

Merge Customer:


- KAVIS is a 'Customer Centric' vehicle titling application, whereas AVIS was 'Vehicle Centric' which resulted in the creation of many duplicate Customer Accounts.
- Our goal in KAVIS is to combine all the duplicate AVIS accounts into a single Drivers License Verified KAVIS Customer Account.
- **Organization Accounts CAN NOT** be merged at this time.
- The MERGE functionality of KAVIS is the tool you'll use to combine duplicate Customer Accounts imported from AVIS into a single Customer Account in KAVIS.

When KAVIS detects a potential duplicate Customer Account, you will be notified in the ACTION CENTER section with a message that **"Customer record contains fields**

That match another Customer. Click the matching Customer ID ##### to begin the Merge process."

1. To begin a Customer Merge, click the **RED** Customer Number listed in the ACTION CENTER

The screenshot displays the KAVIS system interface for a customer record. At the top left, the customer information is shown: Cust # 014439947, 107 WATSON CT, FRANKFORT, KY 40601. There are buttons for 'Edit', 'View', 'Notes', and 'Financial History'. A yellow arrow points from the 'Notes' button to a warning message in the 'ACTION CENTER' section. The warning message reads: 'Customer record contains fields that match another Customer. Click the matching Customer ID 003378416 to begin the Merge process.' Below this, there are two other messages: 'The Physical address not verified by USPS' and '2004 JEP GRANDCH is Ready for Registration Renewal.' The 'Vehicles (2)' section shows two vehicle records. The first is a 2015 INFI Q50 with title # 223211040044, registered to 'In God We Trust'. The second is a 2004 JEP GRANDCH with title # 190240370028, registered to 'University of Kentucky'. Each vehicle record has 'Manage', 'Title', and 'View' buttons. Below the vehicles, there is a 'Disabled Placards' section with an 'Issue Disabled Placard' button and a message 'No Disabled Placard History found!'. At the bottom, there is a 'Previously Owned Vehicles (4)' section.

2. Select the Customer Account(s) you'd like to MERGE using the  in the 'Personal Information' column.
3. Verify the information in the 'Identification' column.
4. Select the Physical Address & MAILING ADDRESS information. Normally this will be the Address associated with the DL VERIFIED account, but you will need to verify which address is correct.

5. ! YOU WILL ALSO HAVE TO MAKE A MAILING ADDRESS SELECTION EVEN THOUGH THIS WILL BE BLANK IN MANY CASES !



6. Click the button.

The screenshot shows the KAVIS Customer Merge interface. At the top, a red banner reads "THIS IS KAVIS PRACTICE SITE. THIS IS KAVIS PRACTICE SITE." Below the KAVIS logo and "Customer Merge" title, a navigation bar includes "Home", "Customer Search", "Customer Account", and "Customer Merge". A message box states: "The Customer record you selected has data that matches with a Customer that was verified by Driver's License. If you would like to perform a Customer Merge, select the Finalize Merge button below. Otherwise, choose Cancel." Below this is a table with columns: Personal Information, Identification, County of Residence, Address, and Vehicles. Two customer records are listed:

Personal Information	Identification	County of Residence	Address	Vehicles
<input checked="" type="checkbox"/> CLAYTON, JOHN BRIDGES Birth Date: 05/14/1968 Gender: M Citizenship:	DL: C18147596 SSN: 256379669 ITIN:	<input checked="" type="radio"/> FRANKLIN	<input checked="" type="radio"/> Physical: 107 WATSON CT. FRANKFORT, KY 40601-2611 <input checked="" type="radio"/> Mailing: You must select	<input checked="" type="checkbox"/> 2015 INFI Q50 <input checked="" type="checkbox"/> 2004 JEP GRANDCH
<input checked="" type="checkbox"/> CLAYTON, JOHN B Birth Date: Gender: Citizenship:	DL: SSN: 256379669 ITIN:	<input type="radio"/> JESSAMINE	<input type="radio"/> Physical: 3100 Lexington Rd NICHOLASVILLE, KY 40356-6068 <input type="radio"/> Mailing:	

Below the table, a legend explains the symbols: a star for "Customer Notes do not merge", a red square for "Data that will not be merged", a green square for "Data that will be used to merge", a checkmark for "Customer to be Merged", and a checkmark with a star for "Driver's License Verified Customer". At the bottom right of the table area are "Cancel" and "Finalize Merge" buttons.

7. Click Yes to complete the MERGE.

This screenshot is identical to the previous one, but with a "Confirmation" dialog box overlaid in the center. The dialog box has a title bar "Confirmation" and contains the text: "Are you sure you would like to perform a merge for all selected customers?". At the bottom of the dialog box are two buttons: "Yes" and "No".