

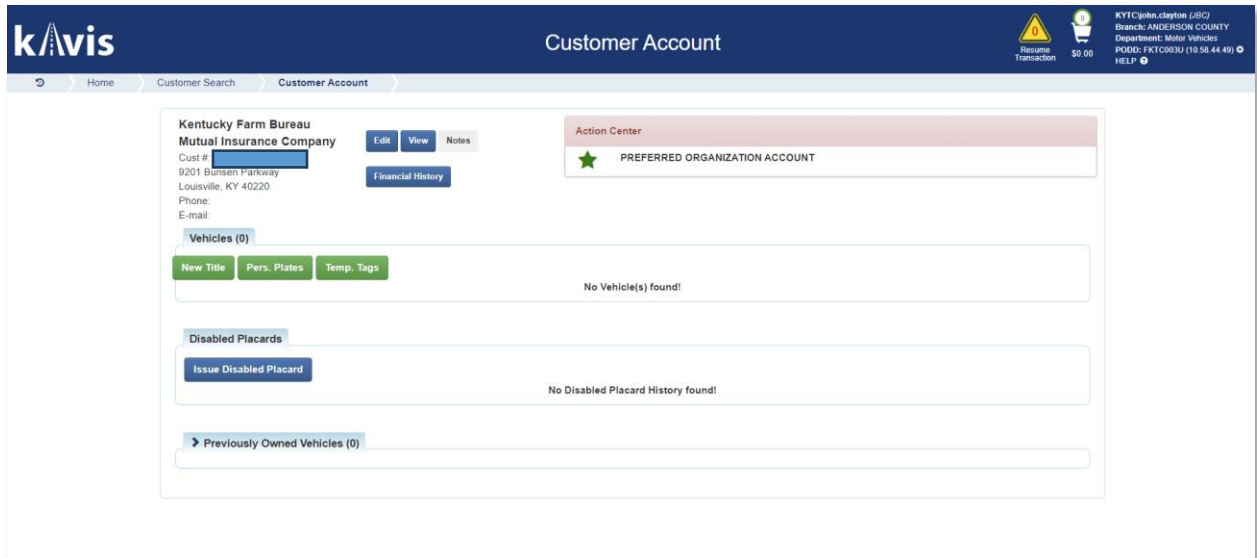


QRG - Organization Search Enhancements

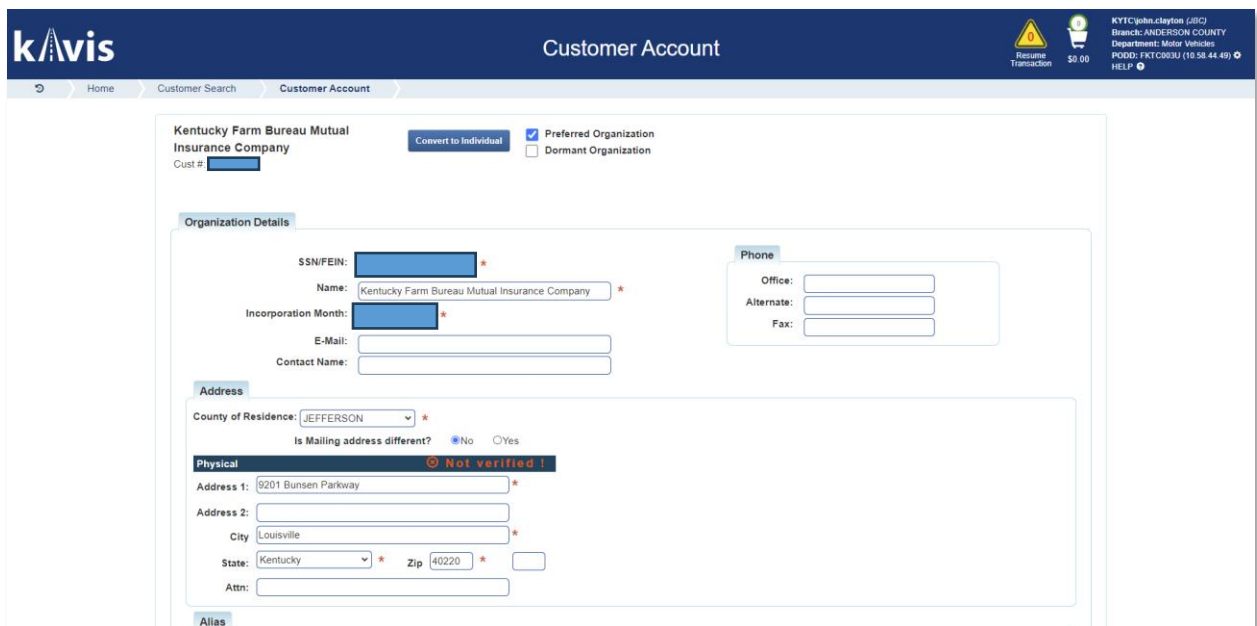
Updated October 2024



1. Organization Customer Accounts can be designated by users with the 'Edit Customer' role as 'Preferred Organizations' in KAVIS.
2. The Customer Account page will display a green star icon in the Action Center:



3. Click the 'Edit' button on the Customer Account page to display the **optional** Preferred Organization checkbox:



4. You can also remove this designation (if previously selected) by deselecting the checkbox and **Saving** your changes.

- Preferred Organizations will appear (highlighted in gray) at the top of Organization search results in all NTA flows or from the Customer Search page:

The screenshot shows the KAVIS Customer Search interface. At the top, there is a navigation bar with the KAVIS logo, the text "Customer Search", and user information including "KYTC\john.clayton (JBC)", "Branch: ANDERSON COUNTY", "Department: Motor Vehicles", "PODD: FKTC003U (10.58.44.49)", and "HELP". A "Resume Transaction" button and a "\$0.00" amount are also visible.

The main search area contains a "Search By:" dropdown menu set to "Organization's Name". Below this, there are input fields for "Organization's Name" (containing "FARM BUREAU"), "FEIN:" (empty), and "County:" (set to "ALL"). To the right of these fields are two checked checkboxes: "Narrow Search Results" and "Hide Dormant Organizations". At the bottom of the search area are three buttons: "Cancel", "Reset", and "Search". A "+ Add New Customer" button is located in the top right corner of the search area.

The screenshot shows the KAVIS Customer Search interface displaying search results. At the top, there is a navigation bar with the KAVIS logo, the text "Customer Search", and user information including "KYTC\john.clayton (JBC)", "Branch: ANDERSON COUNTY", "Department: Motor Vehicles", "PODD: FKTC003U (10.58.44.49)", and "HELP". A "Resume Transaction" button and a "\$0.00" amount are also visible.

The main search area contains a message: "Your search resulted in more than 1000 records. Please enter more specific search criteria to display fewer results." Below this message are two buttons: "Display Search Criteria" and "+ Add New Customer".

The search results are displayed in a table with the following columns: "Customer ID", "FEIN/SSN", "Organization Name", "Physical Address", and "Select". The table contains 15 rows of data. The first row is highlighted in gray, indicating it is a preferred organization. The "FEIN/SSN" column is highlighted in blue.

Customer ID	FEIN/SSN	Organization Name	Physical Address	Select
017585992	92	Kentucky Farm Bureau Mutual Insurance Company	9201 Bursen Parkway . Louisville, KY, 40220	Select
016759113	92	KAENTUCKY FARM BUREAU	1051 Industry Rd, LAWRENCEBURG, KY, 40342	Select
018018868	92	KEENTUCKY FARM BUREAU	1051 Industry Rd, LAWRENCEBURG, KY, 40342	Select
016625003	97	KEMTUCKY FARM BUREAU	5801 Kasp Ct, LEXINGTON, KY, 40509	Select
016650286	92	KENCTUCKY FARM BUREAU INS CO	710 Woodford Ave, BOWLING GREEN, KY, 42101	Select
017265076	92	KENRUCKY FARM BUREAU	687 E Outer Rd, SIKESTON, MO, 63801	Select
017112506	92	KENTCUKY FARM BUREAU		Select
017027935	92	KENTUCKY FARM BUREAU MUTUAL IN		Select
018092746	92	KENTICKY FARM BUREAU	1051 Industry Rd, LAWRENCEBURG, KY, 40342	Select
016616741	92	KENTICKY FARM BUREAU INS CO	710 Woodford Ave, BOWLING GREEN, KY, 42101	Select
016960519	92	KENTICKY FARM BUREAU INS. CO.		Select
016890311	92	KENTICKY FARM BUREAU INSURANCE	123 Four Wheel Dr, ASHLAND, KY, 41102	Select

At the bottom right of the table, there are "Previous" and "Next" buttons for pagination.

- The maximum number of search results per page has increased from 100 to 1,000 also with the addition of pagination controls (Previous + Next) when > 1,000 results are returned from search.

- KAVIS also gives users the ability to designate Organizations as 'Dormant Organizations' on the Customer Account **Edit** page:

FENTUCKY FARM BUREAU
Cust # [REDACTED] Convert to Individual Preferred Organization Dormant Organization

Organization Details

SSN/FEIN: [REDACTED] *

Name: FENTUCKY FARM BUREAU *

Incorporation Month: JAN *

E-Mail: [REDACTED]

Contact Name: [REDACTED]

Phone

Office: [REDACTED]

Alternate: [REDACTED]

Fax: [REDACTED]

Address

County of Residence: ANDERSON *

Is Mailing address different? No Yes

Validated By USPS Verified!

Physical

Address 1: 1051 Industry Rd *

Address 2: [REDACTED]

City: LAWRENCEBURG *

State: Kentucky * Zip: 40342 * 9225

Attn: [REDACTED]

FENTUCKY FARM BUREAU
Cust # [REDACTED] Edit View Notes

1051 Industry Rd
LAWRENCEBURG, KY 40342
Phone:
E-mail:

Financial History

Action Center

DORMANT ORGANIZATION ACCOUNT

Vehicles (0)

New Title Pers. Plates Temp. Tags

No Vehicle(s) found!

Disabled Placards

Issue Disabled Placard

No Disabled Placard History found!

Previously Owned Vehicles (1)

- Dormant Organization icon will display in the Action Center of the Organization Customer Account.
- By default, Dormant Organizations will be hidden from Organization search results in the NTA or the Customer Search page.

10. For example, the Organization on the previous page has an obvious misspelling (FENTUCKY FARM BUREAU) in the name AND has no active titles or placards. Marking the Organization as 'Dormant' will cut down the search results clutter that was inherent with the data import from AVIS, where it was necessary to preserve the original legacy data.

The screenshot shows the KAVIS Customer Search interface. The header includes the KAVIS logo, the title 'Customer Search', and user information: KYTC (john.clayton /JBC), Branch: ANDERSON COUNTY, Department: Motor Vehicles, POID: FKTC003U (10.58.44.46), and a HELP icon. A navigation bar shows 'Home' and 'Customer Search'. The main search area has a 'Search By:' dropdown set to 'Organization's Name' and a '+ Add New Customer' button. The search criteria are: Organization's Name: FENTUCKY FARM BUREAU, FEIN: (empty), and County: ALL. Two checkboxes are present: 'Narrow Search Results' (checked) and 'Hide Dormant Organizations' (checked). At the bottom of the search area are 'Cancel', 'Reset', and 'Search' buttons. Below the search area, a message states: 'No results found. Please refine your search, or Click here to add new customer.'

11. If for any reason you would like to view Dormant Organizations in search results, simply deselect the 'Hide Dormant Organizations' checkbox:

This screenshot is identical to the previous one, but the 'Hide Dormant Organizations' checkbox is now unchecked. The rest of the interface, including the search criteria and the 'No results found' message, remains the same.

The screenshot shows the KAVIS Customer Search interface. At the top, there is a navigation bar with the KAVIS logo and 'Customer Search' title. The search criteria are set to 'Organization's Name' with the value 'FENTUCKY FARM BUREAU'. The search results table is as follows:

Customer ID	FEIN/SSN	Organization Name	Physical Address	
018037122	[REDACTED]	FENTUCKY FARM BUREAU	1746 Us Route 60, Hurricane, WV, 25526	Select
016246986	[REDACTED]	FENTUCKY FARM BUREAU	1051 Industry Rd, LAWRENCEBURG, KY, 40342	Select

*Approximately **1.2 million** Organization Accounts will be initially pre-selected as Dormant and hidden from search results with the KAVIS Release of 10/17/2024. These were Organization Accounts imported from AVIS with no active titles or active placards*

Licensed DEALERS (all types) cannot be selected as Preferred or Dormant, however their standard Organization Accounts may be

Organization Accounts with >50 active titles will be initially pre-selected as Preferred Organizations (same KAVIS release)

Organizations with <50 active titles will be in a 'default' state with neither Preferred nor Dormant pre-selected – Ready for each county to edit as they see fit

