

Quick Start with Kauai

Kauai is the back-office user interface for Kill Bill. This guide walks you through several tasks in Kauai. You will become familiar with moving around the application, and you'll learn some basic Kill Bill concepts:

1. [Create a tenant](#)
2. [Set up a simple catalog and plans](#)
3. [Create an account](#)
4. [Add a payment method to the account](#)
5. [Set up a subscription for the account](#)
6. [View the generated invoice](#)

NOTE

Note: You can also achieve these same results of this tutorial with the [API](#). In fact, if you are going to have a front-end interface (such as a website), the API calls are what you use to communicate with Kill Bill (as opposed to using Kauai). For more information, see [API Client](#) in the [Getting Started](#) guide.

Before You Begin

Make sure you have installed Kill Bill and Kauai and launched them per the [Getting Started](#) guide.

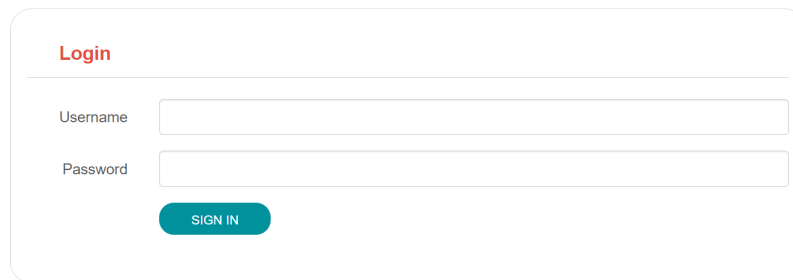
Additional Resources

- [API Reference](#)
- [Kauai Guide](#)
- [Kauai tutorials on YouTube](#)
- [Kill Bill Glossary](#)

Step 1. Create a Tenant

Kill Bill supports multi-tenancy, where each [tenant](#) has its own data, configuration, and so forth. This section explains how to create a tenant the first time you log in to Kauai.

1. Log in to Kauai with the default credentials of `admin/password`.



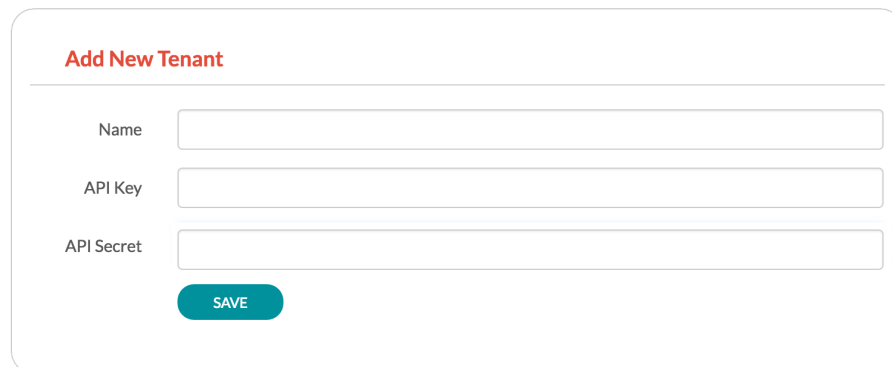
Login

Username

Password

SIGN IN

Kauai prompts you to create a tenant:



Add New Tenant

Name

API Key

API Secret

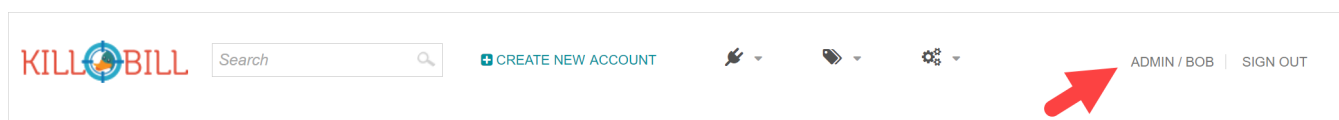
SAVE

2. Fill in the fields:

- Use **bob** for **Name** (tenant name).
- For **API Key**, use **bob**, and for **API Secret**, use **lazar**.

3. Click the **Save** button.

After you create a tenant, the active tenant name appears in the upper right corner of the Kauai screen:



Step 2. Set Up a Simple Catalog and Plans

The Kill Bill [catalog](#) contains [products](#) and [plans](#) definitions. This XML configuration file is really powerful and offers various options for handling [trials](#), [add-ons](#), [upgrades](#) / [downgrades](#), and so forth. (For more information on the Kill Bill catalog, see the [Catalog](#) section in the *Subscription Billing* guide.)

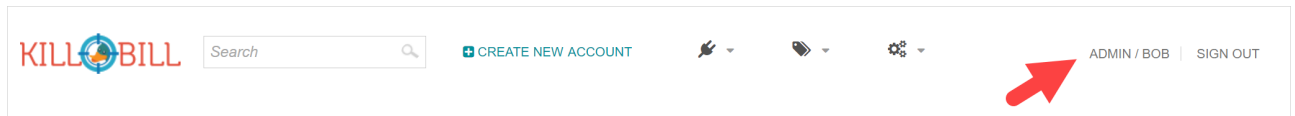
For this tutorial, instead of starting with the XML catalog, you'll learn how to create a simple catalog in Kauai and configure it with two plans.

NOTE

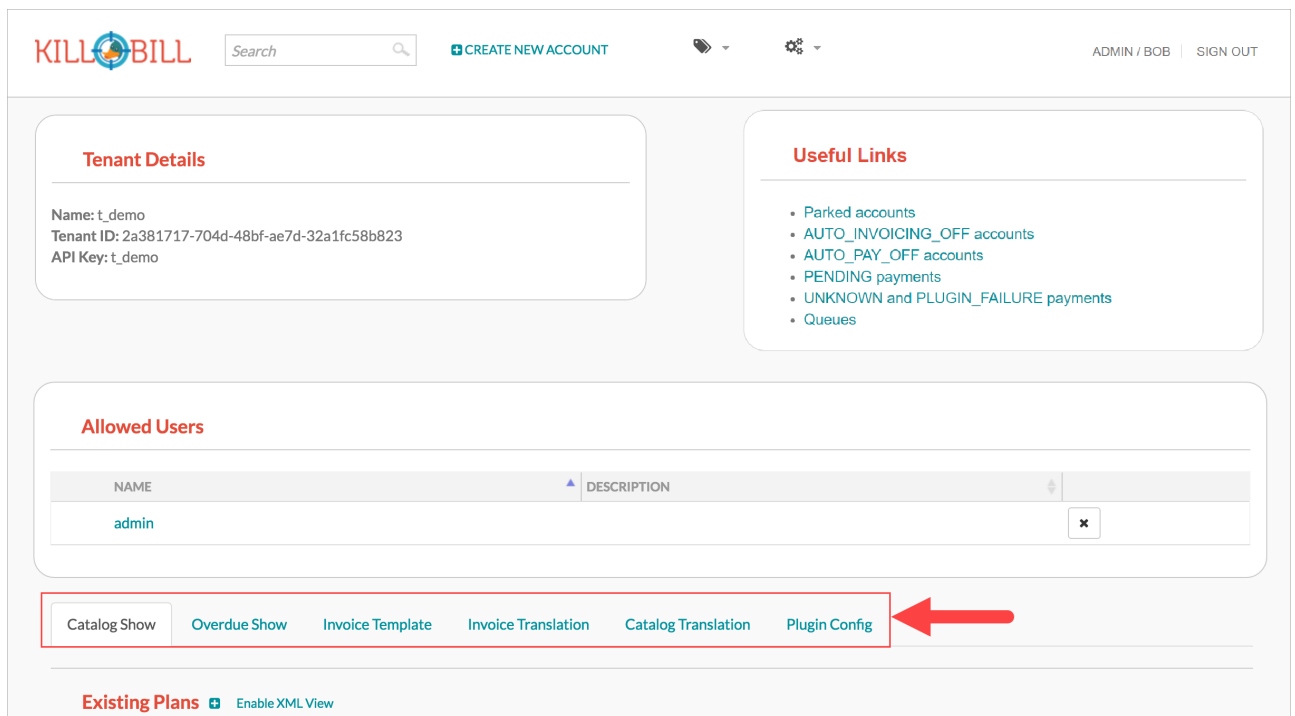
Note The simple catalog supports a *subset* of the regular XML catalog features and isn't intended to serve as a catalog in production. For more details on the simple catalog, see the ["Simple Plan"](#) section in the *API Reference*.

To create the simple catalog and two plans:

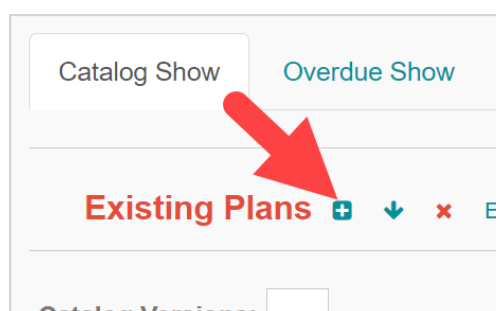
1. Click the tenant name in the upper right corner:



Kaui opens the Tenant Configuration page. At the bottom of the page, you'll see the a row of tabs:



2. Click the plus sign next to Existing Plans.



Kaui opens the Catalog Configuration screen.

3. Fill in the fields as shown below:

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

Product Category	Base ▾
Product Name	Standard
Plan Name	standard-free
Amount	0
Currency	USD ▾
Billing Period	Monthly ▾
Trial Length	0
Trial Time Unit	Unlimited ▾

SAVE

- Click the **Save** button.

Kaui returns to the Tenant Configuration screen.

- Click the plus sign again.
- On the Catalog Configuration screen, fill in the fields as shown below:

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

Product Category	Base ▾
Product Name	Standard
Plan Name	standard-monthly
Amount	24.95
Currency	USD ▾
Billing Period	Monthly ▾
Trial Length	0
Trial Time Unit	Unlimited ▾

SAVE

- Click the **Save** button, and Kaui returns to the Tenant Configuration screen.

You will now see the two plans you have created. Note that when you created the first plan, Kaui created the simple catalog:

Catalog Show	Overdue Show	Invoice Template	Invoice Translation	Catalog Translation	Plugin Config
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Existing Plans + ↓ × [Enable XML View](#)

Catalog Versions: 2022-07-11T20:51:30.000Z ↓ Catalog name

PLAN ID	PRODUCT	CATEGORY	BILLING PERIOD	USD ↓	TRIAL	
standard-free	Standard	Base	Monthly	0	N/A	+ currency
standard-monthly	Standard	Base	Monthly	24.95	N/A	+ currency

Plans

Step 3. Create an Account

In this section, we will create an [account](#) for a [customer](#), which stores the data your organization uses to transact business with a customer. To keep things simple, we will create an account with a minimum of information.

1. At the top of any Kaui screen, click **Create New Account**.

Kaui opens the Add New Account screen.

2. Fill in the **Name** field as shown:

Add New Account

Name

First name length ?

External key

Email

3. Scroll down the page and click the **Save** button.

Kaui displays the customer name for the new account at the top left of the screen:

CREATE NEW ACCOUNT

John Smith

ACCOUNT

SUBSCRIPTIONS

INVOICES

PAYMENTS

TIMELINE

TAGS

CUSTOMERS

Account was successfully created

Account Information

Edit

Close

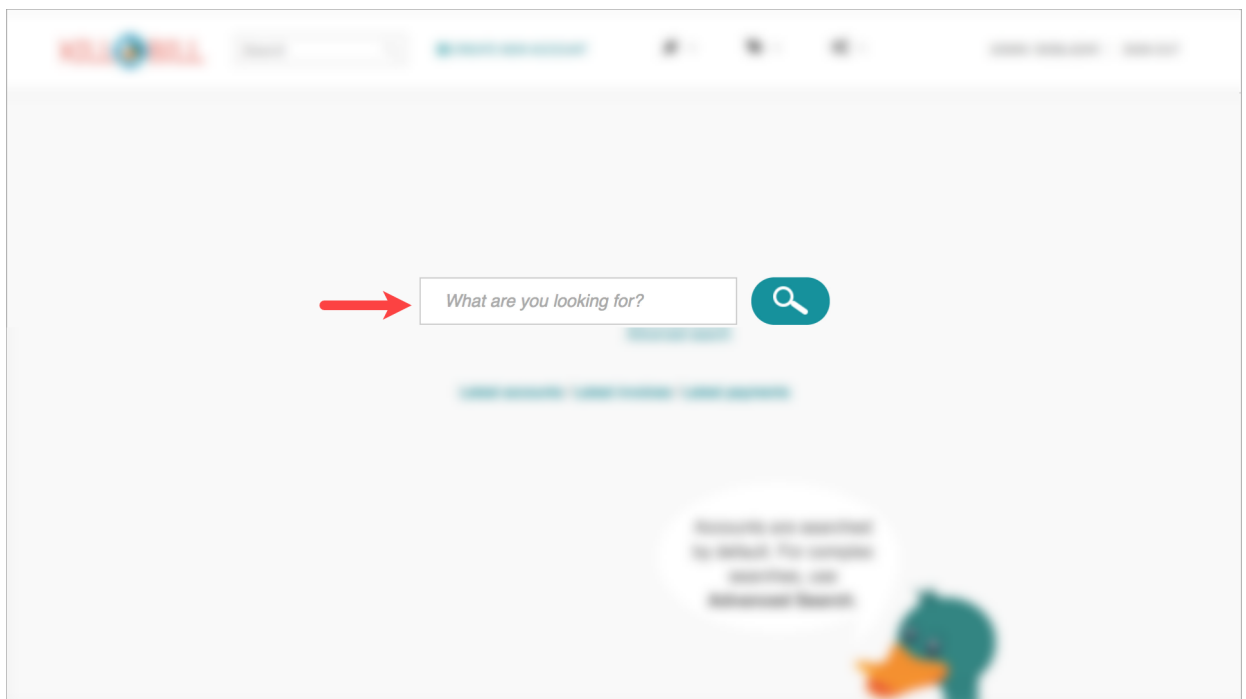
Billing Information

Step 4. Add a Payment Method to the Account

To pay its [invoices](#), an account must have at least one [payment method](#) saved. This section explains how to add a payment method to a customer account.

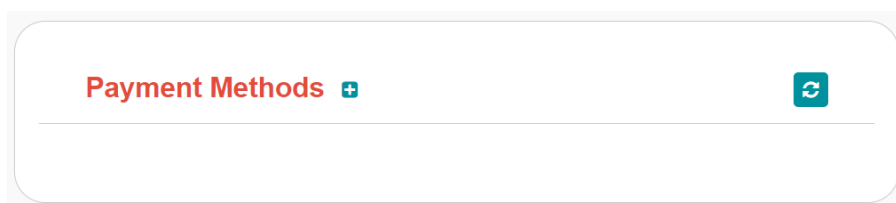
For simplicity, we will create an offline payment method—checks—for the account we created in step 3.

1. Search for and open the customer account. (If you still have the account open from the previous section, you can skip this step.)
 - a. On the main Kauai page, click in the center text box and press the Enter key (or click the search icon).



Kauai displays the accounts you have created so far for the tenant.

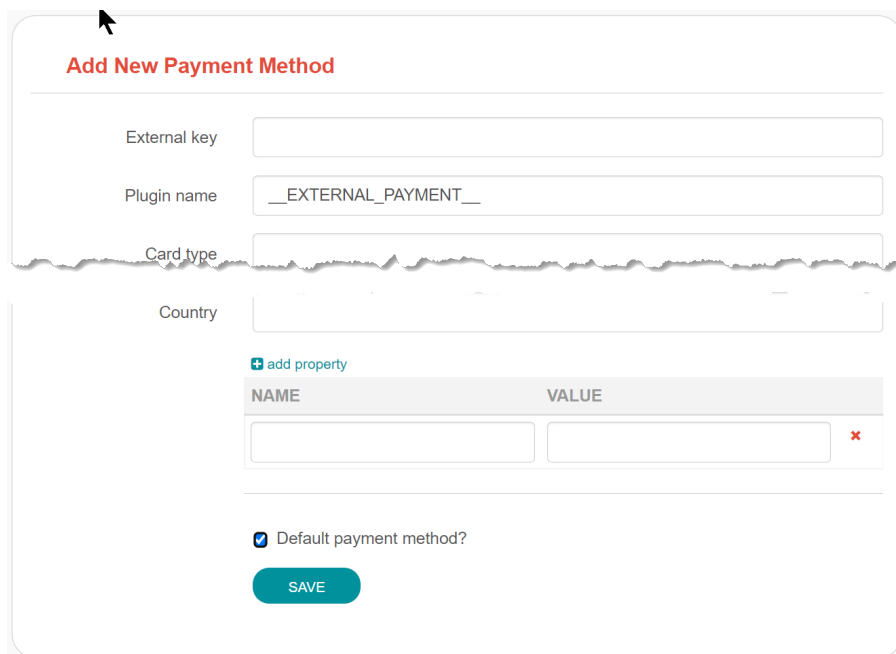
- b. Click on an account, which opens the Account page for the customer.
2. On the lower right, click the + sign next to **Payment Methods**.



Kauai opens the Add New Payment Method screen.

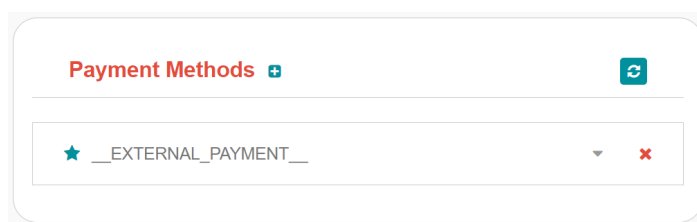
3. Verify that `__EXTERNAL_PAYMENT__` appears in the **Plugin name** field and check the **Default**

payment method checkbox.



4. Click the **Save** button.

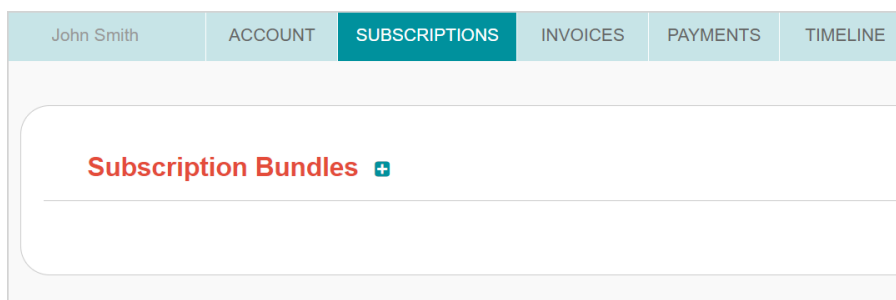
Kaui displays the new payment method as `__EXTERNAL_PAYMENT__` in the **Payment Method** section. The filled star to its left indicates it is the *default* payment method:



Step 5. Set Up a Subscription for the Account

You are now ready to create a [subscription](#) for the customer.

1. On the customer Account page, click **Subscriptions** on the sub-menu.



2. Next to **Subscription Bundles**, select the plus icon (+).

NOTE

Note: A subscription bundle is a collection of subscriptions. A bundle contains one base subscription and zero or more add-ons.

Kill Bill opens the Add New Subscription screen.

3. In the **Plan** field, select **standard-monthly**.

Add New Subscription

Bundle Key

Subscription Key

Plan standard-free ▼

Price Override

☒ Immediate Creation
☐ Specify a date

SAVE

4. Click **Save**.
5. The customer is now subscribed to the plan, and it is displayed on the Subscriptions page:

Raquel Vasquez ACCOUNT **SUBSCRIPTIONS** INVOICES PAYMENTS TIMELINE TAGS CUSTOM FIELDS QUEUES AUDIT

Subscription was successfully created

Subscription Bundles +

Bundle ID b11a648d-dd18-4165-884a-c7ef7faffef0

CATEGORY	NAME	PHASE TYPE	START DATE	CHARGED THROUGH DATE	CANCEL INFORMATION	ACTIONS
Base	standard-free	EVERGREEN	2022-07-29	2022-08-29		Change Cancel Update BCD

Step 6. View the Generated Invoice

To view the invoice that Kill Bill automatically generated for the subscription (step 5):

1. On the account page, click **Invoices** on the sub-menu:

Invoices

NUMBER	DATE	AMOUNT	BALANCE	STATUS
13	2022-08-17	\$24.95	\$0	COMMITTED

NOTE

Note: Kill Bill immediately generated the invoice for the first month of the subscription because the plan (on which the subscription is based) has no trial period and because billing is performed *in advance* by default.

2. Click on the invoice number to see the invoice details:

Invoice 13
[View Customer Invoice Html](#)

Invoice date 2022-08-17
Target date 2022-08-17

DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	COMMENTS
standard-monthly	2022-08-17	2022-09-17	0463ee1c-906b-4582-9dc4-cd55fdbaddf3	\$24.95 (USD)	Adjust
				INVOICE TOTAL:	\$24.95 (USD)
				CREDITS:	\$0 (USD)
				REFUNDED:	\$0 (USD)
				BALANCE:	\$0 (USD)

Payment Details

Payment 1
External key a9cd2153-08c3-4ee8-9699-8490da219776

DATE	TYPE	AMOUNT	TRANSACTION EXTERNAL KEY	FIRST ID	SECOND ID	GATEWAY CODE	GATEWAY MESSAGE	STATUS
2022-08-17	PURCHASE	\$24.95 (USD)	cc5c951e-308c-4e51-b594-c3f168c9d292					SUCCESS

Because the account has a default payment method defined (`__EXTERNAL_PAYMENT__`), Kill Bill automatically pays the amount due on the invoice and displays the payment information below the invoice detail.