Subscriptions

IN PROCESS

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

Invoices

IN PROCESS

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

If a customer account has a default payment method, Kaui 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.

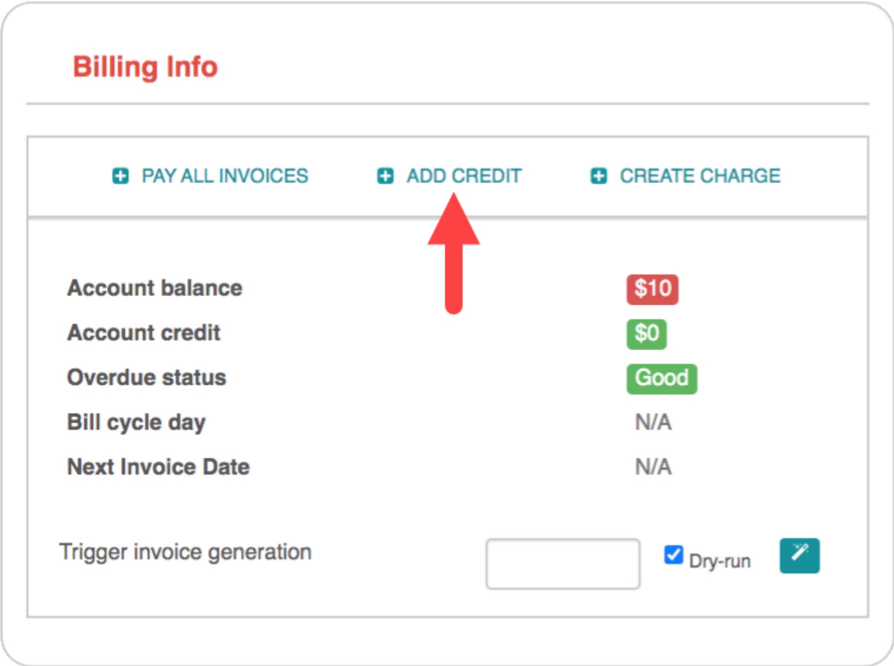
Charges, Refunds, and Invoices

IN PROCESS

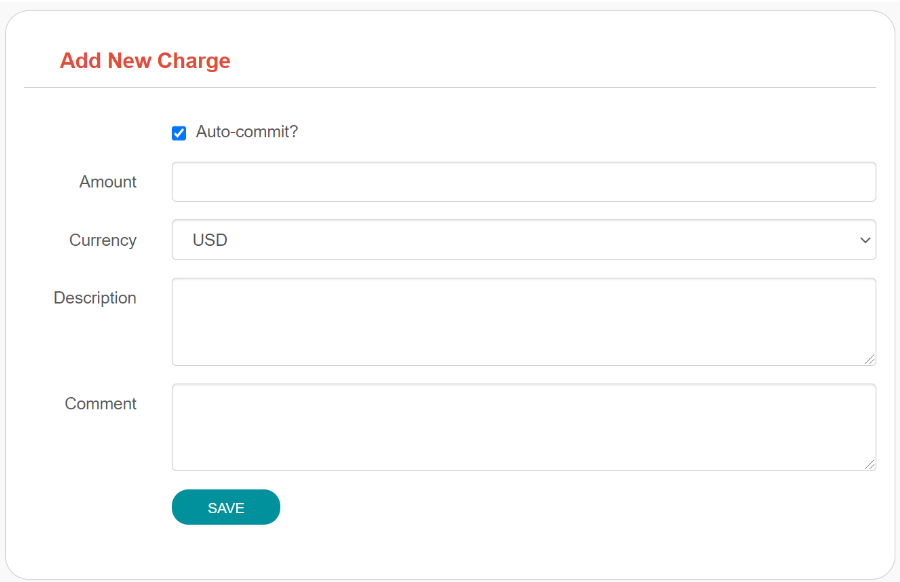
Create Charge

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

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



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



2. 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

3. The **Description** field and **Comments** field are optional. What you type here displays on the customer’s invoice.
4. Click **Save** and Kaui generates an invoice.
5. 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?

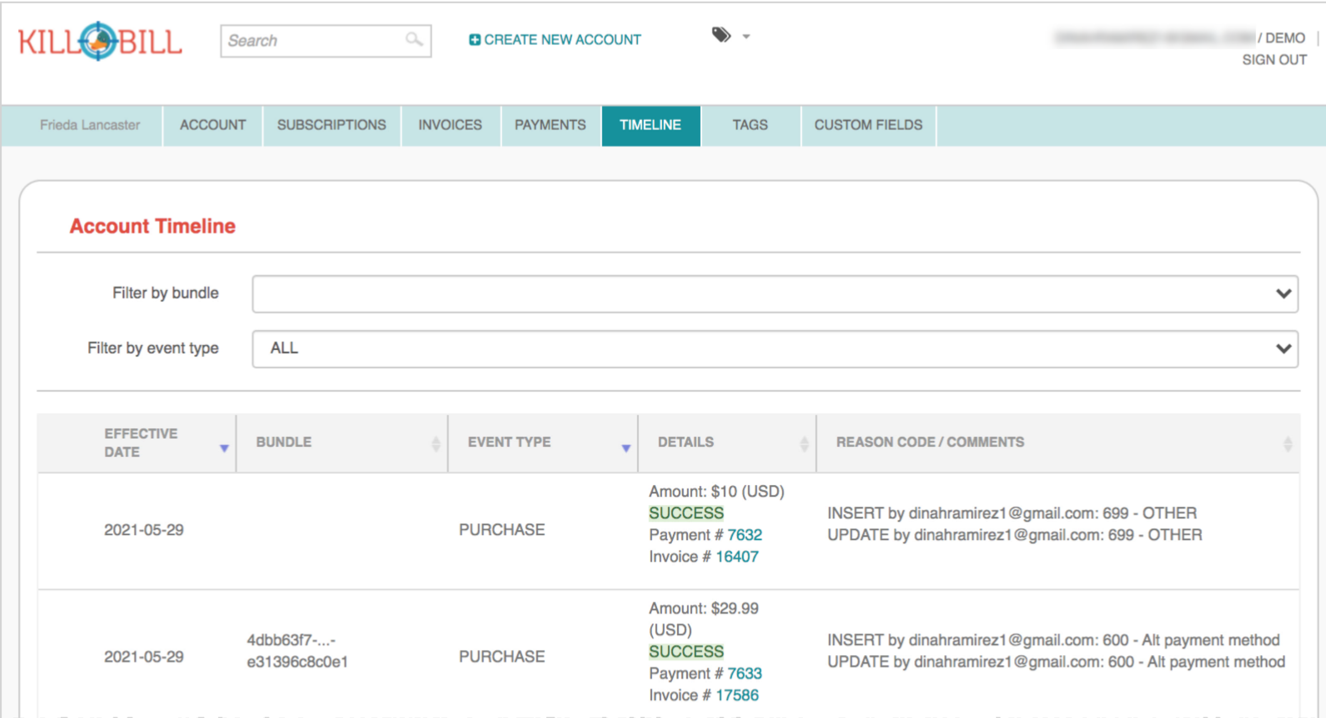
[[How to view/interpret the timeline. What it shows.]]

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.



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