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 [Customer Search] tile.
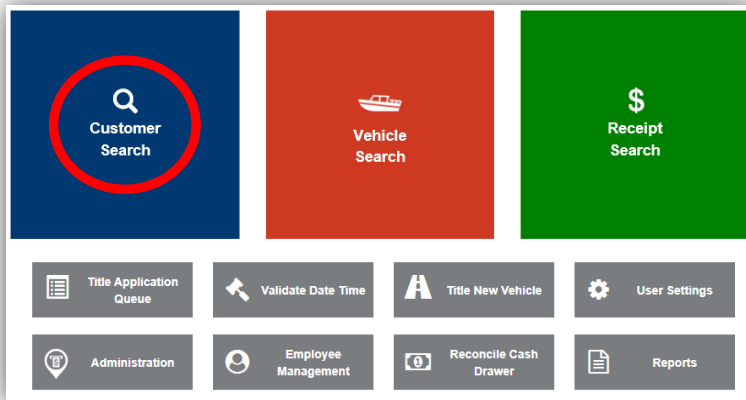
2. Choose from the dropdown menu how you would like to search for the customer, enter the requested info and click [Search].
   a. Or select 'Driver's License Number' and scan the Customer's License.
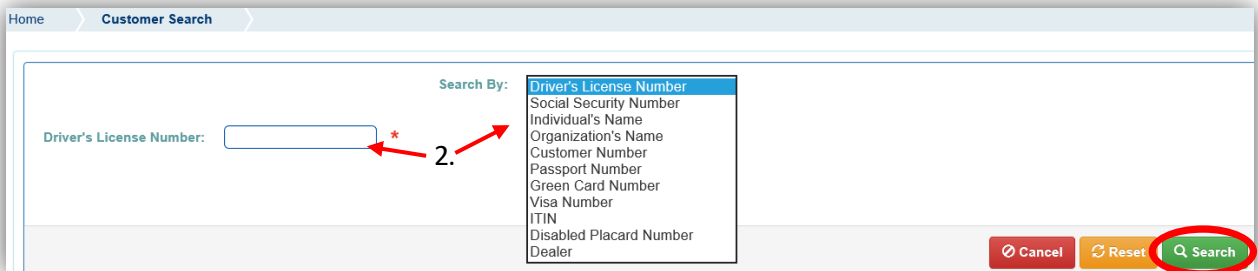
3. From the search results, click Select to be taken to their Customer Account Page.
   a. The green customer accounts have been Driver's License verified.
      b. If you do not see your customer, click Q Display Search Criteria and the search fields will open above the list and you can edit your search 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.
   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
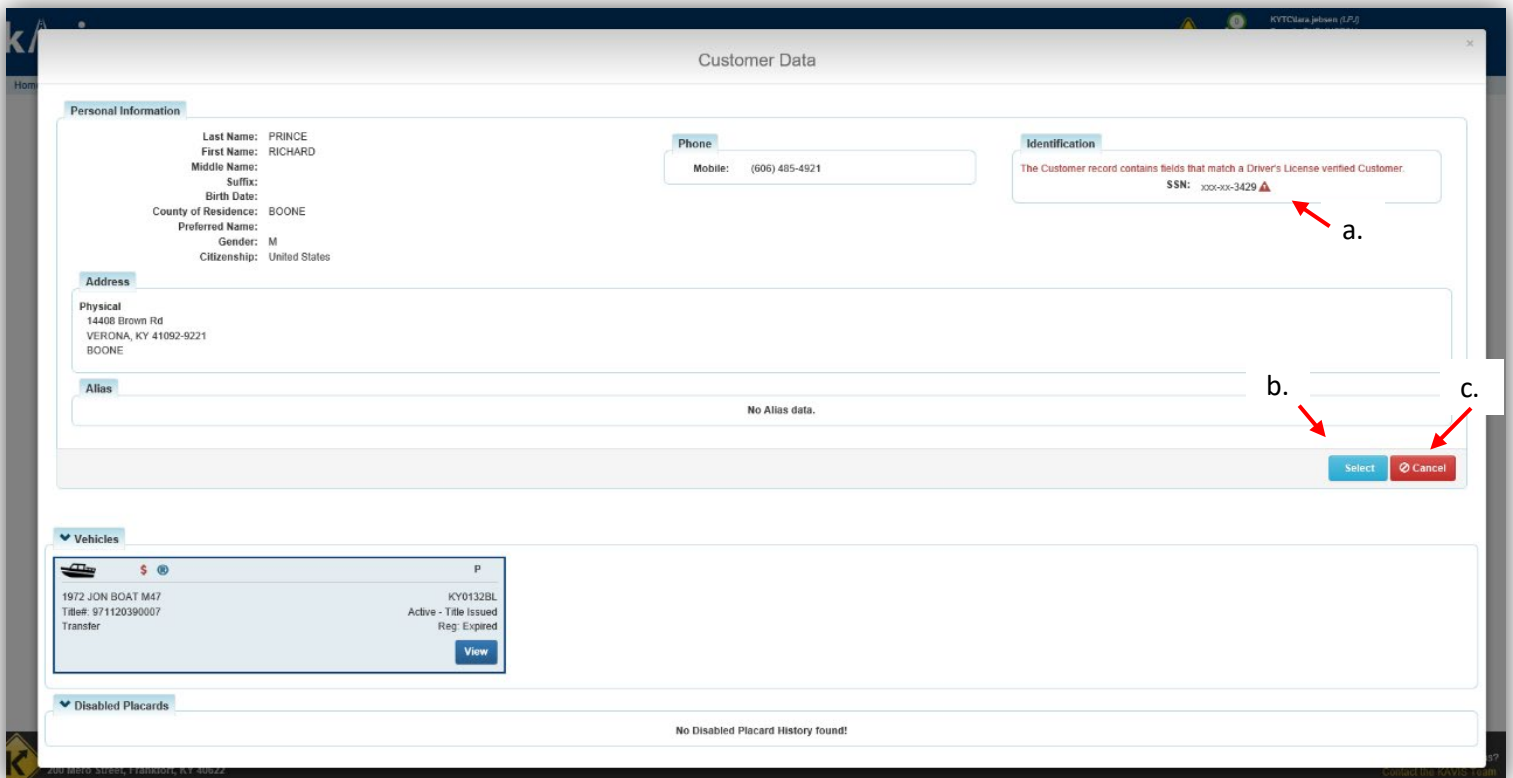
4. From the Customer Search Results, you can click on the blue Customer ID to open an overlay that will show you the vehicles owned by that customer to make sure you are choosing the correct customer.
   a. If the Identification section has an alert about a possible match with another account, see the '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.

Adding a KAVIS Customer

1. From the Home Page, click 'Customer Search'.
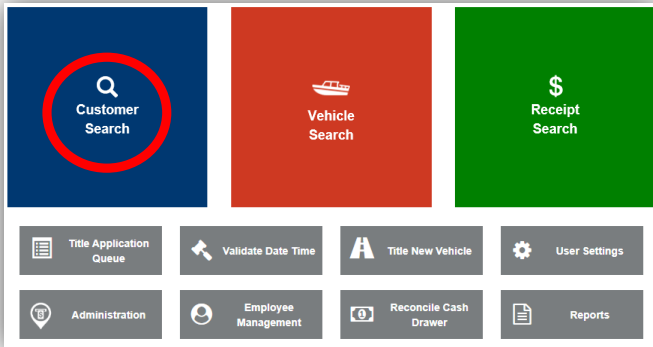
2. Click ⊕ **Add New Customer** .

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

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

⊘ Cancel   ✔ Continue

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

a.

5.

b.   c.

⊘ 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.

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.

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.

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.**

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

		Phone	
SSN/FEIN:	400783429 *	Office:	
County of Residence:	BOONE ▾ *	Alternate:	
Name:	*	Fax:	
Type:	Select Organization type ▾		
Incorporation Month:	Select Month ▾ *		
E-Mail:			
Contact Name:			

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.

5. 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 **Q Search**.
    b. You may preview the receipt or recall the transaction if necessary.

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.
        o **M** = there are multiple owners on the title.
        o **M** = a shared owner has past due ad valorem owed on another vehicle or has a PVA issue.
        o **P** = this customer is the primary owner on the title.
        *Note. Hover over any icon to see an explication of the icon.

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.

- o 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.
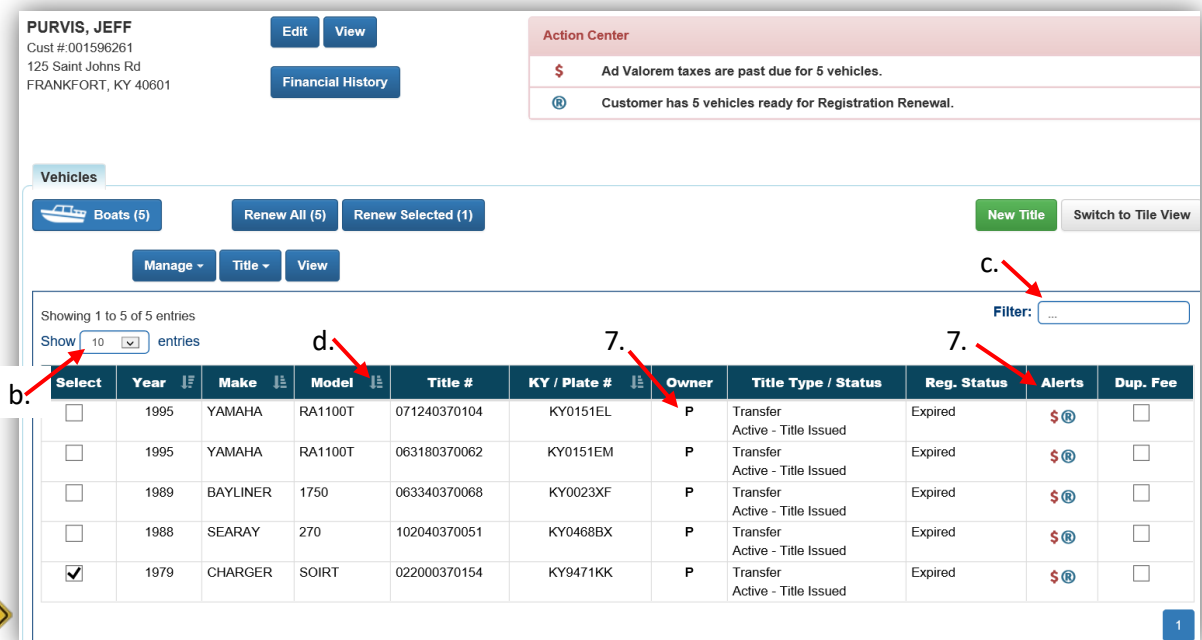
🏛 = there is a pending lien on this vehicle.

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

PVA = 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.
   a. The page will default to List View if the Customer has 12 or more vehicles.
   b. You can choose the # of vehicles per page in the drop down menu.
   c. You can filter the list by a keyword in the filter field.
   d. Clicking the 🔀 symbol will order the list alphabetically or numerically by that specific column.
   e. 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 [10 ▼] entries

Filter: [...]

Select	Year	Make	Model	Title #	KY / Plate #	Owner	Title Type / Status	Reg. Status	Alerts	Dup. Fee
☐	1995	YAMAHA	RA1100T	071240370104	KY0151EL	P	Transfer Active - Title Issued	Expired	$\$$ Ⓡ	☐
☐	1995	YAMAHA	RA1100T	063180370062	KY0151EM	P	Transfer Active - Title Issued	Expired	$\$$ Ⓡ	☐
☐	1989	BAYLINER	1750	063340370068	KY0023XF	P	Transfer Active - Title Issued	Expired	$\$$ Ⓡ	☐
☐	1988	SEARAY	270	102040370051	KY0468BX	P	Transfer Active - Title Issued	Expired	$\$$ Ⓡ	☐
☑	1979	CHARGER	SOIRT	022000370154	KY9471KK	P	Transfer Active - Title Issued	Expired	$\$$ Ⓡ	☐

1

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		
1998	BOMBARDIER	GTX	141570220029	KY0280RB	P	Surrendered - Transferred	Cancelled		

b.

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.

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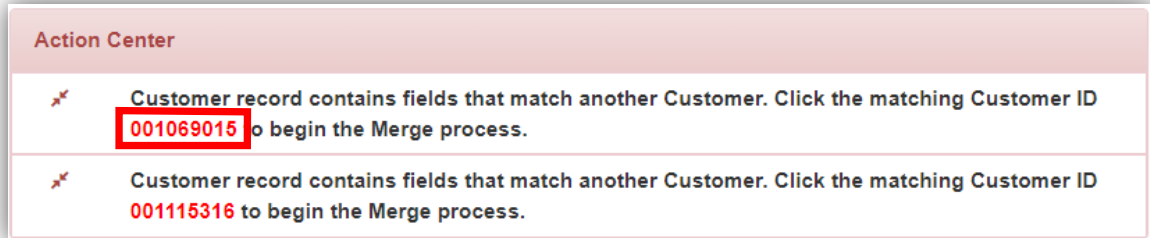
2. To begin merging click the red Customer ID in the Action Center prompt.

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.

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

How to Unmerge a Customer Account

1. In this example, there were 2 disabled placards assigned and a boat transferred to the customer account <u>after</u> it was merged

    a. Click **Unmerge** if it was merged in error.

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.

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
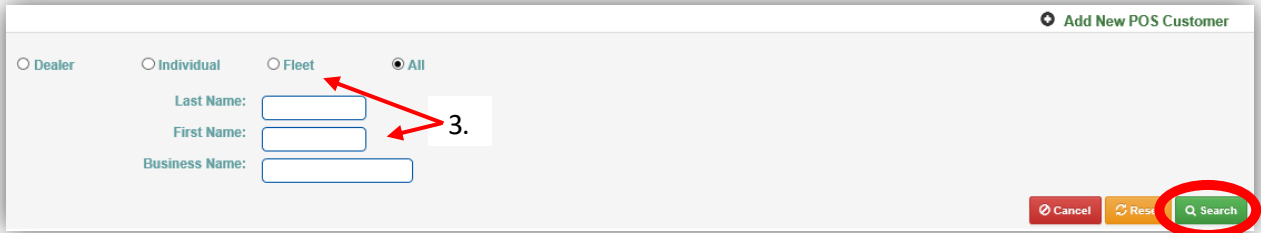
1. From the Home Screen, select [Administration].
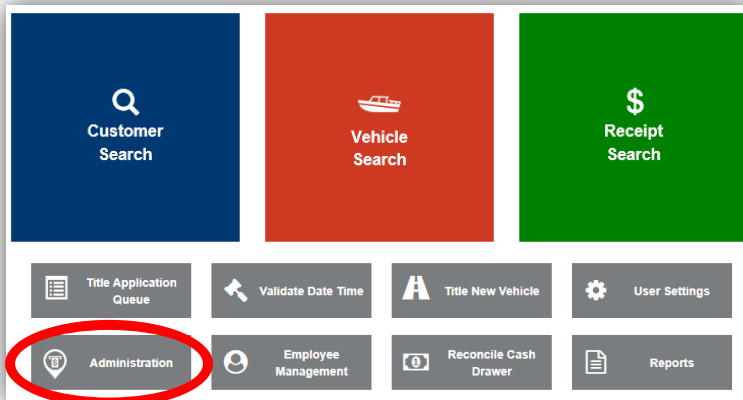
2. Click on [Manage POS Customers].
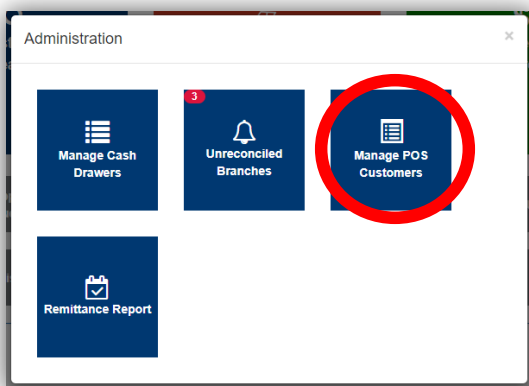
3. Enter the customer's information, choose their specific type, and click **Q Search**.
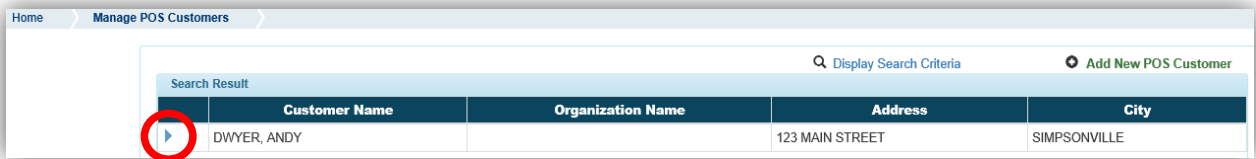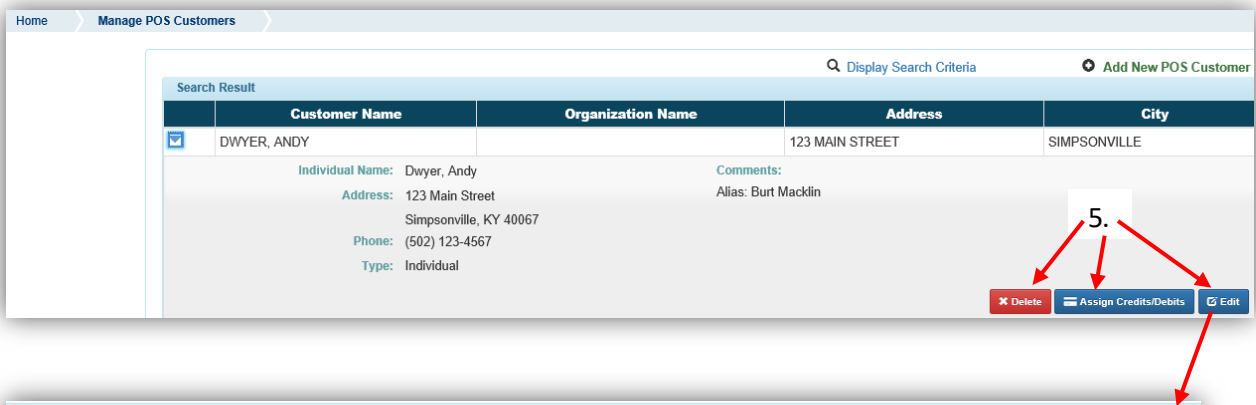
4. Click the ▶ next to the correct customer to open the field.
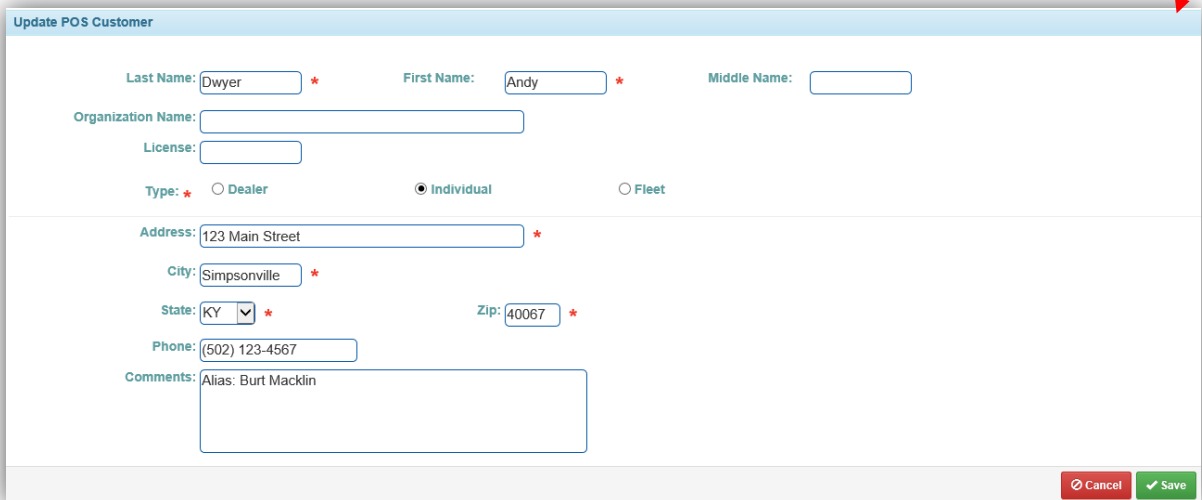
5. You are able to delete this customer's account, assign credits and debits (depending on your county's configuration settings) or update their profile.
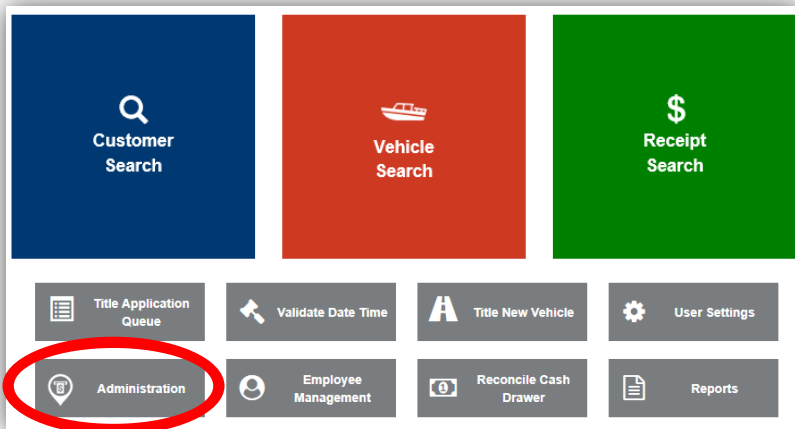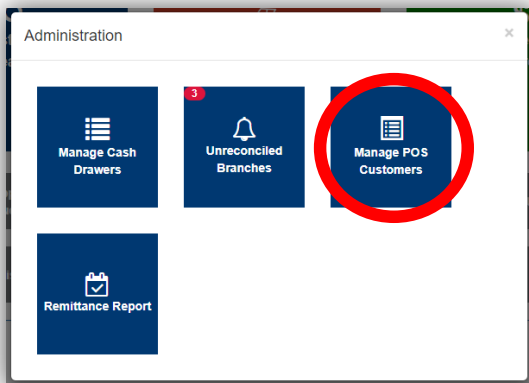
Adding a Point of Sale Customer

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.
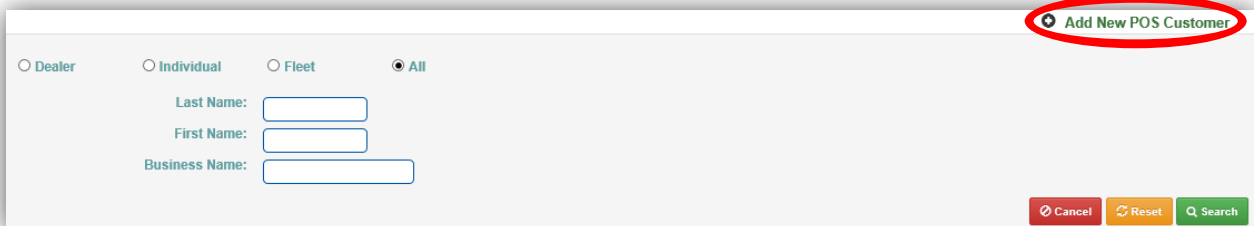
1. From the Home Screen, select [Administration] .
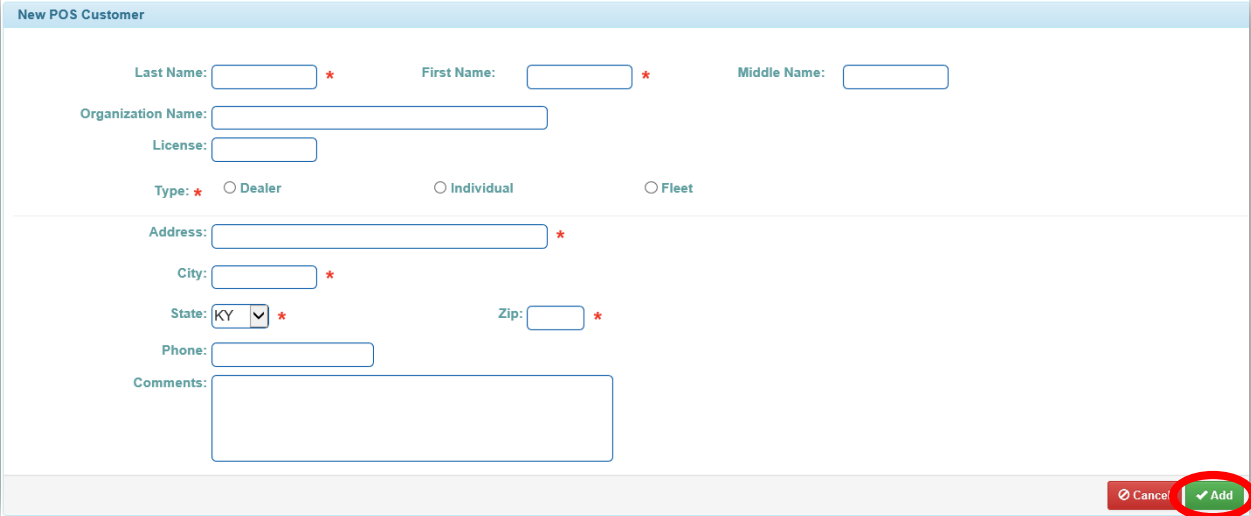

2. Click on [Manage POS Customers] .

3. Click ⊕ **Add New POS Customer** .

4. Enter their information and click ✔ Add .

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