

# Subscriptions

## *IN PROCESS*

This area of Kauai lists the subscriptions associated with the account.

# Invoices

## *IN PROCESS*

This area of Kauai lists the invoices applied to the account. An invoice can get generated automatically if the customer has a recurring subscription. You can also generate an invoice for the account by adding a charge.

# Payments

## *IN PROCESS*

This area of Kauai lists the payments applied to the account.

If a customer account has a default payment method, Kauai automatically makes a payment when an invoice is generated (whether the invoice was generated by the system or manually).

Another way to generate a payment is to add a charge to the account.

To view an account's payments:

1. Click **Payments** on the submenu.
2. Click the payment number to view its detail.

# Charges, Refunds, and Invoices

## *IN PROCESS*

### Create Charge

Creating a charge in Kauai creates a new invoice. To create a charge:

1. On the Account page, click **Create Charge** at the top of the Billing Info section.

**Billing Info**

[+ PAY ALL INVOICES](#)
[+ ADD CREDIT](#)
[+ CREATE CHARGE](#)

Account balance	\$10
Account credit	\$0
Overdue status	Good
Bill cycle day	N/A
Next Invoice Date	N/A

Trigger invoice generation  ☒ Dry-run

Kaui opens the **Add New Charge** pop-up:

**Add New Charge**

☒ Auto-commit?

Amount

Currency

Description

Comment

**SAVE**

- To set the invoice as a draft instead of immediately committing it, uncheck the **Auto-commit** box and enter the amount of the charge.



**Note:** Currency defaults from the customer account and should not need to be changed

- The **Description** field and **Comments** field are optional. What you type here displays on the customer's invoice.
- Click **Save** and Kaui generates an invoice.
- If you unchecked the **Auto-commit** box, you can click **Commit** if necessary.

If you do not commit the invoice, it will stay in Draft mode. You can commit it by opening it from the Invoices page and clicking **Commit**.

## Create Refund

## Create Invoice

Authorize, Capture, Purchase, Chargeback, Credit, Void?

[[How to view/interpret the timeline. What it shows.]]

# Timeline

The billing timeline shows all the events that occurred for a specific user account:

The top two **Filter by...** dropdown fields let you filter the events by subscription bundle or by event type.

In the **Details** column, you can click payment and invoice links to open the associated documents.

KILLBILL

Search

CREATE NEW ACCOUNT

/ DEMO

SIGN OUT

Frieda Lancaster

ACCOUNT

SUBSCRIPTIONS

INVOICES

PAYMENTS

TIMELINE

TAGS

CUSTOM FIELDS

Account Timeline

Filter by bundle

Filter by event type

ALL

EFFECTIVE DATE	BUNDLE	EVENT TYPE	DETAILS	REASON CODE / COMMENTS
2021-05-29		PURCHASE	Amount: \$10 (USD) SUCCESS Payment # 7632 Invoice # 16407	INSERT by dinahramirez1@gmail.com: 699 - OTHER UPDATE by dinahramirez1@gmail.com: 699 - OTHER
2021-05-29	4dbb63f7-...-e31396c8c0e1	PURCHASE	Amount: \$29.99 (USD) SUCCESS Payment # 7633 Invoice # 17586	INSERT by dinahramirez1@gmail.com: 600 - Alt payment method UPDATE by dinahramirez1@gmail.com: 600 - Alt payment method

## Part 3 - Users, Roles, and Permissions

IN PROCESS

## Part 4 - Tags and Custom Fields

IN PROCESS

## Tags

## Custom Fields

## Part 5 - Plugin Manager and Analytics

### KPM (Kill Bill Package Manager)

### Analytics and Reporting

### Deposits (Wire Transfers)

## Part 6 - Tenants and Admin

## FAQs

### *IN PROCESS*

**Q:** What can I search on with Advanced Search?

**A:** You can search on the following object types:

- Accounts
- Bundles
- Credits
- Custom fields
- Invoices
- Invoice payments
- Payments
- Subscriptions
- Transactions
- Tags
- Tag Definitions