

Set Up Kill Bill Using 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 [Set Up Kill Bill with the API](#).

Additional Resources

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

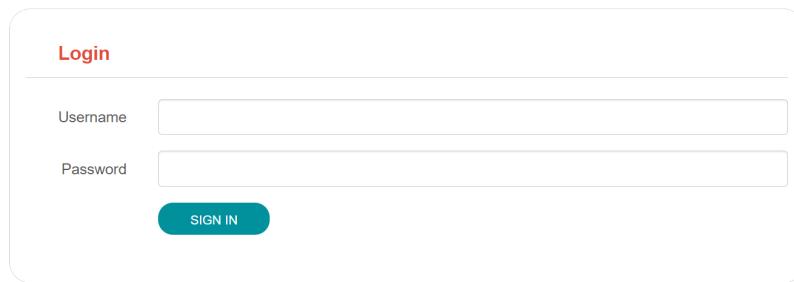
Before You Begin

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

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:



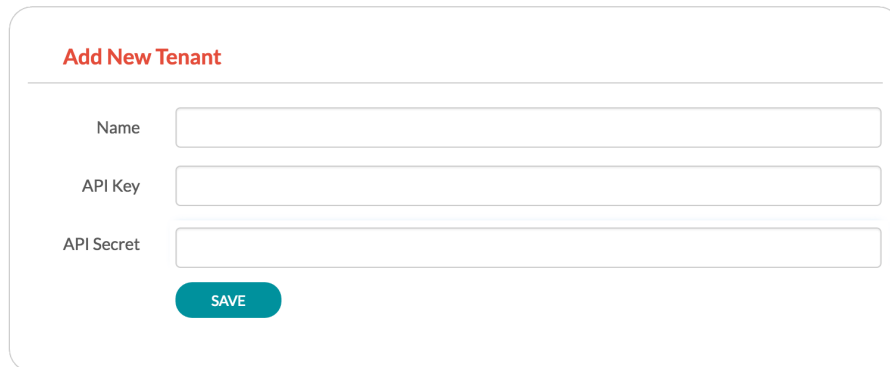
Login

Username

Password

SIGN IN

Kauai prompts you to create a tenant:



Add New Tenant

Name

API Key

API Secret

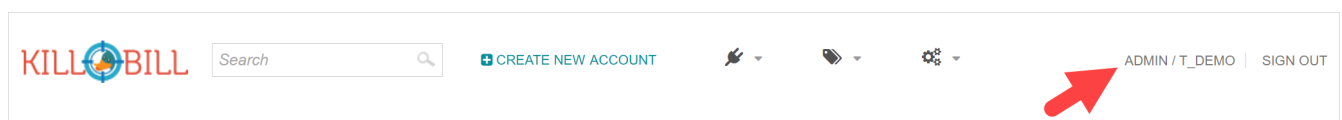
SAVE

2. Fill in the fields:

- **Name** refers to the tenant name.
- For **API Key**, use **bob**, and for **API Secret**, use **lazar** in the rest of this guide.

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.

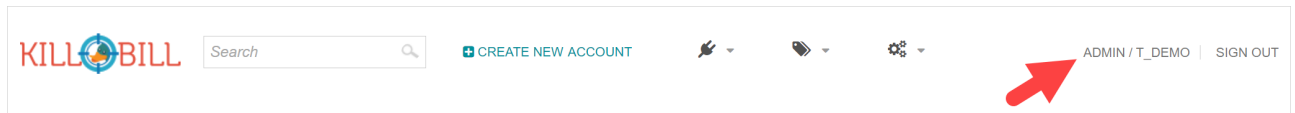
For this tutorial, instead of starting with the XML catalog, you'll learn how to create a simple catalog in Kauai and configure it with two plans.

NOTE

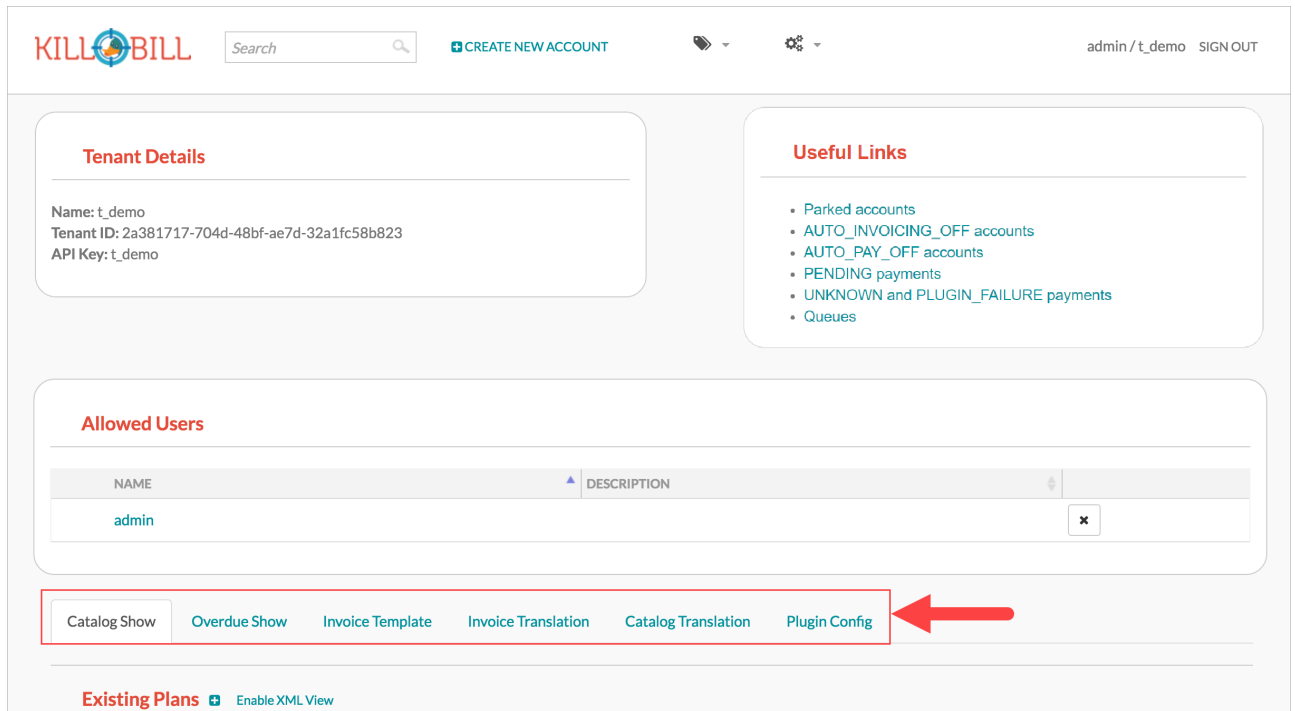
Note The simple catalog supports a *subset* of the regular XML catalog features and isn't intended to serve as a catalog in production. For more details on the simple catalog, see the "[Simple Plan](#)" section in the *API Reference*.

To create the simple catalog and two plans:

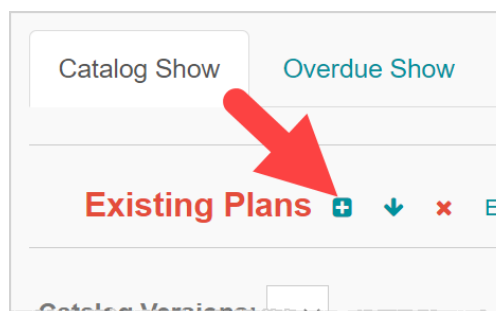
1. Click the tenant name in the upper right corner:



Kauai 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.



Kauai 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:

Existing Plans + - x Enable XML View

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

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

Step 3. Create an Account

In this section, we will create a customer account, 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 John Smith

First name length 4

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:

KILLBILL Search CREATE NEW ACCOUNT

John Smith ACCOUNT SUBSCRIPTIONS INVOICES PAYMENTS TIMELINE TAGS CUSTOMER

Account was successfully created

Account Information Edit Close

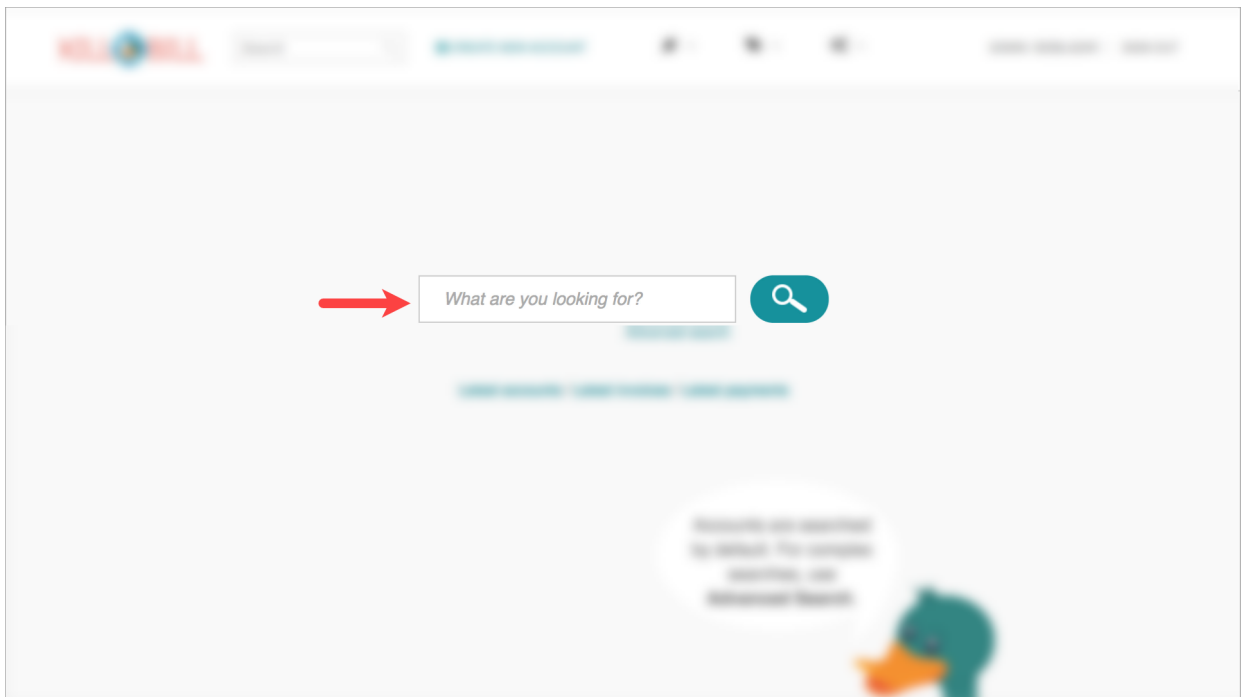
Billing Information

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.

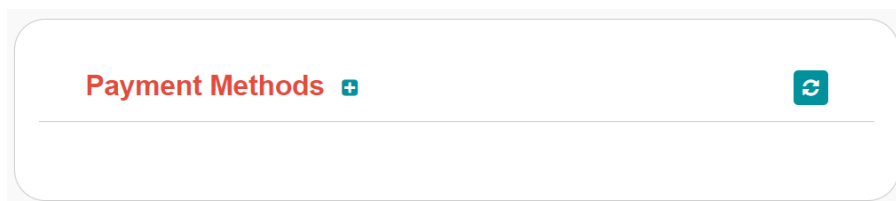
For simplicity, we will create an offline payment method - checks - for the account we created in step 3.

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.

Add New Payment Method

External key

Plugin name

Card type

Country

[+ add property](#)

NAME	VALUE
<input type="text"/>	<input type="text"/>

☒ Default payment method?

SAVE

4. Click the **Save** button.

Kauai 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:

Payment Methods [+](#)

★ __EXTERNAL_PAYMENT__	▼	✖
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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.

John Smith ACCOUNT **SUBSCRIPTIONS** INVOICES PAYMENTS TIMELINE

Subscription Bundles [+](#)

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

NOTE

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

Kill Bill opens the Add New Subscription screen.

- 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

- Click **Save**.
- 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-c7ef7fafef0

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):

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

Invoices				
NUMBER	DATE	AMOUNT	BALANCE	STATUS
8	2022-07-29	\$24.95	\$24.95	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 8

[View Customer Invoice Html](#)

Invoice date

2022-07-29

Target date

2022-07-29

DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	COMMENTS	
standard-monthly	2022-07-29	2022-08-29	1ee7b728-66d8-40f0-8067-ea1d1af8ace3	\$24.95 (USD)		Adjust
				INVOICE TOTAL:	\$24.95 (USD)	
				CREDITS:	\$0 (USD)	
				REFUNDED:	\$0 (USD)	
				BALANCE:	\$24.95 (USD)	

If a payment gateway had been configured with Kill Bill *and* the account had a valid payment method with the gateway, Kill Bill would have immediately paid this invoice. In that case, you would see the relevant payment information under the invoice detail.