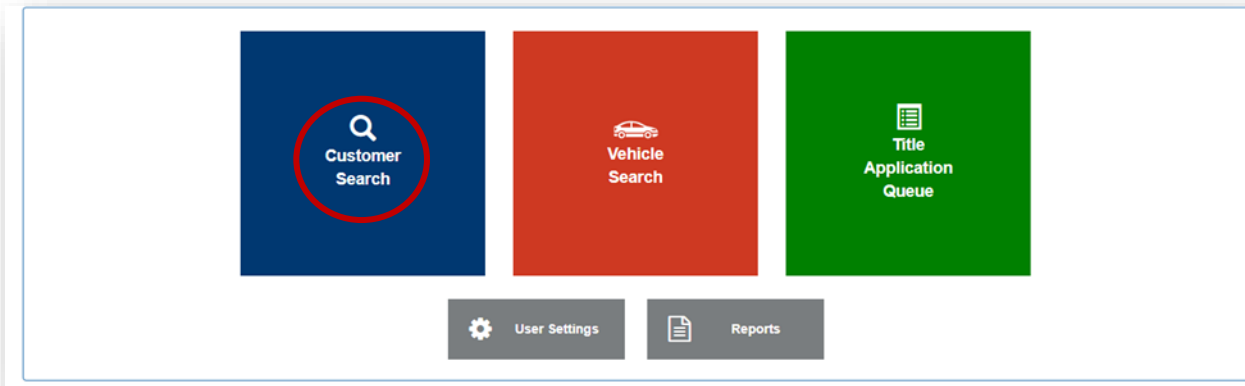


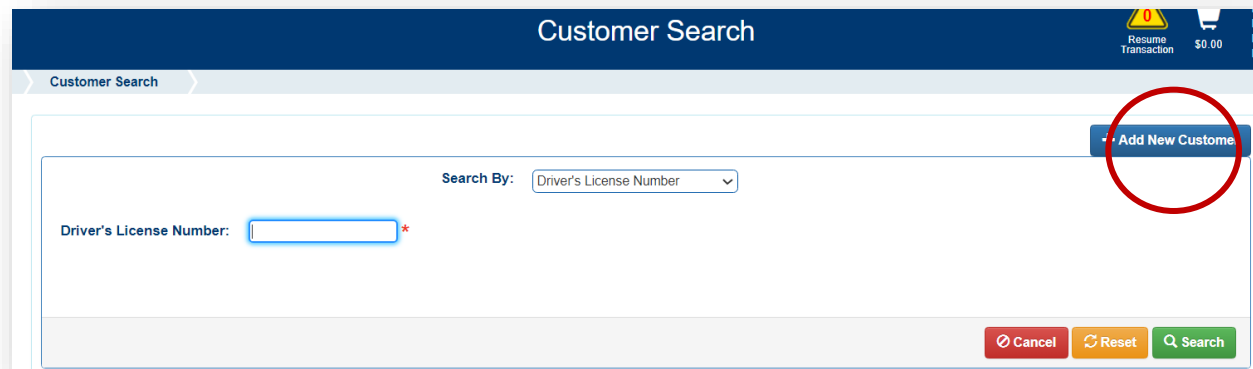
Adding an Organization

This guide will demonstrate how to add an organization as a KAVIS customer.

1. From the Home Page, select "Customer Search".



2. On the 'Customer Search' click [+ Add New Customer](#)



3. Select 'Organization' from the Customer Type dropdown menu.

The screenshot shows the top navigation bar with the 'kavis' logo and 'Add Customer' title. Below the navigation bar, there is a breadcrumb trail: Home > Customer Search > Add Customer. The main content area features a 'Customer Type' dropdown menu. The dropdown is open, showing three options: 'Select customer type', 'Individual', and 'Organization'. The 'Organization' option is highlighted, and a red circle is drawn around it. In the top right corner, there are icons for 'Resume Transaction' and a shopping cart with '\$0.00'.

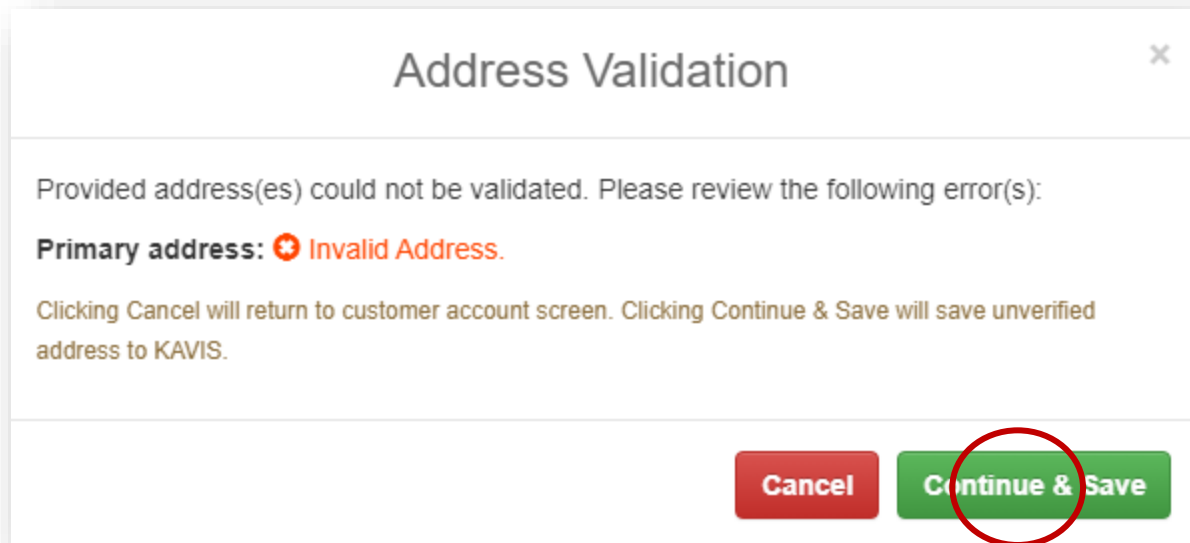
4. Once selected you may enter the required customer details and then click 

The screenshot shows the 'Add Customer' page with the 'Customer Type' dropdown set to 'Organization' and 'Type' set to 'Select Organization type'. The page is divided into several sections:

- Organization Details:** Contains fields for SSN/FEIN, Name, Incorporation Month, Dealer (checkbox), E-Mail, and Contact Name. A 'Phone' section includes fields for Office, Alternate, and Fax.
- Address:** Contains a 'County of Residence' dropdown (set to SCOTT), a radio button for 'Is Mailing address different?' (set to No), and a 'Physical' address section. The 'Physical' section has a red error message: 'Not verified!'. It includes fields for Address 1, Address 2, City, State (dropdown), Zip, and Attn.
- Alias:** A section with the text 'No Alias data.' and an 'Add Alias' button.


 At the bottom right, there are three buttons: 'Cancel', 'Reset', and 'Save'. The 'Save' button is circled in red.

5. If the address can't be validated, you will receive a message. This is not a hard stop. It is a chance to check the address or to Continue & Save.



6. After saving, if KAVIS has an existing Customer with information that matches what you have entered, you will get a message alerting you of the similarity.
 - a. This could be if KAVIS has found a duplicate FEIN/SSN
 - b. Click OK

Duplicate Customer Result



Resume Transaction


Customer ID	FEIN/SSN	Organization Name	Physical Address	
017110957	272837954	4 SEASON ALL OUTDOORS, LLC	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
015944103	272837954	4 SEASON ALL OUTDOORS LLC		Select
015993021	272837954	4 SEASONS LAWN ALLOUTDOORS	1829 Oxford Dr,	Select
016067127	272837954	4 SEAS		Select
016226542	272837954	4 SEAS		Select
016492124	272837954	FOUR S	GEORGETOWN, KY, 40324	Select
016567413	272837954	FOUR SEASONS ALL OUTDOORS	154 Riviera Dr, GEORGETOWN, KY, 40324	Select
016598578	272837954	4 SEASONS ALL OUTDOORS	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
016715704	272837954	4 SEASONS ALL OUTDOORS LLC	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
017208186	272837954	4-SEASONS ALL OUTDOORS LLC		Select
017346233	272837954	FOUR SEASONS ALL OUTDOORS, LLC	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
017454475	272837954	4 SEASONS ALL OUTDOORS LLC	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select

Duplicates Found


We have found existing KAVIS customers that match the information entered on the Add Customer Screen.

OK

7. Clicking the Customer ID to open a popover with their information in case the Customer is already in KAVIS

a.  will open a pop-over message that will erase the information you added to create a new customer and take you to that Customer's Account Page

b.  will take you back to step 3 where you can edit the information you entered in case it is incorrect

c.  will allow you to create the new Customer Account with the duplicate information (this will be a rare circumstance that people have the same information).

7.

Customer ID	FEIN/SSN	Organization Name	Physical Address	
017110957	272837954	4 SEASON ALL OUTDOORS, LLC	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
015944103	272837954	4 SEASON ALL OUTDOORS LLC		Select
015993021	272837954	4 SEASONS LAWN ALLOUTDOORS	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
016067127	272837954	4 SEASONS ALL OUTDOOR LL	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
016226542	272837954	4 SEASONS ALL OUTDOORS LL	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
016492124	272837954	FOUR SEASONS ALL OUTDOORS LLC	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
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017346233	272837954	FOUR SEASONS ALL OUTDOORS, LLC	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select
017454475	272837954	4 SEASONS ALL OUTDOORS LLC	1829 Oxford Dr, GEORGETOWN, KY, 40324	Select

a.

b.

c.

Cancel

Continue