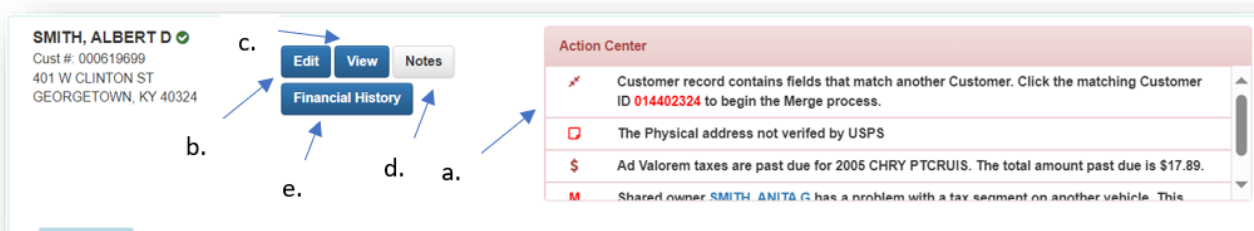


Customer Account Overview

The Customer Account page is where you will find all the Customer's information. You can edit their personal information, view their financial history, placard, or vehicle ownership history. You can also start a New Title Application, perform title actions, perform registration actions, and pay delinquent Ad Valorem.

Customer Account Page Details

1. The top section houses the Customer's information.
 - a. The Action Center gives details about why a particular vehicle requires attention. This will be covered in more detail on step 6.
 - b. **Edit** will allow you to view and edit personal information.
 - c. **View** will allow you to expand the section to show more of their personal information.
 - d. **Notes** will allow notes to be added about the customer. Anything useful to know about the customer may be put here.
 - e. **Financial History** will take you to a receipt search for the customer.



2. When clicking **Edit** you have the option to edit personal information, click **Save** after you have scanned their Driver's License or made changes. There will also be three buttons on edit the page.

PRINCE, RICHARD
Cust # 001220544

Name Change | **Cancel to Organization**

Personal Information

Birth Date: Birth Date is required

Gender: Selected One

Citizenship: United States

Deaf or Hard of Hearing: No Yes

Deceased: No Yes

Phone

Home:

Mobile: (502) 425-4321

Work:

Identification

The Customer record contains fields that match a Driver's License verified Customer. Please call 508-338-1234 or select 001425500 to view the merge summary.

Driver's License: Select State

SSN: 400-75-3429

Passport:

Green Card:

I-94:

ITIN:

* At least one form of identification is required

Address

Country of Residence: BOONE

In Mailing address different? No Yes

Verified by USPS

Address 1: 14400 Brown Rd Verified

Address 2:

City: VERONA

State: Kentucky

Zip: 41062 6021

Attn:

Alias

No Alias data.

Add Alias

Cancel **Save**

- a. **Name Change** will bring up an overlay that will require Last Name, First Name, Name Change Reason, and Supporting Document Type to complete a name change. Click **Add to Cart** and checkout the name to commit to the name change.

***Note. Any Change Reason other than BTR Conversion Error will prevent Duplicate titles for any vehicles this customer owns. They will all need Updated titles if the customer needs a copy of any vehicle's titles.**

Name Change

Personal Information

Last Name: <input type="text" value="PRINCE"/> *	First Name: <input type="text" value="RICHARD"/> *
Middle Name: <input type="text"/>	Suffix: <input type="text" value="v"/>
Name Change Reason: <input type="text" value="Select One..."/> *	
Supporting Documentation Type: <input type="text" value="Select One..."/> *	

Note: Valid characters for First, Middle and Last Name are: **A-Z a-z 0-9 - ~ ! ^ & ' " ' and space.**

- b. **Convert to Organization** will allow a KAVIS Customer who is not Driver's License verified to be considered an organization. Add Name, Type, Incorporation Month and then click save to commit to this conversion.

Cust #: 001220844

Organization Details

Name was: PRINCE RICHARD

SSN/FEIN: *

Name: *

Incorporation Month: *

E-Mail:

Contact Name:

Phone

Office:

Alternate:

Fax:

Address

County of Residence: *

Is Mailing address different? No Yes

Validated By USPS.

Physical ✔ Verified !

Address 1: *

Address 2:

City: *

State: * Zip: *

Attn:

3. The **Notes** button will allow notes to be added about the customer. Anything useful to know about the customer may be put here.
 - a. Click **Add** to make a new note.
 - A window will pop up. Write a note in the field provided and decide if the Note should include an Alert. Including an Alert will have the Note show up in the Action Center for this customer and by the Customer Name on each of the customer's title Vehicle Summary pages.
 - Click **Save** to confirm your new Customer Note.

Add Customer Note

Indicate if you desire the Note to include an 'Alert': No Yes

* Notes:

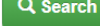
- b. To delete select **Action** and then Delete.
- c. To turn an Alert on or off select Alert On/Off. The Alert column will tell you if the Alert is on by the word **ON**.

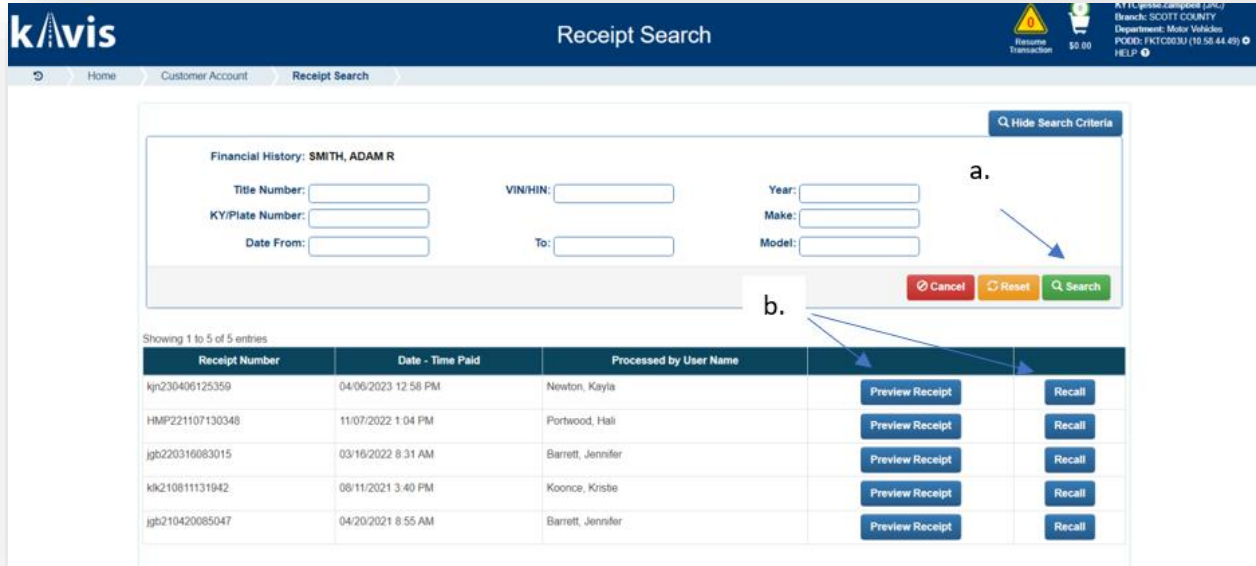
The screenshot shows the 'Customer Account' page for 'PRINCE, RICHARD' (Cust #: 001220844). Under the 'Customer Notes' section, there is a table with the following data:

Alert	Date	Note	User	Action
ON	12/21/2023	Test	kytjessie.campbell	<input checked="" type="button" value="Action"/> <ul style="list-style-type: none"> <input checked="" type="button" value="Delete"/> <input type="button" value="Alert On/Off"/>

Annotations in the image: 'b.' points to the 'Action' dropdown menu, and 'c.' points to the 'Alert' column header and the 'ON' value in the first row.

- 4. The **Financial History** button will take you to a receipt search for the Customer.

- a. To narrow your search, enter specific data to search for and click .
- b. You may preview the receipt or recall the transaction if necessary.



Financial History: SMITH, ADAM R


Title Number: VIN/HIN: Year:

KY/Plate Number: To: Make:

Date From: Model:

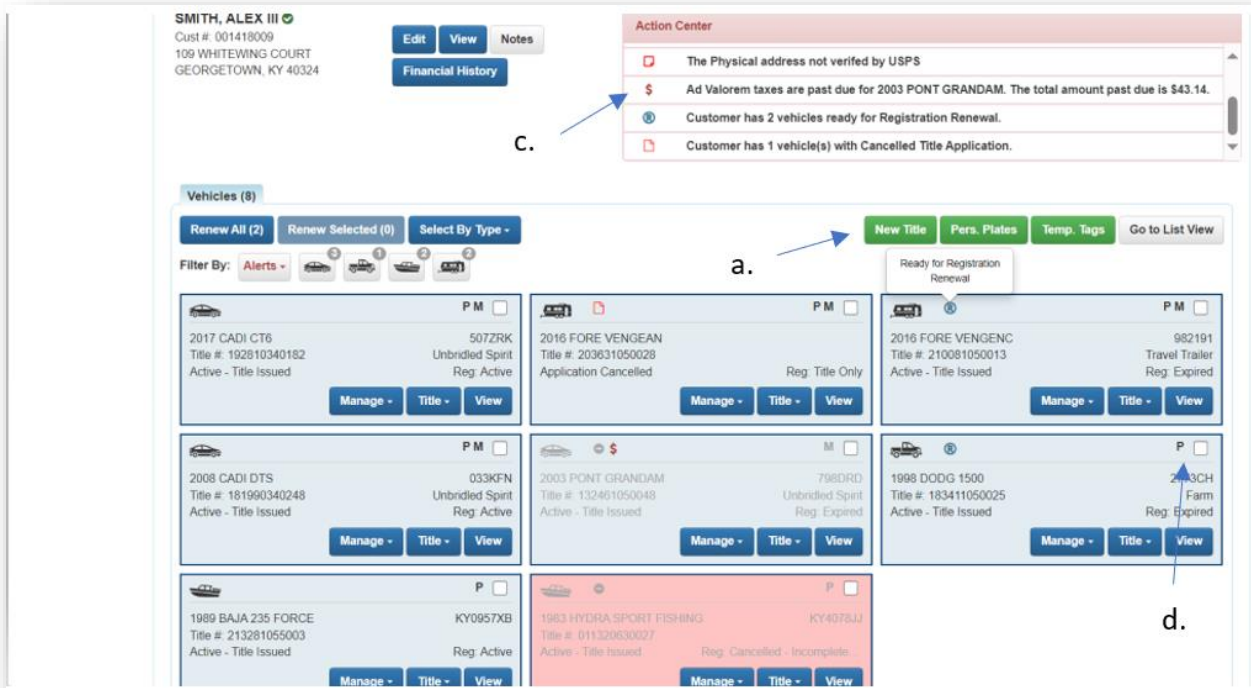
Showing 1 to 5 of 5 entries

Receipt Number	Date - Time Paid	Processed by User Name		
kjn230406125359	04/06/2023 12:58 PM	Newton, Kayla	Preview Receipt	Recall
HMP221107130348	11/07/2022 1:04 PM	Portwood, Hali	Preview Receipt	Recall
jgb220316083015	03/16/2022 8:31 AM	Barrett, Jennifer	Preview Receipt	Recall
kk210811131942	08/11/2021 3:40 PM	Koonce, Krisbe	Preview Receipt	Recall
jgb210420085047	04/20/2021 8:55 AM	Barrett, Jennifer	Preview Receipt	Recall

5. The 'Vehicles' section will have all the vehicles this customer currently owns.
 - a. You can start a new title application for the Customer for a vehicle that does not currently have a KY Title from the  button.
 - b. The blue button dropdown menus in the Vehicles section are explained in detail in the 'Title Applications for Current KY Titles' and 'Registration Actions' section of the manual.
 - c. The icons in the Action Center will also be on the corresponding vehicle tile(s).
 - d. The vehicle tiles may include the letters M and P next to the checkbox.
 - **M** = there are multiple owners on the title.
 - **M** = a shared owner has past due ad valorem owed on another vehicle or has PVA issues.
 - **P** = this customer is the primary owner on the title.

*Note. Hover over any icon to see an explication of the icon.
 - e. The vehicle tiles can have different colors as well:
 - The blue tile is the standard color
 - Pink lets the user know that a vehicle the Customer no longer owns still has unpaid Ad Valorem.

- Yellow lets the user know that the vehicle has been placed on hold.
- Grayed out means that the vehicle has inactive tax status.



6. The Action Center and vehicle tiles can include the following icons:

= Ad Valorem on the vehicle is past due.

= Registration on this vehicle can be renewed.

= The vehicle is missing information necessary to renew the registration.

- If the customer would like to register the vehicle, you will need to go to the vehicle summary page and edit the Vehicle Attributes. Depending on the missing information, an updated title might be necessary.

= There is a pending lien on this vehicle.

= PVA has adjusted the paid Ad Valorem section. This means that the customer needs to be refunded money.



= There is a problem with a tax segment for the vehicle, you will need to call your PVA so they can enter the correct information and clear the PVA alert. The customer can call/visit the PVA to resolve the issue.




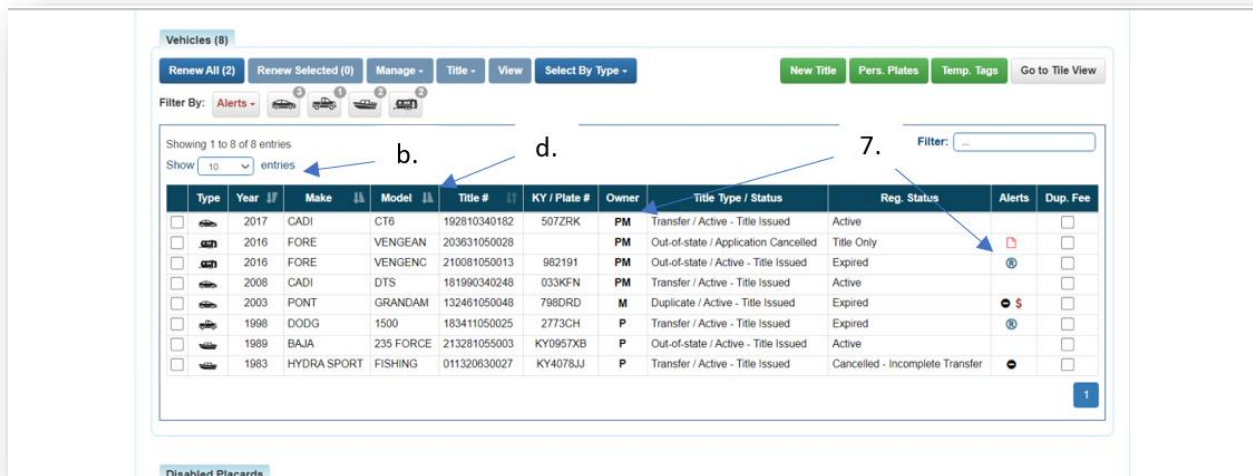
= Title Application has been cancelled.



= Inactive tax status.

7. In the list view on a Customer Account page, the owner status and alert icons will be in their own columns.

- The page will default to List View if the Customer has 12 or more vehicles.
- You can choose the # of the vehicles per page in the dropdown menu.
- You can filter the list by a keyword in the filter field.
- Clicking the  symbol will order the list alphabetically or numerically by that specific column.
- The checkboxes, blue buttons and dropdown menus in the Vehicle section are explained in detail in the 'Title Applications for Current KY Titles' and 'Registration Actions' section of the manual.



The screenshot shows a 'Vehicles (8)' section with a table of vehicle records. Annotations point to specific UI elements:








- b.** points to the 'Show 10 entries' dropdown menu.
- d.** points to the 'Title #' column header.
- 7.** points to the 'Alerts' column header.


Type	Year	Make	Model	Title #	KY / Plate #	Owner	Title Type / Status	Reg. Status	Alerts	Dup. Fee
<input type="checkbox"/>	2017	CADI	CT6	192810340182	507ZRK	PM	Transfer / Active - Title Issued	Active		<input type="checkbox"/>
<input type="checkbox"/>	2016	FORE	VENGEAN	203631050028		PM	Out-of-state / Application Cancelled	Title Only		<input type="checkbox"/>
<input type="checkbox"/>	2016	FORE	VENGENC	210081050013	982191	PM	Out-of-state / Active - Title Issued	Expired		<input type="checkbox"/>
<input type="checkbox"/>	2008	CADI	DTS	181990340248	033KFN	PM	Transfer / Active - Title Issued	Active		<input type="checkbox"/>
<input type="checkbox"/>	2003	PONT	GRANDAM	132461050048	798DRD	M	Duplicate / Active - Title Issued	Expired		<input type="checkbox"/>
<input type="checkbox"/>	1998	DODG	1500	183411050025	2773CH	P	Transfer / Active - Title Issued	Expired		<input type="checkbox"/>
<input type="checkbox"/>	1989	BAJA	235 FORCE	213281055003	KY0957XB	P	Out-of-state / Active - Title Issued	Active		<input type="checkbox"/>
<input type="checkbox"/>	1983	HYDRA SPORT	FISHING	011320630027	KY4078JJ	P	Transfer / Active - Title Issued	Cancelled - Incomplete Transfer		<input type="checkbox"/>

8. Below the Vehicles section is the Disabled Placard section. All Disabled Placard History including the ability to issue new placards and take actions on current placards, will be in the Disabled Placard section.
 - a. Detailed explanations of the specific buttons and options can be found in the Disabled Placards Manual.

Disabled Placards

Issue Disabled Placard


























Trans ID	Control Number	Placard Type	Placard Year	Placard #	Issue Date	Expiration Date	Status	Authorized Placard(s)	Comments		
586681975	22-297-105-0-DP-00003		47	857103	10/24/2022	06/30/2028	Active	1 of 2			
586487085	22-277-105-0-DP-00001		47	853150	10/04/2022	01/04/2023	Inactive	1 of 1			
002373187	17-199-105-0-DP-00013		46	219664	07/18/2017	07/31/2019	Expired	1 of 2			

9. Clicking [Previously Owned Vehicles \(9\)](#) at the bottom of the Customer Account page will open the section to show the Customer's previously owned vehicles.
 - a.  will take you to that Vehicle's Summary page.

Previously Owned Vehicles (9)

Showing 1 to 9 of 9 entries

Filter

Status	Date	Type	Year	Make	Model	Title #	KY / Plate #	Owner	Title Status	Reg. Status	Alerts	
	09/16/2010		2006	BUIC	REND	090630340020		M	Surrendered - Transferred	Cancelled		 
	04/08/2008		1997	DODG	RAM	080660340091		M	Surrendered - Transferred	Cancelled		 
	03/06/2008		1997	DODG	RAM	052661050064		M	Surrendered - Transferred	Cancelled		 
	11/18/2005		2005	TOYT	COROLLA	053120340378		M	Surrendered - Transferred	Cancelled		 
	11/08/2005		2005	TOYT	COROLLA	050270340069		M	Surrendered - Transferred	Cancelled		 
	09/23/2005		1997	DODG	RAM	991660340299		M	Surrendered - Transferred	Cancelled		 
	06/22/2004		1997	MERC	VILLAGR	020300340265		M	Surrendered - Transferred	Cancelled		 
	07/07/2003		2002	DODG	NEON	022291050032		M	Surrendered - Transferred	Cancelled		 
	04/22/1991		1984	KAWK	ZN700A1	871480340509		M	Surrendered - Transferred	Cancelled		