Customer Account Page

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

Searching for a Customer

1. From the Home Page, click the search tile.



- Choose from the dropdown menu how you would like to search for the customer (search a record by a customer's Driver's License Number, Social Security Number, Individual's Name, Organization's Name, Customer Number, Passport Number, Green Card Number, Visa Number, ITIN Number, and Disable Placard Number), enter the requested info and click Q Search.
 - a. Or select 'Driver's License Number' and scan the Customer's License.

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ා Home Customer Search		
		+ Add New Cus
	Search By: Driver's License Number	
Driver's License Number: *		
		O Cancel C Reset Q Sea

- 3. From the search results, click Select to be taken to their Customer Account Page.
 - a. The green customer accounts have been Driver's License verified.
 - b. If you do not see your customer, click ^Q Display Search Criteria and the search fields will open above the list, and you can edit your search criteria. Click ^Q Hide Search Criteria to hide the search fields.
 - c. You can click on the column names to organize the results alphabetically or numerically by that column.
 - In the migration of customers to KAVIS, there are multiple customer accounts that you will need to merge manually.

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										٩	Display Search Criteria	+ Add	New C
	Customer ID	Driver's License	e Last Name	First Name	Middle Name	Suffix	DOB	SSN	ITIN	Physical Address	County of Residence	Preferred Name	
	007268305		ATHA	JOHN				xxx-xx-6653		611 Richardson Ln, FRANKFORT, KY, 40601	FRANKLIN		
	018497889		ATHA	JOHN				xxx-xx-2747		320 Fannin Ct Apt 8, FRANKFORT, KY, 40601	FRANKLIN		
	005905758		ATHA	JOHN				xxx-xx-2747		320 Fannin Ct Apt 8, FRANKFORT, KY, 40601	FRANKLIN		
	015315128	A95225467	ATHA	JOHN	G		10/03/1964	xxx-xx-6653		611 Richardson Ln, FRANKFORT, KY, 40601	FRANKLIN		
	002734032	A95225467	ATHA	JOHN	G		10/03/1964	xxx-xx-6653		611 Richardson Ln, FRANKFORT, KY, 40601	FRANKLIN		
$\overline{\ }$	017364618	A96859176	ATHA	JOHN	GILBERT		08/14/1980	xxx-xx-2747		1480 Colston Ln, FRANKFORT, KY, 40601	FRANKLIN		
	006209261	A96859176	ATHA	JOHN	GILBERT		08/14/1980	xxx-xx-2747		1480 Colston Ln, FRANKFORT, KY, 40601	FRANKLIN		C
	018664269		ATHA	JOHN	GREGORY			xxx-xx-6653		611 Richardson Ln, FRANKFORT, KY, 40601	FRANKLIN		
_1	004209182		ATHA	JOHN	GREGORY			xxx-xx-6653		611 Richardson Ln, FRANKFORT, KY, 40601	FRANKLIN		
	Indicates C	ustomer record ha	s been verifie	d with Driver's	License								

- 4. From the Customer Search Results, you can click on the blue Customer ID to open an overlay that will show you the vehicles owned by that customer to make sure you are choosing the correct customer.
 - a. If the Identification section has an alert about a possible match with another account.
 - b. If it is the correct customer account, click
 - c. If it is not the correct customer account, click <a>Cancel and the overlay will close, and you will return to the previous search results.

Select

D Home Customer S	Search Customer Acco	ount			HELP 🛛
ATHA, JOHN GILBERT 🛇	Edit View Notes	Actio	n Center		
1480 Colston Ln FRANKFORT, KY 40601	Financial History	1	Customer record contains fields that match 005905758 to begin the Merge process.	another Customer. Click th	e matching Customer ID
		*	Customer record contains fields that match 017364618 to begin the Merge process.	another Customer. Click th	e matching Customer ID
		*	Customer record contains fields that match	another Customer. Click th	e matching Customer ID
Vehicles (2)					
Select By Type -					Go to List View
0					
Filter By: Alerts -					
s \$	P 🗌	PVA	P		
	160GEM	2000 CHEV CAVALIE	288BAB		
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Title #: 113620030006					
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