Kaui User Guide

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PART 1

What Is Kaui?

"Kaui" (KAUI) stands for Kill (Bill) Admin User Interface.

Kaui is a user interface for Kill Bill. You can use Kaui to perform all sorts of back office tasks related to customer accounts. You can also use Kaui to perform more advanced tasks.

What You Can Do in Kaui

In Kaui, users can perform basic tasks, such as:

- Create a customer account
- Generate a customer invoice
- Cancel a subscription

However, Kaui can also help advanced users perform tasks, for example:

- Adding a plugin to Kill Bill
- Managing Kill Bill users
- Creating tags or custom fields

These are just a handful of the tasks you can accomplish with Kaui. For a full list, see the *Table of Contents* at the beginning of this guide.

How to Use This Guide

PART 1 explains how Kaui is organized

PART 2 explains how to perform the basic tasks for administering customer accounts, such as creating accounts, invoices, and so forth. It’s appropriate for back office staff, such as those working in customer service, product management, and finance.

PART 3 explains how to create and manage users as well as users roles and permissions. It’s appropriate for Kill Bill administrators and software developers.

PART 4 covers the advanced features of custom fields, tags and more.

The FAQs are great if you have a basic question like, "How do I create an invoice?"

About Screenshots

The screenshots displayed in this guide may differ from what you see on your Kaui screen. That’s because your user permissions control what features you can access (i.e., what you see on the screen).

If you have any questions about why your Kaui screen doesn’t match what you see in this guide, ask your Kaui administrator.

Other Learning Resources

Glossary

For terms specific to Kill Bill, we encourage you to review the following terms in the *Kill Bill Glossary*:

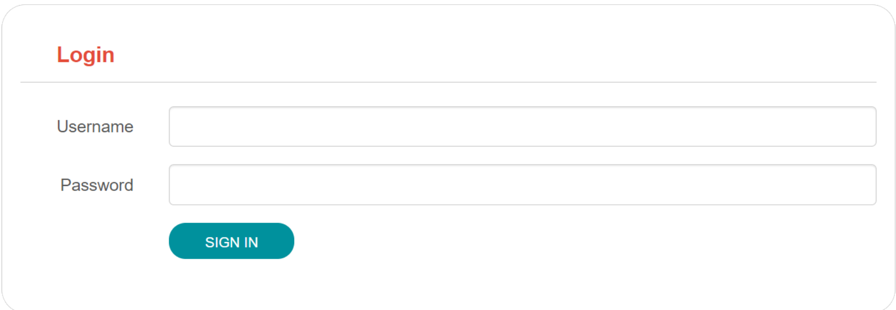
Account | External Key | Parent | Payment Method | Subscription | Tag | Tenant | User

Videos

We regularly add new overviews and tutorials to our YouTube videos, so check in from time to time.

Sign In and Sign Out

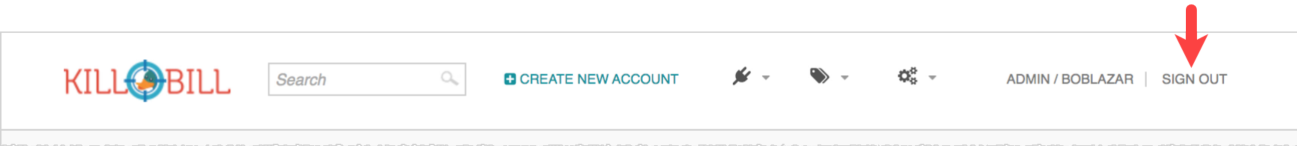
To sign in to Kaui, type in your username and password, then select the **Sign In** button.



If your organization uses more than one Kill Bill tenant, select the tenant from the dropdown and select the **Save** button:

Note: Authentication is handled by Kill Bill. The method your organization uses to manage users is highly configurable. For information on managing users and permissions, see Users, Roles, and Permissions.

To log out of Kaui, select **SIGN OUT** in the upper right corner of the Kill Bill homepage:



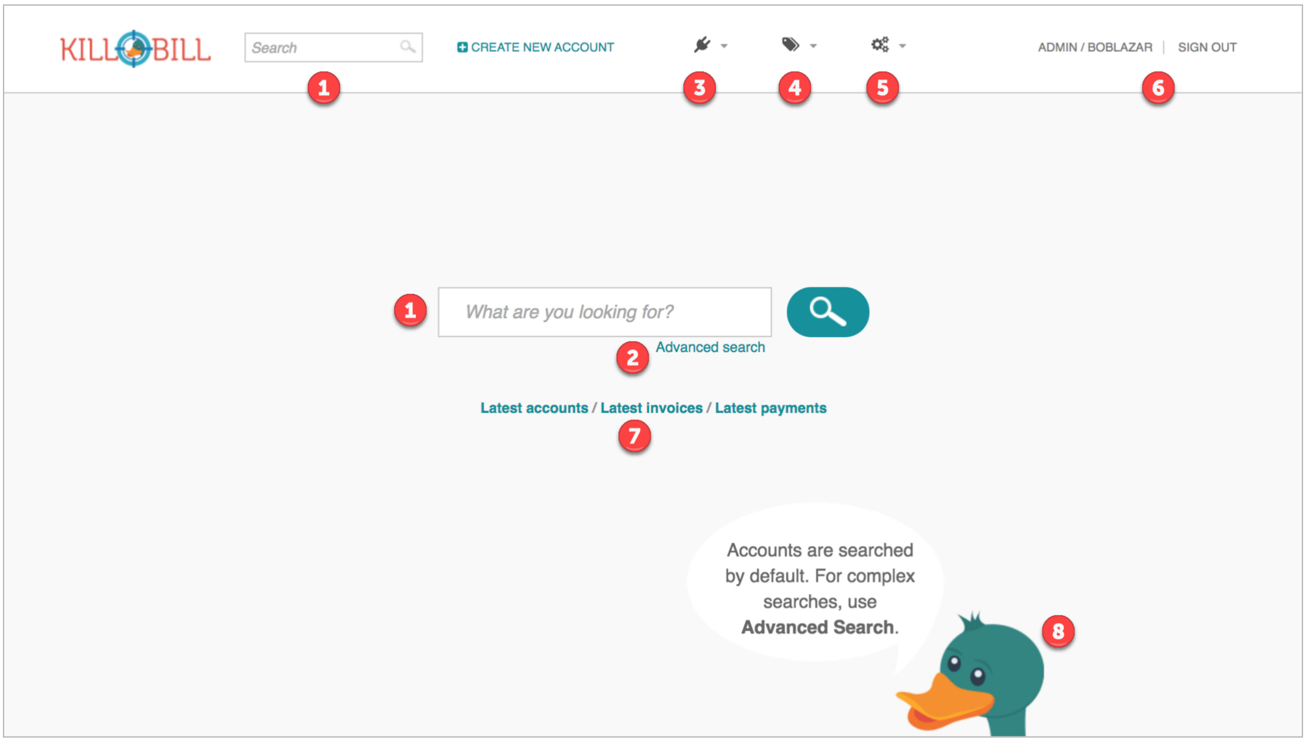
Navigate

This section gets you familiar with the standard features of Kaui's user interface, such as:

- Homepage Layout
- Icons
- Grids/Tables
- Basic Search
- Advanced Search

Homepage Layout

The homepage is the screen that Kaui displays after you first log in.



1. Basic Search (find customer accounts)
2. Advanced Search (find invoices, payments, and more)
3. Plugin specific screens (e.g., analytics (reporting), deposits (record wire transfers), KPM (Kill Bill Package Manager)
4. Tags, Tag Definitions, and Custom Fields
5. Users, Tenants, and Admin
6. Username / Tenant name and Sign Out
7. Latest invoices, accounts, and payments (latest records created for this tenant)
8. This is Killian, the Kill Bill mascot!

*Advanced features you may or may not have access to, depending on your user permissions.

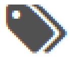
Return to Homepage

From any screen in Kill Bill, you can return to the homepage by clicking the logo in the upper left corner:

KILL BILL

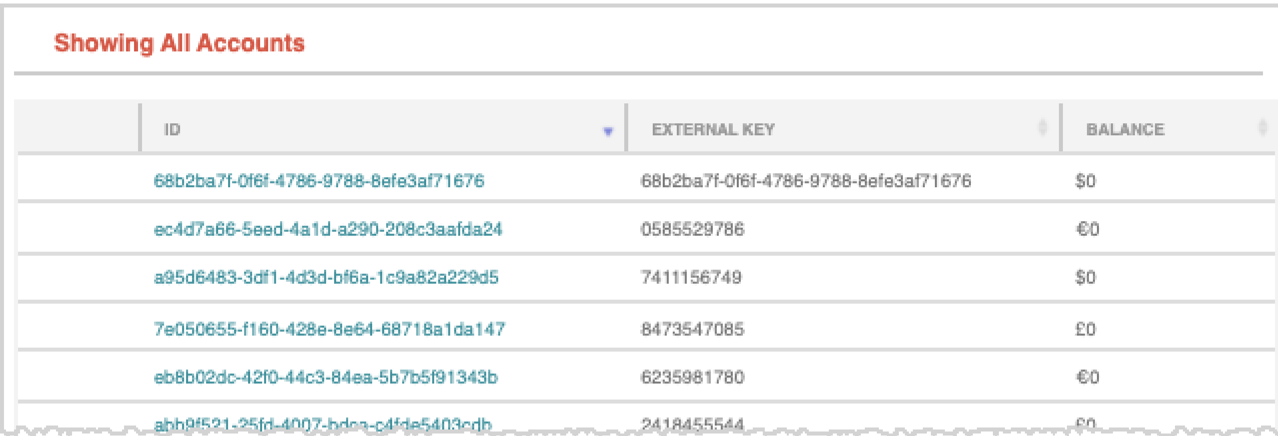
Icons

Icon	Description
	Appears where you can add an item, such as a payment method, credit, charge, etc.

Icon	Description
	Appears on the Account page. Clicking it manually triggers a committed or dry-run invoice.
	Expand a section or dropdown menu.
	Collapse a section.
	*Admin-level feature:* On the home page, click to access Tags, Tag Definitions, and Custom Fields. *All users:* In other locations in Kaui, click to select a tag to apply to the current object (for example, an account).
	Appears at the top of the screen and gives you access to plugin specific screens.
	Appears on the Subscription screen and lets you add an add-on to the account's subscription.
	Appears on the Invoice screen and lets you make a payment against the invoice.
	*Admin level feature:* Appears at the top of the screen and gives you access to Users, Tenants, and Admin.

Grids/Tables

Grids (also referred to as *tables*) appear throughout Kaui to keep lists organized:

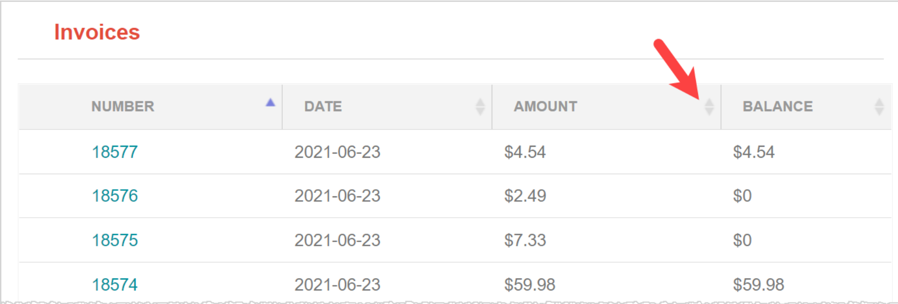


Showing All Accounts

ID	EXTERNAL KEY	BALANCE
68b2ba7f-0f6f-4786-9788-8efe3af71676	68b2ba7f-0f6f-4786-9788-8efe3af71676	$0
ec4d7a66-5eed-4a1d-a290-208c3aafda24	0585529786	€0
a95d6483-3df1-4d3d-bf6a-1c9a82a229d5	7411156749	$0
7e050655-f160-428e-8e64-68718a1da147	8473547085	£0
eb8b02dc-42f0-44c3-84ea-5b7b5f91343b	6235981780	€0

For very large grids, use the pagination controls to view different "pages:"

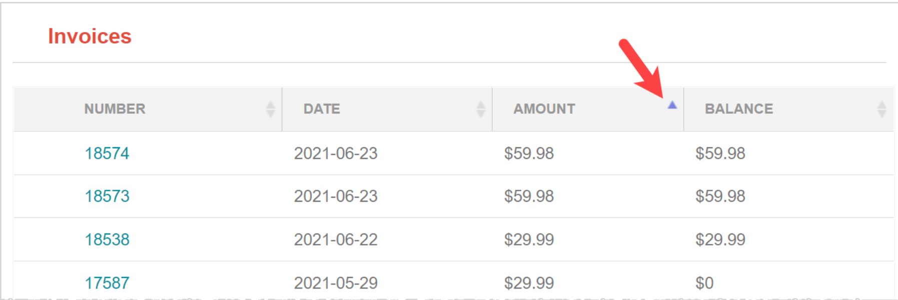
To sort columns on a grid, click the up/down arrow in that column's header:



Invoices

NUMBER	DATE	AMOUNT	BALANCE
18577	2021-06-23	$4.54	$4.54
18576	2021-06-23	$2.49	$0
18575	2021-06-23	$7.33	$0
18574	2021-06-23	$59.98	$59.98

Kaui shows you which column is currently sorted by the purple arrow:

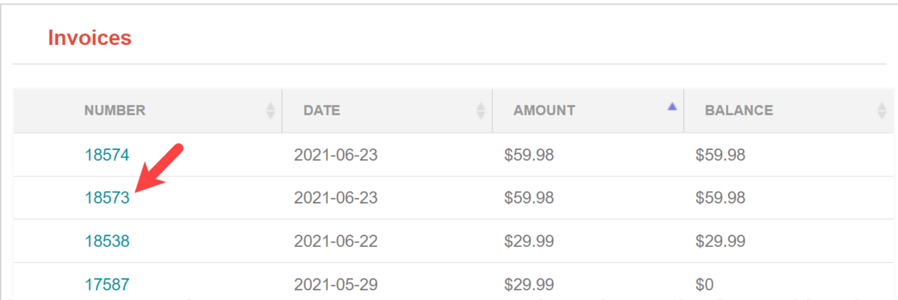


Invoices

NUMBER	DATE	AMOUNT	BALANCE
18574	2021-06-23	$59.98	$59.98
18573	2021-06-23	$59.98	$59.98
18538	2021-06-22	$29.99	$29.99
17587	2021-05-29	$29.99	$0

The direction of the arrow (up or down) indicates if the column is sorted in ascending or descending order.

If relevant, you can click on a link in the grid to view that item's detail. For example, on the Invoices grid, click the link to open that specific invoice:



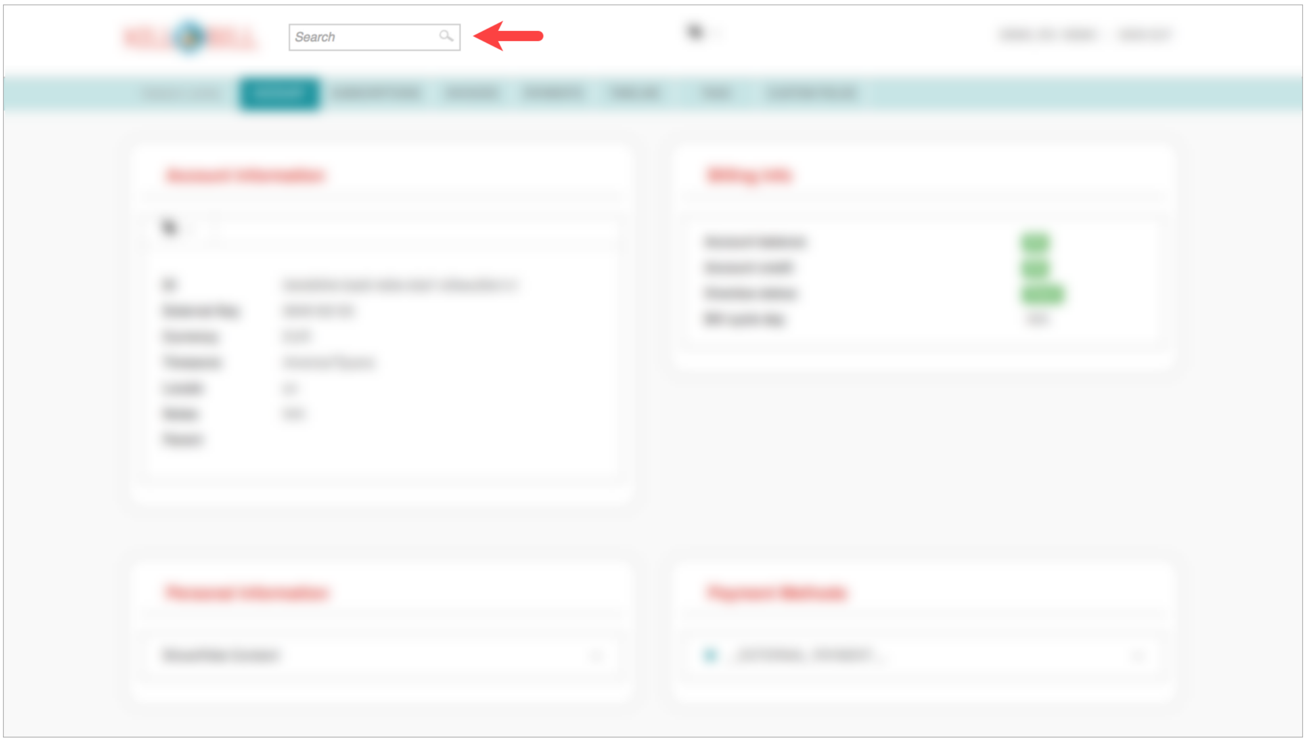
Invoices

NUMBER	DATE	AMOUNT	BALANCE
18574	2021-06-23	$59.98	$59.98
18573	2021-06-23	$59.98	$59.98
18538	2021-06-22	$29.99	$29.99
17587	2021-05-29	$29.99	$0

Basic Search

Tip: To view all accounts, place your cursor in the search field and press the Enter key.

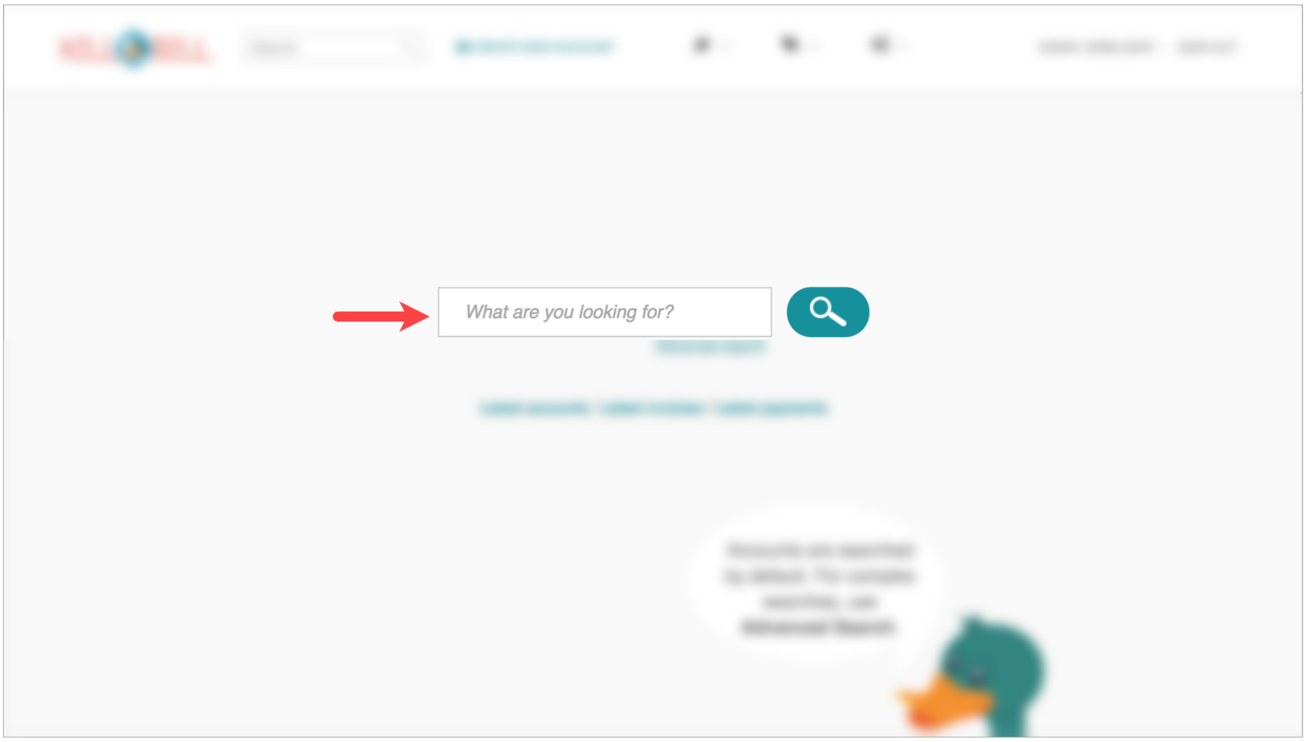
To search for customer accounts, use the basic search. Basic search is available at the top of the screen no matter where you are in Kaui:



You can also search on the following information:

- ID
- External key
- Name
- Email address

Basic search is also available in the center of the **homepage**:



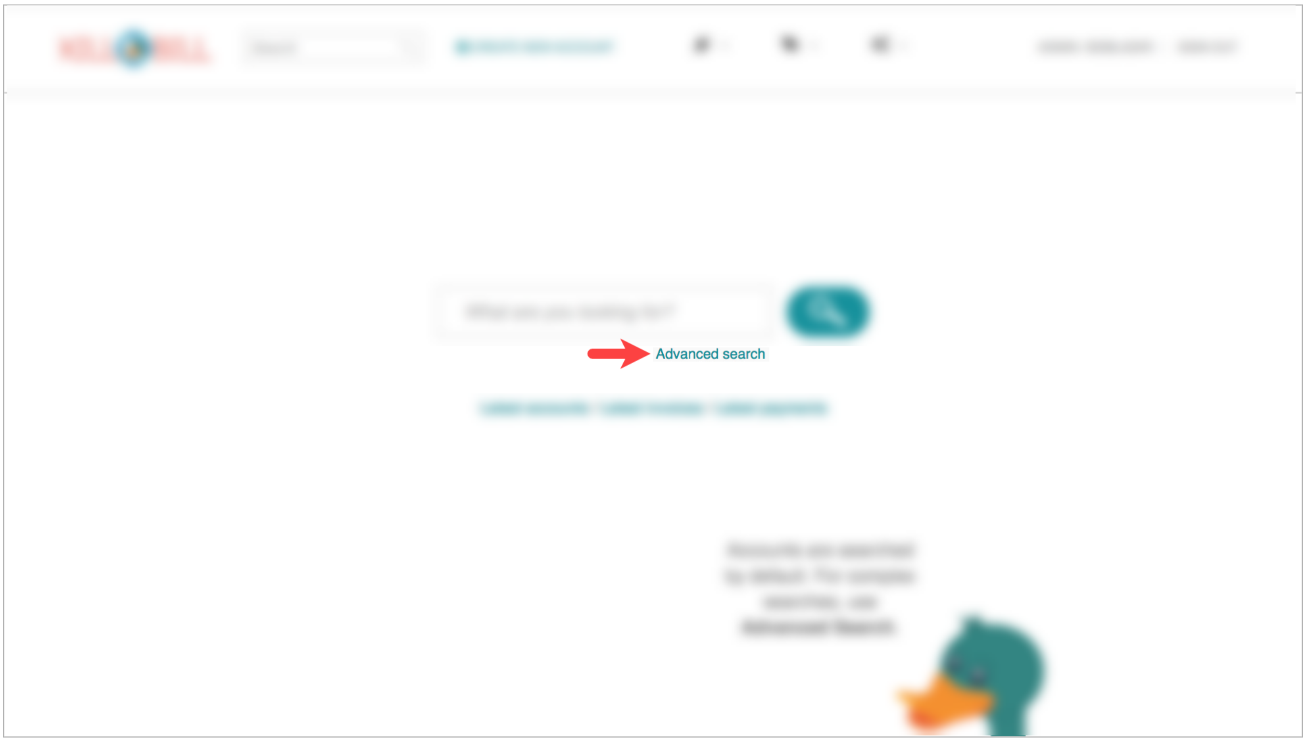
Advanced Search

An advanced search can help you find customer account information as well as other types of objects in the system:

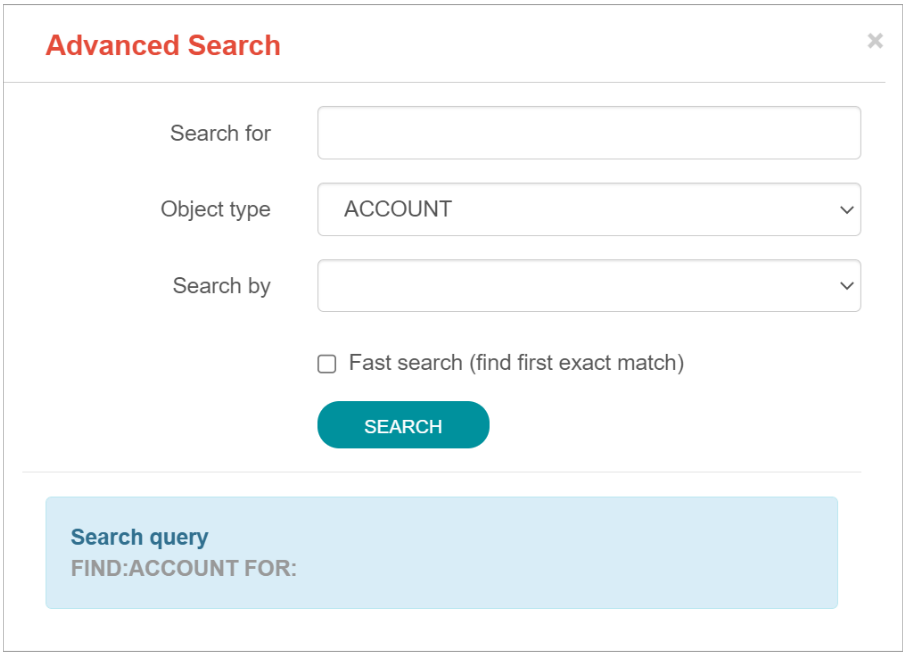
- Bundle
- Invoice
- Credit
- Custom field
- Invoice payment
- Invoice
- Payment
- Subscription
- Transaction
- Tag
- Tag definition

To perform an advanced search:

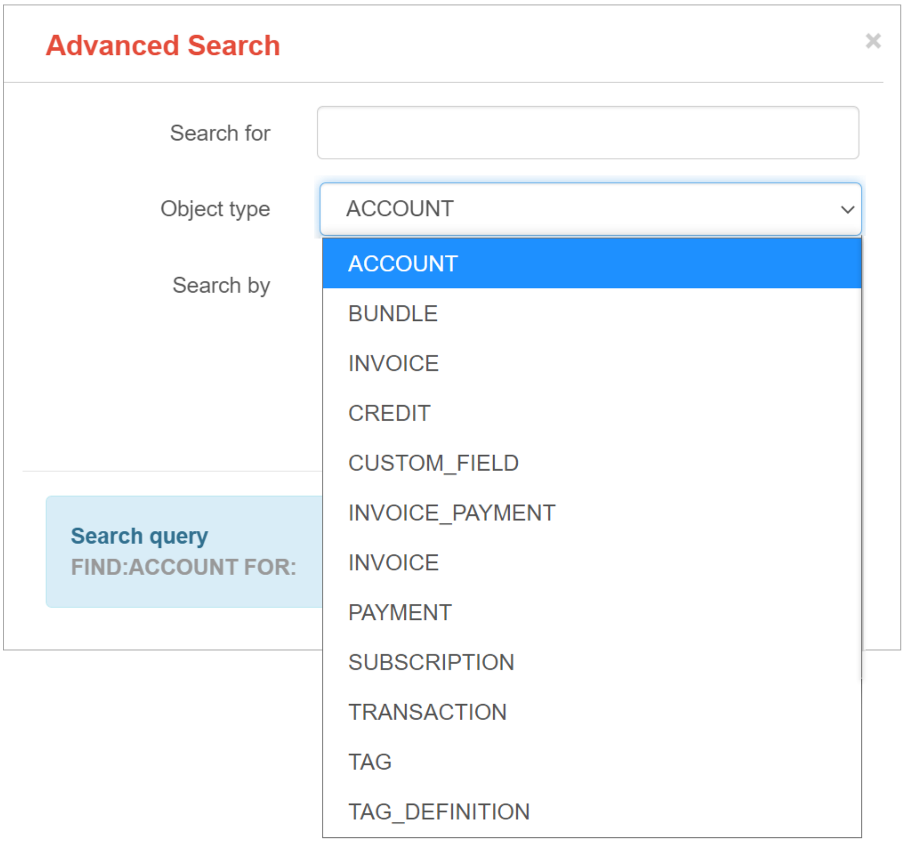
1. On the homepage, click **Advanced search:**



Kaui displays the Advanced Search popup:



2. In the **Object type** field, select the object type you want to search for:



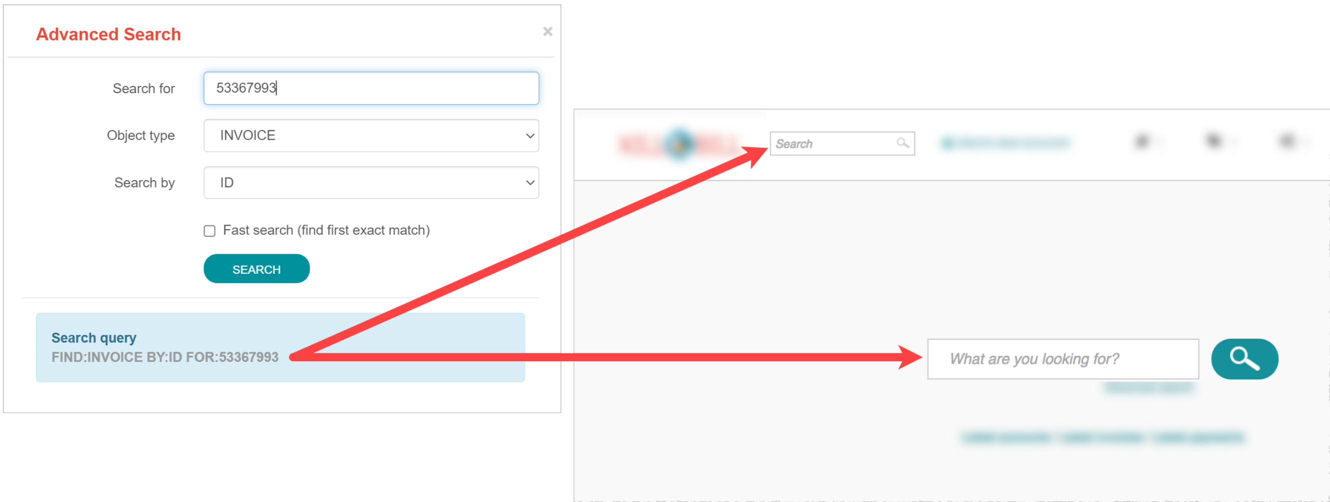
3. In the **Search for** field, enter the identifier (ID) of the object you're searching for. (*Example:* If you're searching for a specific invoice, type in the invoice number.)

> **Note:** In addition to searching with an ID, some object types can be searched for using an external key, such as the customer account.

4. If you want Kaui to search and display the first record in the search results, click the **Fast search** checkbox.
5. Click the **Search** button. Kaui displays the search results.

Tip: At the bottom of the Advanced Search popup, Kaui displays the search syntax. You can copy and paste this advanced search syntax into a basic search field. This is helpful if you frequently perform the same kinds of advanced searches.

Example:



PART 2

Accounts

This section helps you become familiar with customer accounts and the layout of the Account page.

The Account page provides information about a specific customer, such as email address, physical address, and so forth. It is also the central location for the customer's billing information, subscriptions, invoices, and payment methods.

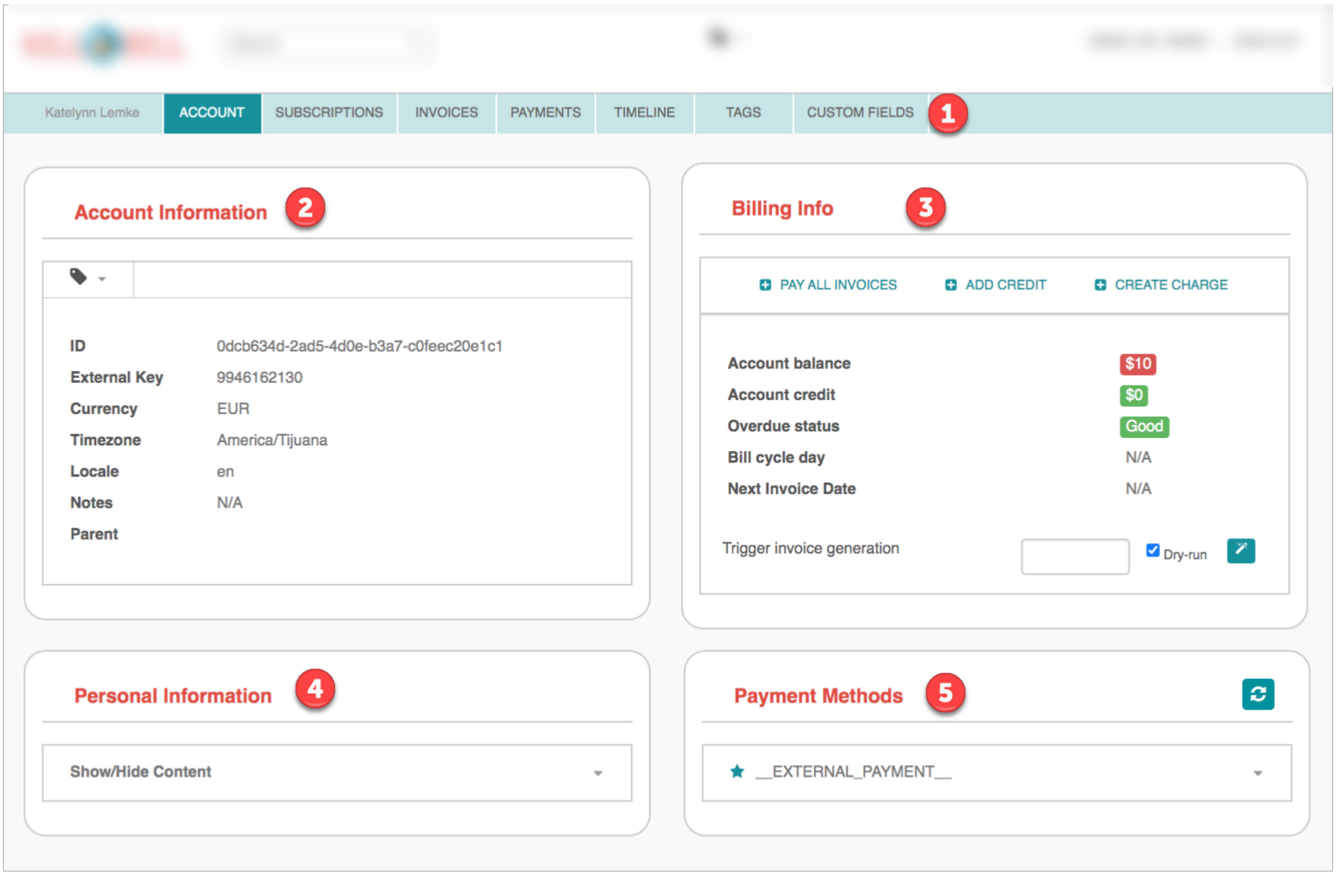
To find a customer in the system, use Basic Search or Advanced Search. To open the customer account, click on the customer ID in the search results.

The next section explains how the Account page is laid out. To skip this and see the task-based steps, go to Create an Account.

Account Page Layout

The Account page has the following sections:

1. Sub-menu
2. Account information
3. Billing info
4. Personal info
5. Payment methods



1. Account Sub-Menu

The Account sub-menu organizes and provides access to different areas of the customer's account:

- Subscriptions
- Invoices
- Payments
- Timeline
- Tags
- Custom Fields

To see these areas, click on the relevant item on the sub-menu. To return to the customer's Account page, click **Account** on the sub-menu.

2. Account Information

This section of the screen displays a summary of the customer's account information, such as their ID, currency, and time zone. To edit this information, click **Edit** next to "Account Information."

Here you can perform the following tasks for the customer account:

- Edit an Account
- Link to Parent Account

- Add a Tag to an Account

3. Personal Information

This section of the screen displays the customer's personal contact information (read only).

By default, Personal Information details are hidden for GDPR Compliance and customer privacy. To see the information, click **Show/Hide Content**.

To edit this information, see the Edit an Account section.

4. Billing Info

Here you can perform the following tasks for the customer:

- Pay all invoices
- Add a credit
- Create a charge

You can also see a summary of billing information:

Field	Description
Account balance	Amount of money due on the account, including any account credits.
Account credit	Amount of any money owed to the customer.
Overdue status	The status of the customer's account that indicates if they are overdue or up-to-date on their invoice payments. **Note:** The account can have a negative account balance, but not be overdue. That's because overdue status depends on invoice due dates and how late payments are defined based on a company's business policy. For example, an invoice may not be overdue if a company allows a 15-day grace period (a.k.a. NET terms) to make a payment.
Bill cycle day	The day of the month on which the system generates an invoice.
Next invoice date	The date on which the system generates the customer's next invoice.

The **Trigger invoice generation** feature lets you generate an invoice, either as a test or in a committed state.

5. Payment Methods

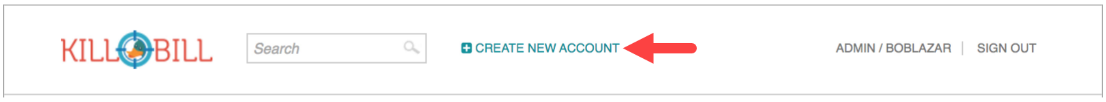
This section of the Account page lets you:

- Add a payment method
- Set a payment method as default
- Delete a payment method
- Apply a transaction to a payment method (authorize, charge, credit, etc.)

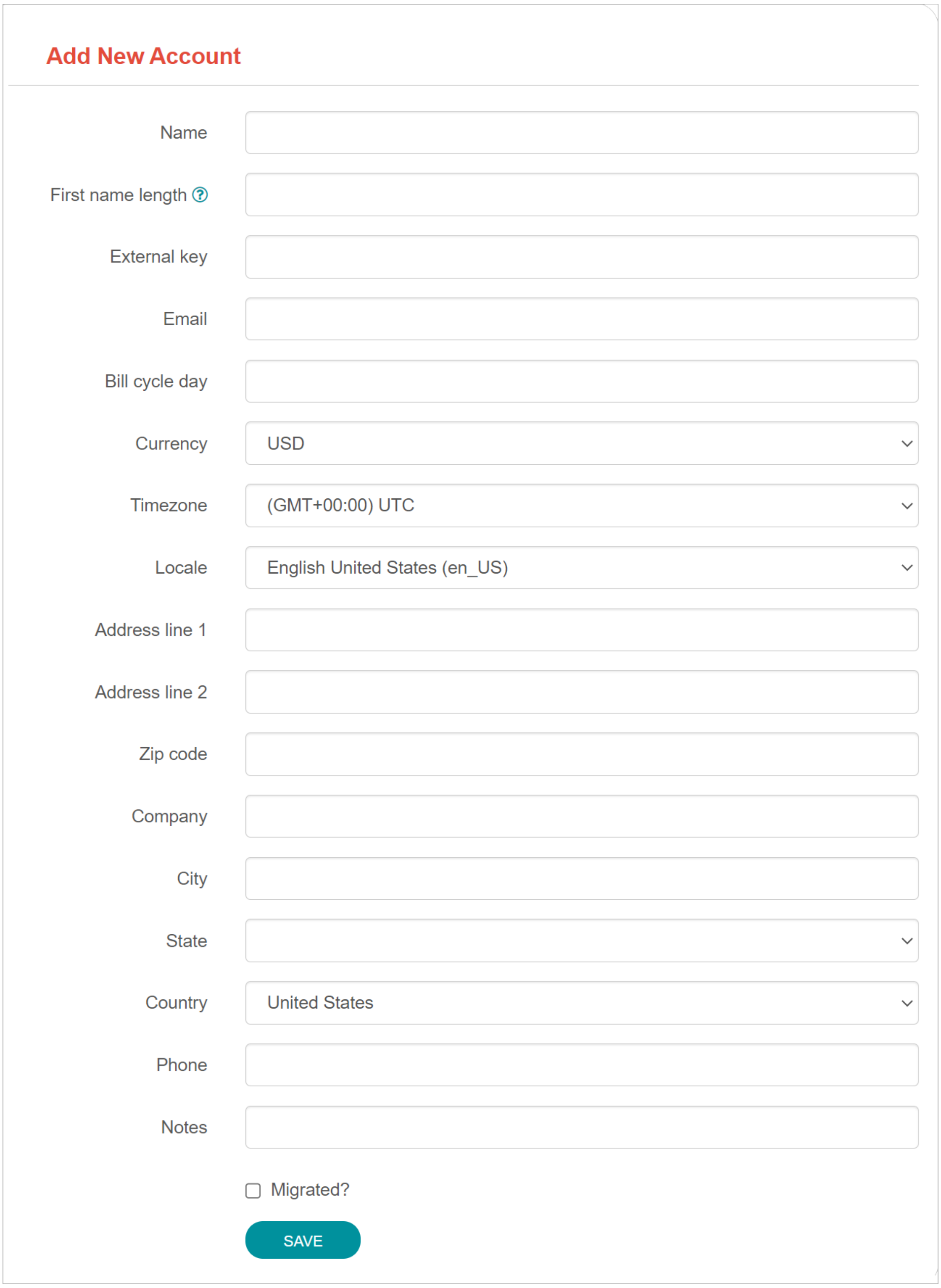
For more information on payment methods, see the Payment Methods section.

Create an Account

1. At the top right of the screen, click **Create New Account**:



2. Kaui opens the New Account screen:



3. Fill in the fields. For field information, see the table in the next section.

4. Click the **Save** button.

Account Field Information

Field	Description
Name	The customer’s first and last name.
First name length	This field sets the length of the customer’s first name. Kill Bill automatically calculates this number based on the location of the space between the first and last name. You can overwrite it with a different number, if necessary. **Note:** This field is used if your organization needs to extract customers' first or last names for communication (invoices, emails, etc.). The field lets an organization accommodate variations of names used across the globe.
External key	An optional alternate ID for the account. Once this is saved for the customer, you cannot change it. **Tip:** The external key feature is helpful if you integrate Kill Bill with another system, such as a CRM, and want to use that system’s ID in Kill Bill (for identification, searching, and so forth). Once this is set and saved for the customer, you cannot change it.
Email	The main email address to use for communicating with the customer.
Billing cycle day	For monthly or quarterly subscriptions, what day of the month the invoice is created. Once this is saved for the customer, you cannot change it.
Currency	The currency that the customer uses to make purchases. Once this is saved for the customer, you cannot change it.
Timezone	The time zone in which the customer resides. Once this is saved for the customer, you cannot change it.
Locale	Indicates the language that Kaui uses to send communication to the customer (invoices, emails, etc.) If your organizaton communicates with customers in a language that’s different than the system’s default language, it’s important to select the appropriate locale for the customer. For more information, see the *Internationalization* manual.
Address line 1 and Address line 2	The street address where the customer resides.
Zip code	The zip code for the area in which the customer resides.
Company	If relevant, the company/organization the customer works for.
City	The city in which the customer resides.
State	The state in which the customer resides.

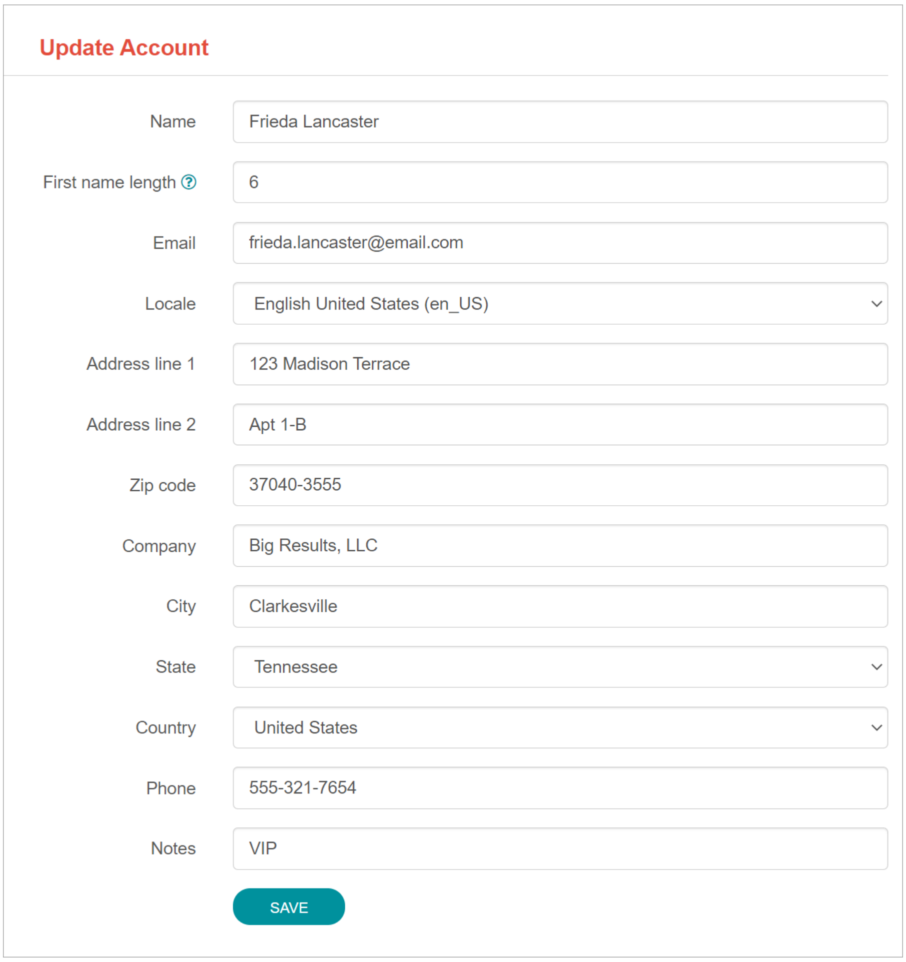
Field	Description
Country	The country in which the customer resides.
Phone	The customer’s phone number.
Notes	Additional information about the account. These notes are not viewable by the customer.
Migrated?	This field is for informational purposes only. You can check this box if you have migrated this customer account into Kill Bill.
Contact email addresses	Email addresses to be used in addition to the email address specified above. The email addresses listed here (separated by ???) will receive the same emails as the main Email address. [THIS IS A SEPARATE SCREEN / FLOW?]

Edit an Account

You can make changes to account information except for ID, External Key, Billing Cycle Day, Currency, and Timezone.

1. Open the account on the Account page.
2. Next to "Account Information," click **Edit**.

Kaui opens the Update Account screen:



3. Make changes to the fields. For field information, see the previous section. [LINK]

> **Note:** You cannot change the following fields: Bill Cycle Day, Currency, External Key, and Time Zone.

4. Click the **Save** button.

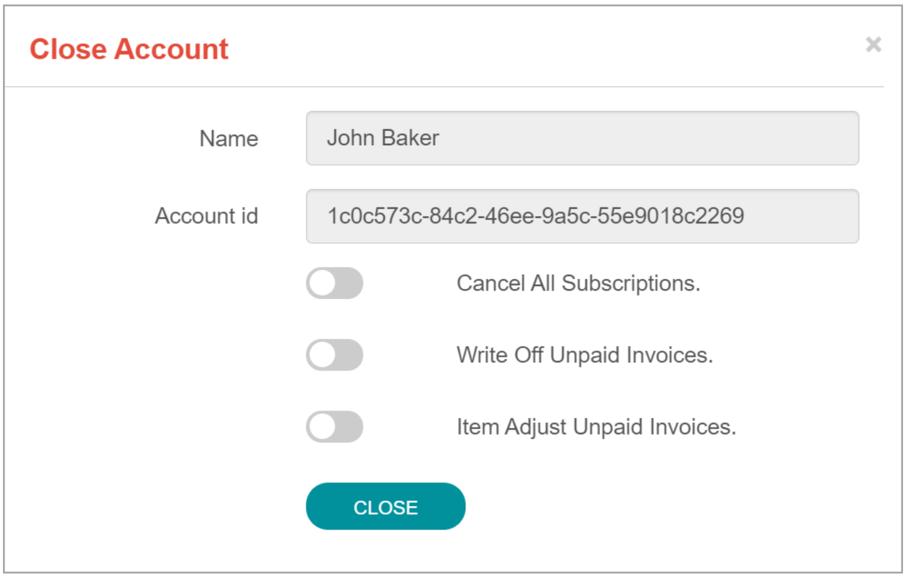
Close an Account

Use the steps in this section to indicate you will no longer be doing business with a customer. If the customer has unpaid invoices, using the steps below, you can choose to either write off or item-adjust them.

> **Note:** Closing an account does not delete it. It only indicates the account is no longer a customer of yours. Once you close the account, its data becomes read-only, and you cannot make changes to it.

1. Open the account on the Account page.
2. Next to "Account Information," click **Close**.

Kaui displays the Close Account pop-up:

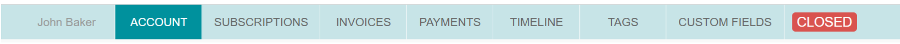


3. Check the **Name** and **Account ID** fields to ensure you are closing the correct account.
4. Select any of the following actions:
   - **Cancel All Subscriptions**—Stops any subscriptions that are current for this account.
   - **Write Off Unpaid Invoices**—Brings the balance for all unpaid invoices to zero. When you choose to write off the invoice, it is removed from Account Receivables.
   - **Item Adjust Unpaid Invoices**—Adds an invoice line item with a negative amount to bring each unpaid invoice's balance to zero.

> **Note:** The last two options are mutually exclusive (i.e., you can only select one of them).

5. Click the **Close** button.

Kaui displays a message that lets you know the account was closed. In addition, the Account menu displays "Closed":

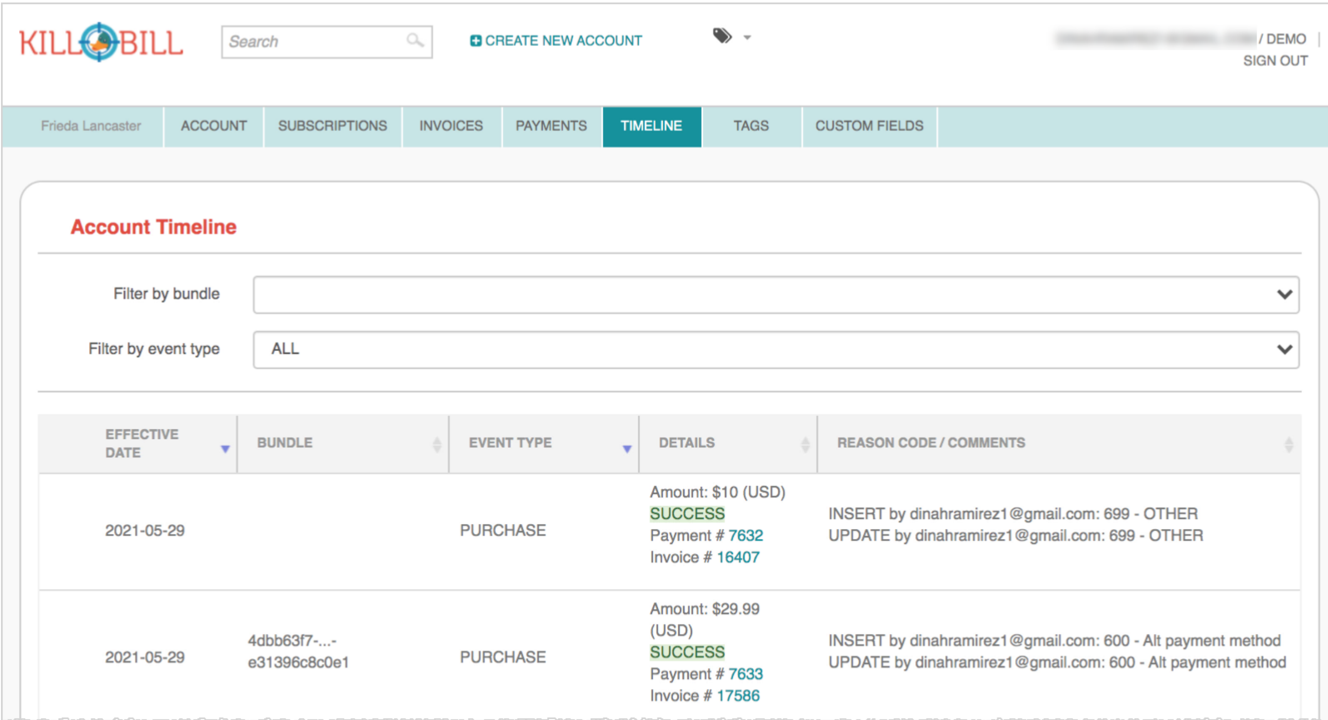


View the Account Timeline

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

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

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



Add a Tag to an Account

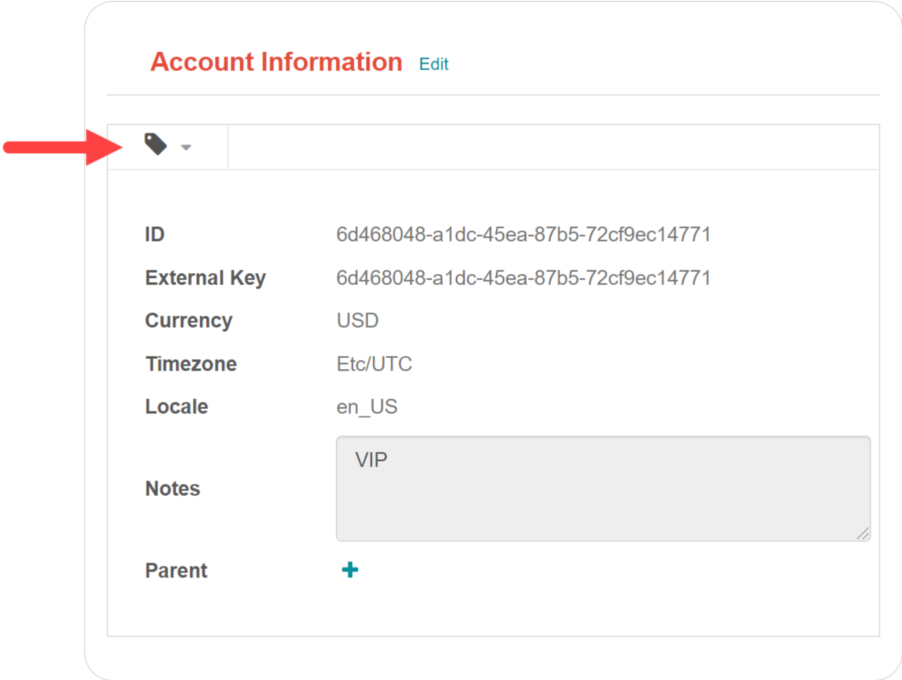
You can attach a tag to an account as a way of communicating information or to starting/stopping an action. Some examples from the default tags that already exist in the system include:

- The AUTO_INVOICING_OFF tag stops invoicing the customer account until the tag is removed.
- The TEST tag indicates the account is used internally for testing purposes.

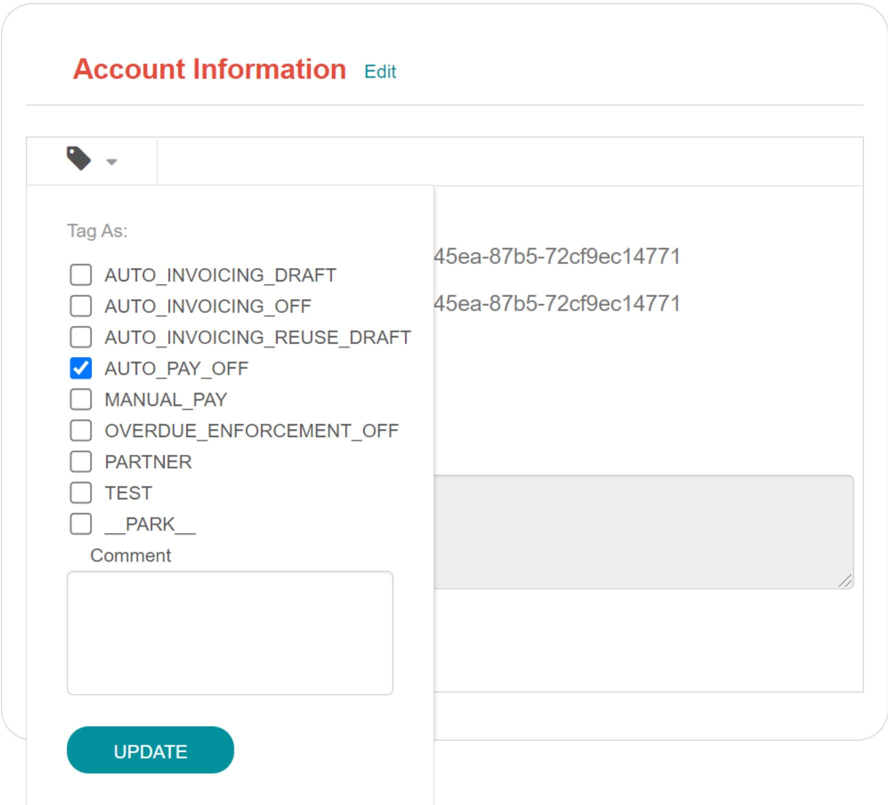
For more information on Tags, including a list of default tags, see the "Tags" section in the *REST API Reference Manual*.

To add a tag to a customer account:

1. Open the account on the Account page.
2. In the "Account Information" section, click the tag icon in the upper left corner:



3. Select the checkboxes of the tags you want to assign to the account.

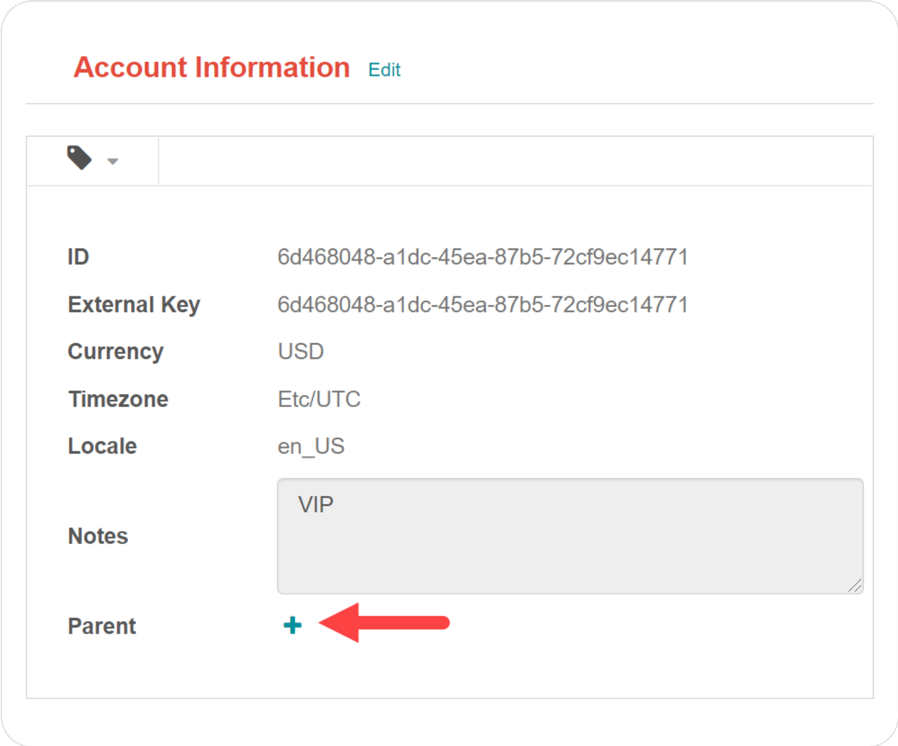


4. Click the **Update** button to save your changes.

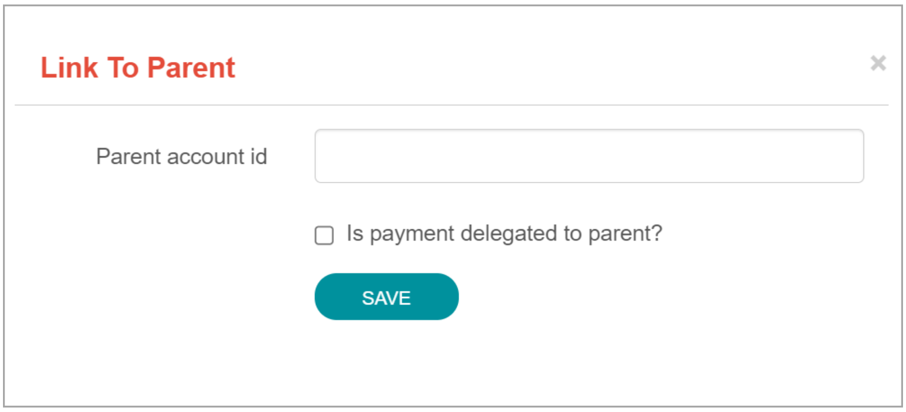
Link to Parent Account

When you link an account to a *parent* account, the account becomes a *child* account. Defining a parent-child association between accounts lets you define which entity is responsible for paying the invoice. For more information on this feature, see the Hierarchical Accounts Tutorial.

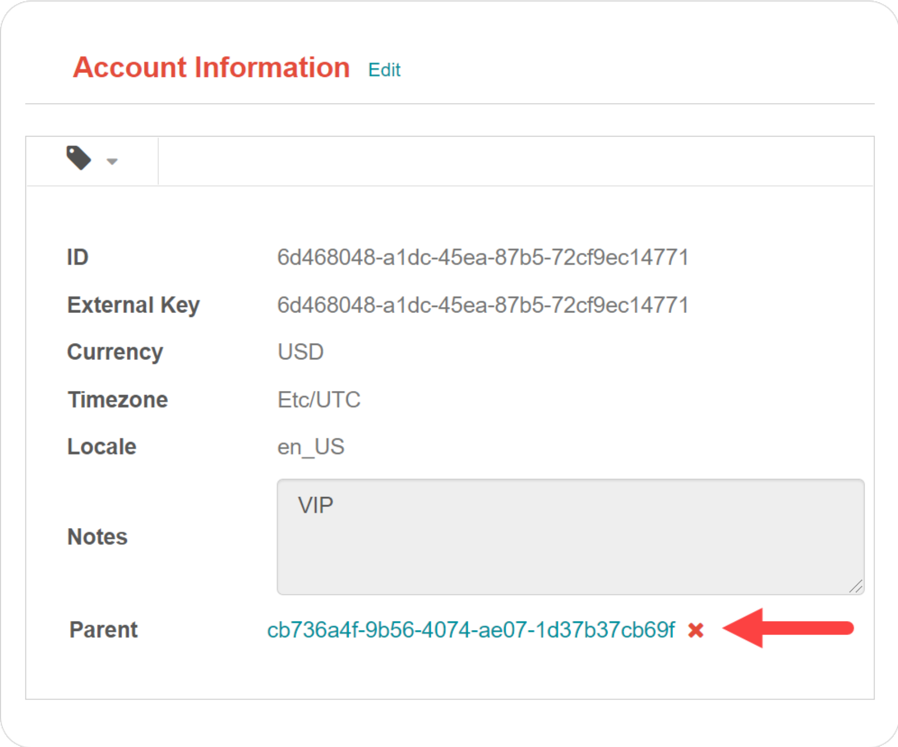
1. As a preparation step, open the parent account and copy the Account ID.
2. Open the account that will become the child account.
3. Next to the **Parent** field, click the plus sign icon in the "Account Information" section:



Kaui opens a popup:



4. Click in the **Parent account id** field and paste in the Account ID that you copied in step 1.
5. To set the parent as responsible for all payments associated with this account, check the **Is payment delegated to a parent?** box. If you do not check this box, the child account is responsible for its own payments.
6. Click the **Save** button. Kaui displays the parent account ID as a link in the "Account Information" section.



Tip: To open the parent account from the child account, click on the account ID link next to the **Parent** field.

Payment Methods

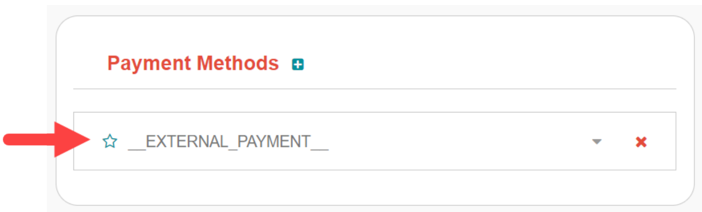
In production systems, payment method information is typically added via gateway-specific data flows. However, you can use this Payment Method section for testing purposes. For PCI compliance, *do not* enter any genuine payment information in these fields.

Set a Payment Method as the Default

Kill Bill uses the default payment method to automatically pay invoices (whether that invoice is generated by the system or manually by a user).

To set a payment method as the default:

1. Open the account on the Account page.
2. In the Payment Methods section, click the star icon next to the relevant payment method:



Add Payment Method

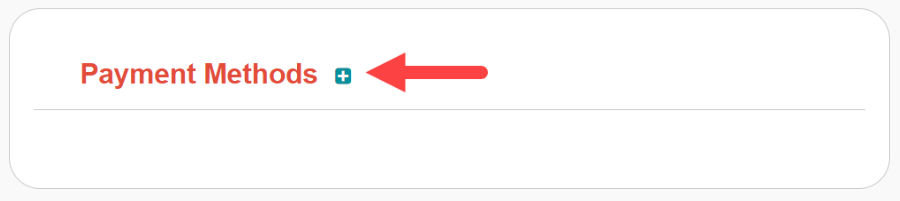
A customer account can have several payment methods to allow making payments in different ways, such as credit cards, debit cards, PayPal, and so forth. The payment method includes the details needed for Kill Bill to process a payment against an invoice. (For more information about payment methods, see)

Saving this information in Kaui makes it easier for you to accept payments from the customer, because the customer does not have to repeatedly give you their payment method details.

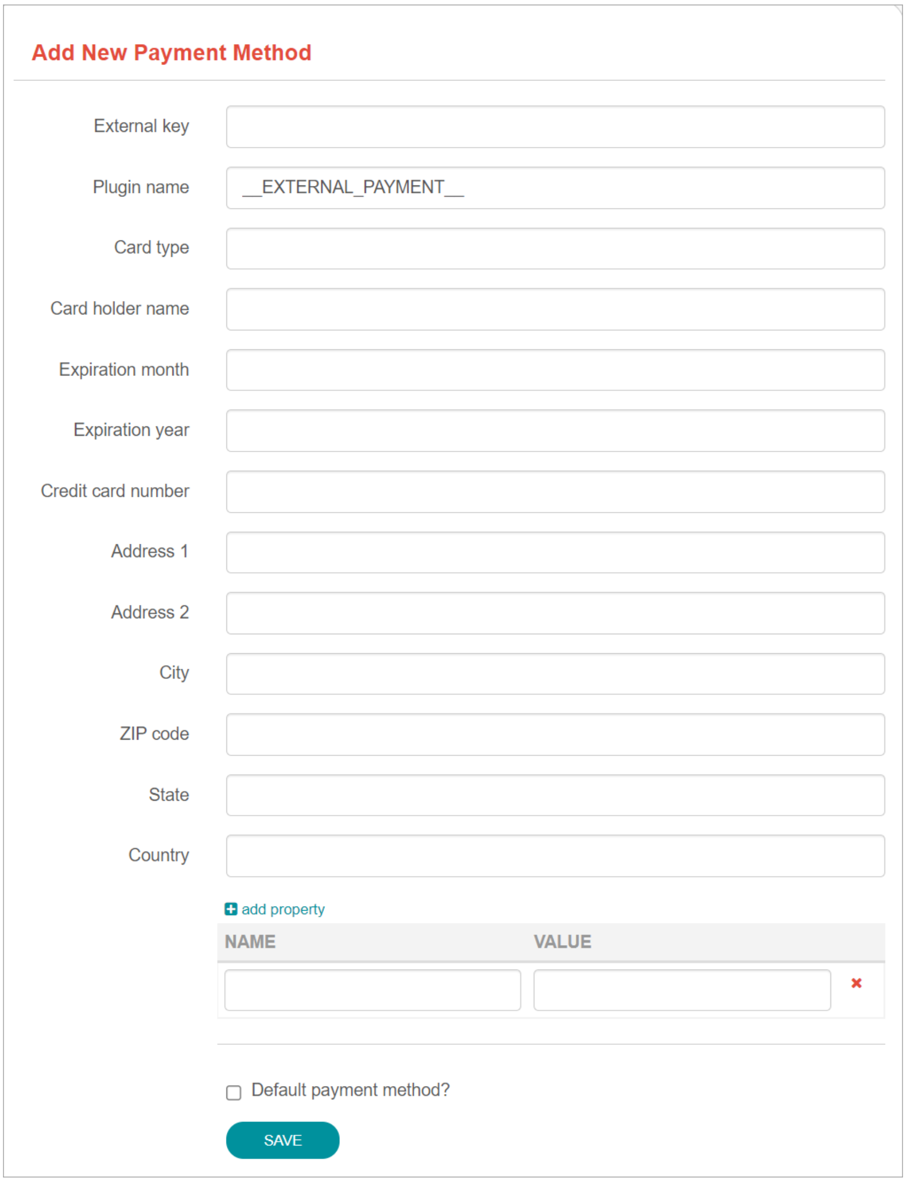
Tip: If you set a payment method as the default, Kill Bill will automatically process any open invoices for the account.

To add a payment method for a customer:

1. Open the account on the Account page.
2. Next to "Payment Methods," click the plus sign:



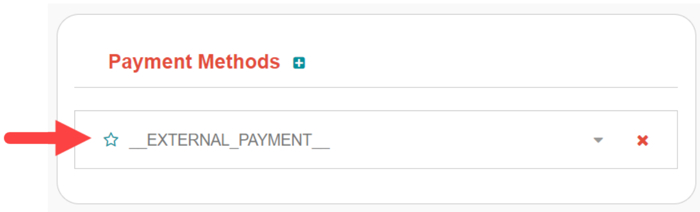
Kaui displays the Add New Payment Method screen:



3. Fill in the fields. For field information, see the table in the next section.
4. Click the **Save** button.

Payment Method Field Information

Field	Description
External key	An optional alternate ID for the payment method. Once this is saved for the customer, you cannot change it.
Plugin name	Type in the name of the plugin that is associated with this type of payment method.
Card type	The name of the credit or debit card.
Card holder name	The name that appears on the card.
Expiration month Expiration year	The month and year the card expires. Enter month as *mm* and year as *yy*. (*Examples:* 07 for the month of July and 23 for the year 2023.)
Credit card number	The credit card number, typed without dashes.

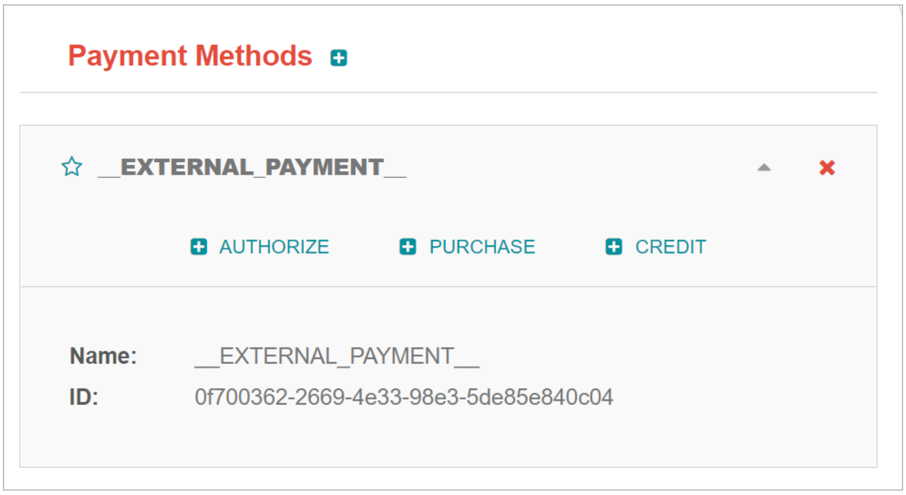
Field	Description
Address 1, Address 2, City, ZIP code, State, Country	The billing address associated with this card.
Add property (Name/Value)	Use this area to assign custom fields and values to the payment method. **Note:** Custom fields are an advanced feature. For more information, see PART 4.
Default payment method?	Check this box to set this payment method as the default. Kill Bill uses the default payment method to automatically pay invoices (whether that invoice is generated by the system or manually by a user). **Note:** If you forget to select this box, you can set the payment method as the default by clicking the star icon next to the payment method on the Account page: 

View Payment Method Details

Although you cannot edit a payment method once it is created, you can view its details:

1. Open the account on the Account page.
2. In the Payment Methods area, click the gray down arrow ( ) next to the payment method.

Kaui expands the details for the payment method:



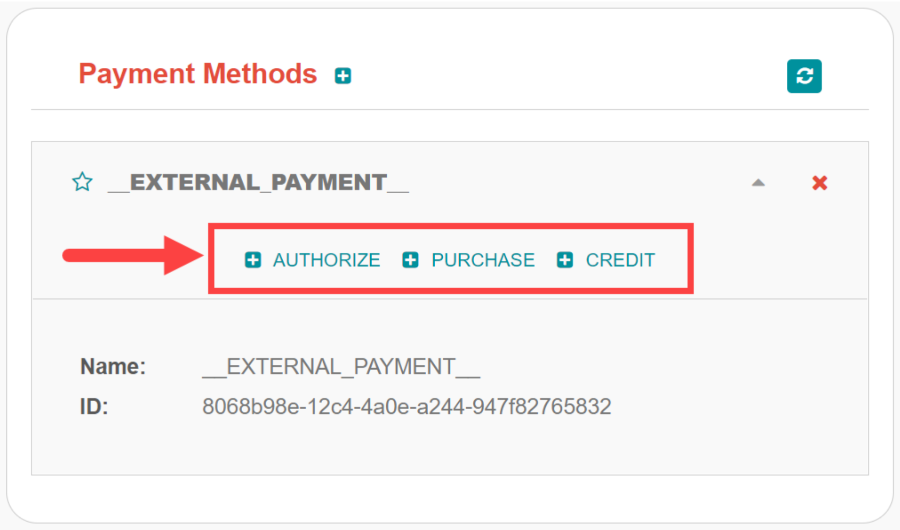
Applying Transactions to a Payment Method

This section explains how to process a transaction that's applied to a payment method. These transactions include:

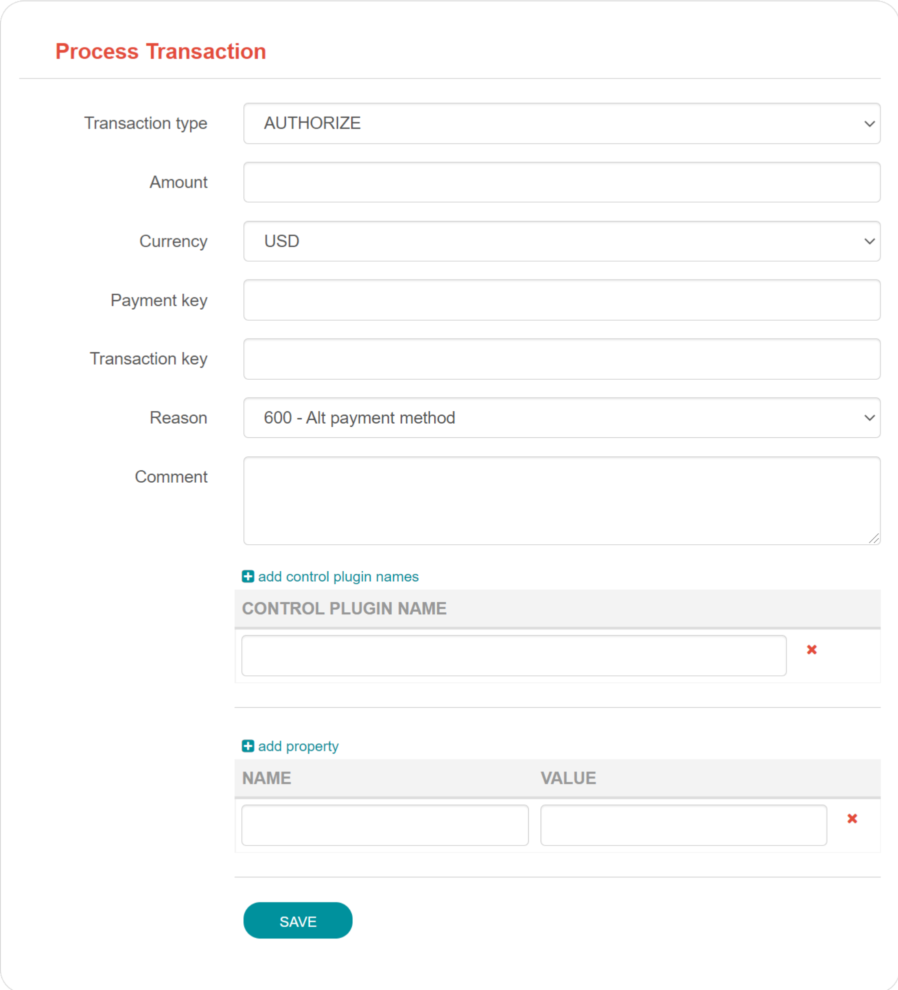
- Authorize
- Capture
- Chargeback
- Credit
- Purchase (i.e., charge)
- Refund
- Void

Note: These transactions are directly applied on the payment instrument (as opposed to being applied to the unpaid invoice). Additionally, "credit" here refers to depositing funds directly to the customer card and is unrelated to account credits.

1. Open the account on the Account page.
2. In the Payment Methods area, click the gray down arrow ( ) next to the payment method.
3. Select the type of transaction you want to perform:



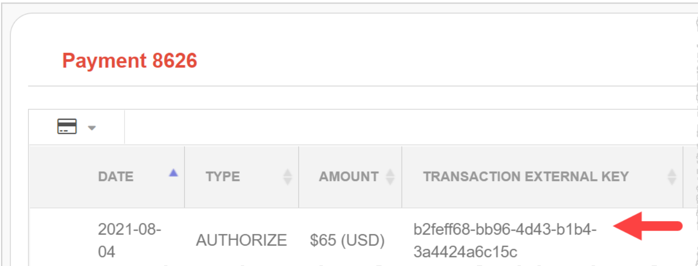
Kaui displays the Process Transaction screen:



4. Fill in the fields. For field information, see the following section.
5. Click the **Save** button. Kaui saves the transaction and displays it on the Payments page.

Process Transaction Field Information

Field	Description
Transaction type	From the dropdown list, select the type of transaction you want to perform. You can choose from the following: * Authorize * Capture * Chargeback * Credit * Purchase (i.e., charge) * Refund * Void
Amount	The amount of the transaction.
Currency	The currency used for the transaction. This field defaults from the customer account.

Field	Description
Payment key	The unique payment key (ID) to which you want to apply the transaction. This field is required for every transaction type *except* Auth, Credit, and Purchase. **Note 1:** You can copy the payment key for a specific transaction from the **External Key** column of the Payments page. Or you can copy it from the URL displayed in your browser's address. See the following example. [[PROBABLY NEED TO REWRITE THIS TO MAKE THIS AN INITIAL STEP IF CREATING A TRANSACTION THAT AFFECTS ANOTHER TRANSACTION.]] *Example:* In the URL displayed below, `0d1e11e5-2df6-4b6b-992f-e9ff2de38cef` is the payment key. `https://demo.killbill.io/accounts/cb736a4f-9b56-4074-ae07-1d37b37cb69f/payments/0d1e11e5-2df6-4b6b-992f-e9ff2de38cef`
Transaction key	Kill Bill automatically generates an external transaction key for Auth, Purchase, and Credit transactions. To process a transaction that requires the transaction key, open the payment detail from the Payments screen and copy the key from the **Transaction External Key** column. 
Reason and Comment	The text you enter for Reason and Comment displays on the Timeline page.
Add control plugin	For information on control plugins, see PART 4.
Add property (Name/Value)	Use this area to assign custom fields and values to the transaction. **Note:** Custom fields are an advanced feature. For more information, see PART 3.

Delete Payment Method

Warning: Kaui does not ask you to confirm your deletion; use this feature with caution.

To delete a payment method:

1. Open the account on the Account page.
2. In the Payment Methods area, click the red X (✖) next to the payment method. Kaui *immediately* removes the payment method.

Subscriptions

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

To create a subscription, you must first have at least one plan defined in the catalog.

Add a Subscription Edit a Subscription? Delete a Subscription

Invoices

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. [LINK]

To view an account's invoices, click on Invoices on the submenu:

Click on the invoice number to view the invoice detail:

If an invoice has been paid, the payment information is listed directly under the invoice information:

Payments

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. [LINK]

To view an account's payments, click on Payments on the submenu:

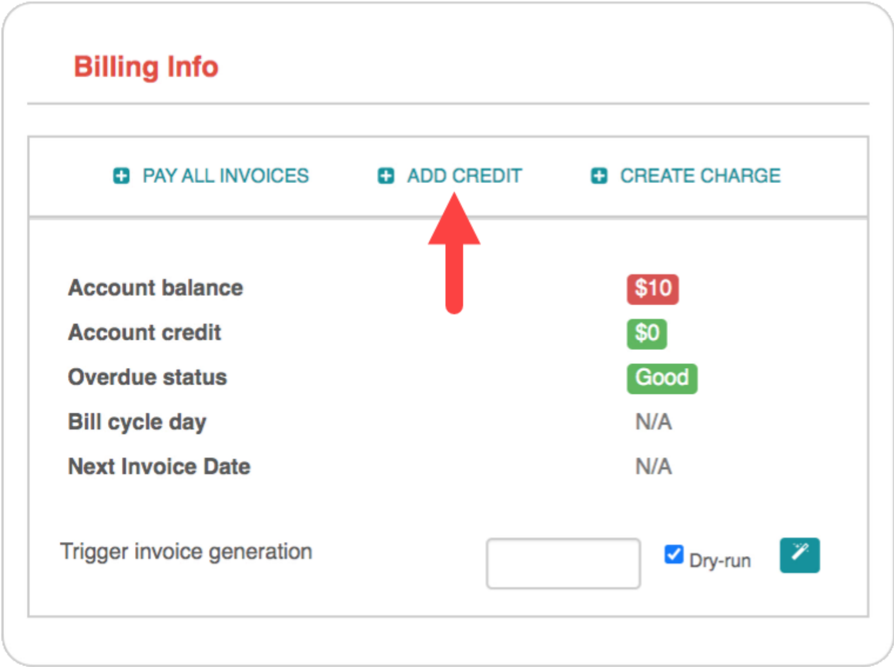
Click on the payment number to view its detail:

Charges, Refunds, and Invoices

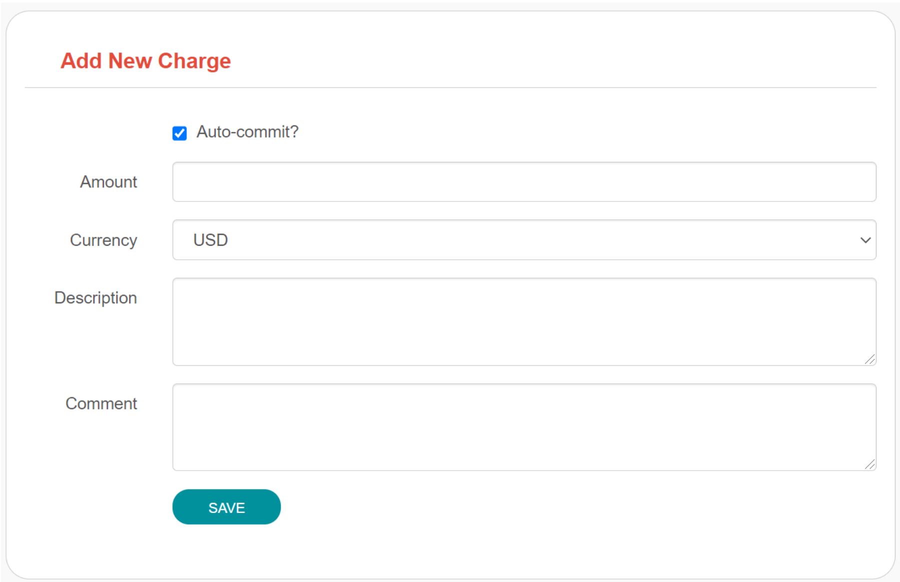
Create Charge

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? [[Some are listed under the specific payment method on the Accounts > Payment Methods]]

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

PART 3

Users, Roles, and Permissions

either database or third-party integration for storing usernames and passwords

The default "admin" username/password includes all of the roles and permissions available with Kill Bill.

PART 4

Tags

Custom Fields

FAQs

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