SALES INFORMATION TRANSFER SYSTEM AND METHOD

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Publication Classification

Int. Cl.
H04M 3/436 (2006.01)
G06Q 30/06 (2006.01)
H04W 4/16 (2006.01)

U.S. Cl.
CPC H04M 3/436 (2013.01); H04W 4/16 (2013.01); G06Q 30/0623 (2013.01)

ABSTRACT

An information transfer system and method are disclosed. When a call is received on a mobile device, the application on the mobile device can search local databases and server databases for a number associated with the caller. If there is a match in the local database or server databases, the information associated with the number can be copied into temporary folders. The information in the temporary folders can be displayed on the mobile device.
Figure 1
Figure 6
Receiving a call by a mobile device from a client.

- Searching a mobile device database for client profile of the client when the call is received.
- Searching a local server database for the client profile when the call is received.
- Searching a remote server database for the client profile when the call is received.

Receiving the client profile from at least one of the mobile device database, the local server database, or the remote server database if the client profile is found.

Displaying the client profile on a display of the mobile device when the call is received.

Figure 7a
Figure 7b
Figure 7c
Figure 8

Client Profile

First set of client profile

Second set of client profile

Third set of client profile
Selly Automotive Phone Notes Pop Up

Selly Automotive is Running in Background on Device

Incoming Call is Received by Phone

Phone Begins to Ring

Selly automotive recognizes phone state as Receiving Call

Selly Automotive (SA) extracts telephone number from call data

Continue Reference 1
Figure 13A
Figure 13D
Figure 13G
Figure 13H
Figure 14I

Continued Reference 4A1

Requesting Sales Rep Name does not match Sales Rep associated with client

Selly Servers generates notification

SA Compares Sales Rep Request Name to Sales Rep associated with client

Requesting Sales Rep Name is the same as Sales Rep associated with client

Selly Servers take no action

Requesting Sales Rep Name, Associated Sales Rep Client Information

Selly Server send Notification to Requesting Sales Rep, Associated Sales Rep, and Manager
Figure 14J
Figure 15A
Continued Reference

SA Receives Request
Invalid

SA Does not generate
screen pop

SA returns state to
running in background

Figure 16
SALES INFORMATION TRANSFER SYSTEM AND METHOD

CROSS-REFERENCE TO RELATED APPLICATIONS

[0001] This application claims benefit of priority to U.S. Provisional Application No. 62/104,014 filed Jan. 15, 2015, which is herein incorporated by reference in its entirety.

BACKGROUND OF THE INVENTION

[0002] 1. Field of the Invention
[0003] An information transfer system and method are disclosed. The system and method relate to customer relationship management (CRM) software.
[0004] 2. Description of the Related Art
[0005] Currently, automobile dealerships use desktops to store and look up client information, track inventory, and schedule appointments. This requires the sales representative to enter the dealership and login to a computer to find such information which is not efficient. Moreover, when a sales representative receives a call, it may be difficult for the sales representative to remember each client and the relevant, important information related to each client.
[0006] A mobile device able to receive client information is desired. With this device, relevant customer data will display on the screen when a call is received from a matching profile, even if the customer is not added in the phone contact directory. Depending on what stage the client is in of the sales process, specific data will be included in the pop up notes on the mobile device. For example, if an existing client has purchased a car, different data will be shown in the pop up notes than if the client just went for a test drive.
[0007] There can be two versions of the sales information transfer application. There can be a dealership version and a sales representative version. The dealership version is connected to remote servers and also uses local servers to provide the desired information. The sales representative version for an individual or independent sales representative uses local servers.

BRIEF DESCRIPTION OF THE DRAWINGS

[0011] FIG. 1 illustrates a variation of components in a sales information transfer system with a local server and a remote server.
[0012] FIG. 2 illustrates a variation of components in a sales information transfer system with a local server.
[0013] FIG. 3 illustrates a variation of components in a sales information transfer system with a remote server.
[0014] FIG. 4 illustrates a variation of components in a sales information transfer system with a local server and remote server connected to external servers.
[0015] FIG. 5 illustrates a variation of components in a sales information transfer system with a local server, a remote server, and external servers.
[0016] FIG. 6 illustrates a variation of components in a sales information transfer system with multiple mobile devices.
[0017] FIG. 7a illustrates a variation of a sales information transfer method.
[0018] FIG. 7b illustrates a variation of a display of a pop up note.
[0019] FIG. 7c illustrates a variation of a display of a pop up note.
[0020] FIG. 8 illustrates a variation of the types of information.
[0021] FIGS. 9-17 illustrate a variation of a flowchart of the sales information transfer system.

DETAILED DESCRIPTION

[0022] FIG. 1 illustrates that the sales information transfer system can have at least one, two, or three mobile devices, at least one, two, or three local servers, at least one, two, or three remote servers, or any combination thereof. The thin lines can represent connections between components. The lines can
represent information/data transfers in either direction. The lines can be hardwired, wireless, or any combination thereof. The mobile device can be, but is not limited to, a laptop, a desktop, a computer, a tablet, or a cellular phone. The mobile device can have a mobile device database. The mobile device database can be located within the mobile device or on the exterior of the mobile device. The mobile device database can be connected to the mobile device. The mobile device database can store information such as client information, deal information associated with clients, appointment information associated with clients, any other information related to the client, or any combination thereof.

Client information can include, but is not limited to, first name, last name, address, phone, email, source, birthday, notes, sales representative’s name, or any combination thereof. Deal information can include, but is not limited to, the client information, vehicle identification number (VIN), stock number, year, make, model, mileage, price, color, notes, trade-in information, or any combination thereof. Trade-in information can include, but is not limited to, VIN, year, make, model, mileage, value, payoff (debit), color, notes, or any combination thereof. Appointment information can include, but is not limited to, date, time, location, notes about an appointment, deal/deal information, or any combination thereof.

The mobile device can be connected to a local server via a local area network (LAN). The local server can have a local server database. The local server database can store information such as client information, deal information, appointment information, any other information, or any combination thereof. The local server database can be located within the server or on the exterior of the server.

The mobile device can be connected to a remote server via a wide area network (WAN). The remote server can have a remote server database. The remote server database can store information such as client information, deal information, appointment information, any other information, or any combination thereof. The remote server database can be located within the server or on the exterior of the server.

FIG. 2 illustrates that the mobile device can be connected to a local server via LAN.

FIG. 3 illustrates that the mobile device can be connected to a remote server via WAN.

FIG. 4 illustrates that the mobile device can be connected to the local server via LAN. The mobile device can be connected to the remote server via WAN. The remote server can be connected to at least one, two, three or more external servers via LAN, WAN, hardwire, wireless, or any combination thereof. The external server can have an external server database. The external server database can store information such as client information, deal information, appointment information, any other information, or combinations thereof. The external server database can be located within the server or on the exterior of the server.

FIG. 5 illustrates that the mobile device can be connected to a local server. The local server can be connected to a remote server via WAN. The remote server can be connected to external servers via WAN, LAN, or any combination thereof.

FIG. 6 illustrates that a first mobile device can be connected to a remote server via WAN. The first mobile device can be connected to a local server via LAN. A second mobile device can be connected to the same remote server or a different remote serve via WAN. The second remote server can be connected to the same local server or a different local server via LAN.

FIG. 7a illustrates that an application can commence when the mobile device receives a call from a client (i.e., a second mobile device). The application can run in the background of the mobile device. When the mobile device receives a call from a client, the mobile device (i.e., the application) can search the mobile device database for a client profile of the client, the mobile device can request that the local server search the local server database for the client profile, the mobile device can request that the remote server search the remote server database for the client profile, or any combination thereof. The request to search the mobile or server databases can occur at different times or at the same time. When the mobile device database, the local server database, the remote server database, or any combination thereof searches for the client profile, the mobile device can receive the client profile from the mobile device database, the local server database, the remote server database, or any combination thereof if the client profile is found. If the client profile is not found, no action can be taken or a new client profile can be created. When the mobile device receives the client profile, the mobile device can display the client profile (or a subset of the client profile) on the mobile device. The displaying of the client profile on the mobile screen can be a pop up note. The displaying of the client profile can be for the duration of the call, when the mobile device rings, after the call, before receiving the call, when receiving a text message, when receiving an email, or any combination thereof.

For example, the user can receive a call from a client on a mobile device. The application can search local and server databases for a phone number and/or profile match based on the phone number or profile extracted from the call received by the user. If there is a match in the local system or server databases, the pop up note feature of an application can be enabled. Depending on what stage the client is in, the application can display specific information that can be included on the pop up note on the screen of the mobile device.

FIG. 7B and 7C illustrate a pop up note (i.e., client profile notes) that can be displayed on the device. The application can display the pop up note. The information on the pop up note can be found on the mobile device, the local server, the remote server, or any combination thereof. FIG. 7d illustrates that the pop up note can include a dismiss note button, an answer and open button, client notes (e.g., client information, deal information, appointment information, or any combination thereof), application name, or any combination thereof. The pop up note can be displayed on the entire screen of the device or on a portion of the screen of the device.

FIG. 7C illustrates another variation of the pop up note. The pop up note can include a drag outside the circle to reject or answer the call where the user must move his/her hands/fingers across the screen to answer or reject the call, rejecting a call with a message, or any combination thereof. The user can open the application or answer the call via voice command. The pop up note can be displayed on the top, bottom, or side of the device screen.

FIG. 8 illustrates the various subsets of information. The client profile can include the client information, the deal information, the appointment information, any other information related to the client, or any combination thereof. The
client profile can have a first, second, third, fourth, or more subsets of information. Each subset of information can include the client information, the deal information, the appointment information, any other information related to the client, or any combination thereof. The subsets of client profile information can overlap with one another.

[0037] FIG. 9 illustrates that when the Selly Automotive Application (Application) is running in the background on the first device, the first mobile device can receive an incoming notification (e.g., a call or a text) by a second mobile device. When the incoming call is received by the mobile device, the mobile device can begin to ring or vibrate. When the mobile device begins to ring, the application can recognize a mobile device state, for example, Receiving Call. When the application recognizes the mobile device state, the application can extract a number (e.g., telephone number, name, or email address) from the call data of the mobile device.

[0038] FIG. 10 illustrates that when the application extracts the number from the call data of the mobile device, the application can search “Phone” data fields (or any other data fields of the mobile device). When the application searches “Phone” data fields, the application can find a match in local data (i.e., mobile device database).

[0039] If the application finds a match in local data, the application can retrieve client information associated with the number. When the application retrieves client information associated with the number, the application can place the information in a temporary file, for example, temporary file of client information (e.g., client information file). When the application places the information in a temporary file, the application can place the information in a temporary folder, for example, temporary folder A. When or after the application retrieves client information associated with the number, the application can search for deals associated with the client. If the application does not find deals associated with the client, the application may not add a temporary file. If the application finds deals associated with the client, the application can place the information in a temporary file, for example, temporary file of deal information (e.g., deal information file). The temporary file of deal information can be placed in a temporary folder, for example, temporary folder A. When or after the application searches for deals associated with the client, the application can search for appointments associated with the client. If the application does not find appointments associated with the client, the application may not add a temporary file. If the application finds appointments associated with the client, the application can place the information in a temporary file, for example, temporary file of appointment information. The temporary file of appointment information can be placed in a temporary folder, for example, temporary folder A. After the application searches for appointments, the application can gather the temporary folder created (i.e., temporary folder A).

[0041] FIG. 12A and 12B illustrate that when the application gathers the temporary folder (i.e., temporary folder A), the application can check the temporary folder for temporary file of deal information. If the application finds the temporary file of deal information, the application can check the temporary folder for the temporary file of appointment information.

[0043] FIG. 13A illustrates that when the application finds/does not find the temporary file of appointment information, the application can reference the deal information file from the temporary folder. When the application references the deal information file from the temporary folder, the application can search the deal information file for a stage value. The stage values can be, but is not limited to, fresh up, test drive, validation, write up, negotiation, sold, lost, or any combination thereof. The stage value can be any value the client, user, or person inputs. The stage value can be selected manually by the user. The stage value can be selected automatically by the application. The stage value can be any value that represents a stage during the automobile purchase process.

[0044] “Fresh Up” can be a car dealer term for a new customer, someone who has walked on the lot and is a potential customer. “Test Drive” can be the stage where the client sees the car and test drives it on a road to assess the way the vehicle preforms. “Validation” can be when the salesman inquires about whether the customer likes the vehicle and would like to see a price statement or look at another car. “Write Up” can be when the salesman provides the initial quote on the car’s price. “Negotiation” can be the stage where the client and salesman try to come to an agreement on the car’s value. “Sold” can be when the client and the salesman come to an agreement on price and the client pays for the car
and accepts ownership. “Lost” can be when the client and the salesman fail to come to an agreement about the price/value of the car, and the client leaves the dealership without the intent to return.

[0045] FIG. 13B illustrates that when the stage value is fresh up, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle, vehicle value, trade in, trade in value, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the deal information file.

[0046] When the stage value is fresh up, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the client information file.

[0047] When the stage value is fresh up, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the appointment information file.

[0048] The copied information from the deals information file, the client information file, and/or the appointment information file can be copied to an intermediate temporary file before being added to the notes temporary file. The copied information from the deals information file, the client information file, and/or the appointment information file can be in one notes temporary file or multiple notes temporary files.

[0049] FIG. 13C illustrates that when the stage value is test drive, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle, vehicle value, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the deal information file.

[0050] When the stage value is test drive, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the client information file.

[0051] When the stage value is test drive, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the appointment information file.

[0052] FIG. 13D illustrates that when the stage value is validation, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle, vehicle value, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the deal information file.

[0053] When the stage value is validation, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the client information file.

[0054] When the stage value is validation, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the appointment information file.

[0055] FIG. 13E illustrates that when the stage value is write up, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle, vehicle value, trade in, trade in value, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the deal information file.
When the stage value is write up, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to a notes temporary file, the application can close the client information file.

When the stage value is write up, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the appointment information file.

FIG. 13F illustrates that when the stage value is negotiation, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle, vehicle value, trade in, trade-in value, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the deal information file.

When the stage value is negotiation, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the client information file.

When the stage value is negotiation, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the appointment information file.

FIG. 13H illustrates that when the stage value is lost, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle, vehicle value, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the deal information file.

When the stage value is lost, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the client information file.

When the stage value is lost, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as name, number, date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the appointment information file.
FIG. 14A illustrates when the application finds/does not find the temporary file of appointment information, the application can reference the deal information file from the temporary folder. When the application references the deal information file from the temporary folder, the application can search the deal information file for a stage value. The stage values can be, but is not limited to, fresh up, test drive, validation, write up, negotiation, sold, lost, or any combination thereof.

FIG. 14B illustrates that when the stage value is fresh up, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle, vehicle value, trade in, trade in value or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the deal information file.

When the stage value is fresh up, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as sales representative name, first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the client information file.

When the stage value is fresh up, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the second notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the appointment information file.

FIG. 14C illustrates that when the stage value is test drive, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle, vehicle value, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the deal information file.

When the stage value is test drive, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as sales representative name, first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the deal information file.
example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the deal information file.

When the stage value is write up, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as sales representative name, client first name, client last name, client middle name, client notes, client birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the client information file.

When the stage value is write up, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the second notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the appointment information file.

FIG. 14F illustrates that when the stage value is negotiation, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle, vehicle value, trade in, trade in value, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the deal information file.

When the stage value is negotiation, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as sales representative name, first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the client information file.

When the stage value is negotiation, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the second notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the appointment information file.

FIG. 14G illustrates that when the stage value is sold, the application can open the deal information file from the temporary folder. When the application opens the deal information file from the temporary folder, the application can copy information such as vehicle. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the deal information file.

When the stage value is sold, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as sales representative name, first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the client information file.

When the stage value is sold, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the second notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the appointment information file.

When the stage value is lost, the application can open the client information file from the temporary folder. When the application opens the client information file, the application can copy information such as first name, last name, middle name, client notes, birthdate, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the client information file.

When the stage value is lost, the application can check for the appointment information file. If the application does not find the appointment information file, the application
may not add appointments to the second notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof.

When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the appointment information file.

FIG. 14 illustrates that when the application copies the sales representative’s name, the application compares the sales representative’s name requesting the information to the sales representative associated with the client. The sales representative’s name can be copied during any stage value. If the sales representative’s name requesting the information is the same as the sales representative’s name associated with the client, the application takes no action. If the sales representative’s name requesting the information is different than the sales representative’s name associated with the client, then the application and/or the servers generate a notification. When the application and/or the servers generate a notification, the server/application requests the requesting sales representative’s name, the associated sales representative’s name, client information, or any combination thereof. When the server/application generates the notification, the server sends a notification to the requesting sales representative, the associated sales representative, the manager, or any combination thereof. The comparison of the names can be substituted such that the sales representative’s numbers, mobile device, mobile device number, email, or any combination thereof can be compared.

For example, a requesting first mobile device can request user information (e.g., client profile) from a server. The first mobile device can be associated with a first mobile device identifier (e.g., number, name, email, address, code, or any combination thereof). The server can search for the user information. The user information can comprise a stored mobile device identifier. The server can compare the stored mobile device identifier with the first mobile device identifier. When the first mobile device identifier is not the same as the stored mobile device identifier, the server can generate a notification to the first mobile device, a second mobile device associated with the stored mobile device identifier, and a third mobile device.

FIG. 14 illustrates that when any stage value is recognized, the application can check signal connection for strength. If no WIFI or data network transfer is available, the application can place the action on wait until signal is strong. If the application can transfer data on the network or is connected to WIFI, the application can send data notification about the stage to the server. When the application sends data notification about the stage to the server, the server can receive the data notification about the stage value. When the server receives data notification about the stage value, the server can search for client information associated with the deal. When the server searches for client information associated with the deal, the server can send client information associated with deal/stage value to a manager (i.e., another mobile device). The manager can receive the notification from the server about client and deal/stage.

FIG. 15A illustrates that when the application does not find the temporary deal information file in the temporary folder (see FIG. 12A), the application can open the client information file from the temporary file/temporary folder. When the client information file is open, the application can copy information such as first name, last name, client notes, birthdate, or any combination thereof. When the information is copied, the application can add the copied information to a notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the client information file.

FIG. 15B illustrates that when the application does not find the temporary deal information file in the temporary folder (see FIG. 12B), the application can open the client information file from the temporary file/temporary folder. When the client information file is open, the application can copy information such as first name, last name, client notes, birth date, or any combination thereof. When the information is copied, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the client information file.

When the application opens the client information file from the temporary file/temporary folder, the application can check for the appointment information file. If the application does not find the appointment information file, the application may not add appointments to the notes temporary file. If the application finds the appointment information file, the application can open the appointment information file from the temporary folder. When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to the notes temporary file, for example, notes temporary file 1. When the application adds the copied information to the notes temporary file, the application can close the appointment information file.

When the application opens the appointment information file, the application can copy information such as date, time, or any combination thereof. When the application copies the information, the application can add the copied information to a second notes temporary file, for example, notes temporary file 2. When the application adds the copied information to the second notes temporary file, the application can close the appointment information file.

FIG. 16 illustrates that when the application cancels the server request, the application can receive invalid request. The application may not generate a screen pop up on the mobile device. The application can return to the state in which it runs in the background of the device.

FIG. 17 illustrates that when the application successfully creates a temporary file (e.g., temporary file 1) and/or the application receives temporary file 2 from the server, the application presents the information in the notes.
temporary file on the screen (notes temporary file 1 and/or notes temporary file 2). When the application does not create a temporary file (e.g., temporary file 1) and the application receives temporary file 2, the application presents the information in the notes temporary file on the screen (notes temporary file 1 and/or notes temporary file 2).

When the application presents the information on the mobile device screen, a user can see the pop up note. When the user sees the pop up note, the user may not interact with the mobile device. The call can be sent to voicemail. The application can make a note on the client information that a call was missed. The application can end function and return to running in the background.

When the application presents the information on the device screen, the user can dismiss the note. The application can make note on the client information that a call was received. The application can end function and return to running in the background.

When the application presents the information on the device screen, the user can answer and open the entire application. The application can mark the call as answered in the client information. The application can open to view client profile or entire client profile associated with notes. When the application is exited, the application can return to running in the background.

When the user is on another call, the pop up note can display on the screen. If the user dismisses the note, the application can make a note on the client information that a call was received. The application can end function and return to running in the background. If the user answer and opens the application, the current call can be placed on hold or can be hung up. The application can mark the call as answered in the client information. The application can open to view client profile associated with notes. When the application is exited, the application can return to running in the background.

The term connected/connection can mean transfer of data in either direction, attached to, coupled to, hardwired, wireless connection, connected by WAN, connected by LAN, physically connected, requesting data between devices/servers, transferring of data in either direction wirelessly, transferring of data in either direction via hardware, or any combination thereof. The term database can include remote database, local database, mobile database, external database, or any combination thereof. The term user information can be the same as client information, client profile, client profile information, deal information, appointment information, number or any combination thereof.

All steps in the process and flowcharts described in the application can be done sequentially, at the same time, at different times, or any combination thereof. Any process described in the application can be completed by a processor. The processor can be located on the device (e.g., mobile device), on the local server, on the local database, on the remote server, on the remote database, or any combination thereof.

It is apparent to one having ordinary skill in the art that various changes and modifications can be made to this disclosure, and equivalents employed, without departing from the spirit and scope of the invention. Elements shown with any embodiment are exemplary for the specific embodiment and can be used on other embodiments within this disclosure.

We claim:
1. A method for sales information transfer comprising:
   storing a first set of user information on a first mobile device database, wherein the first mobile device database is on a first mobile device;
   storing a second set of user information on a local server database;
   storing a third set of user information on a remote server database;
   receiving a call from a second mobile device, wherein the call is received by the first mobile device;
   searching the mobile device database for the first set of user information of the user when the call is received, wherein the user information comprises at least a second mobile device identifier of the second mobile device;
   searching the local server database for the second set of user information when the call is received;
   searching the remote server database for the third set of user information when the call is received;
   receiving at least one of the first, second, or third set of user information if the respective set of user information is found, wherein the user information is received by the first mobile device;
   and
   displaying the sets of information associated with the second mobile device identifier received by the first mobile device on a display of the first mobile device when the call is received.
2. The method of claim 1, wherein the displaying of the sets of user information on the display of the mobile device is for the duration of the call.
3. The method of claim 1, wherein the displaying of the sets of user information on the display of the mobile device is for at least 30 seconds.
4. The method of claim 1, further comprising answering the call on the mobile device from the user, wherein the answering the call comprises displaying a user profile on the mobile device.
5. The method of claim 1, further comprising disabling the displaying the sets of user information on the mobile device if the user information is not found.
6. The method of claim 1, further comprising, identifying, a stage of the user purchasing the car, wherein the mobile device performs a portion of the identifying, wherein the displaying comprises the mobile device displaying a subset of the first, second, or third set of user information, and wherein the subset is based on the stage.
7. A system for sales information transfer comprising:
   a mobile device comprising a mobile device database, wherein the mobile device database is configured to store user information, wherein the user information comprises at least a mobile device identifier; and
   a local server comprising a local server database, wherein the local server database is configured to store the user information;
   wherein the mobile device is configured to receive a client profile associated with the user information if the user information is found, wherein the mobile device is configured to display the user information on a display of the mobile device if the user information is found, wherein the mobile device is configured to display the user information when the mobile device receives a call, and wherein the client profile is based on a stage of purchasing an automobile.
8. The system of claim 7, further comprising a local area network.

9. The system of claim 7, further comprising a remote server comprising a remote server database, wherein the remote server database is configured to store the user information, wherein the remote server is configured to send the user information to the mobile device if the user information is found.

10. The system of claim 9, further comprising a wide area network.

11. The system of claim 9, further comprising an external server comprising an external server database, wherein the external server database is configured to store the user information, wherein the external server is configured to send the user information to the remote server if the user information is found, and wherein the remote server is configured to send the user information from the external server to the mobile device.

12. The system of claim 7, wherein the mobile device is configured to display the user information for the duration of the call.

13. The system of claim 7, wherein the mobile device is configured to display the user information for at least 30 seconds.

14. The system of claim 7, wherein the mobile device comprises an optical sensor, wherein the optical sensor is configured to scan vehicle identification numbers, business cards, and driver’s licenses.

15. A method for sales information transfer comprising:
    storing a first set of user information on a first mobile device database, wherein the first mobile device database is on a first mobile device;
    storing a second set of user information on a second mobile device database, wherein the second mobile device database is on a second mobile device;
    storing a third set of user information on a remote server database;
    receiving a call from a user, wherein the call is received by the second mobile device;
    searching the first mobile device database for the first set of user information of the user when the call is received, wherein the user information comprises a make of a car or a value of a car;
    searching the second mobile device database for the second set of user information of the user when the call is received;
    searching a remote server database for the third set of user information when the call is received;
    receiving at least one of the first, second, or third set of user information if the user information is found; and
    displaying the sets of user information on a display of the second mobile device when the call is received.

16. The method of claim 15, wherein the user information comprises a make of a car.

17. The method of claim 15, further comprising searching for the user information from a remote server database.

18. The method of claim 17, further comprising displaying the user information on the mobile device if the user information is found on the remote server database.

19. The method of claim 17, further comprising searching for the user information from an external server database wirelessly connected to the remote server database.

20. The method of claim 19, further comprising displaying the user information on the mobile device if the user information is found on the external server database.

21. A method for sales information transfer comprising:
    requesting user information from a server by a requesting first mobile device, wherein the first mobile device is associated with a first mobile device identifier;
    searching the server for the user information, wherein the user information comprises a stored mobile device identifier;
    comparing the stored mobile device identifier with the first mobile device identifier, wherein the comparing is performed by the server, and
    when the first mobile device identifier is not the same as the stored mobile device identifier, generating a notification to the first mobile device, a second mobile device associated with the stored mobile device identifier, and a third mobile device.

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