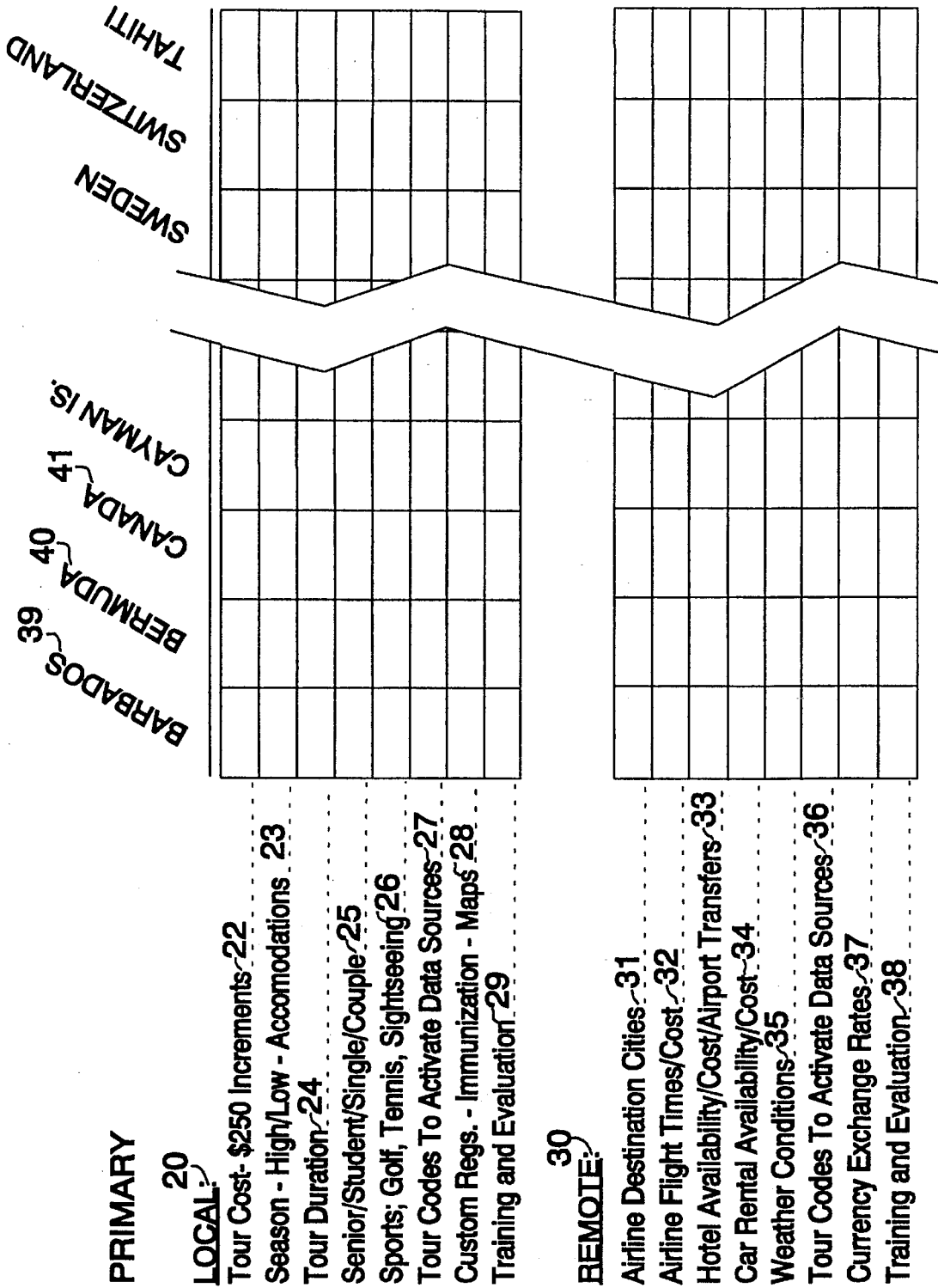


Figure 2

SECONDARY	LOCAL 21	Tour Cost - \$250 Increments 22	CANADA 17	ALBERTA	BRITISH COL. 23	MANITOBA	QUEBEC	SASKATCHEWAN	YUKON TERR.
		Season - High/Low - Accommodations 23							
		Tour Duration 24							
		Senior/Student/Single/Couple 25							
		Sports; Golf, Tennis, Sightseeing 26							
		Tour Codes To Activate Data Sources 27							
		Custom Regs. - Immunization - Maps 28							
		Training and Evaluation 29							
		REMOTE 30							
		Airline Destination Cities 31							
		Airline Flight Times/Cost 32							
		Hotel Availability/Cost/Airport Transfers 33							
		Car Rental Availability/Cost 34							
		Weather Conditions 35							
		Tour Codes To Activate Data Sources 36							
		Currency Exchange Rates 37							
		Training and Evaluation 38							

Figure 3

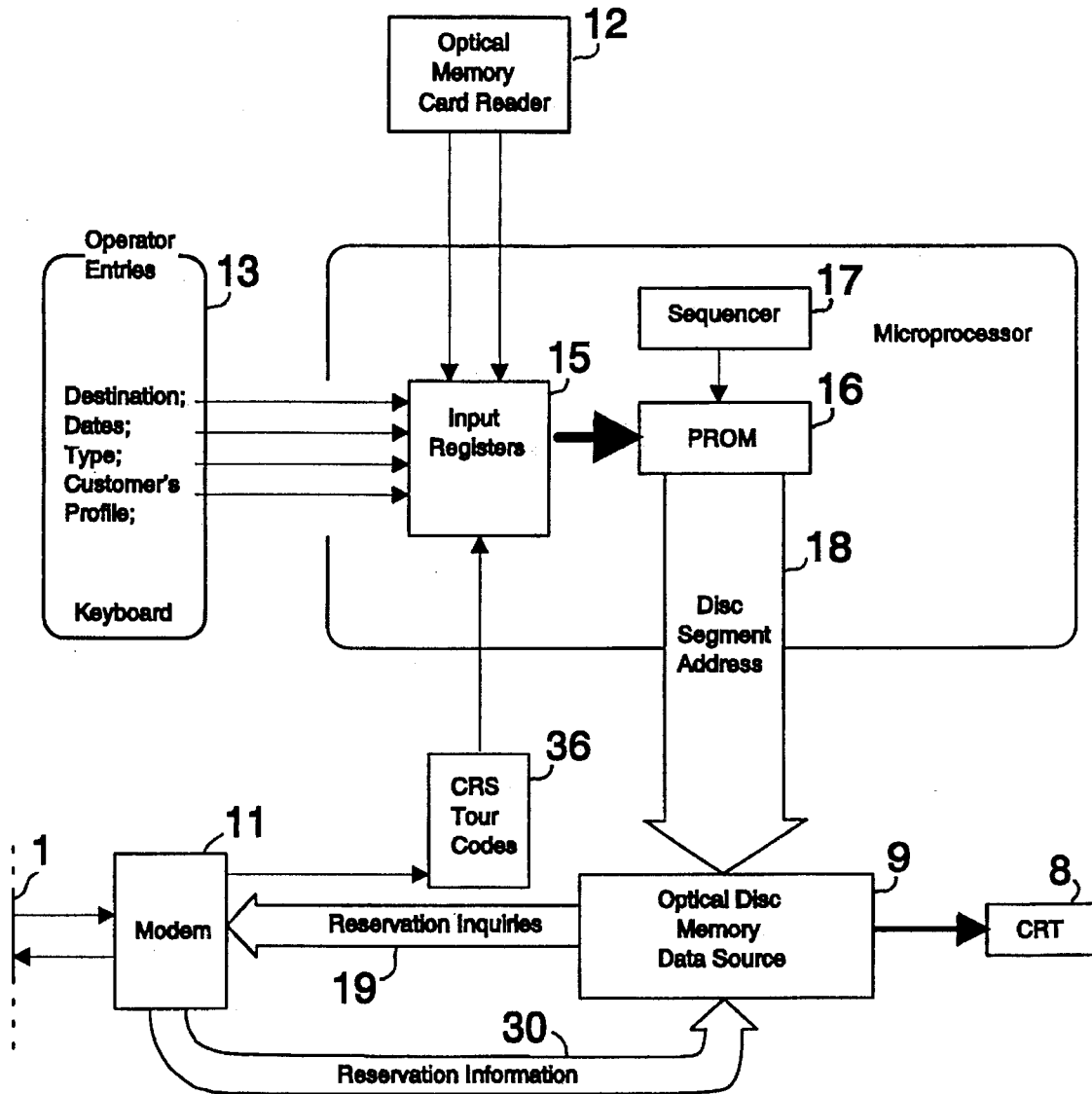


Figure 4

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