

# Overview

Kaui lets you configure basic settings for how the system behaves when an account is overdue. For overdue configuration, you define:

- The various states that the account must go through
- The change in users' entitlements when the account is transitioned from one state to the other
- The period after which the state is re-evaluated

These three pieces of information make up the *overdue flow*.

Overdue configuration applies at the tenant level. However you can also configure overdue actions for the *global* Kill Bill system.

In Kaui, overdue configuration is a subset of the full overdue configuration settings. For more information on the full configuration settings and global settings, see the [Overdue System Guide](#).

See the following sections to configure overdue (dunning) flows for a tenant:

- [View overdue configuration](#)
- [View overdue configuration as XML](#)
- [Configure overdue flows](#)
- [Delete overdue flows](#)
- [Upload an XML overdue configuration file](#)

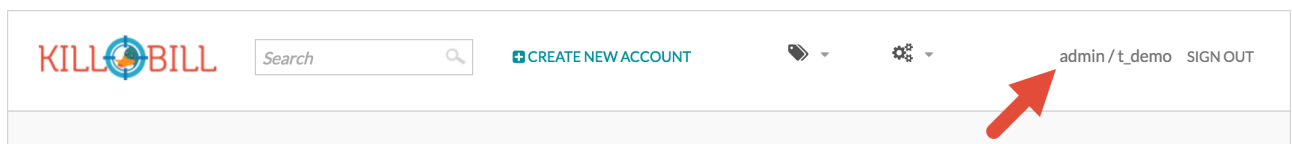
## Additional Overdue Resources

- "Overdue" section in the *Subscription Guide*.
- [Overdue System Guide](#)

## View Overdue Configuration

If any overdue (dunning) actions are configured, you can see them on the Overdue Show tab at the bottom of the Tenant Configuration page. To get there:

1. Click on your username and tenant name in the upper right corner:



Kaui displays the Tenant Configuration page.

2. Scroll down and click on the Overdue Show tab:

### Tenant Details

Name: Kill Bill

### Useful Links

- [Parked accounts](#)

[Catalog Show](#)
[Overdue Show](#)
[Invoice Template](#)
[Invoice Translation](#)
[Catalog Translation](#)
[Plugin Config](#)

### Existing Overdue Config

[View Overdue Xml](#)

No overdue configuration defined for tenant

## Configure Overdue Flows

The following steps explain how to set up overdue flows (i.e., actions) for the tenant.

1. Go to the [Overdue Show](#) tab on the Tenant Configuration page.

### Tenant Details

Name: Kill Bill

### Useful Links

- [Parked accounts](#)

[Catalog Show](#)
[Overdue Show](#)
[Invoice Template](#)
[Invoice Translation](#)
[Catalog Translation](#)
[Plugin Config](#)

### Existing Overdue Config

[View Overdue Xml](#)

No overdue configuration defined for tenant

2. Click the plus sign (  ) next to **Existing Overdue Config**.

Kaui opens the Overdue Configuration screen:

### Overdue Configuration

[Enable Advanced Configuration \(Upload XML\)](#)

+ new overdue states

EXTERNAL NAME	MESSAGE	BLOCK SUBSCRIPTION CHANGES	SUBSCRIPTION CANCELLATION	DAYS SINCE EARLIEST UNPAID INVOICE	TAG INCLUSION	TAG EXCLUSION	NUMBER OF UNPAID INVOICES	TOTAL UNPAID INVOICE BALANCE
<div>SAVE</div>								

3. Click + **New Overdue States**. Kaui opens the fields for editing:

### Overdue Configuration

[Enable Advanced Configuration \(Upload XML\)](#)

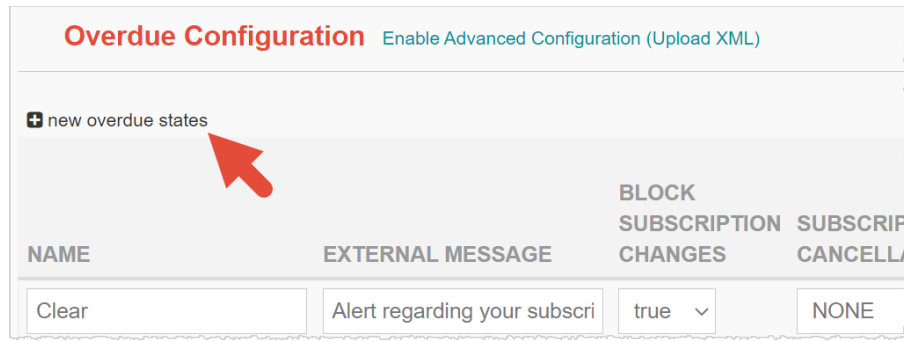
+ new overdue states

NAME	EXTERNAL MESSAGE	BLOCK SUBSCRIPTION CHANGES	SUBSCRIPTION CANCELLATION	DAYS SINCE EARLIEST UNPAID INVOICE	TAG INCLUSION	TAG EXCLUSION	NUMBER OF UNPAID INVOICES	TOTAL UNPAID INVOICE BALANCE
Clear		false	NONE	0	NONE	NONE	0	0
<div>SAVE</div>								

4. Fill in the fields for the current row. For field information, see the [Overdue Configuration Field](#)

Descriptions table.


5. To add another overdue configuration row, click + **new overdue states**.



6. When you are done adding configuration rows, click the **Save** button. Kauai displays the new row(s) on the Overdue Show tab:

I NEED A SCREENSHOT OF THIS



**Note:** To edit an existing overdue flow, on the Overdue Show tab, click the plus sign (  ) next to **Existing Overdue Config**. This opens the overdue configuration fields in edit mode.

## Overdue Configuration Field Descriptions

Field	Description
Name	The name assigned to the overdue state.
External Message	Message text that other plugins, when listening for overdue events, can retrieve and display to the user. <i>(Optional)</i>
Block Subscription Changes	If set to <b>true</b> , the customer <i>cannot</i> make plan changes to the subscription in this overdue flow. If set to <b>false</b> , the customer is allowed to make changes.
Subscription Cancellation	Select the option that describes how Kill Bill behaves regarding a cancellation in this overdue flow: <ul style="list-style-type: none"><li>• <b>NONE</b>: The subscription is not cancelled.</li><li>• <b>POLICY_NONE</b>: ??? Maybe some to do with the default cancellation policy in the catalog? Not sure...</li><li>• <b>POLICY_IMMEDIATE_POLICY</b>: Cancels the subscription immediately and applies a partial credit to the account based on how much of the service has been consumed.</li><li>• <b>END_OF_TERM</b>: Cancels the subscription at the end of the billing period with no refund to the customer (i.e., no proration).</li></ul>
Days Since Earliest Unpaid Invoice	Specifies how many days should pass after the last unpaid invoice before initiating this overdue flow.

Field	Description
Tag Inclusion	<p>Specifies that the overdue flow will occur if the account is tagged with one of the selected system (control) tags. To disregard tag inclusion for this overdue flow, leave as the default <b>NONE</b> setting.</p> <ul style="list-style-type: none"> <li>• <b>AUTO_PAY_OFF</b></li> <li>• <b>AUTO_INVOICING_OFF</b></li> <li>• <b>OVERDUE_ENFORCEMENT_OFF</b></li> <li>• <b>MANUAL_PAY</b></li> <li>• <b>TEST</b></li> <li>• <b>PARTNER</b></li> </ul> <p>For a description of system tags, see the "<b>Tags</b>" section of the <i>Subscription Guide</i>.</p>
Tag Exclusion	<p>Specifies that the overdue flow will occur if the account is <i>not</i> tagged with one of the selected system (control) tags. (See tags information above.) To disregard tag exclusion for this overdue flow, leave as the default <b>NONE</b> setting.</p>
Number of Unpaid Invoices	<p>Specifies that the overdue flow will occur if the number of unpaid invoices equals or exceeds the specified value.</p>
Total Unpaid Invoice Balance	<p>Specifies that the overdue action will occur if the total unpaid invoice balance equals or exceeds the specified value.</p>

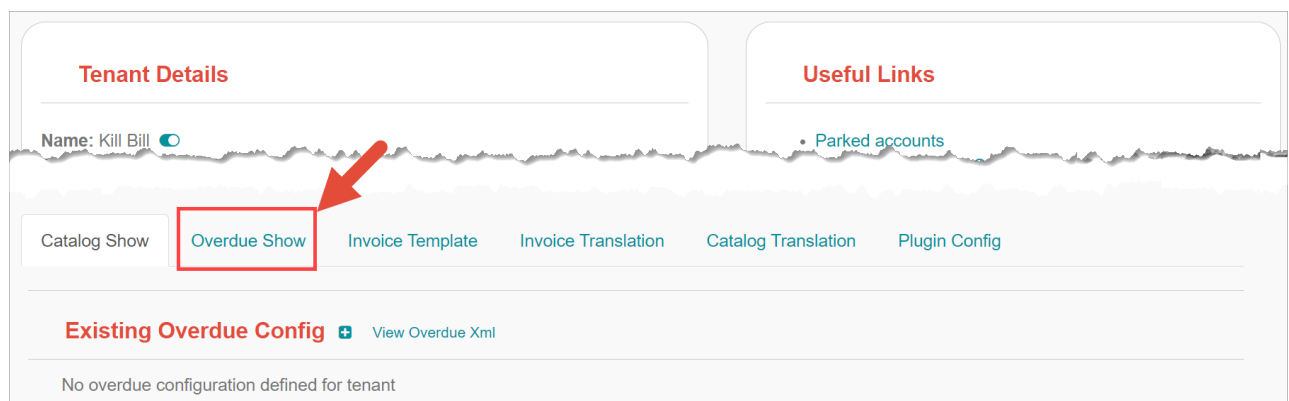
## Upload an XML Overdue Configuration File

Kill Bill overdue configuration is stored in XML format. This section explains how to upload an XML file that contains the overdue configuration.



**Note:** You cannot edit a raw overdue configuration XML file in Kauai.

1. Go to the [Overdue Show](#) tab on the Tenant Configuration page.



2. Click the plus sign (  ) next to **Existing Overdue Config**.

Kaui opens the Overdue Configuration screen:

Overdue Configuration

Enable Advanced Configuration (Upload XML)

+ new overdue states

EXTERNAL NAME	MESSAGE	BLOCK SUBSCRIPTION CHANGES	SUBSCRIPTION CANCELLATION	DAYS SINCE EARLIEST UNPAID INVOICE	TAG INCLUSION	TAG EXCLUSION	NUMBER OF UNPAID INVOICES	TOTAL UNPAID INVOICE BALANCE
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SAVE

3. Click **Enable Advanced Configuration (Upload XML)**. Kaui displays an upload screen:

Upload Overdue XML Config

Enable Simple View

Choose File

No file chosen

UPLOAD

4. Click the **Choose File** button, locate the XML file, and select it.

Once you have selected the file, Kaui displays the filename next to the **Choose File** button.

Upload Overdue XML Config

Enable Simple View

Choose File

overdue\_V2.xml

UPLOAD

5. Click the **Upload** button.

If the upload is successful, Kaui displays a confirmation message along with a list of overdue flows on the Overdue Show tab:

I ALSO NEED A SCREENSHOT OF THIS

# View Overdue Configuration as XML

1. Go to the [Overdue Show tab](#) on the Tenant Configuration page.

Tenant Details

Name: Kill Bill

Useful Links

Parked accounts

Catalog Show

Overdue Show

Invoice Template

Invoice Translation


Catalog Translation

Plugin Config

Existing Overdue Config

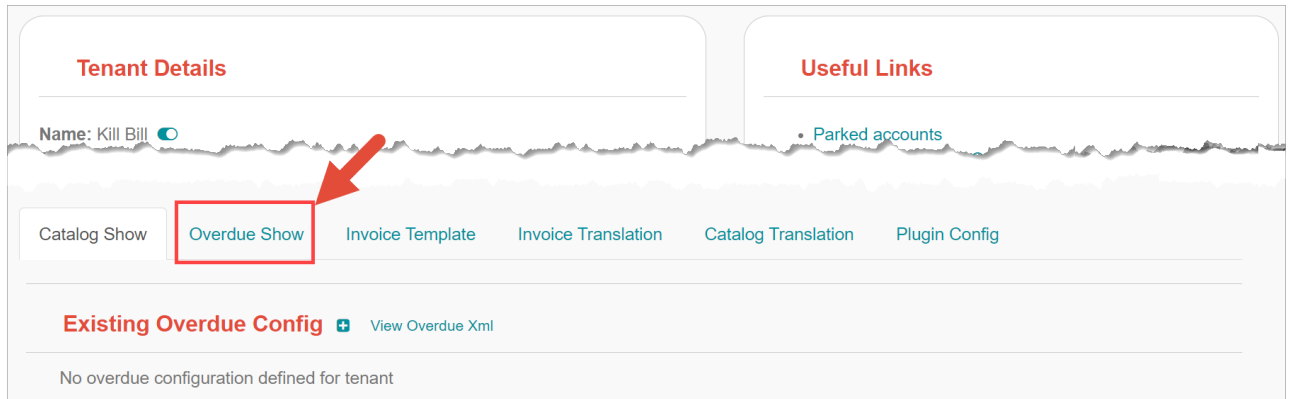
View Overdue Xml

No overdue configuration defined for tenant

2. Click **View Overdue XML** to the right of the plus sign (  ). Kauai displays the raw XML (uneditable in this view).
3. To return to Kauai, click the Back arrow button of your browser.

## Delete Overdue Flows

1. Go to the **Overdue Show** tab on the Tenant Configuration page.

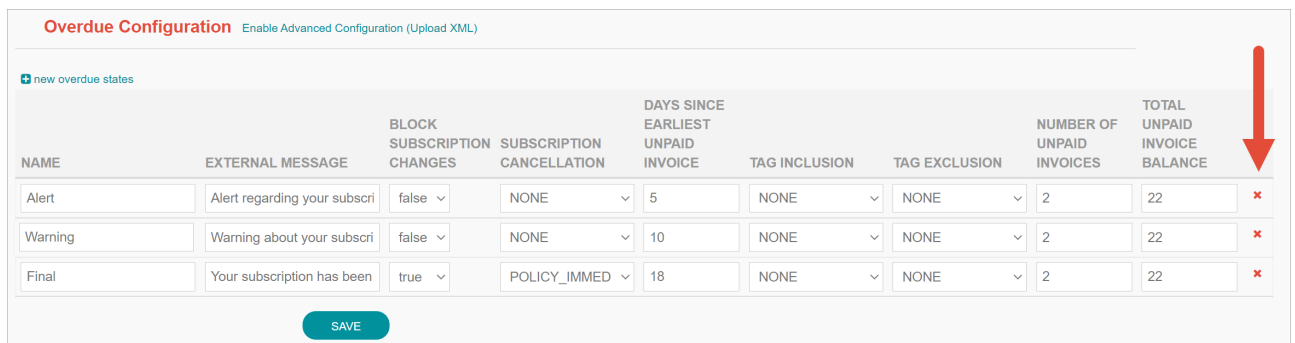


The screenshot shows the 'Tenant Configuration' page. The 'Tenant Details' section shows 'Name: Kill Bill' with a toggle switch. The 'Useful Links' section has a link for 'Parked accounts'. Below these is a horizontal menu with tabs: 'Catalog Show', 'Overdue Show' (highlighted with a red box and a red arrow), 'Invoice Template', 'Invoice Translation', 'Catalog Translation', and 'Plugin Config'. Below the tabs is a section titled 'Existing Overdue Config' with a plus icon and a link 'View Overdue Xml'. At the bottom, it says 'No overdue configuration defined for tenant'.

2. Click the plus sign (  ) next to **Existing Overdue Config**.

Kauai opens the Overdue Configuration screen.

3. Click the red X (  ) to the right of every configuration row you want to delete.



The screenshot shows the 'Overdue Configuration' screen. At the top, there's a header 'Overdue Configuration' with a link 'Enable Advanced Configuration (Upload XML)'. Below the header is a section 'new overdue states'. A table lists configurations with columns: NAME, EXTERNAL MESSAGE, BLOCK SUBSCRIPTION CHANGES, SUBSCRIPTION CANCELLATION, DAYS SINCE EARLIEST UNPAID INVOICE, TAG INCLUSION, TAG EXCLUSION, NUMBER OF UNPAID INVOICES, and TOTAL UNPAID INVOICE BALANCE. There are three rows: 'Alert', 'Warning', and 'Final'. Each row has a red X icon in the rightmost column. A 'SAVE' button is at the bottom.

NAME	EXTERNAL MESSAGE	BLOCK SUBSCRIPTION CHANGES	SUBSCRIPTION CANCELLATION	DAYS SINCE EARLIEST UNPAID INVOICE	TAG INCLUSION	TAG EXCLUSION	NUMBER OF UNPAID INVOICES	TOTAL UNPAID INVOICE BALANCE	
Alert	Alert regarding your subscri	false ▾	NONE ▾	5	NONE ▾	NONE ▾	2	22	✖
Warning	Warning about your subscri	false ▾	NONE ▾	10	NONE ▾	NONE ▾	2	22	✖
Final	Your subscription has been	true ▾	POLICY_IMMED ▾	18	NONE ▾	NONE ▾	2	22	✖

4. Click the **Save** button.

Kauai removes the overdue configuration row(s) from the Overdue Show tab and displays a successful deletion message.

THIS ALSO DOESN'T WORK FOR ME. I'M ASSUMING YOU GET A CONFIRMATION MESSAGE THAT THE DELETE WORKED.