



CUSTOMER MANAGEMENT MANUAL

Updated January 2020



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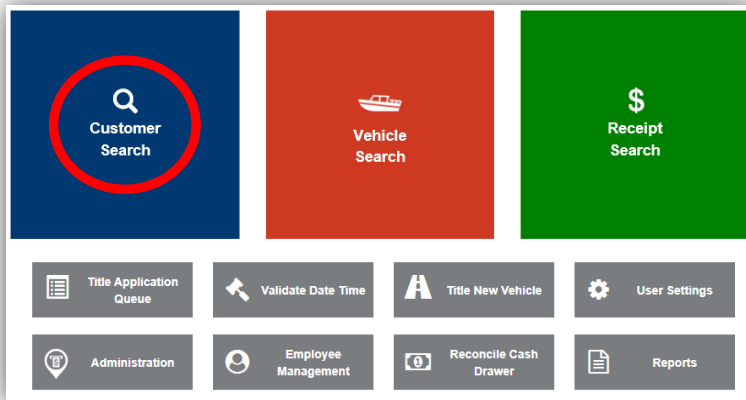



Customer Account Page

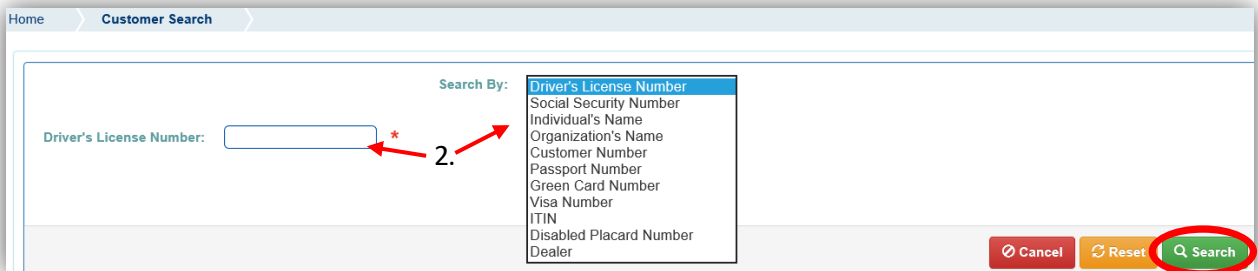
The Customer Account Page is where you will find all of a Customer's information. You can edit their personal information and view their financial, placard, or vehicle ownership history. You can also start a New Title Application, perform all title actions, perform all registration actions, and pay their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

Searching for a Customer

1. From the Home Page, click the  tile.



2. Choose from the dropdown menu how you would like to search for the customer, enter the requested info and click  Search.
 - a. Or select 'Driver's License Number' and scan the Customer's License.



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 **Display Search Criteria** and the search fields will open above the list and you can edit your search criteria. Click **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.
 - d. In the migration of customers to KAVIS, there are multiple customer accounts that you will need to merge manually.

*See the '[How to Merge Customer Accounts](#)' section of this manual

b.

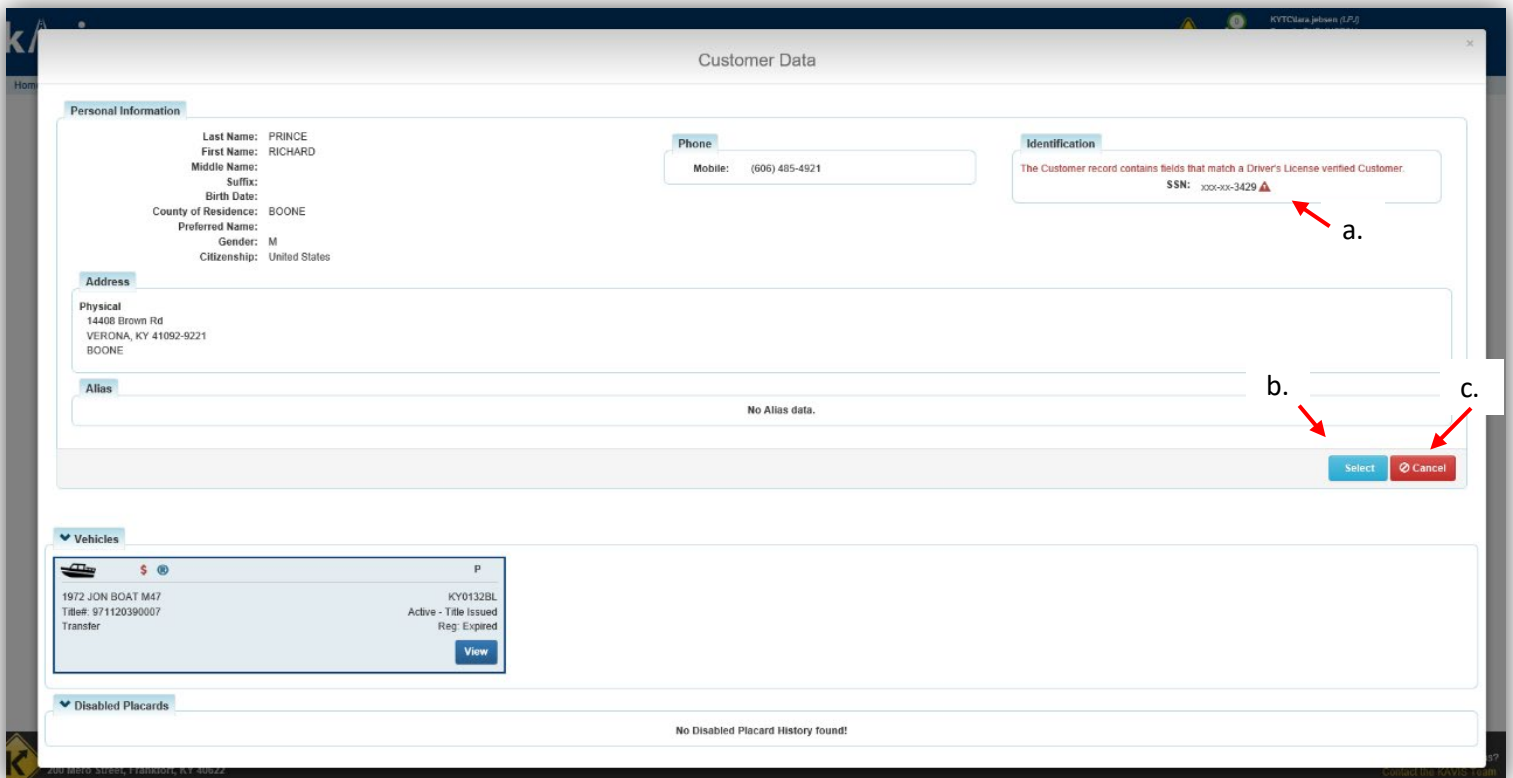
Your search resulted in more than 100 records. Please enter **c.** search criteria to display fewer results.

Customer ID	Driver License	Last Name	First Name	Middle Name	Suffix	DOB	SSN	ITIN	Physical Address	County of Residence	Preferred Name	
001411348		SMITH	ADAM			05/11/1980	xxx-xx-3221		2200 Treetop Ln, HEBRON, KY, 41048	BOONE		<input type="button" value="Select"/>
001271922		SMITH	ALBERT			05/11/1980	xxx-xx-5862		1016 Orchid Rd, FLORENCE, KY, 41042	BOONE		<input type="button" value="Select"/>
001122990	S91091261	SMITH	ALBERT	E		03/18/1938	xxx-xx-6852		1016 Orchid Rd, FLORENCE, KY, 41042	BOONE		<input type="button" value="Select"/>
001139756		SMITH	ALBERT	E			xxx-xx-6856		1016 Orchid Rd, FLORENCE, KY, 41042	BOONE		<input type="button" value="Select"/>
001337926		SMITH	ALBERT	E			xxx-xx-6882		1016 Orchid Rd, FLORENCE, KY, 41042	BOONE		<input type="button" value="Select"/>

4. → **d.** → **c.** →



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, see the [‘How to Merge Customer Accounts’](#) section of this manual.
 - b. If it is the correct customer account, click **Select**.
 - c. If it is not the correct customer account, click **Cancel** and the overlay will close and you will return to the previous search results.



Customer Data

Personal Information

Last Name: PRINCE
First Name: RICHARD
Middle Name:
Suffix:
Birth Date:
County of Residence: BOONE
Preferred Name:
Gender: M
Citizenship: United States

Phone

Mobile: (606) 485-4921

Identification

The Customer record contains fields that match a Driver's License verified Customer.
SSN: xxx-xx-3429 ▲

Address

Physical
14408 Brown Rd
VERONA, KY 41092-9221
BOONE


Alias

No Alias data.

Actions

Select Cancel

Vehicles

 1972 JON BOAT M47 Title#: 971120390007 Transfer	P KY0132BL Active - Title Issued Reg: Expired View
---	--

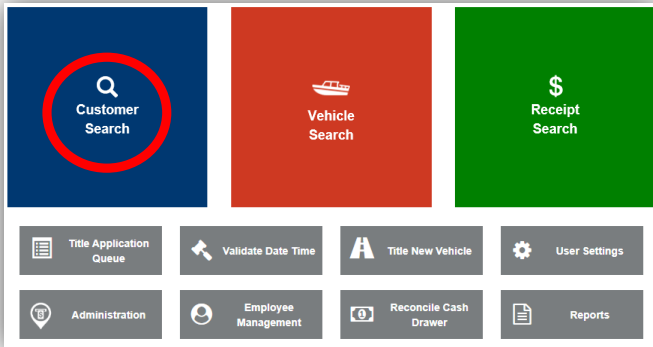
Disabled Placards

No Disabled Placard History found!



Adding a KAVIS Customer

1. From the Home Page, click 'Customer Search'.



2. Click **+ Add New Customer**.

The screenshot shows a search interface with a 'Search By:' dropdown menu set to 'Driver's License Number'. Below it is a text input field for 'Driver's License Number:'. At the bottom right, there are three buttons: 'Cancel', 'Reset', and 'Search'. A green button with a plus sign and the text '+ Add New Customer' is circled in red in the top right corner.

3. Choose the Customer type from the dropdown and enter the information before clicking **Save**.

The screenshot shows a detailed form for adding a customer. At the top, there is a 'Customer Type:' dropdown menu with 'Individual' selected, indicated by a red arrow and the number '3.'. The form is divided into several sections: 'Personal Information' (Last Name, First Name, Middle Name, Suffix, Birth Date, County of Residence, Preferred Name, Gender, Citizenship, E-Mail), 'Phone' (Home, Mobile, Work), 'Identification' (Passport, Visa, Driver's License, SSN, Green Card, ITIN), 'Address' (Physical address fields, City, State, Zip, Attn), and 'Alias'. At the bottom right, there are three buttons: 'Cancel', 'Reset', and 'Save'. The 'Save' button is circled in red.



4. After clicking save in step 3, 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 SSN, ITIN or Driver's License number
 - b. Click OK.

Customer ID	Driver License	Last Name	First Name	Middle Name	Suffix	DOB	SSN	ITIN	Physical Address	County of Residence	Preferred Name	
000623520		SMITH	JACK	R		09/01/1924		xxx-xx-1651	200 Mero Street, Frankfort, KY, 40622	BELL		Select

■ Indicates Customer data matching Driver License data
■ Indicates Customer record has been verified with Driver's License

Duplicates Found

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

OK

5. Clicking the Customer ID to open a popover with their information in case the Customer is already in KAVIS
 - a. **Select** 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. **Cancel** will take you back to step 3 where you can edit the information you entered in case it is incorrect
 - c. **Continue** 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).

Customer ID	Driver License	Last Name	First Name	Middle Name	Suffix	DOB	SSN	ITIN	Physical Address	County of Residence	Preferred Name	
000623520		SMITH	JACK	R		09/01/1924		xxx-xx-1651	200 Mero Street, Frankfort, KY, 40622	BELL		Select

■ Indicates Customer data matching Driver License data
■ Indicates Customer record has been verified with Driver's License

Cancel
Continue



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.
 - It will include the year, make, and model for the vehicle.
 - There is more details on the icons you will see in the Action Center in step 6.

PRINCE, RICHARD
Cust #:001072118
14408 Brown Rd
VERONA, KY 41092
Phone: (606) 485-4921

3. Edit View Notes 4.
5. Financial History 2. 1.a.

Action Center

- \$ Ad Valorem taxes are past due for 1972 JON BOAT M47.
- @ 1972 JON BOAT M47 is Ready for Registration Renewal.

2. Clicking **View** next to their name will expand the section to show more of their personal information.
 - a. The Identification section might have an alert about a possible match with another account, see the '[How to Merge Customer Accounts](#)' section of this manual.

PRINCE, RICHARD
Cust #:001072118

Action Center

- \$ Ad Valorem taxes are past due for 1972 JON BOAT M47.
- @ 1972 JON BOAT M47 is Ready for Registration Renewal.

Personal Information

Birth Date: [Redacted]
County of Residence: BOONE
Preferred Name: [Redacted] 3.
Gender: M
Citizenship: United States

Phone

Mobile: (606) 485-4921

Identification

The Customer record contains fields that match a Driver's License verified Customer. Please edit SSN, Driver's License Number or ITIN, as indicated below. Or select 001266539

SSN: xxx-xx-3429 ▲ a.

Address

Physical
14408 Brown Rd
VERONA, KY 41092-9221
BOONE

Alias

No Alias data.

Cancel



3. **Edit** will allow you to view and edit their personal information, click **Save** after you have scanned their Driver's License or made changes. There will also be three buttons on the edit page.

PRINCE, RICHARD
Cust # 001072118

Name Change **Convert to Organization** 3. b

3. a

Personal Information

Birth Date: *

County of Residence: BOONE *

Preferred Name:

Gender: Male

Citizenship: United States

E. Mail:

Phone

Home:

Mobile: (606) 485-4921

Work:

Identification

The Customer record contains fields that match a Driver's License verified Customer. Please edit SSN, Driver's License Number or ITIN, as indicated below. Or select 001266539 to view the merge summary.

Passport:

Visa:

Driver's License: Select State

SSN: 400-78-3429 ▲

Green Card:

ITIN:

▲ At least one form of Identification is required!

Address

Is Mailing address different? No Yes

Physical

Address 1: 14408 Brown Rd *

Address 2:

City: VERONA *

State: Kentucky * Zip: 41092 *

County: BOONE

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 change to commit to the name change.
- *Note. Any Name Change Reason other than BTR Conversion Error will prevent Duplicate titles for any vehicles this customer owns. They will all need an Updated titles if the customer needs a copy of any of the vehicles' titles.**

Organization

Name Change

Personal Information

Last Name: PRINCE * First Name: RICHARD *

Middle Name: Suffix:

Name Change Reason: Select One... *

Supporting Documentation Type: Select One... *

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

Cancel **Add to Cart**



- 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.

Organization Details

Name was: PRINCE RICHARD

SSN/FEIN: 400783429 *

County of Residence: BOONE *

Name: *

Type: Select Organization type

Incorporation Month: Select Month *

E-Mail:

Contact Name:

Phone

Office:

Alternate:

Fax:

Address

Is Mailing address different? No Yes

Physical

Address 1: 14408 Brown Rd *

Address 2:

City: VERONA *

State: Kentucky * Zip: 41092 * 9221

County: BOONE

Attn:

Alias

No Alias data.

Add Alias

Cancel Save

4. The **Notes** button will allow notes to be added about a customer. Anything useful to know about this customer may be put here.
- a. Click **Add** to make a new note.
- A window will pop up. Write the 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 the customer's boat 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:

Cancel Save



- b. Click **Close** to exit the view of the Customer Notes.

Customer Notes

Alert	Date	Note	User
No Customer Notes Found.			

a. → Add

b. → Close

5. The **Financial History** button will take you to a receipt search for the Customer.
- To narrow your search, enter specific data to search for and click **Search**.
 - You may preview the receipt or recall the transaction if necessary.

Receipt Search

Hide Search Criteria

Financial History: PURVIS, JEFF

Title Number: VIN/HIN: Year:

KY/Plate Number: Make:

Date From: To: Model:

Cancel Reset Search

Showing 1 to 2 of 2 entries

Receipt Number	Date - Time Paid	Processed by User Name		
lbw180423101142	04-23-2018 10:17:00 AM	Washington, Lauren	Preview Receipt	Recall
lbw180403112842	04-03-2018 11:49:00 AM	Washington, Lauren	Preview Receipt	Recall

a. → Search

b. → Preview Receipt / Recall



6. The 'Vehicles' section will have all of the vehicles this customer currently owns.
 - a. You can start a new title application for the Customer for a boat that does not currently have a KY Title from the **New Title** button.
 - b. The blue buttons and dropdown menus in the Vehicles section are explained in detail in the '[Title Applications for Current KY Titles](#)' and '[Registration Actions](#)' sections of this 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 a PVA issue.
 - **P** = this customer is the primary owner on the title.
- *Note. Hover over any icon to see an explication of the icon.**

PURVIS, JEFF
Cust #:001596261
125 Saint Johns Rd
FRANKFORT, KY 40601

Action Center

- \$ Ad Valorem taxes are past due for 5 vehicles.
- Ⓜ Customer has 5 vehicles ready for Registration Renewal.
- M Shared owner **MILLER, CINDY A** has past due Ad Valorem taxes owed on another vehicle. These taxes must be paid before some Actions can be taken on KY0422LY

Vehicles

Boats (5) Renew All (5) Renew Selected (0)

1995 YAMAHA RA1100T KY0151EL P
Title#: 071240370104 Active - Title Issued
Transfer Reg: Expired

1995 YAMAHA RA1100T KY0151EM P
Title#: 063180370062 Active - Title Issued
Transfer Reg: Expired

1989 BAYLINER 1750 KY0023XF P
Title#: 063340370068 Active - Title Issued
Transfer Reg: Expired


1988 SEARAY 270 KY0468BX P
Title#: 102040370051 Active - Title Issued
Transfer Reg: Expired


1979 CHARGER SOIRT KY9471KK P
Title#: 022000370154 Active - Title Issued
Transfer Reg: Expired


1999 BOMBARDIER GTX KY0422LY P M
Title#: 033250080024 Active - Title Issued
Out-of-state Reg: Cancelled



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


 = Ad Valorem on the vehicle is past due.


 = The 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.

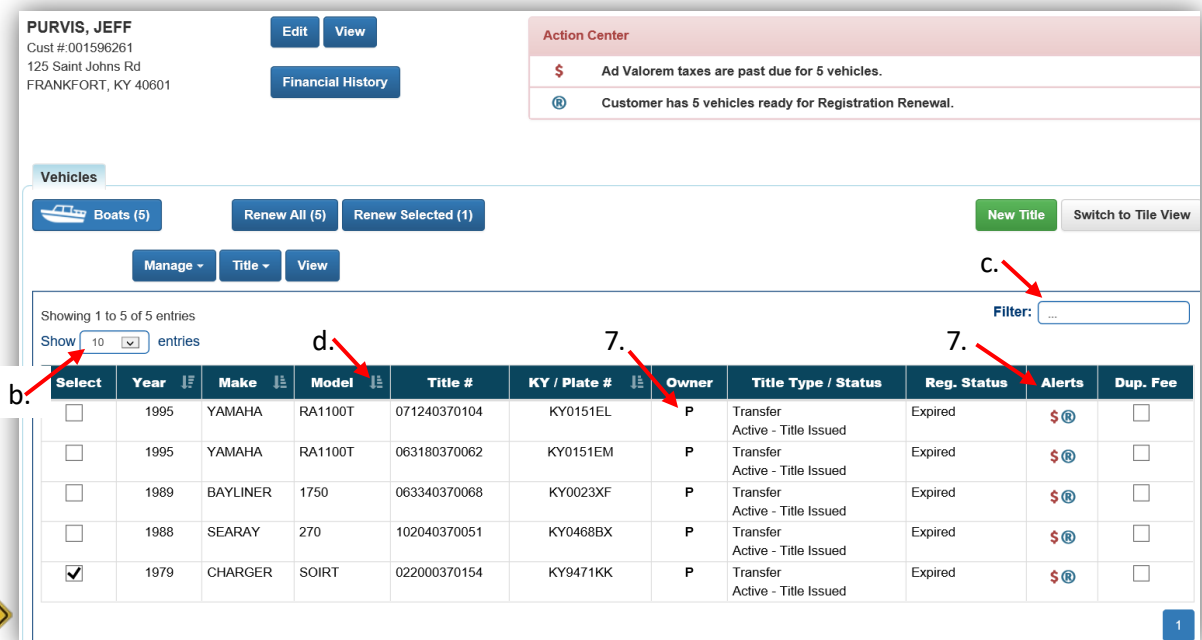
 = PVA has adjusted the paid Ad Valorem section. This means that the customer needs to be refunded money.

 = 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.

8. 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 vehicles per page in the drop down 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 Vehicles section are explained in detail in the '[Title Applications for Current KY Titles](#)' and '[Registration Actions](#)' sections of this manual.



PURVIS, JEFF
Cust #: 001596261
125 Saint Johns Rd
FRANKFORT, KY 40601

[Edit](#) [View](#)
[Financial History](#)

Action Center

-  Ad Valorem taxes are past due for 5 vehicles.
-  Customer has 5 vehicles ready for Registration Renewal.











Vehicles

[Boats \(5\)](#) [Renew All \(5\)](#) [Renew Selected \(1\)](#) [New Title](#) [Switch to Tile View](#)

[Manage](#) [Title](#) [View](#)

Showing 1 to 5 of 5 entries
Show entries

Filter:

Select	Year	Make	Model	Title #	KY / Plate #	Owner	Title Type / Status	Reg. Status	Alerts	Dup. Fee
<input type="checkbox"/>	1995	YAMAHA	RA1100T	071240370104	KY0151EL	P	Transfer Active - Title Issued	Expired	 	<input type="checkbox"/>
<input type="checkbox"/>	1995	YAMAHA	RA1100T	063180370062	KY0151EM	P	Transfer Active - Title Issued	Expired	 	<input type="checkbox"/>
<input type="checkbox"/>	1989	BAYLINER	1750	063340370068	KY0023XF	P	Transfer Active - Title Issued	Expired	 	<input type="checkbox"/>
<input type="checkbox"/>	1988	SEARAY	270	102040370051	KY0468BX	P	Transfer Active - Title Issued	Expired	 	<input type="checkbox"/>
<input checked="" type="checkbox"/>	1979	CHARGER	SOIRT	022000370154	KY9471KK	P	Transfer Active - Title Issued	Expired	 	<input type="checkbox"/>



9. 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 of this section can be found in the Disable 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		
002369101	17-192-102-0-DP-00006		46	195396	07/11/2017	07/31/2019	Active	2 of 2		Renew	Inactivate
002369101	17-192-102-0-DP-00005		46	195397	07/11/2017	07/31/2019	Active	1 of 2		Renew	Inactivate
001203778	13-0-01-08123		45	047417	05/17/2013	05/31/2015	Inactive				
001203577	12-0-02-09983		44	801889	06/04/2012	06/30/2014	Inactive				

10. Clicking [Previously Owned Vehicles \(5\)](#) at the bottom of the Customer Account Page will open the section to show the Customer's previously owned vehicles.
 - a. Ad Val Payment will be the only option allowed in the Manage dropdown menu.
 - b. [View](#) will take you to that particular Vehicle's Summary Page.

Previously Owned Vehicles (5)

Showing 1 to 5 of 5 entries

Filter:

Year	Make	Model	Title #	KY / Plate #	Owner	Title Status	Reg. Status	
1990	BAJA	DSR	132590220077	KY0026ZB	P	Surrendered - Transferred	Expired	Manage - View
1991	YAMAHA	JETSKI	141570220028	KY0551CE	P	Active - Title Issued	Cancelled - Sold Out of State	Manage - View
1991	YAMAHA	JETSKI	130710220060	KY0551CE	P	Surrendered - Transferred	Expired	Manage - View
1995	BOMBARDIER	SEADOO	132590220076	KY0317XH	P	Surrendered - Transferred	Cancelled	Manage - View
1998	BOMBARDIER	GTX	141570220029	KY0280RB	P	Surrendered - Transferred	Cancelled	Manage - View

a.

- Renew
- First Time
- Ad Val Payment
- Junk
- Sold Out of State
- Incomplete Transfer
- Other



Merging and Unmerging Customer Accounts

The Merge Function is for when a Driver's License Verified customer account and a possible duplicate customer account have been identified by KAVIS. The User can merge the customer records to assist in keeping the records consolidated and holding customers accountable for taxes due on all vehicles.

The Unmerge Function is for separating previously merged accounts if the merge was done in error.

To perform a Merge and Unmerge, the User must have permission granted in the 'Add/Edit Customer' checkbox of their User Profile Permissions.

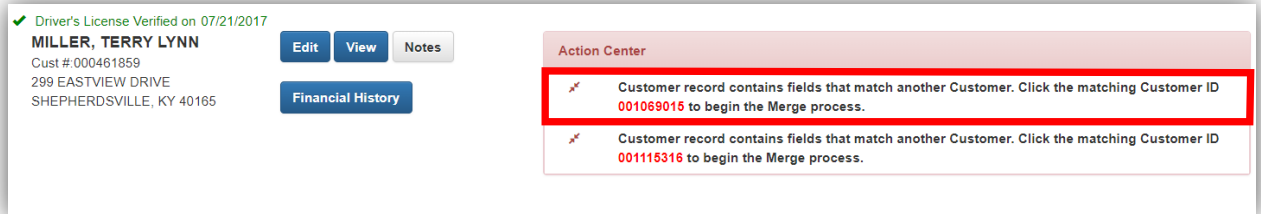
In their User Profile.

The screenshot displays the 'Employee Information' section for Lara Jebsen, with fields for First Name, Last Name, User Initial, AD Account, and Mainframe ID-CC/DT#. Below this is the 'Employee Security Request Information' section with checkboxes for AD Account/Windows, Email Account, Reports to be accessed, AVIS Mainframe, Document Direct, and PODD Archive. The 'Working Locations' section shows a dropdown for County (MVL) and checkboxes for MVL and System Service Support. The 'Kavis Access' section shows an 'Access Level' dropdown set to 'County Clerk' and a 'Permissions' section. The 'Permissions' section is expanded to show several categories: 'Read Only' (Customer Inquiry, Vehicle Inquiry), 'User Management' (Submit User Request), 'Title & Registration' (New Title Application), 'Lien Management' (Manage Lien - File, Manage Lien - Release), 'Others' (Edit Tax Liability), 'Customer Management' (Disabled Placards, Add/Edit Customer), 'Point Of Sale' (POS Reports, Cashier, POS Manager, POS Admin - Logged in County, Remittance Report - Read Only, Reconcile Branch), and 'Title Verification' (Title Transaction Queue - Full Edit, Title Transaction Queue - Action Own). A red arrow points to the 'Add/Edit Customer' checkbox in the 'Customer Management' section.



How to Merge Customer Accounts

1. Sometimes a customer has more than one account associated with their social security. When a customer has an account that has been Driver's License verified and another account a message will show up in the Action Center prompting you to merge the accounts.



✓ Driver's License Verified on 07/21/2017
MILLER, TERRY LYNN
Cust #: 000461859
299 EASTVIEW DRIVE
SHEPHERDSVILLE, KY 40165

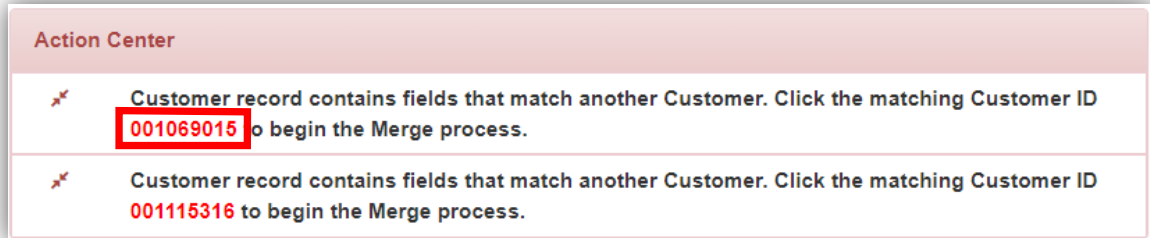
Edit View Notes

Financial History

Action Center

- ✘ Customer record contains fields that match another Customer. Click the matching Customer ID **001069015** to begin the Merge process.
- ✘ Customer record contains fields that match another Customer. Click the matching Customer ID **001115316** to begin the Merge process.

2. To begin merging click the red Customer ID in the Action Center prompt.



Action Center

- ✘ Customer record contains fields that match another Customer. Click the matching Customer ID **001069015** to begin the Merge process.
- ✘ Customer record contains fields that match another Customer. Click the matching Customer ID **001115316** to begin the Merge process.



3. The green customer account is the Driver's License Verified customer, the circles are for you to choose which info to keep with the finalized account.
 - a. Once you choose a checkbox, that info will display with a green background and the data to be replaced will have a red background.
 - b. If Disable Placards are not chosen, they will be Inactivated, but can be Reactivated. See the Disabled Placard Manual for instructions on how to do this.
 - c. When you have made all choices available, click the **Finalize Merge** button.

MILLER, TERRY Customer ID: 001086015

MILLER, TERRY LYNN Customer ID: 000481859

Personal Information

Birth Date: 05/04/1982
 Preferred Name:
 Gender: M
 Citizenship:

County of Residence: BULLITT

Identification

Driver's License: M93534040
 SSN: 401923772
 ITIN:

Phone

Mobile: (502) 593-8448

Address

Physical: 299 Eastview Dr, SHEPHERDSVILLE, KY 40165-7110
 BULLITT

Vehicles - Boats

1995 YAMAHA WRA550T
 KYD407RU 000690430051 Active - Title Issued

Disabled Placards

Placard #	Placard Year	Placard Type	Expiration Date	Status
383733	45	♿	01/31/2020	Active
383734	45	♿	01/31/2020	Active

Customer Notes

- * Customer Notes do not merge
- Data that will not be merged
- Data that will be used to merge
- ✓ - Customer to be Merged
- ✓ - Driver's License Verified Customer

Finalize Merge

4. You will be taken to the newly merged Customer Account Page.

Driver's License Verified on 07/21/2017

COLOMB, LINDA LEE
 Cust # 000336947

Action Center

- Ad Valorem taxes are past due for 1981 SEASWRL CONTENDER.
- 1981 SEASWRL CONTENDER is Missing Required Information for Registration.

Vehicles

Boats (1) Renew All (0) Renew Selected (0) New Title Switch to List View

1981 SEASWRL CONTENDER KY191876W
 Title# 94883000148 Active - Title Issued
 Out-of-state

Disabled Placards

Trans ID	Control Number	Placard Year	Placard Type	Placard #	Issue Date	Expiration Date	Status	Authorized Placard(s)	Comments
002375263	17-202-058-1-0P-00011	45	♿	225975	07/21/2017	07/31/2019	Active	1 of 2	
000371504	15-1-03-23078	45	♿	603185	05/28/2015	05/31/2017	Expired	1 of 2	
000371325	15-1-01-11340	44	♿	74367	03/18/2015	06/18/2015	Expired		

Previously Owned Vehicles (0)



How to Unmerge a Customer Account

1. In this example, there were 2 disabled placards assigned and a boat transferred to the customer account after it was merged
 - a. Click **Unmerge** if it was merged in error.

The screenshot displays a customer account for KINMAN, BENJAMIN T. At the top, there are buttons for 'Edit', 'View', and 'Unmerge' (circled in red), along with a 'Financial History' button. An 'Action Center' notification states '2006 RANGER 520VX is Ready for Registration Renewal.' Below this, the 'Vehicles' section shows four boats with their respective details and management options. A red arrow labeled '1.' points from the '2004 LOWE TR200' vehicle card to the 'Disabled Placards' table below. The table lists two disabled placards for the same vehicle.

Trans ID	Control Number	Placard Type	Placard Year	Placard #	Issue Date	Expiration Date	Status	Authorized Placard(s)	Comments	Replace	Inactivate
031075472	18-340-121-0-DP-00001		47	022442	12/06/2018	12/31/2024	Active	1 of 2		Replace	Inactivate
031075472	18-340-121-0-DP-00002		47	022443	12/06/2018	12/31/2024	Active	2 of 2		Replace	Inactivate



2. While unmerging, the placards will be assigned to the Drivers Licensed Verified Account
 - a. You will be given the option to choose the Customer Account that is to have the title that was transferred while the accounts were merged.

— Unmerging this record will revert Personal Information, Identification and Address back to its previous state prior to merge.

2. →

Placard #	Placard Year	Placard Type	Expiration Date	Status
022442	47		12/31/2024	Active
022443	47		12/31/2024	Active

— The Drivers License Verified Record will retain Personal Information, Identification and Address listed above.

Any items currently in the Shopping Cart for the Driver's License Verified Customer will be removed during the Unmerge Process.

- Customer to be Unmerged
 - Driver's License Verified Customer

Cancel Unmerge

3. Click **Unmerge** and the changes will be saved. They will now be 2 separate accounts.



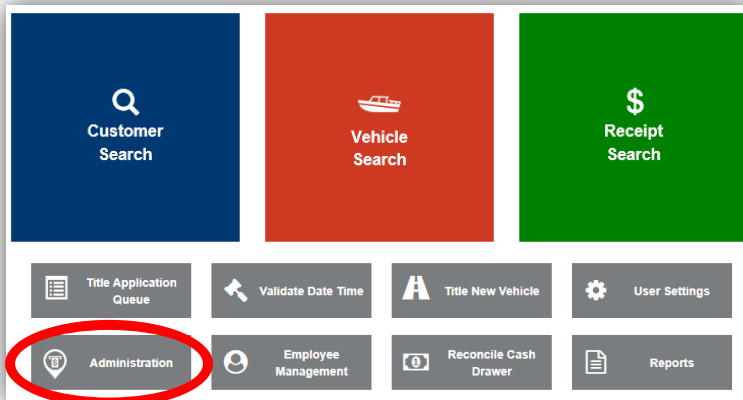
POS Customer


In KAVIS, a Point of Sale Customer is maintained separately from KAVIS Customers. KAVIS Customers are used to process transactions that originated in KAVIS (i.e. Disabled Placards, Boat Title and Registrations Actions). Point of Sale Customers are used for several different reasons.

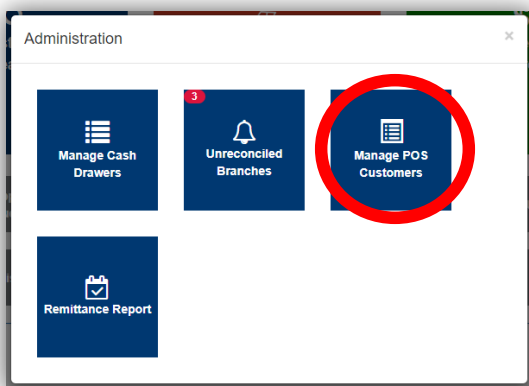
- 1) Indicating a customer is NSF (Non-sufficient funds)
- 2) Indicating a customer is Cash Only
- 3) Manage ACH
- 4) Issuing a Customer a Credit
- 5) Issuing a Customer a Debit
- 6) Paying off a Customer's Debit
- 7) Managing Refunds


Point of Sale Customer Inquiry

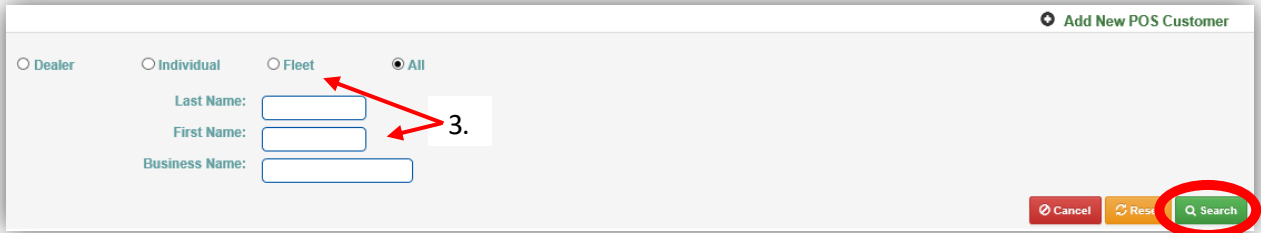
1. From the Home Screen, select  Administration.



2. Click on  Manage POS Customers.



3. Enter the customer's information, choose their specific type, and click .




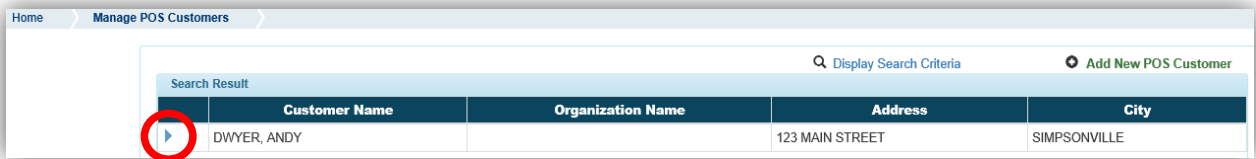
○ Dealer ○ Individual ○ Fleet ● All

Last Name:

First Name:

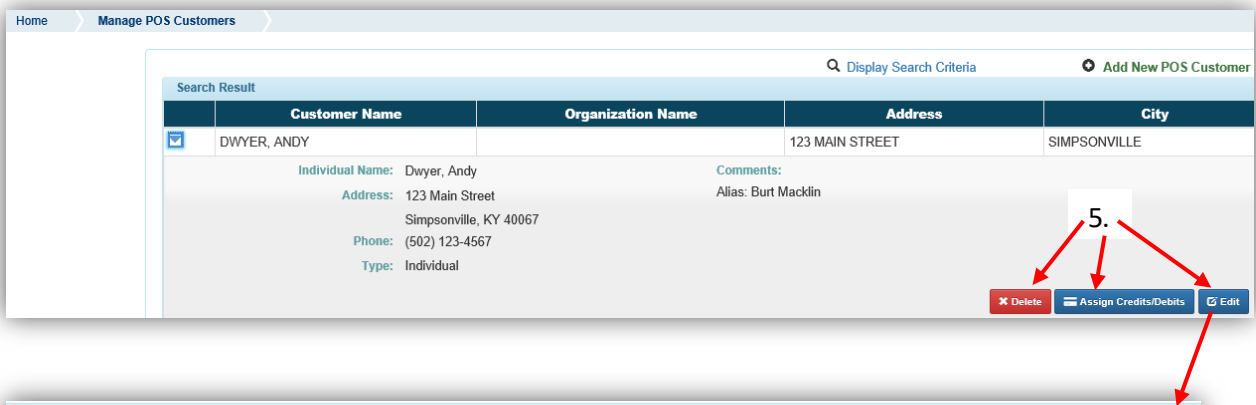
Business Name:

4. Click the  next to the correct customer to open the field.



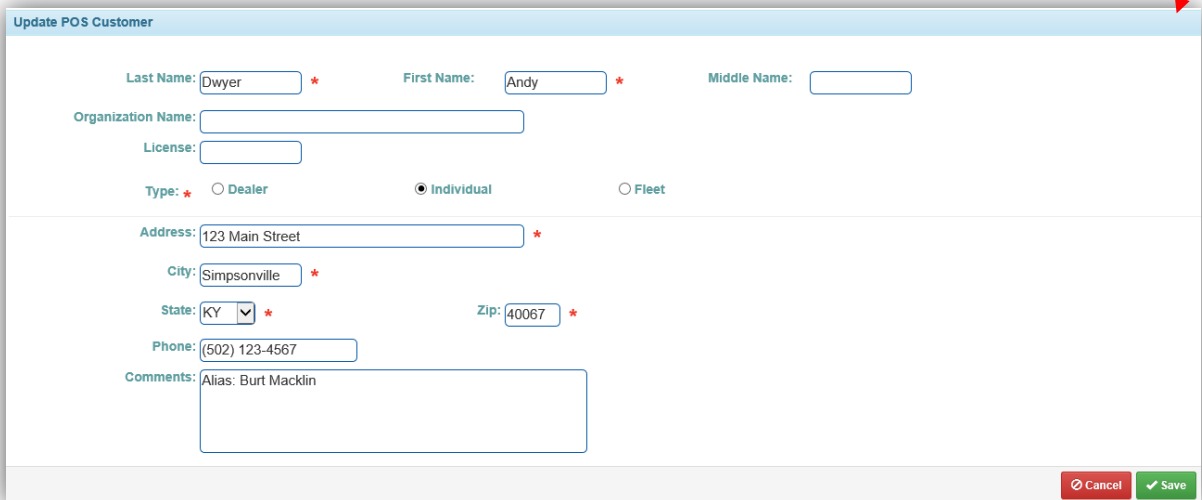
Customer Name	Organization Name	Address	City
DWYER, ANDY		123 MAIN STREET	SIMPSONVILLE

5. You are able to delete this customer's account, assign credits and debits (depending on your county's configuration settings) or update their profile.



Individual Name: Dwyer, Andy
Address: 123 Main Street
Simpsonville, KY 40067
Phone: (502) 123-4567
Type: Individual

Comments:
Alias: Burt Macklin



Last Name: * First Name: * Middle Name:

Organization Name:

License:

Type: * ○ Dealer ● Individual ○ Fleet

Address: *

City: *

State: * Zip: *


Phone:

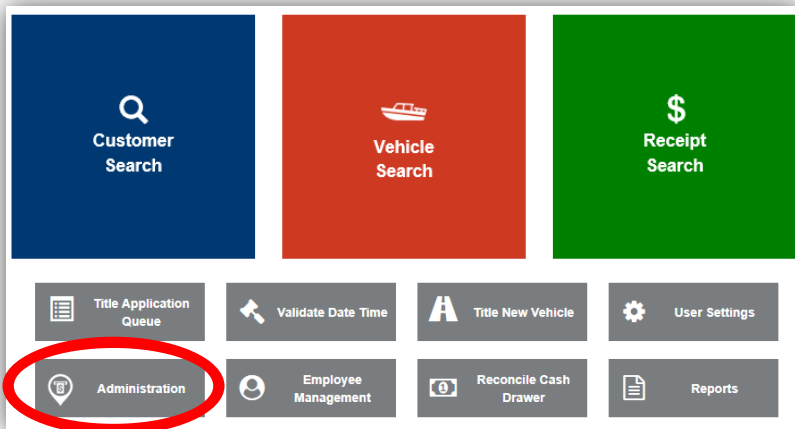
Comments:



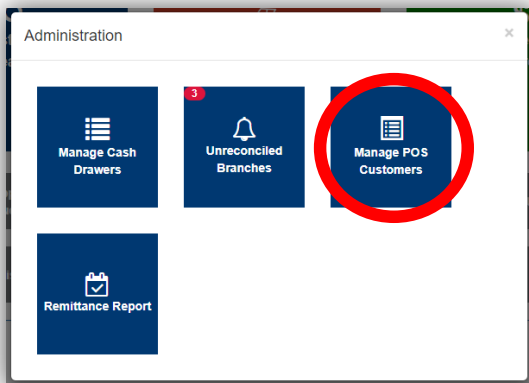
Adding a Point of Sale Customer

Since Point of Sale Customers are managed separately from KAVIS Customers, adding KAVIS Customers does NOT mean they will show up in the POS database. To add a customer to the POS Customer database, you must have the POS Manager, or POS Administrator permissions in your user profile.

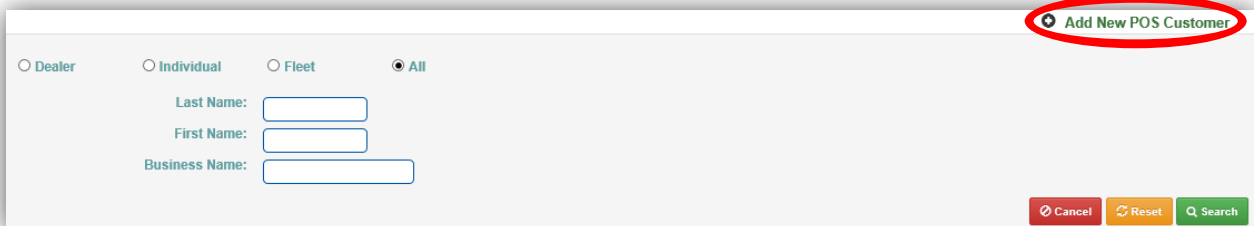
1. From the Home Screen, select  Administration.



2. Click on .




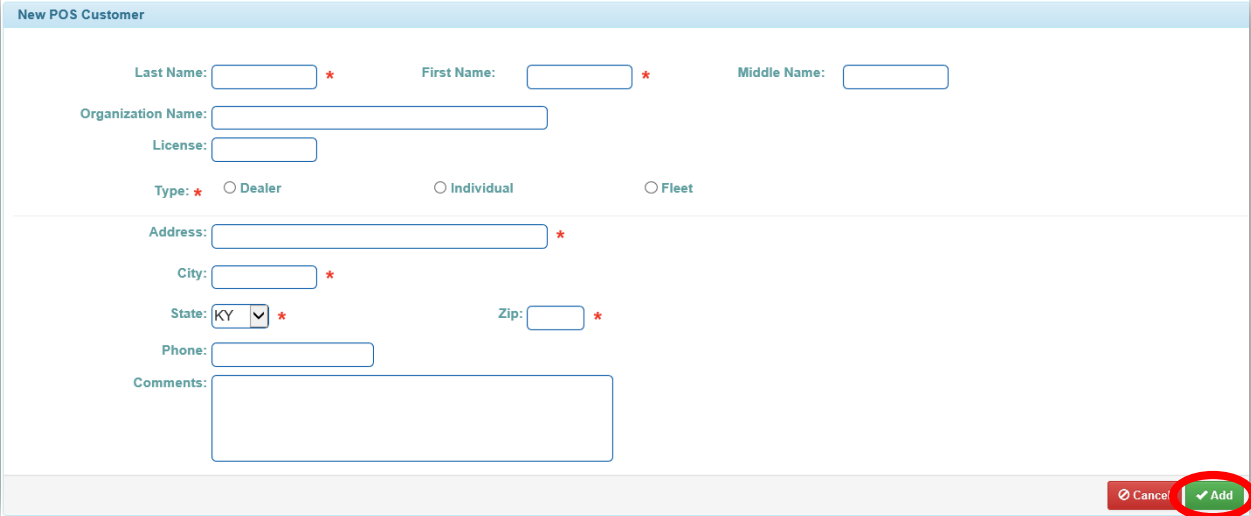
3. Click  Add New POS Customer.



The screenshot shows the 'Add New POS Customer' form. At the top right, the title 'Add New POS Customer' is circled in red. Below the title are radio buttons for 'Dealer', 'Individual', 'Fleet', and 'All' (selected). There are input fields for 'Last Name:', 'First Name:', and 'Business Name:'. At the bottom right, there are 'Cancel', 'Reset', and 'Search' buttons.



4. Enter their information and click .



The screenshot shows a web form titled "New POS Customer". The form has the following fields and controls:

- Last Name: *
- First Name: *
- Middle Name:
- Organization Name:
- License:
- Type: * Dealer Individual Fleet
- Address: *
- City: *
- State: * (dropdown menu)
- Zip: *
- Phone:
- Comments:

At the bottom right of the form, there are two buttons: "Cancel" and "Add". The "Add" button is highlighted with a red circle.

The customer will be added to the Point of Sale Customer database.

