Quick Start with Kaui

Kaui is the back-office user interface for Kill Bill. This guide walks you through several tasks in Kaui. 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 Kaui). For more information, see API Client in the *Getting Started* guide.

Before You Begin

Make sure you have installed Kill Bill and Kaui and launched them per the *Getting Started* guide.

Additional Resources

- *API Reference*
- *Kaui Guide*
- Kaui 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 Kaui.

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

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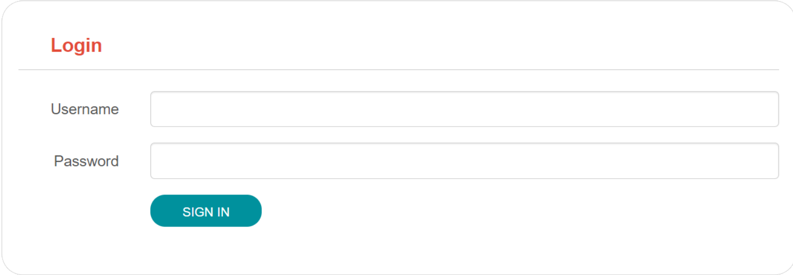
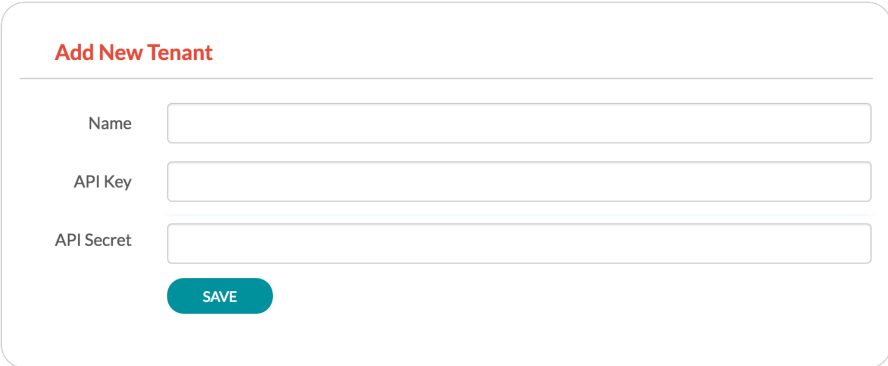
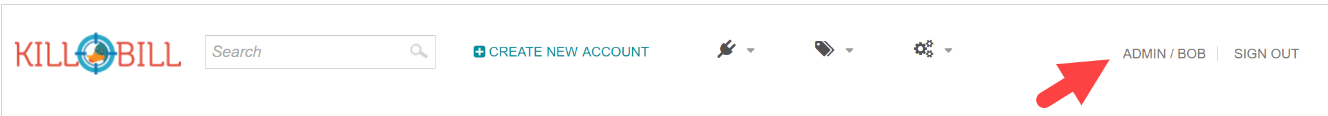


Kaui prompts you to create a tenant:



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 Kaui 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 Kaui 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:

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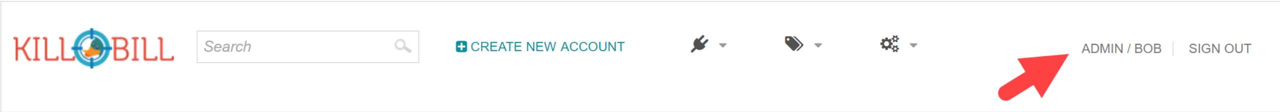
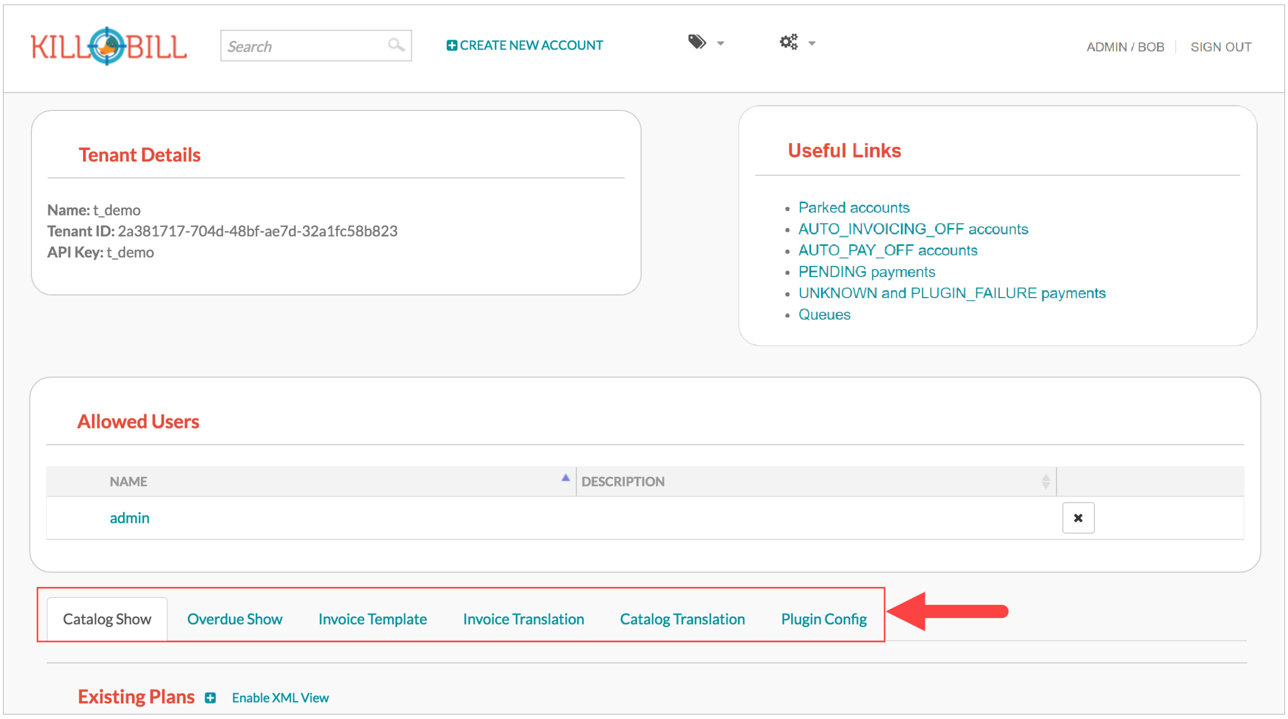
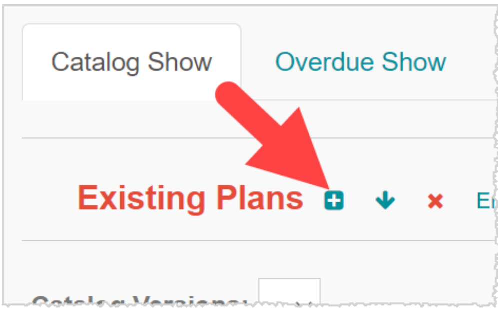
1. Click the tenant name in the upper right corner:



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

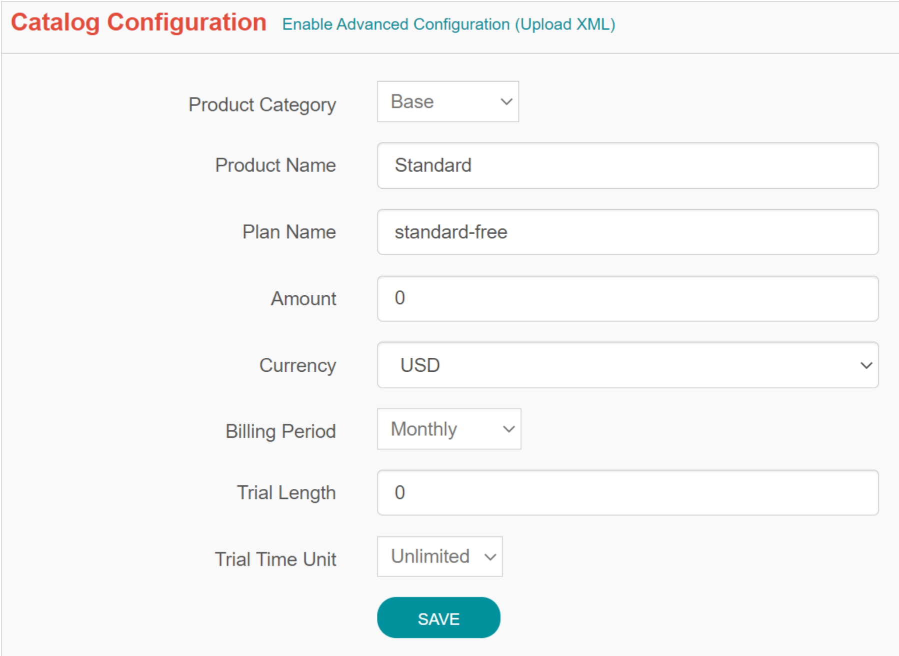


2. Click the plus sign next to Existing Plans.



   Kaui opens the Catalog Configuration screen.

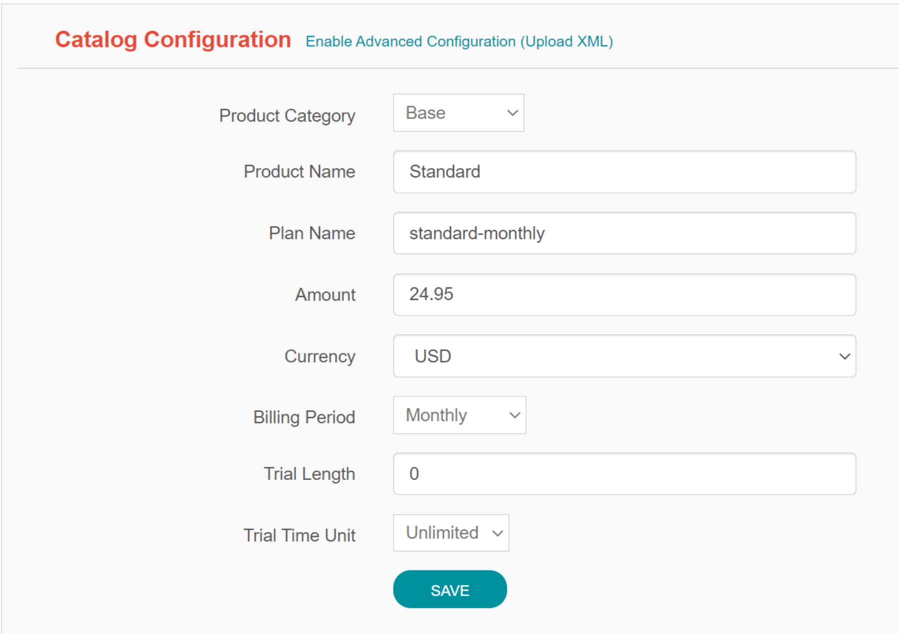
3. Fill in the fields as shown below:



4. Click the **Save** button.

   Kaui returns to the Tenant Configuration screen.

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



7. 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:

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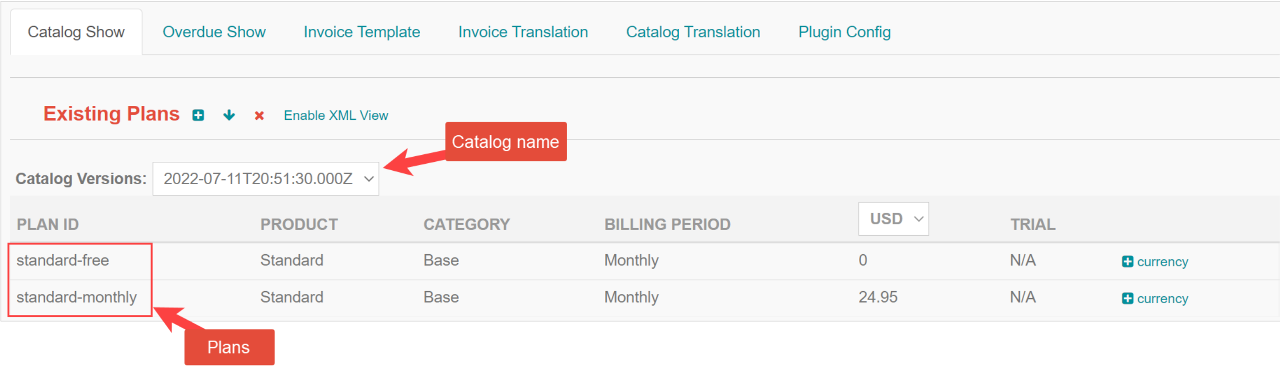


Step 3. Create an Account

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.

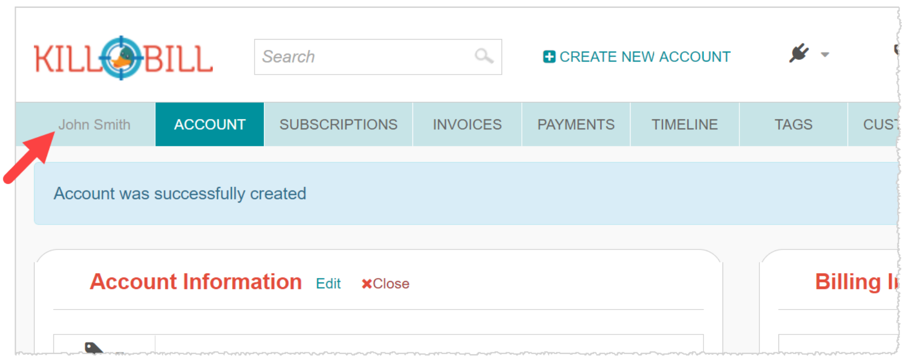
1. At the top of any Kaui screen, click **Create New Account.**

   Kaui opens the Add New Account screen.

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

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:

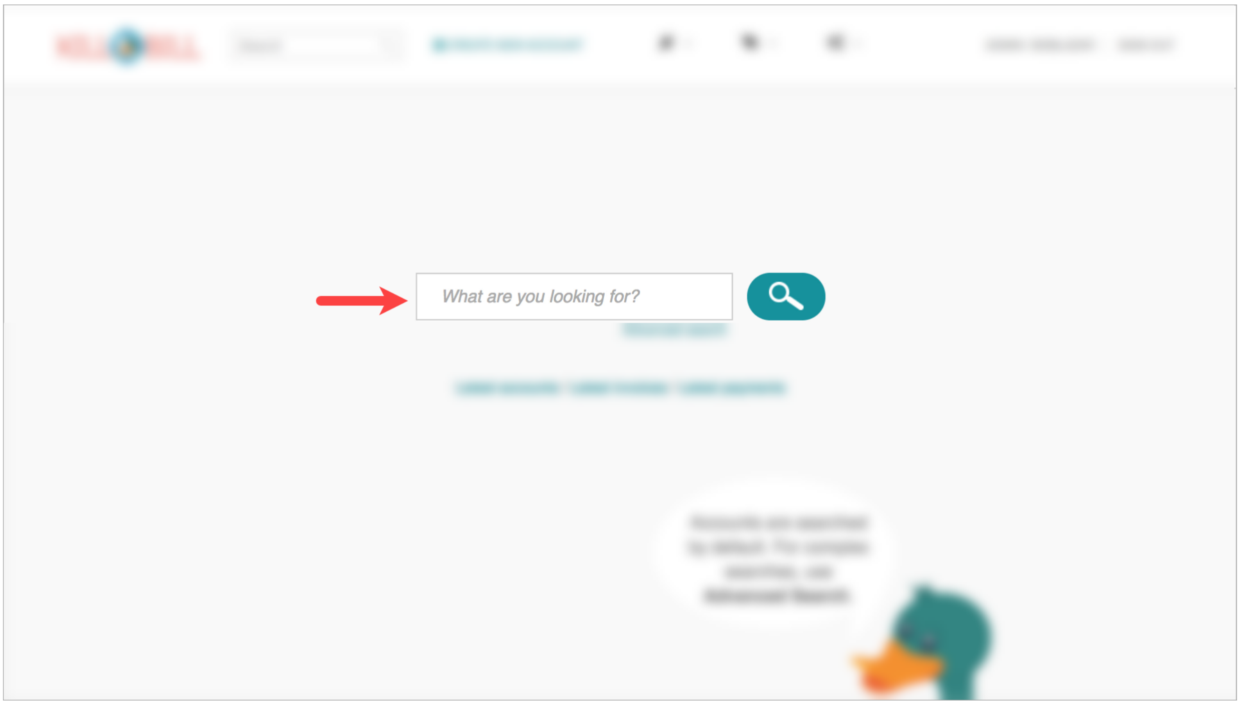


Step 4. Add a Payment Method to the Account

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.

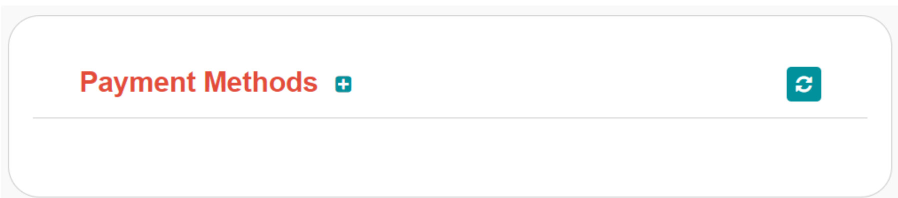
For simplicity, we will create an offline payment method—checks—for the account we created in step 3.

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 Kaui page, click in the center text box and press the Enter key (or click the search icon).



   Kaui 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**.



   Kaui opens the Add New Payment Method screen.

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

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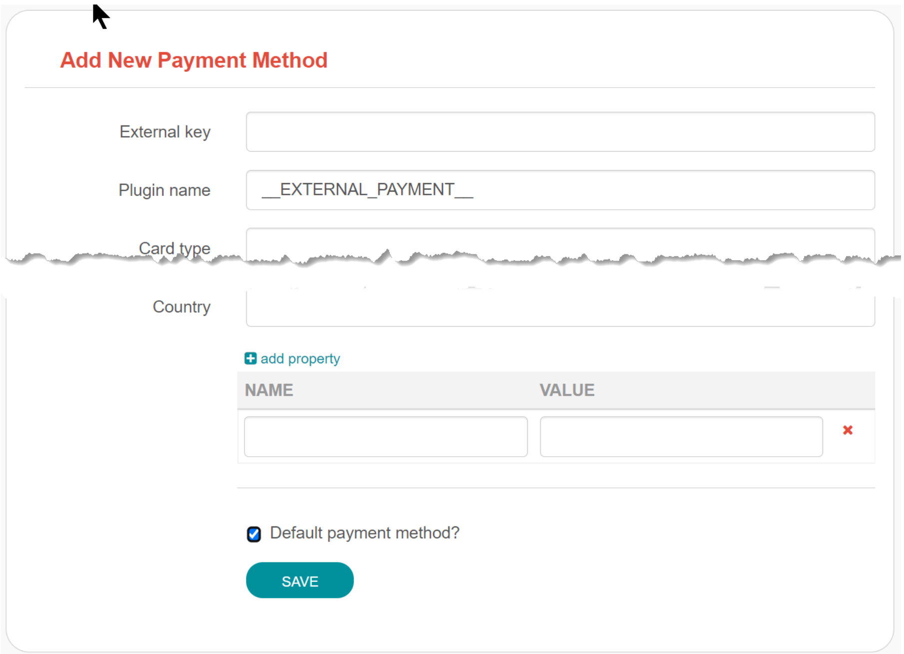
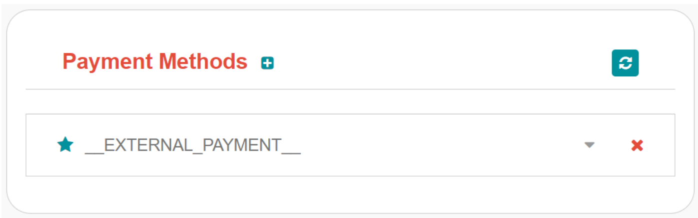
payment method checkbox.



4. Click the **Save** button.

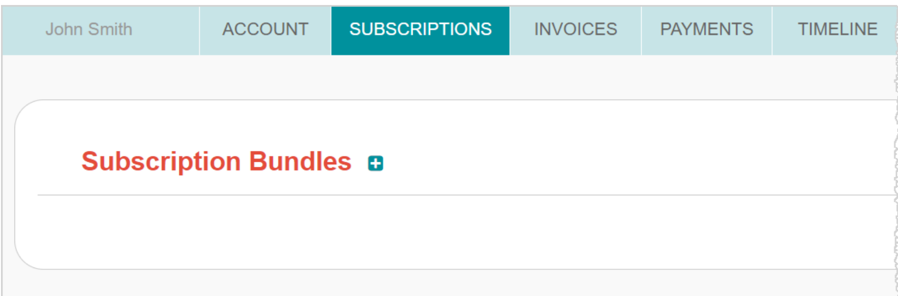
   Kaui displays the new payment method as ___EXTERNAL_PAYMENT___ in the **Payment Method** section. The filled star to its left indicates it is the *default* payment method:



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.

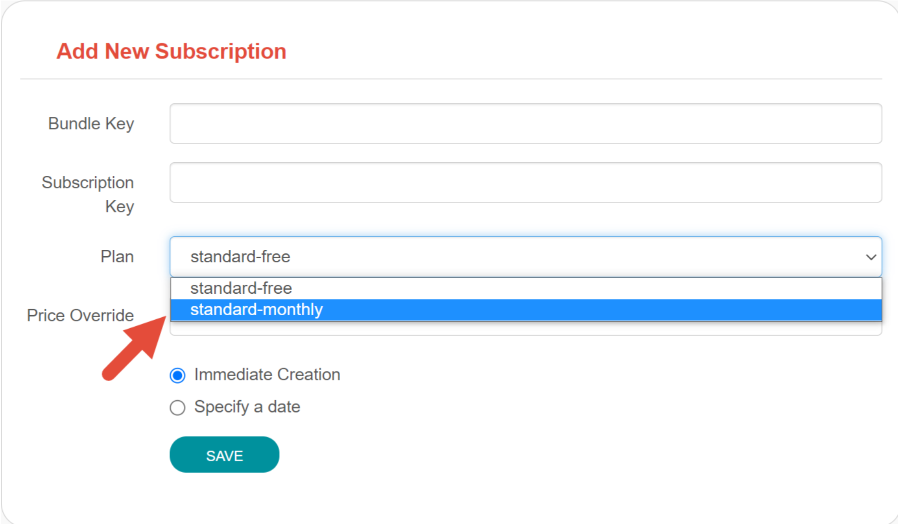


2. Next to **Subscription Bundles**, select the plus icon (+).

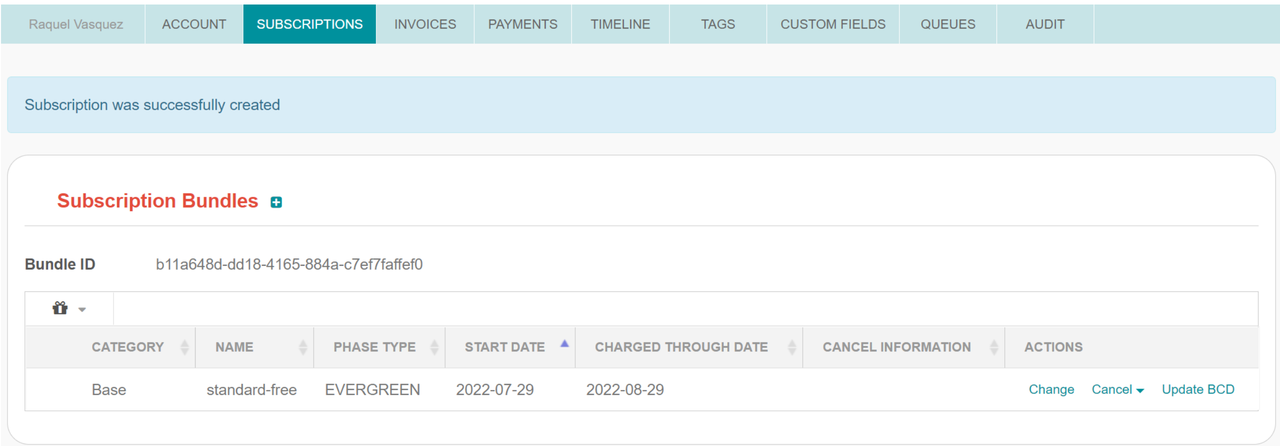
NOTE	**Note:** A subscription bundle is a collection of subscriptions. A bundle contains one base subscription and zero or more add-ons.

Kill Bill opens the Add New Subscription screen.

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



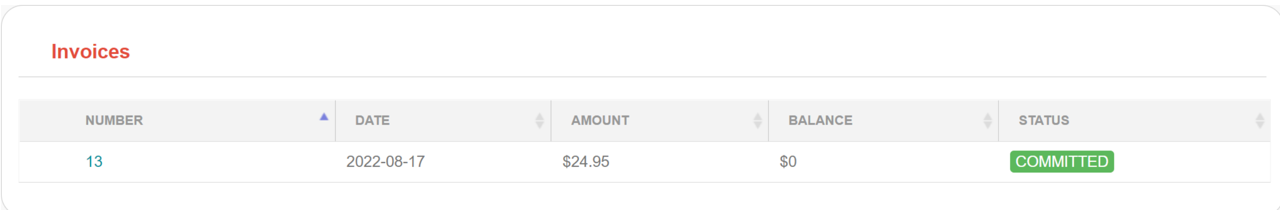
4. Click **Save**.
5. The customer is now subscribed to the plan, and it is displayed on the Subscriptions page:



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:



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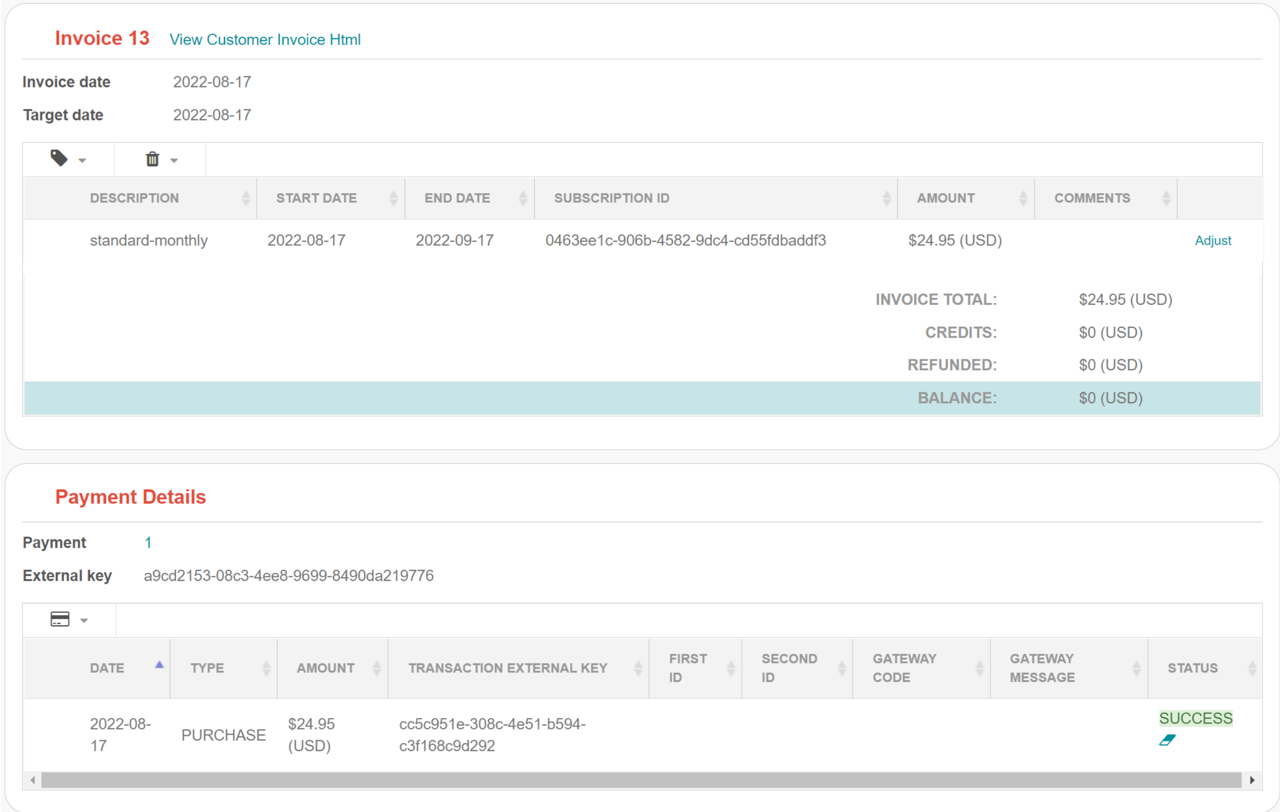
NOTE	**Note:** Kill Bill immediately generated the invoice for the first month of the subscription because the plan (on which the subscription is based) has no trial period and because billing is performed *in advance* by default.

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



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.