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Date Mailed: 01/28/2015

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The country code and number of your priority application, to be used for filing abroad under the Paris Convention, is **US 62/104,043**

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**** SMALL ENTITY ****

Title

Granulated Web Services Guest Survey System

Statement under 37 CFR 1.55 or 1.78 for AIA (First Inventor to File) Transition Applications: No

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Application	Document	Mailroom Date	Attorney Docket No.
62104043	APP.FILE.REC	01/28/2015	

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PATENT APPLICATION INFORMATION RETRIEVAL SYSTEM

GRANULATED WEB SERVICE GUEST SURVEY SYSTEM

[01] **FIELD OF THE INVENTION**

[02] The present invention relates to a computer method and system for receiving guest feedback and information relating to a purchase, and more particularly, automatically generating a particular questionnaire for each purchase and linking the questionnaire results to transaction data.

[03] **BACKGROUND**

[04] In any business, keeping guests satisfied is critical. Many techniques have been used to determine the level of guest satisfaction. One technique provides for analyzing sales histories and related product matrices. However, only limited information is typically gathered from sales histories. For example, while analyzing sales history for a particular product or group of products may provide information about which products are beginning to weaken in sales, little if any information is provided about why particular products are slowing in sales. Furthermore, although sales history may provide information about regional buying trends, it usually cannot indicate why a particular guest was dissatisfied.

[05] Getting guest response through the use of generic surveys has several disadvantages. First, surveys tend to be impersonal and ask general questions such as "How was your meal?" or "Would you shop here again?" that are not unique to a particular guest's experience. Second, surveys are often unnecessarily cumbersome to complete. For example, a survey may ask for the product name, identifier (survey token), serial number, store purchased from, purchase price, purchase date, and a host of other questions unrelated to a particular guest's feedback. While the answers to these questions may be important to determine which product or service the guest is commenting on, a guest looking over this type of survey often determines that too much work must be done that is unrelated to their particular transaction and foregoes answering any of the questions in the survey.

[06] Many merchants, such as retail establishments, restaurants and other service providers, use modern Point-of-Sale (POS) systems that capture rich details around their guests' purchasing

activity. This information, however, has never been made available for the guest to interact with in terms of survey and satisfaction. With most POS systems, check-level data can include: the server or cashier, the date and time of service, the check duration, the table, the location, the mode, and each item ordered on the check plus modifications, comps, etc. applied to the check – this is *rich* data to the guest. Other systems provide guest satisfaction surveys but they ask only a pre-determined set of questions and rarely (if ever) provide actual feedback on the guests' specific experience. To get check-level survey information many guests hire "Secret Diners" (secret only in that the restaurant does not know they are professional survey takers) to provide feedback on service, food, and experience.

[07] What is needed is a system that allows guests to provide valuable feedback for merchants not only through pre-set survey template(s), but also in obtaining detailed feedback on the guests specific experience such as the actual items sold, the server, the table, the time of day, and more.

[08] **SUMMARY OF THE INVENTION**

[09] In accordance with the present invention, there is provided a method and system for automatically generating questions, receiving guest feedback, and associating the feedback with purchase information. With this invention, purchase information is stored at the time of purchase and the guest is given a survey token correlating to the purchase. Then, at the guest's convenience, either at the point of sale or through any web-enabled device, the guest can provide feedback to questions that specifically relate to the items purchased. This feedback is then stored, associated with the purchase information, and immediately available for analysis.

[010] Specifically, in accordance with the present invention, there is provided a method of providing a web-service (WS) that allows merchants, such as retailers and service providers, to integrate a check-level survey module into their own branded web-site. This WS feature allows guests to participate in a survey within the merchant's web-site and to interact with their check details and other survey features being delivered to the merchant web-site using a Guest Survey Module (GSM) web-service as the data-integration and storage platform.

[011] The invention may be implemented as a computer process, a computing system or as an article of manufacture such as a computer program product or computer readable media. The

computer program product may be instructions for executing a computer process encoded on a computer storage media readable by a computer system. The computer program product may also be instructions for executing a computer process encoded on a propagated signal on a carrier readable by a computing system.

[012] These and various other features as well as advantages, which characterize the present invention, will be apparent from a reading of the following detailed description and a review of the associated drawings.

[013] **BRIEF DESCRIPTION OF THE DRAWINGS**

[014] FIG. 1 shows a block diagram for a system for receiving guest feedback in a GSM-Web Services configuration;

[015] FIG. 2 illustrates a flow chart for generating questions and receiving feedback related to a purchase;

[016] FIG. 3 illustrates a flow chart for gathering information relating to a purchase and associating a survey token with the purchase;

[017] FIG. 4 shows a flow chart for automatically gathering feedback associated with a purchase;

[018] FIG. 5 illustrates a flow chart for automatically generating questions for a purchase;

[019] FIG. 6 illustrates a flow chart for automatically generating promotions to reward guest feedback;

[020] FIG. 7 shows a flow chart for specifying merchant preferences for reporting and/or for questions automatically generated for purchases;

[021] FIG. 8 shows an exemplary questionnaire that includes a list of feedback questions that could be asked of a guest; and

[023] **DETAILED DESCRIPTION**

[024] In the following detailed description of exemplary embodiments of the invention, reference is made to the accompanied drawings, which form a part hereof, and which are shown by way of illustration, specific exemplary embodiments of which the invention may be practiced. These embodiments are described in sufficient detail to enable those skilled in the art to practice the invention, and it is to be understood that other embodiments may be utilized, and other changes may be made, without departing from the spirit or scope of the present invention. The following detailed description is, therefore, not to be taken in a limiting sense, and the scope of the present invention is defined only by the appended claims.

[025] FIG. 1 shows a block diagram for a system for receiving guest feedback in a client/server configuration. POS client **100** includes point of sales (POS) terminal **105**, purchase detail component **110**, purchase system client to server interface **115** and web pages **160**. POS terminal **105** represents anywhere a purchase takes place and includes on-line purchasing, restaurants, grocery stores, department stores, and other places where goods or services are purchased. Purchase detail component **110** collects transaction information that may include price, quantity, and name of each item purchased, time and date of purchase, employees on duty, and/or any other relevant information associated with a purchase. For example, when a guest uses a loyalty card or some other means of identification during the purchase, purchase detail component **110** may collect a survey token that identifies the particular guest.

[026] Purchase system client to server interface **115** provides an interface between purchase system client **100** and server **140**. Purchase system client **100**communicates with server **140** through communication link **132**.

[027] Server **140** includes server engine **145**, response table**165**, and purchase detail table **170**. Server engine **145** includes purchase question generator module **150** and question response module **155**. Server **140** includes communications link **132** to purchase system client **100** and communication link **135** to guest response client **120**. Purchase question generator module **150** generates questions based on purchase information stored in purchase detail table **170** and preference data associated with merchant preferences. Question response module **155** receives guest responses from guest response client **120**. Web pages **160** enable guest response client **120** to include a web browser that provides a customizable interface for

collecting guest responses (feedback). Response table **165** stores guest responses and a survey token for referencing purchase detail table **170**. Purchase detail table **170** stores purchase detail collected on purchase system client **100** and associates a survey token and possibly a guest survey token with each entry.

[028] In some circumstances, not all purchase detail collected may be stored in purchase detail table **170**. For example, a merchant may pre-determine that the server should not ask any questions related to certain items. Rather than consume disk space storing purchase detail related to the items, the server may omit storing the items altogether. Alternatively, a purchase detail line may be deleted from purchase detail table **170** when it is determined that it is no longer needed. For example, certain purchase detail transaction lines may trigger purchase generator module **150** to generate a question, while other transaction lines may not cause a question to be generated. In one embodiment, during these scenarios, the transaction lines not triggering a question are deleted to conserve storage space and/or decrease access time to the other remaining transaction lines.

[029] Customer response client **120** is comprised of browser **130** and survey token **125**. It is appreciated that browser **130** may be a web browser, application program, or any device capable of reading web pages. Unique survey token **125** is typically the same survey token given to the guest at the time of the sale and associated with the guest's purchase in purchase detail table **170**. Before submitting responses, a guest enters this survey token to identify the particular purchase for which the responses will be given.

[030] While entering the unique survey token to identify the purchase, the guest may optionally enter a user ID and password to identify the guest. This enables tracking of responses made by a particular guest. The purchasing behavior of the particular guest can be analyzed to provide a unique promotional experience. For example, a merchant could promote guest feedback by giving points or coupons to repeat guests who provide feedback regarding their purchasing experience. Alternatively, guest data can be captured through the use of a Website Contact Module (discussed below).

[031] Purchase system client **100**, server **140**, and guest response client **120** may reside on the same electronic device or may reside on separate electronic devices.

[032] Computing devices, such as the ones shown in FIG. 1, typically include at least some form of computer-readable media. Computer readable media can be any available media that can be accessed by the computing device. By way of example, computer-readable media might comprise computer storage media and communication media.

[033] Computer storage media includes volatile and nonvolatile, removable and non-removable media implemented in any method or technology for storage of information such as computer readable instructions, data structure, program modules or other data. Computer storage media includes RAM, ROM, EPROM, flash memory or other memory technology, CD-ROM, digital versatile disk (DVD) or other optical storage or any other medium that can be used to store the desired information and that can be accessed by a computing device.

[034] Communication media typically embodies computer-readable instructions, data structures, program modules or other data in a modulated data signal such as a carrier wave or other transport mechanism and includes any information delivery media. Combinations of any of the above should also be included within the scope of computer-readable media. Computer-readable media may also be referred to as computer program product.

[035] FIG. 2 illustrates a flow chart for generating questions and receiving feedback related to a purchase. The process starts at block **200** when a purchase is made.

[036] At block **205**, a purchase occurs as described in detail in conjunction with FIG. 3. Briefly stated, a guest makes a purchase, details regarding the purchase are stored, and a survey token identifying the purchase transaction is given to the guest. For example, referring to FIG. 1, a guest makes a purchase at POS terminal **105**. Purchase detail is sent to server **140**, and a survey token is generated and sent back to POS terminal **105** and given to the guest.

[037] At block **210**, a determination is made as to whether as to whether a survey token is valid and a survey will be generated. When a survey is to be generated, the yes branch is followed and processing continues at block **215**. Otherwise, the no branch is followed and processing continues at block **225**. It will be appreciated that feedback may be provided immediately after the transaction or any time thereafter.

[038] At block **215**, feedback about a purchase is received as described in conjunction with FIG. 4. Briefly stated, a survey token associated with a purchase is entered into a client computer

which forwards the survey token to a server. The server generates questions related to the purchase and forwards the questions to the client computer. The client computer receives the questions, solicits responses to the questions, and returns the responses to the server which then stores them. For example, referring to FIG. 1, a guest uses browser **130** to connect to server **140** and to provide feedback regarding a purchase associated with unique survey token **125**.

[039] In another embodiment, a server may pre-generate questions after the purchase details are forwarded to the server. Pre-generating questions may be done to move the generation of questions to off-peak compute times, to speed response when the guest provides feedback, or for other reasons. The generated questions may then be stored together with the survey token that is returned to the guest. When a user desires to provide feedback, the pre-generated questions may then be retrieved by the server and sent to the computer receiving feedback regarding the purchase.

[040] At block **220**, a promotion may be generated. For example, a merchant may promote guest feedback by giving points or coupons to repeat guests who provide feedback regarding their purchasing experience. For example, referring to FIG. 1, server **140** generates a promotion and forwards it to guest response client **120**.

[041] At block **225**, processing ends. At this point, details related to the purchase have been recorded. When feedback is received, this is also recorded and associated with the purchase. Both the purchase detail and the feedback may be immediately retrieved for analysis and reporting. A user may be rewarded when the server determines that a promotion is appropriate.

[042] FIG. 3 illustrates a flow chart for gathering information relating to a purchase and associating a survey token with the purchase. The process starts at block **300** when the purchase is made.

[043] At block **305**, a guest employs client hardware and/or software (hereinafter referred to as the client system) to make a purchase. Client hardware includes cash registers, personal computers, hand-held devices, multiprocessor systems, microprocessor-based or programmable consumer electronics, network PCs, minicomputers, mainframe computers, and the like. Client software typically executes on client hardware and works in conjunction with the hardware to enable the guest to make the purchase and to perform various other

functions described in conjunction with FIG. 3. For example, referring to FIG. 1, a guest employs purchase system client **100** to make a purchase.

[044] At block **310**, purchase detail is collected by the client system. For example, referring to FIG. 1, purchase detail component **110** may collect price, quantity, and name of each item purchased, time of purchase, employees working during purchase, and a survey token identifying the guest. An advantage of collecting this information is that the guest does not have to re-enter the purchase information when providing feedback about the purchase. Another advantage is that information the guest may be unaware of and should not need to be concerned with may also be collected such as manager on duty, cashier, waiter, chef, etc.

[045] Yet another advantage is that the purchase detail can be used to generate customized questionnaires automatically. For example, instead of asking "How was your food?" or "Would you recommend us to a friend?" the purchase detail can be used to ask "How was your foot-long meatball sub?" or "How was your server, Joan?" Such transaction-related questions may aid the guest in providing more accurate and relevant answers. Furthermore, because a guest is not required to fill in details regarding the purchase such as what they ate, what item they purchased, the time and date of the transaction, etc., the guest may determine that the questionnaire will not require too much time to complete and may be more willing to complete it.

[046] At block **315**, the purchase detail is forwarded from the client system to a server. For example, referring to FIG. 1, purchase system client to server interface **115** sends the purchase detail to server **140**.

[047] At block **320**, the server receives the purchase detail, assigns a survey token to the detail, and stores the purchase detail with the survey token for future access. This allows the server to retrieve the purchase detail when a client system identifies the purchase by giving the survey token. Typically, the survey token assigned will be unique with respect to other IDs stored. Over time, however, IDs may be reused. For example, after a purchase detail associated with a survey token is no longer needed, it may be deleted or archived. When the purchase detail is deleted or archived, the survey token may be available for use in identifying another purchase detail. For example, referring to FIG. 1, server **140** receives purchase detail from

purchase system client to server interface **115**. Then, server **140** generates a survey token and stores the purchase detail with the survey token in detail table **170**.

[048] At block **325**, the server sends the survey token to the client system. This allows the client system to give the survey token to a guest for use when the guest provides feedback. For example, referring to FIG. 1, server **140** sends purchase system client **100**the survey token.

[049] At block **330**, processing ends. At this point, the client system has collected purchase detail and forwarded it to the server. The server has generated a survey token and stored the purchase detail with it for future use. Additionally, the server has sent the survey token to the client system so that it may give the survey token to the guest.

[050] It will be appreciated that the client system may give the survey token to the guest in many ways, including displaying it for the guest to read, storing it in a file on a computer, such as in a cookie, printing it on a bar code on a receipt or check given to the guest, encoding it on a loyalty card presented by the guest, encoding it on a ticket given to the guest, transmitting it to the guest through electronic mail, transmitting it to a wireless personal communication device, and the like.

[051] In one embodiment of the invention, purchase detail is forwarded to the server at the time of the purchase. In another embodiment of the invention, purchase detail is forwarded in batches. When purchase detail is forwarded in batches, the survey token may be generated differently. When a guest is ready to complete a purchase transaction, typically, the guest desires to be finished as soon as possible. For example, when checking out of a grocery store a guest typically wants to pay for the items purchased and take the groceries to the car. When leaving a restaurant, a guest typically wants to pay the waiter or cashier and leave. When purchase details are sent as a batch, depending on the batch size and the number of guests, it may take several minutes or hours before a batch is sent. A guest would not likely wish to wait the minutes or hours for the batch to be sent and a survey token to be returned to the guest for use during feedback.

[052] The wait for a survey token in a batched system may be avoided by having the client system generate a survey token immediately which it displays to the guest. Upon sending of the batched information, the client system would also send the survey token so that the server system could store the survey token given to the guest with the purchase made by the guest.

In this embodiment of the invention, the server does not need to generate the survey token or send it back to the client because the client generated it. Many clients systems, however, may be active simultaneously. Without proper integration, the client systems may assign the same survey token to two different purchases. In light of this disclosure, it will be recognized that in a batched system a method or system for avoiding or dealing with duplicate IDs may be required. One system, for example, for avoiding duplicate IDs is to assign each client a unique client survey token and to have the client embed its unique client survey token in IDs the client generates, thus creating IDs that uniquely identify purchases when multiple clients are employed in a batched system.

[053] FIG. 4 shows a flow chart for automatically gathering feedback associated with a purchase. The process starts at block**400** when a user is ready to provide feedback regarding a purchase transaction.

[054] At block **405**, a survey token is inputted into a guest response client. Inputting the survey token into the guest response client may be done in many ways, including entering the survey token on a keyboard, using a computer on which the survey token was stored as a cookie or otherwise, scanning a bar code, swiping a loyalty card containing the survey token, etc. For example, referring to FIG. 1, a guest uses guest response client **120** to input unique survey token **125** into browser **130**.

[055] At block **410**, the guest response client forwards the survey token to the server. For example, referring to FIG. 1, guest response client **120** forwards unique survey token **125** to server **140**.

[056] At block **415**, the server retrieves purchase detail associated with the survey token and generates questions for the purchase as described in detail in conjunction with FIG. 5. Briefly, the questions generated are related to the items purchased and preference data associated with merchant preferences. For example, referring to FIG. 1, server **140** uses the survey token to retrieve related purchase information in purchase detail table **170**. Then, purchase question generator module **150** generates questions based on the detail retrieved. Typically, these questions are then formatted into web pages **160** which are then sent to browser **130**.

[057] At block **420**, the questions are displayed to the guest and answers are collected. Then, the answers are sent to the server. When a guest does not answer one or more questions, the response(s) of not answering for the one or more questions may also be sent to the server. For example, referring to FIG. 1, browser **130** reads the questions on web pages**160** and displays them to the guest. The guest answers the questions by using browser **130** and indicates that the answers are completed. Then, browser **130** sends the answers to server **140** for use in question response module **155**. The answers may be sent one-at-a-time in real time to the server, or, alternatively, answers may be grouped together and sent to the server in batches.

[058] At block **425**, the server stores the answers together with the survey token for future analysis. When the server stores the answers, they are immediately available for analysis. For example, referring to FIG. 1, server **140** stores the answers with the survey token in question response table **165**.

[059] At block **430**, processing completes. At this point, questions related to a purchase have been generated, and feedback has been received and stored for analysis and reporting.

[060] FIG. 5 illustrates a flow chart for automatically generating questions for a purchase. The process starts at block **500**when a user is ready to provide feedback regarding a purchase transaction.

[061] At block **505**, the server locates purchase detail associated with the purchase that was previously stored on the server. The server typically retrieves the purchase detail by using a survey token supplied by the user. Usually, the survey token is associated with the purchase detail previously stored on the server. For example, referring to FIG. 1, server **140** locates purchase detail associated with the survey token from purchase detail table **170**.

[062] At block **510**, the server retrieves a first transaction line from the purchase detail the server previously located. A purchase may include many items and each item may be associated with a different transaction line. For example, a restaurant check may have appetizers, entrees and drinks each on separate transaction lines. Referring to FIG. 1, for example, server **140** reads a first transaction line from the purchase detail.

[063] At block **515**, the transaction line is searched for merchant specified items. When an item in the transaction line matches a merchant's specified category, a question about the item may

be generated depending on preference data associated with merchant preferences. The merchant may prefer to generate one type of question when alcohol is purchased and another type of question when soft drinks are purchased. For example, referring to FIG. 1, purchase question generator module **150** determines if an item in the retrieved transaction line matches a merchant specified category. When an item in the retrieved transaction line matches a merchant specified category, the purchase question generator module **150** may generate a question.

[064] At block **520**, the server retrieves the next detail transaction line (if it exists) from the purchase detail. For example, referring to FIG. 1, server **140** reads the next transaction line from the purchase detail.

[065] At block **525**, a determination is made as to whether either no more transaction lines exist for the purchase or whether a maximum number of questions have been generated regarding the purchase. When either of these conditions exists, the yes branch is followed to block **530**. Otherwise, the no branch is followed to block **515**. For example, referring to FIG. 1, server **140** determines when additional transaction lines exist for a purchase and purchase question generator module **150**determines when the maximum number of questions has been generated.

[066] At block **530**, the server generates additional questions based on preference data associated with merchant preferences. The merchant may prefer, for example, that a question be asked regarding the quality of service rendered to the guest in addition to other questions related to specific transaction lines. For example, referring to FIG. 1, purchase question generator module applies preference data associated with merchant preferences to add additional questions to be asked to the guest.

[067] At block **535**, the server sends the generated questions to the client computer. The server may do so by populating the merchant's web pages **160** that the client computer accesses. For example, referring to FIG. 1, purchase question generator module **150** completes the list of questions to be asked and populates web pages **160** to be read by guest response client **120**.

[068] At block **540**, processing ends. At this point, questions have been generated based on the items purchased and preference data associated with merchant preferences. These questions have been made available to the guest, typically in the form of web pages.

[069] It will be appreciated that merchant preferences may cause question generation to depend on previous questions generated and responses received. For example, a merchant may prefer that a particular question no longer be generated when no or few guests queried respond to it. In addition, a merchant may prefer that a question that has been answered numerous times no longer be generated as a large enough sample has been generated for analysis. The merchant may specify that after the question has been answered a certain number of times that another question be asked instead of the question.

[070] FIG. 6 illustrates a flow chart for automatically generating promotions to reward guest feedback. The process starts at block **600** when a user has provided feedback regarding a purchase transaction.

[071] At block **605**, a determination is made as to whether a promotion should be generated. The determination may depend on many factors including how many questionnaires a guest has completed, advertising needs for a particular product, the feedback the guest provides, items in the purchase transaction, random generations calculated to promote guest feedback, and/or any other factor(s) a merchant prefers. For example, a positive determination to generate a promotion may occur when a guest provides feedback for a television (or other electronic device) for selected questions of a questionnaire. The system may determine, for example, that the guest should be given a coupon giving a discount on a selected DVD. When it is determined that a promotion should be generated, the yes branch is followed to block **610**. Otherwise, the no block is followed to block **615**.

[072] At block **610**, the server generates a promotion and forwards it to a client computer to give to the guest. The client computer may prompt the guest to save the promotion for future use or to print a coupon. When the guest elects to save the promotion, it may be saved on the server and a survey token identifying the guest may be required. For example, referring to FIG. 1, server **140** generates a promotion and forwards it to guest response client **120**.

[073] At block **615**, processing ends. At this point a promotion, when generated, has been forwarded to a client computer and given to the guest.

[074] FIG. 7 shows a flow chart for specifying merchant preferences for reporting and/or for questions automatically generated for purchases. The process starts at block **700** when a user desires to set preferences.

[075] At block **705**, the user inputs a product ID and a category ID. The product ID and category ID identify the product or products for which preferences will be set. For example, the user may enter a product ID identifying a type of steak and category ID identifying entrees. Referring to FIG. 1, for example, a user uses a client computer (not shown) to connect to server **140** and enters a product ID and a category ID.

[076] At block **710**, the server retrieves preference data related to the product ID and the category ID. When the user is adding a new question, a new data entry is added in a preference table. When the user is modifying an existing question, the existing data entry is located. For example, referring to FIG. 1, server **140** retrieves or adds an entry to a merchant preferences table (not shown).

[077] At block **715**, the user specifies a question style. Question styles include multiple choice, yes/no, fill in the blank, rating scales, free form text responses, and the like. Question styles include questions that could be asked in a paper survey. For example, referring to FIG. 1, server **140** receives a selection as to which question style is desired.

[078] At block **720**, a determination is made as to whether the question style selected is multiple choices. When it is, the yes branch is followed to block **725**. Otherwise, the no branch is followed to block **730**. For example, referring to FIG. 1, server**140** determines whether a multiple choice question style has been selected.

[079] At block **725**, choices for a multiple choice question are selected. These choices are stored for use when the server is generating multiple choice questions regarding a purchase. For example, referring to FIG. 1, server **140** prompts the user for choices allowed in a multiple choice question.

[080] At block **730**, the question style and information about the question are stored so that the server can access the information when it is generating questions regarding a purchase. Information about the question includes such things as product ID, category ID, text used for the question, where to insert an item description or name, and other information relevant to generating the question. For example, referring to FIG. 1, server **140** stores information about the question and the question style in a merchant preferences database (not shown) for use when purchase question generator module **145**generates questions.

[081] At block **735**, processing ends. At this point a question style and information about a question have been stored on the server for use during automatic question generation. A user setting merchant preferences may add or change questions by repeating the process above.

[082] FIG. 8 shows an exemplary questionnaire that includes a list of feedback questions that could be asked of a guest. Questions **810** illustrate guest feedback questions with the names of exemplary items purchased shown in italics along with multiple choice responses. It will be appreciated that the third and fourth feedback questions, "How was your service?" and "Will you return?" may be generated based on the preference of a merchant and may not be related to the actual items purchased.

[083] The questions shown in FIG. 8 represent only a sample of questions that may be asked of a guest. Other question styles include star ratings, numerical ratings, fill in the blank, quality of service ratings, free form text responses, and the like.

[084] The various embodiments of the invention may be implemented as a sequence of computer implemented steps or program modules running on a computing system and/or as interconnected machine logic circuits or circuit modules within the computing system. The implementation is a matter of choice dependent on the performance requirements of the computing system implementing the invention. In light of this disclosure, it will be recognized by one skilled in the art that the functions and operation of the various embodiments disclosed may be implemented in software, in firmware, in special purpose digital logic, or any combination thereof without deviating from the spirit and scope of the present invention as recited within the claims attached hereto.

[085] The above specification, examples and data provide a complete description of the invention. Since many embodiments of the invention can be made without departing from the spirit and scope of the invention, the invention resides in the claims hereinafter appended.

[086] *Examples*

[087] The following illustrative embodiments of individual modules can be implemented as a computer program product for use with a computer system. Such implementations may include a series of computer instructions fixed either on a tangible medium, such as a computer readable medium (e.g., a diskette, CD-ROM, ROM, or fixed disk) or transmittable

to a computer system, via a modem or other interface device, such as a communications adapter connected to a network over a medium. The medium may be either a tangible medium (e.g., optical or electrical communications lines) or a medium implemented with wireless techniques (e.g., microwave, infrared or other transmission techniques). The series of computer instructions embodies all or part of the functionality previously described herein. Those skilled in the art should appreciate that such computer instructions can be written in a number of programming languages for use with many computer architectures or operating systems. Furthermore, such instructions may be stored in any memory device, such as semiconductor, magnetic, optical or other memory devices, and may be transmitted using any communications technology, such as optical, infrared, microwave, or other transmission technologies. It is expected that such a computer program product may be distributed as a removable medium with accompanying printed or electronic documentation (e.g., shrink wrapped software), preloaded with a computer system (e.g., on system ROM or fixed disk), or distributed from a server over the network (e.g., the Internet or World Wide Web). Of course, some embodiments of the invention may be implemented as a combination of both software (e.g., a computer program product) and hardware. Still other embodiments of the invention may be implemented as entirely hardware, or entirely software (e.g., a computer program product).

[088] Other features and advantages of the present embodiment will become apparent to those skilled in the art from the following detailed description. It is to be understood, however, that the detailed description above and specific examples below, while indicating preferred embodiments of the present embodiment, are given by way of illustration and not limitation. Many changes and modifications within the scope of the embodiments disclosed herein may be made without departing from the spirit thereof, and such embodiments include all such modifications.

[089] *WS-Based GSM*

[090] The WS-based Guest Survey Module (GSM) of the current invention allows merchants to integrate a GSM into their branded website allowing integration to both survey templates and actual check details. All administration of the GSM occurs within a Data Collection Handler (DCH) smart client. The WS features are implemented as a multi-unit (MU) role based

services; this allowing an MU login to be setup by survey smart group scope for either centralization or decentralization based upon MU login scope to units.

[091] The challenge of this type of survey concept is to get the guest to volunteer to complete a survey. One solution is to offer limited support for incentives (such as special offers described below).

[092] At the time of the sale, the POS provides a printed survey token (either directly on the check/receipt or on separate piece of paper) that allows the system to retrieve check data in order to complete a survey. Additionally, check information and the token can be provided electronically such as through email or the use of a mobile application. The survey invitation begins with a survey token being generated by the POS, this token is preferably a concatenation of UNIT+DATE+CHECK, and presented on the guest check. These three (3) key informational components (unit, check-date, and check number) are used by the DCH to retrieve, with a high level of confidence, information about the check.

[093] The structure of the token in this preferred embodiment can be literally described as "0103+01282011+12345". It is possible, however, to support different masks, per unit, depending upon what POS is in use by individual units. The GSM-WS uses the survey token as a passed service parameter to determine the actual unit, business-date (by using start of business day rules), and check number. The POS system, plus other cards and placards, etc., can request that the guest to complete a survey at the merchant's website (e.g. www.somemerchantwebsite.com/surveys). The target website will then prompt the guest to enter the survey token, or similar.

[094] Many POS systems are not able to universally provide some form of printed token that will allows the DCH to retrieve check data in order to complete a survey. If a POS is not able to generate a survey token, the guest check is still likely to contain the three criteria (unit, check-date and check number) needed to locate the requisite data. The GSM web-service provides support for both survey-token and/or manual entry of unit, date and check as they appear on most printed guest checks.

[095] *Data Structure*

[096] In a preferred embodiment, surveys are template based thereby allowing a merchant to deliver more than one survey type at a time to its guests. The following represents an illustrative template data structure:

- **Survey Header** – a collection of settings that describes a particular survey that can be deployed to one or more restaurants using smart groups, and with start-on-date viewing for changing surveys;
- **Survey Master Questions** – permanent key based list of questions that can be re-used in different surveys, having durable research value independent of differing survey templates;
- **Survey Questions** – taken from the Survey Master Question as a permanent key instance; a collection of these questions are joined to the Survey Header;
- **Respondent Header** – the response header is generated by the guest respondent and contains the information about the survey response itself; a survey is likely to have many responses, but there should only be one response per unit/guest/check instance;
- **Respondent Details** – detail rows of the Response Header containing guest response for survey questions, item surveys and comments;
- **Special Offers Master** – a table of special offer descriptions that might be offered as inducements for survey completion.

[097] An illustrative Survey Header could consist of the following columns *(bold shows default settings)*:

- Survey Description
- Active (Hide) {**Active**, Inactive}
- Active Date
- CkDetails Scope Limit {can be null, or single selection of item smart group }
- Rate CkDetail Quality {**Checked**, Unchecked}
- Rate CkDetail Value {**Checked**, Unchecked}
- CkDetails Exist Action {**Details and Questions**, Details Only}
- CkDetails Missing Action {**Questions Only**, No Survey}
- Allow Guest Edit Hrs (0 – 999, default **0.5** Hrs)

- Special Offer (can be null or select from Special Offer Globally Unique Identifier (GUID)/list)
- Require Guest Authentication {Checked, **Unchecked}**
- >->>Survey Header Smart Groups
- >->>Survey Questions (described below)

[098] When a survey is created by the system it should default to being hidden – so that at first it cannot be seen. The hidden column should be designated as 'Active' and 'In-active' for this purpose. An active survey template is by default active for all stores with optimistic and/or assigned smart group associations, according to the greatest active date. Only one survey can be active per a store at a time – however if an active survey can't be found for a store a return message to the WS caller must be provided.

[099] The Active Date should default to the current date and should not be null. When the **Rate CkDetail Quality** is set to true the Survey Result table is populated for all sold items with the row flagged to measure the quality of the item. Likewise when the **Rate CkDetail Value** is set to true then the survey result table is populated with Detail Value types per items sold. The **CkDetails Exist Action** and **CkDetails Missing Action** work together to configure how the GSM web-service will respond in the event that check details are found, or not found. If details do exist then the merchant has the option to only survey the check items sold, based upon the configurable options, or they may want to survey the details and appended general survey questions.

[0100] If check details do not exist (e.g. there is a network problem or the POS data has not yet been received by the DCH) the **Ck Details Missing Action** allows the system to deliver the general survey questions, or to reject the survey and include a rejection statement such as "The check you entered is not yet available in the survey system – please check back tomorrow." The **Allow Guest Edit Hrs** determines the amount of time a guest could come back and change their survey. If set this value is set to zero, then once the web-site sends the survey result a subsequent request for this same survey token would result in an error message: "This survey was previously completed; no survey is available." The **Special Offer,** when not-null, will hold a GUID linking to the details of the special offer and this information will be available to the web-site according to the Special Offer instructions (see

Special Offer Processing). Setting the **Require Guest Authentication** flag requires that a guest authenticate (see Guest Authentication) to submit the survey and/or to receive the special offer benefit if so directed by the setup.

[0101] *Survey Master Questions*

[0102] In the preferred embodiment, the Survey Master Questions include the following columns (defaulted column values showing in bold):

- Survey Question (vchar)
- Required {Checked, **Unchecked**}
- Answer Type {5-Star, Single Select, Multi-Select}
- Answer List (vchar – can be null for 5-Star)
- Hide {Checked, **Unchecked}**

[0103] The master list of permanent questions is contained in this list. If a question goes out of favor it can be hidden, but it still may be referenced by an older survey. Hiding a question only makes it so that it cannot be looked up in the survey form or in a report parameter. The **Survey Question** should be able to hold a significant paragraph in the order of 400 characters minimum. If a response is '**Required'** the flag indicating such should be set to true; however it is up to the merchant web-site to manage this flag – the GSM web service module generates the flag but does not enforce it.

[0104] The system supports, at least, the following **Answer Types:** 5-Star where the web-site will allow an integer recording "1" through "5" as the result (similar to Amazon.com book reviews). Anything other but 1, 2, 3, 4, or 5 will not be stored by the DCH for this type; Single Select will allow the guest to select one answer from a multiple choice list; Multi-Select will allow the guest to select multiple choices from a multiple choice list. The **Answer List** is also a large storage vchar column that will hold a pipe delimited list of answers that will build the multiple choice list of answers to the question; this column can be null if the Answer Type equals '5-Star'.

[0105] *Response Header*

[0106] The Response Header includes the following columns (DCH generated column values showing in bold):

- Survey Master GUID
- Response Instance GUID
- Merchant GUID (can be null)
- UnitID
- Check Number (can be null)
- Check DateTime (can be null)
- Server/Cashier (can be null)
- Table/Station (can be null)
- Check Duration(can be null)
- Special Offer Grant (can be null)
- Request Manager Contact {checked, unchecked, **null**}
- Wrong Check {checked, unchecked, **null**}

[0107] The Result Header table will be generated by a GSM service. The generation of the survey contains the **Survey Master GUID**, and the **Response Instance GUID,** the instance representing a single survey instance of the master and the join for Response Details. If the merchant has authenticated then the **Merchant GUID** would be stored, else we store a null. **UnitID, Check Number, CheckDateTime, Server/Cashier, Table/Station, and Check Duration** are all columns populated from the original survey token and only if the check data is found at the time of survey. The **Special Offer Grant** is assigned if an offer exists with the survey and the guest qualifies (for example both in terms of completed survey and number of prior offers extended). **Request Manager Contact** is the only web-client-side editable column in the Result Header; this option can be set to Checked/Unchecked or left as NULL. The **Wrong Check** state can be CWSD utilized allowing the guest to declare that the check presented by our service was not identified as the correct guest check.

[0108] *Response Details*

[0109] **The Response Details** include following columns (DCH generated column values showing in bold):

- Survey Instance GUID
- Type {Item Quality, Item Value, Question}
- Question/Item GUID
- Answer (vchar)
- Comment (vchar)

[0110] The Response Details table is generated by the GSM service (discussed below). The generation of the survey contains **Survey Instance GUID,** this key joining data to the Response Header. The **Type** column holds the row-type of generated survey-result rows. A row type of *Item Quality* is generated from check details and only when the Rate Detail Quality flag of the survey is set to 'checked' (or true); this is also the case with *Item Value* and its corresponding flag named Rate Detail Value. Both the Item Quality and Item Value are automatically generated as '5-Star' survey rows. A row-type of Question indicates that the row is an answer to a survey question and the answer is in accordance with the Master Question option for answering the question. The **Answer** column must be large enough to store the multiple or single choice selections of the survey and will store the character value of '1', '2', '3', '4' or '5' for 5-Star values; null or empty Answer values will be considered to be invalid or were ignored by the guest. The **Comment** column is an optional value that can be populated by the web-site for each generated survey result row.

[0111] *Special Offers Master*

[0112] **The Special Offers Master** includes the following columns (defaulted states shown in bold):

- Special Offer Name (unique)
- Special Offer Details (vchar – 1,000)
- Special Offer Restrictions (vchar = 1,000)
- Limit Mode Per Guest {**None**, Per Month, Per Week, Per Day, Total}
- Limit Count {**0**, zero unlimited; 1 – 9999}

[0113] The Special Offers Master table holds a list of offers, plus details of that offer and control settings that the GSM uses to limit excessive repeat guest redemptions on an offer.

[0114] *Smart Client Tasking*

[0115] The system provides, as a part of the smart client tasking function, an administrative task named [Guest Survey Setup]. This task is organized in sub-tabs of "Survey Master Questions", "Special Offers", and "Survey Templates". All of the setup work for creating a new survey, creating and maintaining survey questions and offers, and the collection of this information known as a survey template. The form is preferably presented as a wizard with the option to show/hide the individual sub-tabs. Full wizard-tools can be provided for all row-elements (including child rows) for copy/paste to enable highly efficient setup of guest surveys.

[0116] The [Unit Master] includes a column named [POS Unit survey token]. This column is populated with the existing unit number on conversion and upon a new row insert. Subsequent maintenance of this column is done by the DCH administrator. The POS Unit survey token is used to translate the unit portion of the survey token to retrieve the actual DCH UnitID used for subsequent web-service calls.

[0117] *Web-Services Tasking*

[0118] The system preferably includes a new service locator URL for the Guest Survey Module (GSM) according to a predefined URL convention. An illustrative convention could be www.rmdatacentral.com/web/webservices/gsm and a service login. The GSM includes multiple services required for implementing the inventive method on the system. Services include:

- [GetGSMUnit] – identifies the DCH unit from guest check information;
- [GSM Guest Authentication] – optional feature to allow a returning guest to authenticate;
- [GSM Create/Edit Guest] – optional feature allows guest to create/edit their information;
- [GenerateSurvey] – generates the survey data;
- [EditSurvey] – allows the edited survey data to be stored in the DCH; and
- [GetSurveyState] – allows the survey to be validated as complete and with limited support for generating coupon benefits on a completed survey.

[0119] A [GetGSMUnit] service allows the merchant's web site designers to pass some or all of the following data for the purpose of locating the correct DCH unit, business date and check. For example the website may already have a store locator and this locator might be used instead of a survey token (if the POS is not able to produce the token) and in this case the locator would pass to the DCH the necessary columns to start the survey process. The following are examples of the columns that could be passed to the GetMSMUnit service:

- Survey Token

- External Unit Number
- External Unit Description
- External Unit Address
- External Unit City
- External Unit State
- External Unit Zip
- External Check Number
- External Check DateTime

[0120] Although variations are possible, the sequence precedence for this service of the preferred embodiment is important. The service must first ascertain if it can locate an actual DCH unit, and if not, the service generates a unit locator error. If a unit is found the service second will look for a valid Survey Template, and if none found a Survey locator error is generated. If a survey is found the service will third convert the check to a business date (for after midnight check DateTimes) and fourth attempt to locate the check. If a check is found, or not found, the resulting survey or error message response is determined by settings in the Survey Header. The following are examples of service response columns:

- DC Unit ID
- Survey Description
- Master Survey GUID
- Details Exist Mode
- Details Missing Mode
- Require Guest Authentication
- Special Offer GUID
- Special Offer Name
- Special Offer Details
- Special Offer Restrictions
- DC Check Number
- DC Business Date
- Service Error Message

[0121] The [GSM Guest Authentication] service allows a guest to either create or authenticate using an extant reference. The keys to guest authentication are [Last Name] and ([Phone] or [Email]). There is no secure data contained within this authentication – the purpose of authentication is to identify a regular guest and to have some mechanism for the manager/software to generate replies to surveys. The service will allow these values to be passed:

- DCH Unit ID (required)
- Guest Last Name
- Guest Phone Number
- Guest Email Address

[0122] The return values for authentication indicate that the guest was located; a null return indicates the guest information does not exist for this store. We won't know if the CWSD has their own guest tracking so this feature will be used to coordinate our guest table with web-site guests. The DC guest table only contains Guest Contact (for contact name) so the service will have to perform an 'IndexOf()' determination on last name and then find either an email and/or phone number correlation. The result set for GSM Guest Authentication is:

- Contact Name
- Contact City
- Contact State
- Contact Zip
- Guest GUID

[0123] The [GSM Create/Edit Guest] allows the merchant's web page to react to a failed guest authentication or to handle a new authentication or allow a guest to edit an existing authentication. Service-confirmation returns the Guest GUID for successful insertion or an edit success or fail error message.

[0124] Examples of service options include:

- Guest GUID (if null then service assumes create, else it assumed edit)
- Master Guest GUID (can be null)
- Guest Salutation

- **Guest First Name**
- Guest MI
- **Guest Last Name**
- Guest Suffix
- Note: We concatenate SalFN+MI+LN+Sfx into our [Cusomer.Contact Name]
- **Guest Address1**
- Guest Address2
- **Guest City**
- **Guest State**
- **Guest Zip**
- Guest Cell (one of Cell/Phone/Email required to insert new guest row)
- Guest Phone (one of Cell/Phone/Email required to insert new guest row)
- Guest Email (one of Cell/Phone/Email required to insert new guest row)

[0125] The [GenerateSurvey] service generates the actual survey response rows or may generate an error message according to survey setup requirements. Example service options include:

- UnitID (required)
- MasterSurveyGUID (required)
- Check Number (optional)
- CheckDateTime (optional)
- GuestGUID (optional)
- *Return:* Survey Instance GUID or NULL if not possible
- *Return:* Service Error Message

[0126] The generated survey must follow all of the rules of survey header (mastersurveyGUID). For check-details the CkDetail Scope Limit is used to include only those items belonging to the limiting smart group. If this group is not established, then all sold items are included in the group. The check details are consolidated using the DCH Item description, so that if more than one "7 oz. Sirloin Steak" was sold, only one instance would appear in the survey, but the quantity of sales would be part of the result description, such as "(2) – 7 oz. Sirloin Steak". These survey descriptions would be doubled if the guest rates both the quality and value of check details.

[0127] A call to the [EditSurvey] service will return all of the rows generated by the service provided that the GenerateSurvey did not result in an error. This service will return row sets, but the service is initiated on the following:

- Survey Instance GUID (required)

[0128] The service returns the following row(s) columns according to the generated survey, fields that can be edited and re-submitted are indicated in **bold:**

- SurveyRowGUID
- RowType {Item Value, Item Quality, Question}
- RatingType {5-Star,Single-Select,Multi-Select}
- Item/QuestionText
- AnswerOptions (1,2,3,4,5 for 5-Star)
- ResponseRequired
- **SurveyResponse**
- **SurveyComment**

[0129] The cycle plan for this EditSurvey is that the CWSD passes the only the SurveyInstanceGUID as the initial pass to fill the return dataset with the survey rows. Our instructions indicate that the CWSD must build the survey presentation, including managing the multi-select and single-select answers as well as a 5-Start rating system and that the guest responses are stored in the SurveyResponse row column, and if the CWSD so enables, a corresponding comment. The CWSD, when sending the completed survey is required to only send the SurveyInstanceGUID, SurveyRowGUID, and the SurveyResponse (and optionally the SurveyComment). DC will save the survey but it is up to the CWSD to maintain, at the client (browser) things like required answers.

[0130] The [GetSurveyState] service requires only a passed parameter of SurveyInstanceGUID. The dataset returned is:

- SurveyState {Partial, Complete}
- SpecialOfferGUID
- SpecialOfferName

- SpecialOfferDetails
- SpecialOfferTerms
- ErrorMessage

[0131] This last service step provides a confirmation (or lack thereof) to the CWSD so that a coupon can be rendered by the CWSD, complete with offer name, details, terms and the GUID for coupon tracking. If the special offer exceeded a limit the error message would display the limit. If a guest does not want to use special offer incentives these columns would return nulls.

[0132] *IP Blocking*

[0133] Another aspect of the inventive system includes the ability to present an administrator with a list of IP address as 'select-distinct' from all IP's that have ever generated a website contact or survey. A second column [Block] should allow the admin to set a block on the IP address.

[0134] The web-services for generating a survey or web-site contact must check the blocked IP list, and if the IP is found to be blocked the service should return a message that the IP is blocked. The Guest Survey and Web Site contact apps must simply report that 'The underlying service is not available at this time.' and no further processing should be allowed for that IP.

[0135] *Website Contact*

[0136] The website contact feature is a special subset of the current configurable survey. In general the feature allows merchants to bury a small java-tag into their website to call a dedicated Website Contact form. The form works like the current survey in that the first page will allow the guest to select a unit, but instead of selecting a date and check, the date is always defaulted to the current server date-time, and no check information is required. The next page asks the guest to identify themselves, but in this case 'I prefer to remain anonymous' is not allowed. The next page generates the two questions and one comment in a single page. The submit page provides the guest a last point before submitting the comment, and the Thank you page provides a simple thank you statement.

[0137] *Guest Survey Review*

[0138] Reporting will be the primary method for users to review surveys but the DCH client also provides a platform for reviewing surveys as well as the preferred platform for DCH administrators to manage junk surveys. Just as forum administrators can manage the occasional problematic forum entry, the DCH administrator for surveys is able to invalidate a toxic survey.

[0139] The Guest Survey Review feature is preferably presented as a wizard for Admin/MU and Unit access. The start page of the wizard could provide the following filters:

- o Unit (required)
- o Templates (multi-select of possible templates, default to ‘All’)
- o Questions (multi-select to master questions, default to ‘All’)
- o Minimum and Maximum scores (default to ‘All’, if present filters only those questions that have an associated answer score)
- o From and through dates (filters dining dates, default to current-7 through current)

[0140] Questions and scores are filter tests for survey details while Unit, Template, and Dates are survey header filters. There is preferably a hidden filter for MU and U users that will filter out ‘Junk’ surveys allowing only administrators to see surveys/questions marked as junk.

[0141] Clicking next opens a combination of grid (top panel) and grid (lower panel). The top panel should display the survey headers and the bottom the survey questions, answers and scoring (many to one). The data should appear as read-only.

[0142] The administrator is able to see all surveys and questions, including headers and questions marked as junk. The survey header and survey questions should have an ‘YN (checkbox)’ column named junk. Because the data is to be shown as read-only, two TOOLBAR actions should be available to the administrator:

- o Mark Survey as Junk
- o Mark Question/Response as Junk

[0143] These two should show as a toggle, so that a survey or question accidentally therefore marked can be un-marked. Also for the administrator there should be a TOOLBAR option to ‘Block Survey IP’. Clicking this feature would write the IP address of this survey into the blocked IP list.

[0144] The various embodiments of the invention may be implemented as a sequence of computer implemented steps or program modules running on a computing system and/or as interconnected machine logic circuits or circuit modules within the computing system. The implementation is a matter of choice dependent on the performance requirements of the computing system implementing the invention. In light of this disclosure, it will be recognized by one skilled in the art that the functions and operation of the various embodiments disclosed may be implemented in software, in firmware, in special purpose digital logic, or any combination thereof without deviating from the spirit and scope of the present invention as recited within the claims attached hereto.

[0145] The above specification, examples and data provide a complete description of the invention. Since many embodiments of the invention can be made without departing from the spirit and scope of the invention, the invention resides in the claims hereinafter appended.

[0146] What is claimed is:

1. A computer implemented method executed on data processing system for automatically generating a survey relevant to each purchase transaction and processing feedback from each survey, comprising:
    a. Storing, by a processor, purchase information related to each purchase transaction in a database;
    b. automatically generating, by the processor, a survey based on preferences and stored purchase information related to the purchase transaction;
    c. displaying the generated survey after the completion of each purchase transaction; and
    d. receiving each response for each question in each survey that is at least partially completed.
2. The method of claim 1, further comprising linking the feedback to previously stored information.
3. The method of claim 1, wherein each received response is employed as feedback in the generation of each related question in each subsequent survey.
4. The method of claim 1, wherein the preferences include seller and customer.
5. The method of claim 1, further comprising providing a token associated with the purchase transaction for each customer.
6. The method of claim 5, further comprising printing the token on a receipt.
7. The method of claim 5, further comprising encoding the token as a barcode.
8. The method of claim 5, further comprising encoding the token as a QR code.
9. The method of claim 5, further comprising encoding the token on a ticket.
10. The method of claim 5, further comprising transmitting the token to a wireless communication device.
11. The method of claim 5, further comprising transmitting the token using electronic mail.
12. The method of claim 5, wherein the survey is generated in real time.

13. The method of claim 5, further comprising:

    a. automatically generating the survey when the purchase information is received; and
    b. providing the survey upon receipt of the token.

14. The method of claim 5, further comprising storing each response with the related token in a computer-readable media.

15. The method of claim 5, wherein generating the survey includes:

    a. receiving the token;
    b. retrieving the stored purchase information associated with the token; and
    c. using preference data and retrieved purchase information to generate questions for the survey.

16. The method of claim 15, further comprising:

    a. receiving a user name and a password associated with a user ID; and
    b. storing received feedback together with the token and the user ID.

17. The method of claim 15, further comprising generating a promotion based on the preferences, wherein the promotion is displayed with the survey.

18. The method of claim 15, further comprising generating a promotion based on information including the received feedback and the purchase information.

19. A system for automatically generating a survey and receiving responses related to a purchase transaction, comprising:

    a. a client that performs actions, including:
        i. displaying each question in the survey that is related to the purchase transaction;
        ii. receiving each response to each question in the survey;
        iii. transmitting each response using a communication link to a server;
        iv. generating purchase information associated with the purchase transaction; and

v. transmitting purchase information using another communication link to the server; and

b. the server that performs actions, including:

i. receiving purchase information using the other communication link;

ii. storing purchase information;

iii. generating each question in each survey;

iv. transmitting each question in each survey to the client; and

v. receiving each response transmitted by the client.

20. The system of claim 19, wherein each response is employed in the generation of related questions in each subsequent survey.

21. The system of claim 19, wherein the client receives the response to each question through a computer input device, including a keyboard, touch pad, mouse and bar code scanner.

22. The system of claim 19, wherein the client further comprises:

a. a terminal that is adapted to receive purchase information at the point of sale from the customer;

b. a component that generates details for purchase information related to the purchase; and

c. an interface that enables purchase information to move between the client and the server.

23. The system of claim 19, wherein the client comprises a browser application.

24. The system of claim 19, wherein the client displays each question in a web page and receives each response to each question through the web page.

25. The system of claim 19, wherein the server includes a table that stores at least one entry for each response to each question and another table that stores at least one entry for each detail of the purchase information that is associated with each question, wherein each entry in each table is associated with a particular purchase transaction.

ABSTRACT

Provided are a method and system for automatically generating survey questions, receiving customer response feedback, and associating the feedback with purchase information. Purchase information is stored at the time of purchase and the customer is given an identifier for the purchase. Then, at the customer's convenience, either at the point of sale or through a networked computer, the customer can provide responses to questions that are automatically generated based on the items purchased, preferences and previous feedback. Survey questions are displayed and feedback responses are stored, analyzed and associated with purchase information in real time.

FIG. 1

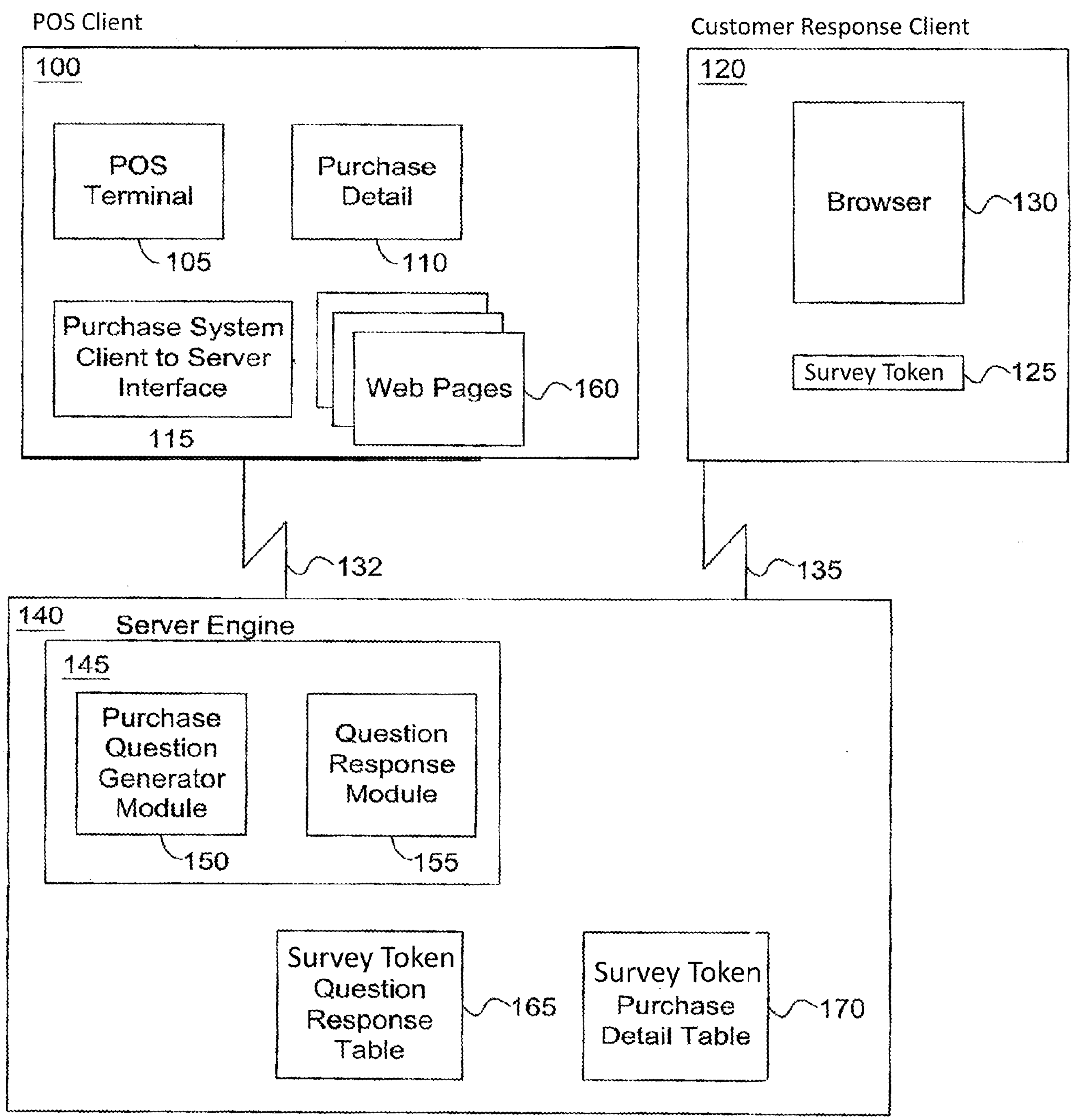

POS Client
100
POS Terminal
105
Purchase Detail
110
Purchase System Client to Server Interface
115
Web Pages
160
Customer Response Client
120
Browser
130
Survey Token
125
132
135
140
Server Engine
145
Purchase Question Generator Module
150
Question Response Module
155
Survey Token Question Response Table
165
Survey Token Purchase Detail Table
170

FIG. 2

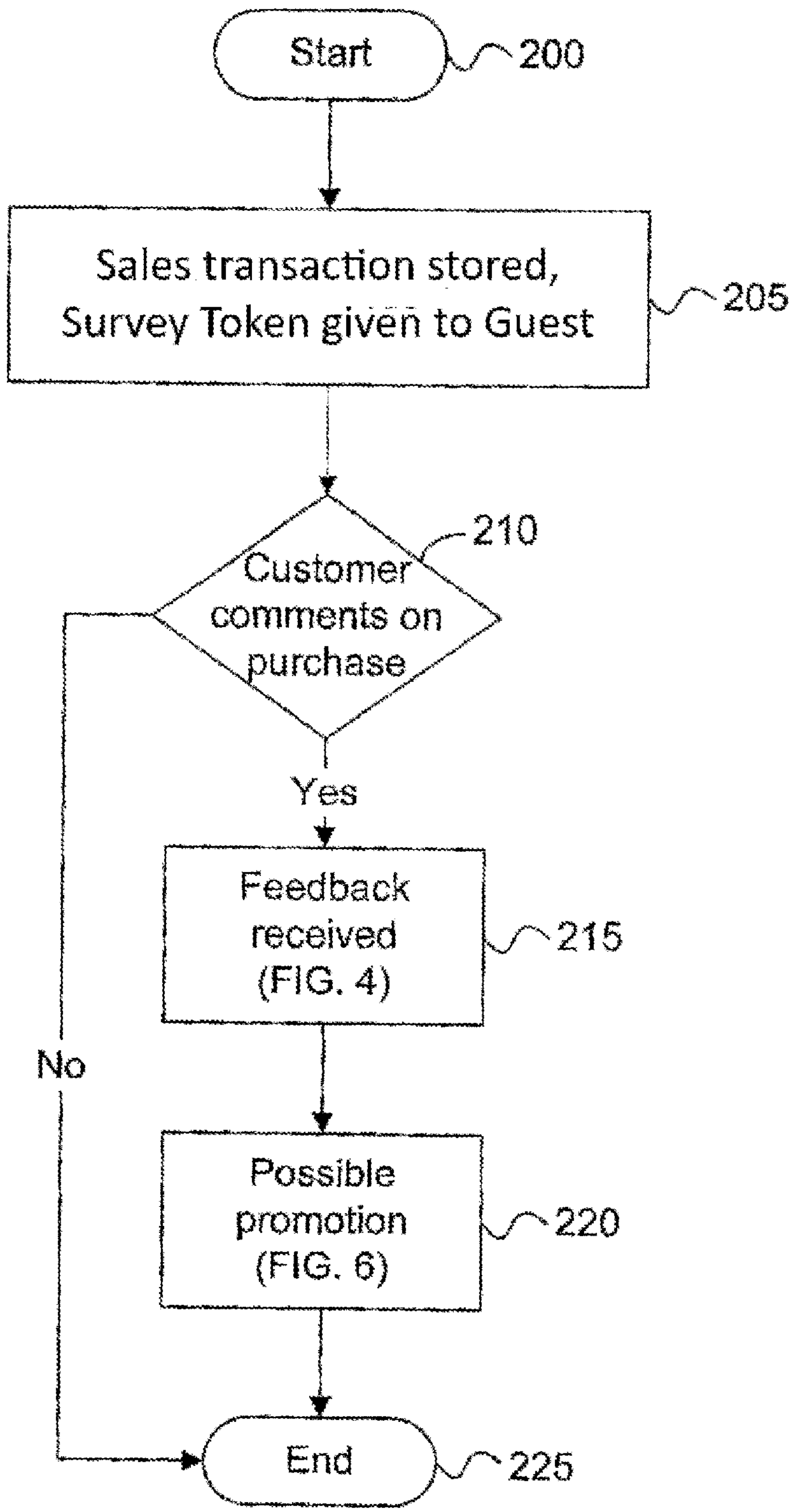
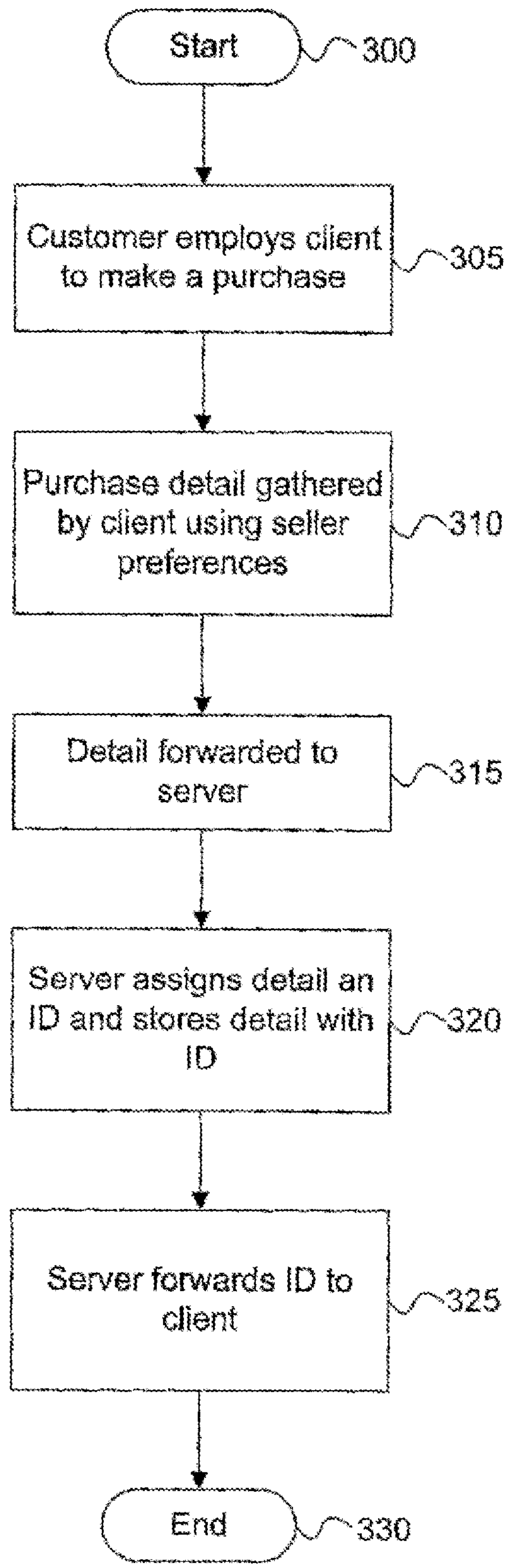

Start
200
Sales transaction stored,
Survey Token given to Guest
205
210
Customer comments on purchase
Yes
No
Feedback received (FIG. 4)
215
Possible promotion (FIG. 6)
220
End
225

FIG. 3



Start
300
Customer employs client to make a purchase
305
Purchase detail gathered by client using seller preferences
310
Detail forwarded to server
315
Server assigns detail an ID and stores detail with ID
320
Server forwards ID to client
325
End
330

FIG. 4

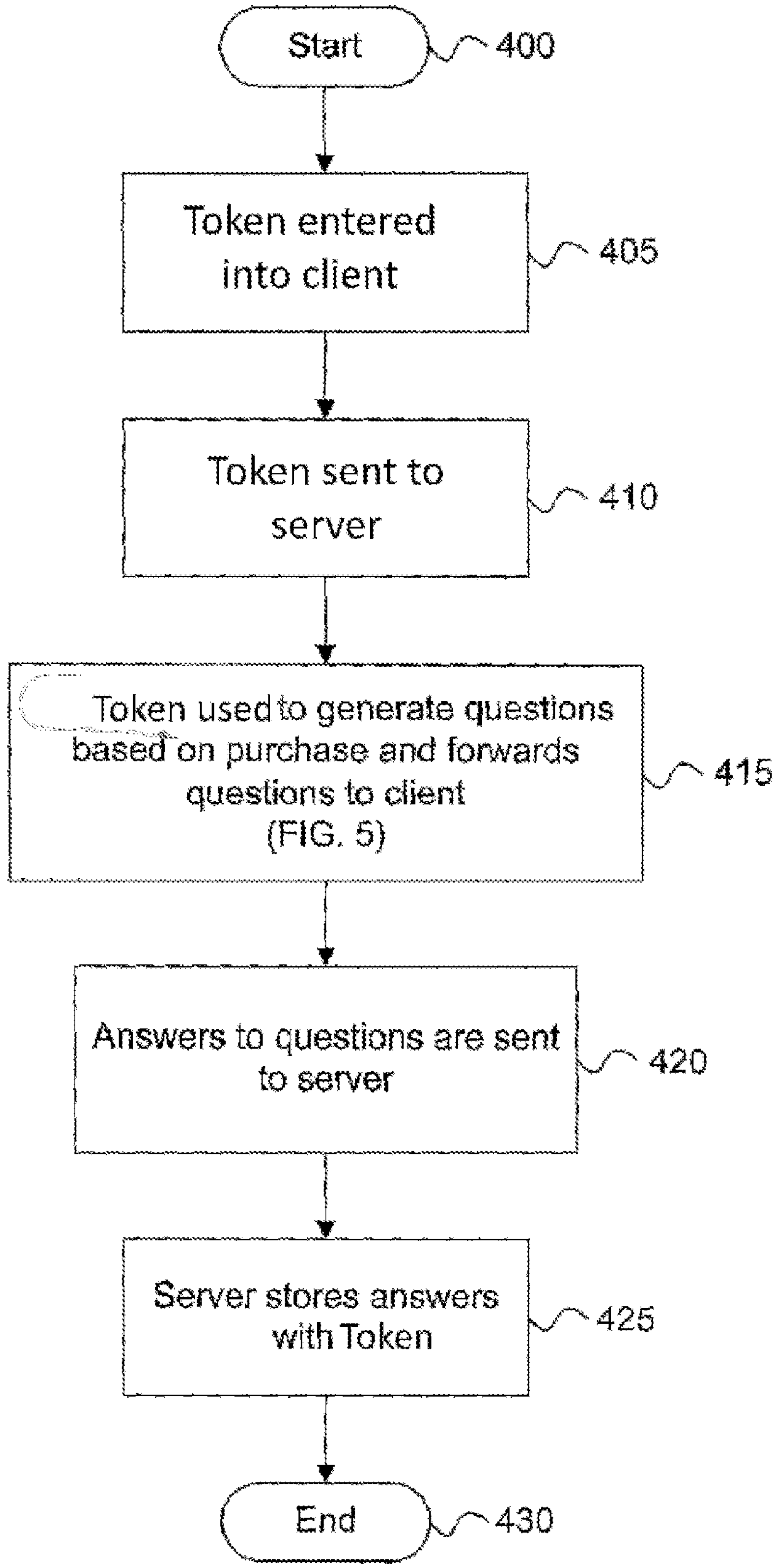

Start
400
Token entered into client
405
Token sent to server
410
Token used to generate questions based on purchase and forwards questions to client (FIG. 5)
415
Answers to questions are sent to server
420
Server stores answers with Token
425
End
430

FIG. 5

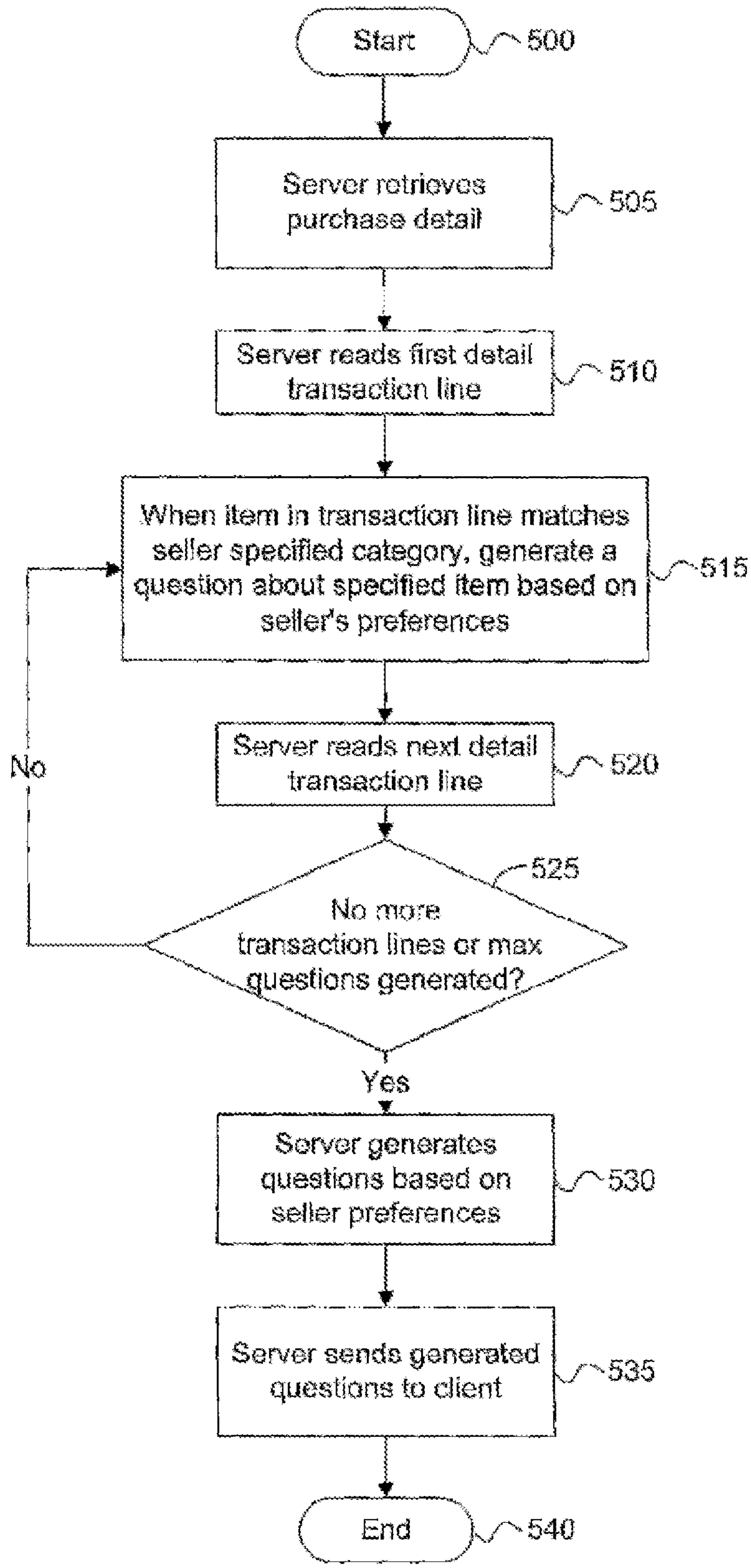

Start
500
Server retrieves purchase detail
505
Server reads first detail transaction line
510
When item in transaction line matches seller specified category, generate a question about specified item based on seller's preferences
515
Server reads next detail transaction line
520
525
No more transaction lines or max questions generated?
No
Yes
Server generates questions based on seller preferences
530
Server sends generated questions to client
535
End
540

FIG. 6

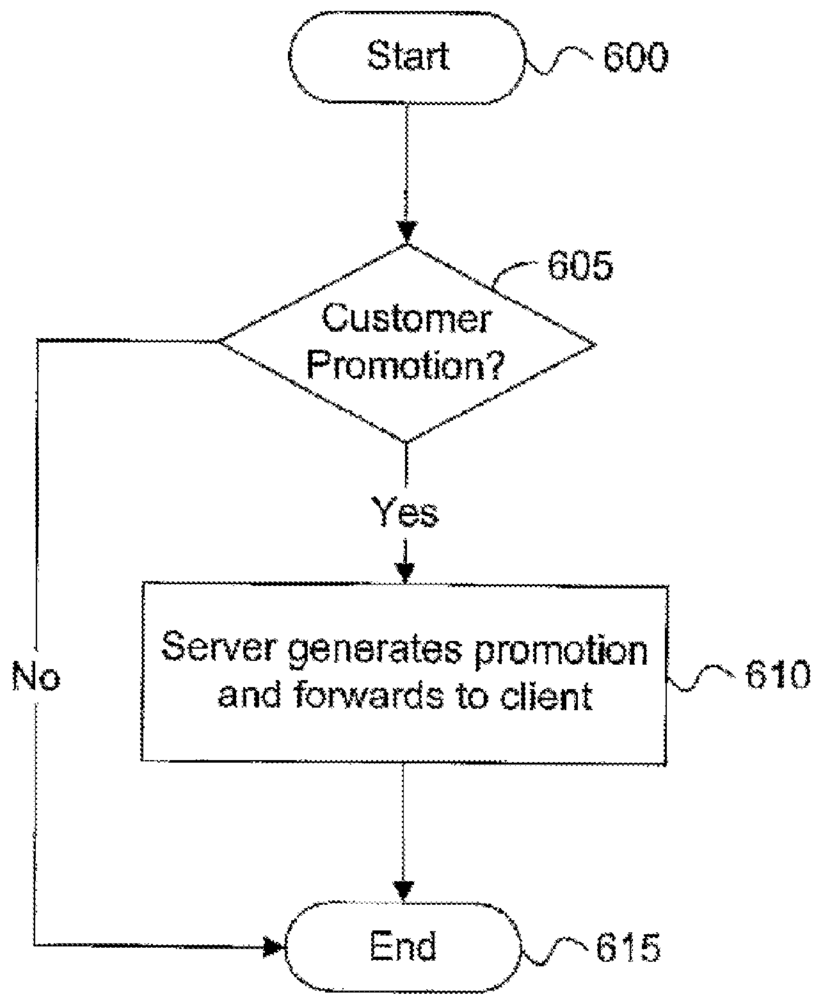

Start
600
605
Customer Promotion?
No
Yes
Server generates promotion and forwards to client
610
End
615

FIG. 7

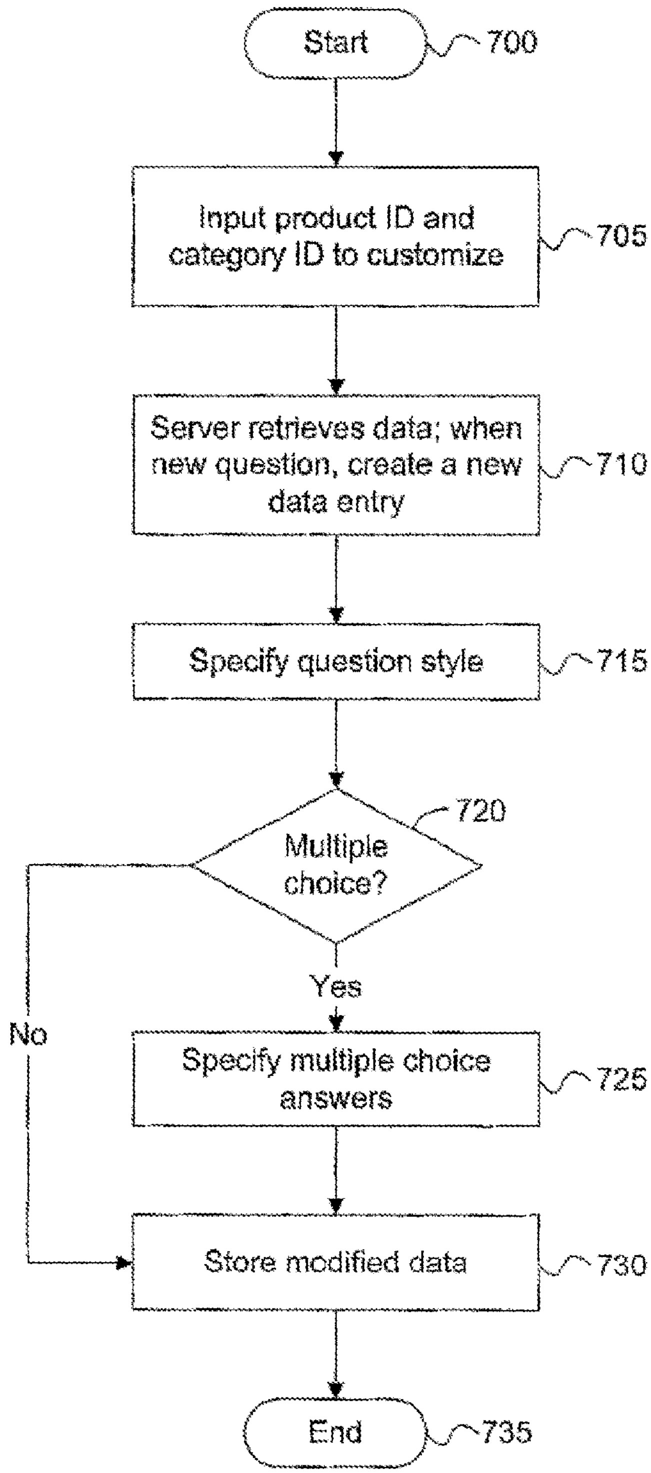

Start
700
Input product ID and category ID to customize
705
Server retrieves data; when new question, create a new data entry
710
Specify question style
715
Multiple choice?
720
Yes
No
Specify multiple choice answers
725
Store modified data
730
End
735

FIG. 8


Did you enjoy your boneless wings?
No
Not Really
Yes
Very Good
Great!!
Did you enjoy your Taco Salad?
Very Bad
Not Good
Acceptable
Good
Great!!
How was your server, Tiffany?
Very Bad
Not Good
Acceptable
Good
Great!!
Will you return?
Yes
No
Done
810

Application Data Sheet 37 CFR 1.76	Attorney Docket Number	
	Application Number	
Title of Invention	Granulated Web Service Guest Survey System	

The application data sheet is part of the provisional or nonprovisional application for which it is being submitted. The following form contains the bibliographic data arranged in a format specified by the United States Patent and Trademark Office as outlined in 37 CFR 1.76.
This document may be completed electronically and submitted to the Office in electronic format using the Electronic Filing System (EFS) or the document may be printed and included in a paper filed application.

Secrecy Order 37 CFR 5.2

☐ Portions or all of the application associated with this Application Data Sheet may fall under a Secrecy Order pursuant to 37 CFR 5.2 (Paper filers only. Applications that fall under Secrecy Order may not be filed electronically.)

Inventor Information:

Inventor 1 Remove

Legal Name

Prefix	**Given Name**	**Middle Name**	**Family Name**	**Suffix**
	Steven	A	Roberts	

Residence Information (Select One) ◉ US Residency ◯ Non US Residency ◯ Active US Military Service

City	Tampa	**State/Province**	FL	**Country of Residence**	US

Mailing Address of Inventor:

Address 1	2502 North Rocky Point Drive		
Address 2			
City	Tampa	**State/Province**	FL
Postal Code	33607	**Country**	US

All Inventors Must Be Listed - Additional Inventor Information blocks may be generated within this form by selecting the **Add** button. Add

Correspondence Information:

Enter either Customer Number or complete the Correspondence Information section below.
For further information see 37 CFR 1.33(a).

☐ **An Address is being provided for the correspondence Information of this application.**

Customer Number	57838	
Email Address	ttoner@slk-law.com	Add Email Remove Email

Application Information:

Title of the Invention	Granulated Web Service Guest Survey System		
Attorney Docket Number		**Small Entity Status Claimed**	☐
Application Type	Provisional		
Subject Matter	Utility		
Total Number of Drawing Sheets (if any)	8	**Suggested Figure for Publication (if any)**	

Filing By Reference :

Application Data Sheet 37 CFR 1.76	Attorney Docket Number	
	Application Number	

Title of Invention	Granulated Web Service Guest Survey System

Only complete this section when filing an application by reference under 35 U.S.C. 111(c) and 37 CFR 1.57(a). Do not complete this section if application papers including a specification and any drawings are being filed. Any domestic benefit or foreign priority information must be provided in the appropriate section(s) below (i.e., "Domestic Benefit/National Stage Information" and "Foreign Priority Information").

For the purposes of a filing date under 37 CFR 1.53(b), the description and any drawings of the present application are replaced by this reference to the previously filed application, subject to conditions and requirements of 37 CFR 1.57(a).

Application number of the previously filed application	Filing date (YYYY-MM-DD)	Intellectual Property Authority or Country

Publication Information:

☐ Request Early Publication (Fee required at time of Request 37 CFR 1.219)

☒ **Request Not to Publish.** I hereby request that the attached application not be published under 35 U.S.C. 122(b) and certify that the invention disclosed in the attached application **has not and will not** be the subject of an application filed in another country, or under a multilateral international agreement, that requires publication at eighteen months after filing.

Representative Information:

Representative information should be provided for all practitioners having a power of attorney in the application. Providing this information in the Application Data Sheet does not constitute a power of attorney in the application (see 37 CFR 1.32).
Either enter Customer Number or complete the Representative Name section below. If both sections are completed the customer Number will be used for the Representative Information during processing.

Please Select One:	◉ Customer Number	○ US Patent Practitioner	○ Limited Recognition (37 CFR 11.9)
Customer Number	57838		

Domestic Benefit/National Stage Information:

This section allows for the applicant to either claim benefit under 35 U.S.C. 119(e), 120, 121, or 365(c) or indicate National Stage entry from a PCT application. Providing this information in the application data sheet constitutes the specific reference required by 35 U.S.C. 119(e) or 120, and 37 CFR 1.78.
When referring to the current application, please leave the application number blank.

Prior Application Status			Remove
Application Number	Continuity Type	Prior Application Number	Filing Date (YYYY-MM-DD)

Additional Domestic Benefit/National Stage Data may be generated within this form by selecting the **Add** button.

Foreign Priority Information:

Application Data Sheet 37 CFR 1.76	Attorney Docket Number	
	Application Number	

Title of Invention	Granulated Web Service Guest Survey System

This section allows for the applicant to claim priority to a foreign application. Providing this information in the application data sheet constitutes the claim for priority as required by 35 U.S.C. 119(b) and 37 CFR 1.55(d). When priority is claimed to a foreign application that is eligible for retrieval under the priority document exchange program (PDX)[i] the information will be used by the Office to automatically attempt retrieval pursuant to 37 CFR 1.55(h)(1) and (2). Under the PDX program, applicant bears the ultimate responsibility for ensuring that a copy of the foreign application is received by the Office from the participating foreign intellectual property office, or a certified copy of the foreign priority application is filed, within the time period specified in 37 CFR 1.55(g)(1).

Remove

Application Number	Country[i]	Filing Date (YYYY-MM-DD)	Access Code[i] (if applicable)

Additional Foreign Priority Data may be generated within this form by selecting the **Add** button.

Statement under 37 CFR 1.55 or 1.78 for AIA (First Inventor to File) Transition Applications

☐ This application (1) claims priority to or the benefit of an application filed before March 16, 2013 and (2) also contains, or contained at any time, a claim to a claimed invention that has an effective filing date on or after March 16, 2013.
NOTE: By providing this statement under 37 CFR 1.55 or 1.78, this application, with a filing date on or after March 16, 2013, will be examined under the first inventor to file provisions of the AIA.

Authorization to Permit Access:

☐ Authorization to Permit Access to the Instant Application by the Participating Offices

Application Data Sheet 37 CFR 1.76	Attorney Docket Number	
	Application Number	
Title of Invention	Granulated Web Service Guest Survey System	

If checked, the undersigned hereby grants the USPTO authority to provide the European Patent Office (EPO), the Japan Patent Office (JPO), the Korean Intellectual Property Office (KIPO), the World Intellectual Property Office (WIPO), and any other intellectual property offices in which a foreign application claiming priority to the instant patent application is filed access to the instant patent application. See 37 CFR 1.14(c) and (h). This box should not be checked if the applicant does not wish the EPO, JPO, KIPO, WIPO, or other intellectual property office in which a foreign application claiming priority to the instant patent application is filed to have access to the instant patent application.

In accordance with 37 CFR 1.14(h)(3), access will be provided to a copy of the instant patent application with respect to: 1) the instant patent application-as-filed; 2) any foreign application to which the instant patent application claims priority under 35 U.S.C. 119(a)-(d) if a copy of the foreign application that satisfies the certified copy requirement of 37 CFR 1.55 has been filed in the instant patent application; and 3) any U.S. application-as-filed from which benefit is sought in the instant patent application.

In accordance with 37 CFR 1.14(c), access may be provided to information concerning the date o f filing this Authorization.

Applicant Information:

Providing assignment information in this section does not substitute for compliance with any requirement of part 3 of Title 37 of CFR to have an assignment recorded by the Office.

Applicant 1

If the applicant is the inventor (or the remaining joint inventor or inventors under 37 CFR 1.45), this section should not be completed. The information to be provided in this section is the name and address of the legal representative who is the applicant under 37 CFR 1.43; or the name and address of the assignee, person to whom the inventor is under an obligation to assign the invention, or person who otherwise shows sufficient proprietary interest in the matter who is the applicant under 37 CFR 1.46. If the applicant is an applicant under 37 CFR 1.46 (assignee, person to whom the inventor is obligated to assign, or person who otherwise shows sufficient proprietary interest) together with one or more joint inventors, then the joint inventor or inventors who are also the applicant should be identified in this section.

Clear

◉ Assignee ○ Legal Representative under 35 U.S.C. 117 ○ Joint Inventor

○ Person to whom the inventor is obligated to assign. ○ Person who shows sufficient proprietary interest

If applicant is the legal representative, indicate the authority to file the patent application, the inventor is:

Name of the Deceased or Legally Incapacitated Inventor :

If the Applicant is an Organization check here. ☒

Organization Name	ACCSYS, INC.		
Mailing Address Information For Applicant:			
Address 1	2502 ROCKY POINT ROAD SUITE 960		
Address 2			
City	Tampa	**State/Province**	FL
Country	US	Postal Code	33607
Phone Number		Fax Number	

Application Data Sheet 37 CFR 1.76	Attorney Docket Number	
	Application Number	

Title of Invention	Granulated Web Service Guest Survey System

Email Address	

Additional Applicant Data may be generated within this form by selecting the Add button.

Assignee Information including Non-Applicant Assignee Information:

Providing assignment information in this section does not subsitute for compliance with any requirement of part 3 of Title 37 of CFR to have an assignment recorded by the Office.

Assignee 1

Complete this section if assignee information, including non-applicant assignee information, is desired to be included on the patent application publication . An assignee-applicant identified in the "Applicant Information" section will appear on the patent application publication as an applicant. For an assignee-applicant, complete this section only if identification as an assignee is also desired on the patent application publication.

If the Assignee or Non-Applicant Assignee is an Organization check here. ☒

Organization Name	ACCSYS, INC.

Mailing Address Information For Assignee including Non-Applicant Assignee:

Address 1	2502 ROCKY POINT ROAD SUITE 960		
Address 2			
City	Tampa	**State/Province**	FL
Country i	US	Postal Code	33607
Phone Number		Fax Number	
Email Address			

Additional Assignee or Non-Applicant Assignee Data may be generated within this form by selecting the Add button.

Signature:

NOTE: This form must be signed in accordance with 37 CFR 1.33. See 37 CFR 1.4 for signature requirements and certifications.

Signature	/thomas e toner/			Date (YYYY-MM-DD)	2015-01-15
First Name	Thomas	Last Name	Toner	Registration Number	57422

Additional Signature may be generated within this form by selecting the Add button.

Application Data Sheet 37 CFR 1.76	Attorney Docket Number	
	Application Number	

Title of Invention	Granulated Web Service Guest Survey System

This collection of information is required by 37 CFR 1.76. The information is required to obtain or retain a benefit by the public which is to file (and by the USPTO to process) an application. Confidentiality is governed by 35 U.S.C. 122 and 37 CFR 1.14. This collection is estimated to take 23 minutes to complete, including gathering, preparing, and submitting the completed application data sheet form to the USPTO. Time will vary depending upon the individual case. Any comments on the amount of time you require to complete this form and/or suggestions for reducing this burden, should be sent to the Chief Information Officer, U.S. Patent and Trademark Office, U.S. Department of Commerce, P.O. Box 1450, Alexandria, VA 22313-1450. DO NOT SEND FEES OR COMPLETED FORMS TO THIS ADDRESS. **SEND TO: Commissioner for Patents, P.O. Box 1450, Alexandria, VA 22313-1450.**

Privacy Act Statement

The Privacy Act of 1974 (P.L. 93-579) requires that you be given certain information in connection with your submission of the attached form related to a patent application or patent. Accordingly, pursuant to the requirements of the Act, please be advised that: (1) the general authority for the collection of this information is 35 U.S.C. 2(b)(2); (2) furnishing of the information solicited is voluntary; and (3) the principal purpose for which the information is used by the U.S. Patent and Trademark Office is to process and/or examine your submission related to a patent application or patent. If you do not furnish the requested information, the U.S. Patent and Trademark Office may not be able to process and/or examine your submission, which may result in termination of proceedings or abandonment of the application or expiration of the patent.

The information provided by you in this form will be subject to the following routine uses:

1. The information on this form will be treated confidentially to the extent allowed under the Freedom of Information Act (5 U.S.C. 552) and the Privacy Act (5 U.S.C. 552a). Records from this system of records may be disclosed to the Department of Justice to determine whether the Freedom of Information Act requires disclosure of these records.
2. A record from this system of records may be disclosed, as a routine use, in the course of presenting evidence to a court, magistrate, or administrative tribunal, including disclosures to opposing counsel in the course of settlement negotiations.
3. A record in this system of records may be disclosed, as a routine use, to a Member of Congress submitting a request involving an individual, to whom the record pertains, when the individual has requested assistance from the Member with respect to the subject matter of the record.
4. A record in this system of records may be disclosed, as a routine use, to a contractor of the Agency having need for the information in order to perform a contract. Recipients of information shall be required to comply with the requirements of the Privacy Act of 1974, as amended, pursuant to 5 U.S.C. 552a(m).
5. A record related to an International Application filed under the Patent Cooperation Treaty in this system of records may be disclosed, as a routine use, to the International Bureau of the World Intellectual Property Organization, pursuant to the Patent C o o p eration Treaty.
6. A record in this system of records may be disclosed, as a routine use, to another federal agency for purposes of National Security review (35 U.S.C. 181) and for review pursuant to the Atomic Energy Act (42 U.S.C. 218(c)).
7. A record from this system of records may be disclosed, as a routine use, to the Administrator, General Services, or his/her designee, during an inspection of records conducted by GSA as part of that agency's responsibility to recommend improvements in records management practices and programs, under authority of 44 U.S.C. 2904 and 2906. Such disclosure shall be made in accordance with the GSA regulations governing inspection of records for this purpose, and any other relevant (i.e., GSA or Commerce) directive. Such disclosure shall not be used to make determinations about individuals.
8. A record from this system of records may be disclosed, as a routine use, to the public after either publication of the application pursuant to 35 U.S.C. 122(b) or issuance of a patent pursuant to 35 U.S.C. 151. Further, a record may be disclosed, subject to the limitations of 37 CFR 1.14, as a routine use, to the public if the record was filed in an application which became abandoned or in which the proceedings were terminated and which application is referenced by either a published application, an application open to public inspections or an issued patent.
9. A record from this system of records may be disclosed, as a routine use, to a Federal, State, or local law enforcement agency, if the USPTO becomes aware of a violation or potential violation of law or regulation.

Electronic Patent Application Fee Transmittal

Application Number:	
Filing Date:	
Title of Invention:	Granulated Web Services Guest Survey System
First Named Inventor/Applicant Name:	Steven Roberts
Filer:	Thomas Edward Toner
Attorney Docket Number:	
Filed as Small Entity	
Filing Fees for **Provisional**	

Description	Fee Code	Quantity	Amount	Sub-Total in USD($)
Basic Filing:				
Provisional Application Filing Fee	2005	1	130	130
Pages:				
Claims:				
Miscellaneous-Filing:				
Petition:				
Patent-Appeals-and-Interference:				
Post-Allowance-and-Post-Issuance:				

Description	Fee Code	Quantity	Amount	Sub-Total in USD($)
Extension-of-Time:				
Miscellaneous:				
		Total in USD ($)		**130**

Electronic Acknowledgement Receipt

EFS ID:	21226082
Application Number:	62104043
International Application Number:	
Confirmation Number:	9087
Title of Invention:	Granulated Web Services Guest Survey System
First Named Inventor/Applicant Name:	Steven Roberts
Customer Number:	57838
Filer:	Thomas Edward Toner
Filer Authorized By:	
Attorney Docket Number:	
Receipt Date:	15-JAN-2015
Filing Date:	
Time Stamp:	21:34:46
Application Type:	Provisional

Payment information:

Submitted with Payment	yes
Payment Type	Deposit Account
Payment was successfully received in RAM	$130
RAM confirmation Number	7002
Deposit Account	505605
Authorized User	

The Director of the USPTO is hereby authorized to charge indicated fees and credit any overpayment as follows:

Charge any Additional Fees required under 37 C.F.R. Section 1.17 (Patent application and reexamination processing fees)

File Listing:

<table>
<tr><th>Document Number</th><th>Document Description</th><th>File Name</th><th>File Size(Bytes)/
Message Digest</th><th>Multi Part /.zip</th><th>Pages (if appl.)</th></tr>
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ce348992588911f3ec39a9a5a94c23f73aa0b002</td><td>yes</td><td>34</td></tr>
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Multipart Description/PDF files in .zip description

Document Description	Start	End
Specification	1	30
Claims	31	33
Abstract	34	34

</td></tr>
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<tr><td colspan="6">Information:</td></tr>
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<tr><td colspan="6">Information:</td></tr>
<tr><td colspan="4">Total Files Size (in bytes):</td><td colspan="2">2119328</td></tr>
</table>

This Acknowledgement Receipt evidences receipt on the noted date by the USPTO of the indicated documents, characterized by the applicant, and including page counts, where applicable. It serves as evidence of receipt similar to a Post Card, as described in MPEP 503.

<u>New Applications Under 35 U.S.C. 111</u>
If a new application is being filed and the application includes the necessary components for a filing date (see 37 CFR 1.53(b)-(d) and MPEP 506), a Filing Receipt (37 CFR 1.54) will be issued in due course and the date shown on this Acknowledgement Receipt will establish the filing date of the application.

<u>National Stage of an International Application under 35 U.S.C. 371</u>
If a timely submission to enter the national stage of an international application is compliant with the conditions of 35 U.S.C. 371 and other applicable requirements a Form PCT/DO/EO/903 indicating acceptance of the application as a national stage submission under 35 U.S.C. 371 will be issued in addition to the Filing Receipt, in due course.

<u>New International Application Filed with the USPTO as a Receiving Office</u>
If a new international application is being filed and the international application includes the necessary components for an international filing date (see PCT Article 11 and MPEP 1810), a Notification of the International Application Number and of the International Filing Date (Form PCT/RO/105) will be issued in due course, subject to prescriptions concerning national security, and the date shown on this Acknowledgement Receipt will establish the international filing date of the application.