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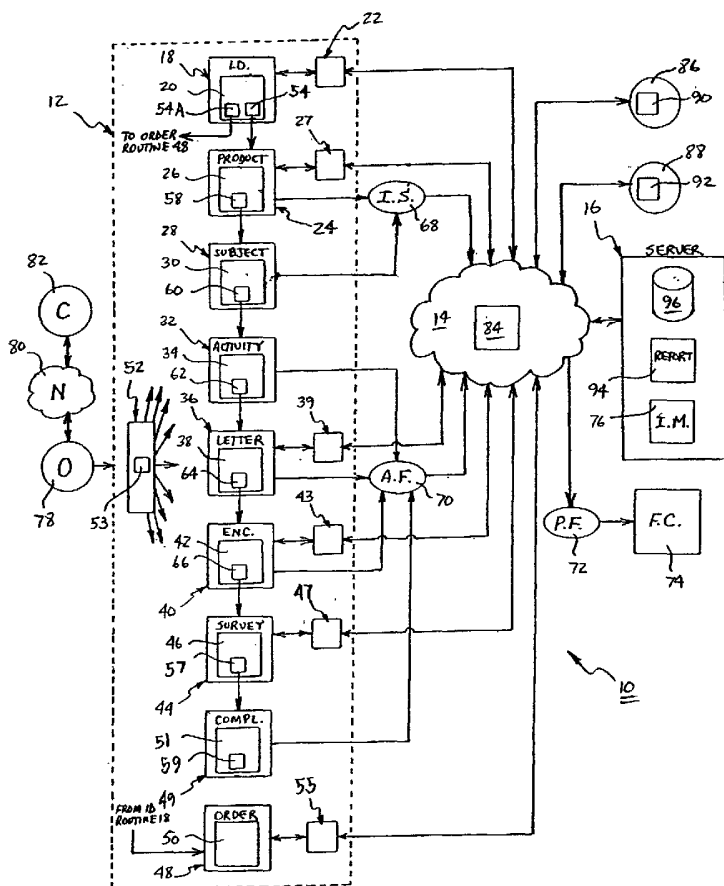
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[Continued on next page]

(54) Title: CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM



(57) **Abstract:** A program (10) for processing contacts from consumers (82) includes a plurality of software routines activated in a sequence corresponding to common steps performed when processing a contact, including an identification routine (18) for generating an identification screen (20) to enable an operator (78) to input information identifying a consumer (82) contacting the operator (78) to communicate an issue, a look-up routine (22) for searching a database (96) containing a plurality of issue histories (102) to identify an issue history (102) associated with the consumer (82), and a subject routine (28) for generating a subject screen (30) to enable the operator (78) to input information relating to the issue. A product routine (24) is also included that generates an issue summary (68) containing the issue information for storage in the database (96) as part of the issue history (102) associated with the consumer (82). The program (10) also includes an activity routine (32) for generating an activity screen (34) to enable the operator (78) to input information describing an activity to address the issue. The issue may be stored in the database (96) in association with the operator (78) or another party responsible for completion of the issue summary (68).



ES, FI, FR, GB, GR, HU, IE, IT, LU, MC, NL, PT, RO,
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INTERNATIONAL SEARCH REPORT

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PCT/US03/13556

A. CLASSIFICATION OF SUBJECT MATTER

IPC(7) : G06F 17/30

US CL : 705/8, 7, 9, 39; 345/329; 707/1, 3, 10, 103, 104, 206

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

U.S. : 705/8, 7, 9, 39; 345/329; 707/1, 3, 10, 103, 104, 206

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)

NPL, WEST, IEEE, CAS ONLINE, DIALOG

C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
Y	US 6,177,932 B1 (GALDES et al), 23 January 2001, see entire document.	1-86
Y	US 6,219,648 B1 (JONES et al), 17 April 2001, see entire document.	1-86
Y	US 6,209,005 B1 (HARKER et al), 27 March 2001, see entire document.	1-86
Y	US 6,122,632 A (BOTTS et al), 19 September 2000, see entire document.	1-86
Y	US 6,014,647 A (NIZZARI et al), 11 January 2000, see entire document.	1-86
Y	US 5,737,726 A (CAMERON et al), 7 April 1998, see entire document.	1-86

☐ Further documents are listed in the continuation of Box C. ☐ See patent family annex.

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"O" document referring to an oral disclosure, use, exhibition or other means		
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