

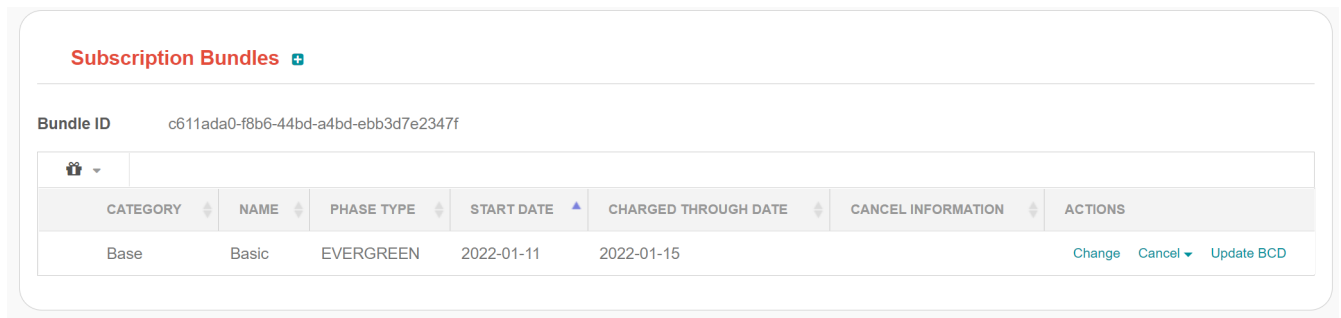
Overview

This section helps you get familiar with the Subscriptions area of Kill Bill.

For more information on subscriptions, see the [Subscription Guide](#).

Open Subscriptions Page

To view the subscriptions for an account, open the account and click **Subscriptions** on the sub-menu. This area of Kauai lists the subscriptions associated with an account.



The screenshot shows the 'Subscription Bundles' section of the Kill Bill interface. It includes a header with a plus sign icon, a 'Bundle ID' field with the value 'c611ada0-f8b6-44bd-a4bd-ebb3d7e2347f', and a table with columns: CATEGORY, NAME, PHASE TYPE, START DATE, CHARGED THROUGH DATE, CANCEL INFORMATION, and ACTIONS. The table contains one row with the following data: CATEGORY: Base, NAME: Basic, PHASE TYPE: EVERGREEN, START DATE: 2022-01-11, CHARGED THROUGH DATE: 2022-01-15, CANCEL INFORMATION: (empty), and ACTIONS: Change, Cancel, Update BCD.

Subscription Bundles +						
Bundle ID c611ada0-f8b6-44bd-a4bd-ebb3d7e2347f						
CATEGORY	NAME	PHASE TYPE	START DATE	CHARGED THROUGH DATE	CANCEL INFORMATION	ACTIONS
Base	Basic	EVERGREEN	2022-01-11	2022-01-15		Change Cancel Update BCD

On the Subscriptions page, you can:

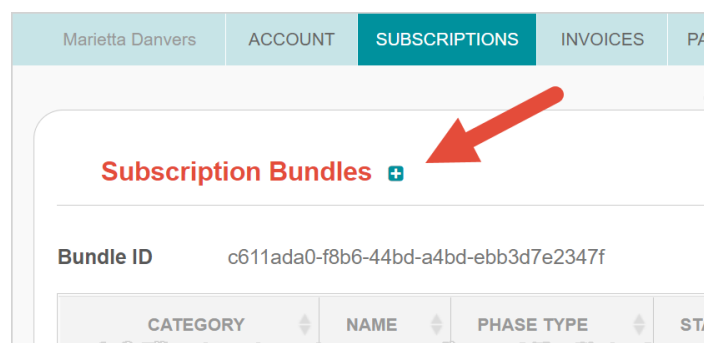
- [Add a subscription](#)
- [Add an add-on product to a subscription](#)
- [Pause and resume a subscription](#)
- [Change a subscription's plan and amount](#)
- [Cancel a subscription](#)
- [Update the billing cycle day \(BCD\) for the subscription](#)

Add a Subscription



Note: To create a subscription, you must have at least one product and one plan defined in the catalog.

1. On the Subscriptions page, click the plus sign to the right of **Subscription Bundles**:



Kauai displays the Add New Subscription screen:

Add New Subscription

Bundle Key

Subscription Key

Plan

Basic

▼

Price Override

☒ Immediate Creation

☐ Specify a date

SAVE

2. Fill in the fields. For field information, see [Add Subscription Field Descriptions](#).
3. Click the **Save** button.

Add Subscription Field Descriptions

Field	Description
Bundle Key	If you leave this field blank, Kill Bill generates a unique bundle key. If necessary, you can enter a different bundle key.
Subscription Key	If you leave this field blank, Kill Bill generates a unique subscription key. If necessary, you can enter a different subscription key.
Plan	Select the plan from the dropdown list. These options come from the plans defined in the catalog.
Price Override	If you need to override the price for the plan you've selected, enter an amount in this field.
Immediate Creation	Select this option to start the subscription immediately.
Specify a date	To define a specific date on which the subscription begins, select this option, and choose a date from the Date field that appears.

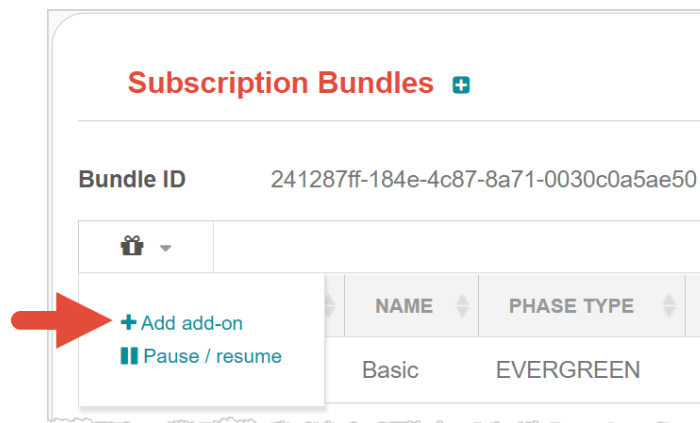
Add an Add-On Product to a Subscription

This section explains how to add an add-on product to a customer's subscription.



Note: To add an add-on to a subscription, the add-on must exist in the catalog *and* be available in the base plan.

1. Open the account and click **Subscriptions** on the sub-menu.
2. Hover over the gift icon and click **Add add-on**:



Kaui opens the Add New Add-On screen:

Add New Add-On

Subscription Key

Plan

Auto-update-monthly

Price Override

☒ Immediate Creation

☐ Specify a date

SAVE

3. Fill in the fields. For field information, see [Add New Add-On Field Descriptions](#).

Add New Add-On Field Descriptions

Field	Description
Subscription Key	Note that this subscription key applies to the add-on, not the original subscription. If you leave this field blank, Kill Bill generates a unique subscription key. If necessary, you can enter a different subscription key.
Plan	Select the add-on to add to the subscription.
Price Override	If you need to override the price for the add-on you've selected, enter an amount in this field.
Immediate Creation	Select this option to start the subscription immediately.
Specify a date	To define a specific date on which the subscription begins, select this option, and choose a date from the Date field that appears.

Pause/Resume Subscriptions

Pausing and resuming happens at the subscription bundle level. In other words, pause/resume affects *all* subscriptions and add-ons in the customer's account.



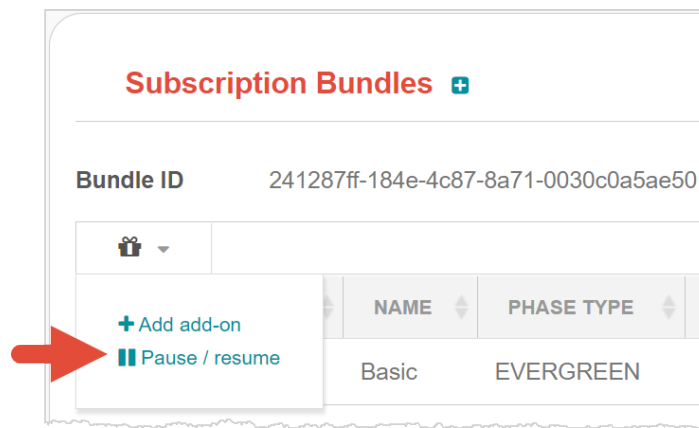
Note: While a customer's subscription bundle is paused, you cannot add any new subscriptions or add-ons to the account.

You can use the pause/resume feature to:

- Stop a subscription bundle indefinitely
- Reactivate a paused subscription bundle
- Set a specific time period during which the bundle is paused and then automatically resumed

To pause or resume a subscription bundle, perform the following steps:

1. Open the account and click **Subscriptions** on the sub-menu.
2. Hover over the gift icon and click **Pause / Resume**:



Kaui opens the Pause/Resume screen:

3. Fill in the following fields:

- **Pause date**—The calendar date on which to temporarily stop the subscription bundle. To resume a paused subscription, leave this field blank.
- **Resume date**—The calendar date on which to remove the pause from the subscription(s). To set a pause to continue indefinitely, leave this field blank.
- **Comment**—The text you enter here displays on the [\[Timeline\]](#) page after saving the

pause/resume. Adding comments is optional.

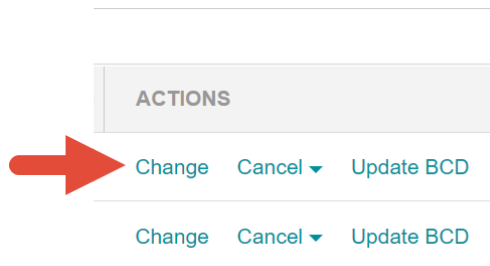
4. Click the **Pause / Resume** button. Kaui displays a success message at the top of the screen.

Change a Subscription

In Kaui, you can change a customer's subscription from one plan to another plan. You can also define a different price than what is set in the catalog and when the change takes effect.

To change an account's subscription:

1. Open the account and click **Subscriptions** on the sub-menu.
2. In the **Actions** column (far right), click **Change**.



Kaui opens the Change Subscription screen:

A screenshot of the 'Change Subscription' form. The title 'Change Subscription' is at the top in red. Below it, there are three fields: 'New plan' with a dropdown menu showing 'Basic', 'Price Override' with a text input field, and three radio buttons: 'Default policy' (selected), 'Specify Policy', and 'Specify a date'. At the bottom is a green 'SAVE' button.

3. In the **New plan** field, select a different plan.
4. If you need to override the price for the plan you've selected, enter the amount in the **Price Override** field.
5. To accept the system's default policy for changing subscriptions (**END_OF_TERM**), leave **Default policy** selected and click **Save**.

OR

You can select one of two other options: **Specify Policy** or **Specify a date**. This will override the policy defined in the catalog for the plan. For information on this topic, see "[Plan Change Timing](#)" in the *Subscription Guide*.

- **Specify Policy:** You can select either **IMMEDIATE** or **END_OF_TERM**. For information on these two policies, see "[Subscription Alignment Rules](#)" in the *Subscription Guide*.

☐ Default policy
☒ Specify Policy
☐ Specify a date

Policy

IMMEDIATE
END_OF_TERM

SAVE

- **Specify a date:** Click on this and choose a date from the **Change Date** calendar that appears. Make sure to choose an effective date that is in the future.

☐ Default policy
☐ Specify Policy
☒ Specify a date

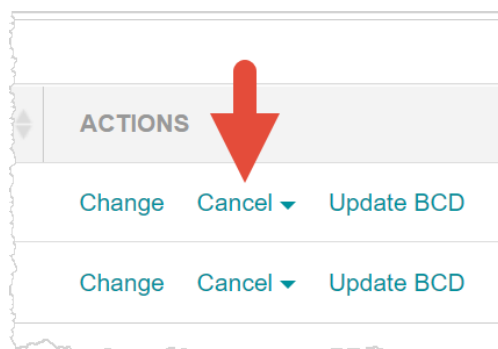
Change Date

SAVE

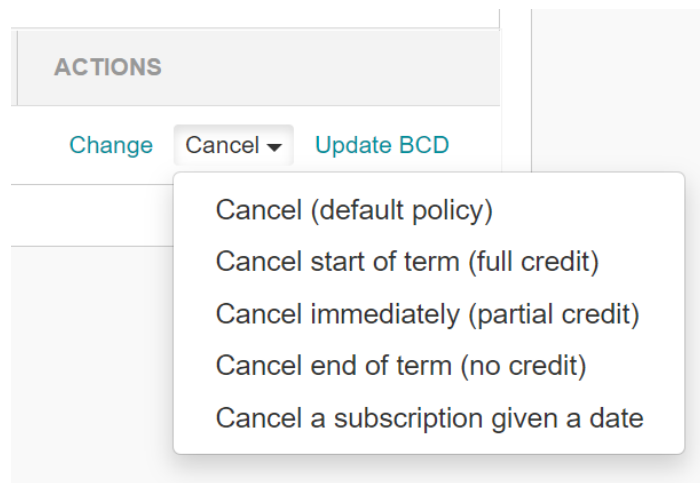
Cancel a Subscription

To cancel an account's subscription:

1. Open the account and click **Subscriptions** on the sub-menu.
2. In the **Actions** column (far right), click **Cancel**.



Kaui displays several options. The option you select defines how Kill Bill handles billing for the canceled subscription:



Cancellation Options

Option	Description
Cancel (default policy)	Uses the default policy specified for the plan in the catalog.
Cancel start of term (full credit)	Cancels the subscription immediately and refunds whatever amounts have been paid toward the subscription.
Cancel immediately (partial credit)	Cancels the subscription immediately and applies a partial credit to the account based on how much of the service has been consumed.
Cancel end of term (no credit)	Cancels the subscription at the end of the billing period with no refund to the customer. Note that after using this option to cancel, you can still reinstate the customer (i.e., reverse the cancellation).
Cancel a subscription given a date	<p>If you select this option, Kaui displays a pop-up from which to choose a date:</p> <p>image::CancelSubGivenDate.png[width=350,align="center"]</p> <p>Use requested date for billing: To set the entitlement date and billing date the same as the date you just selected, check this box.</p> <p>Otherwise, if you leave the checkbox empty, the entitlement date is the same as you just selected BUT the billing date defaults to <i>immediate</i>.</p>

Update the Billing Cycle Day

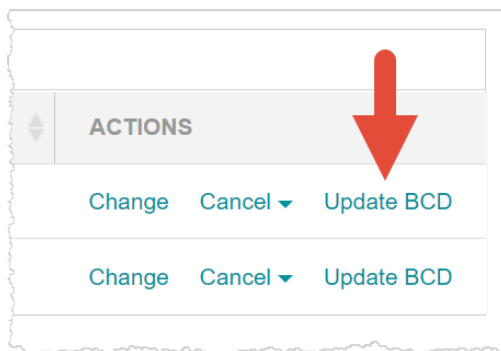
Follow the steps below to update the billing cycle day (BCD) defined for a subscription. These steps assume the subscription is billed on a monthly basis.

If you update the BCD with these steps, the new BCD overrides what is specified in the billing alignment rules in the catalog.



Note: These steps do not change the account billing cycle day specified in the "Billing Info" section on the Account page.

1. Open the account and click **Subscriptions** on the sub-menu.
2. In the **Actions** column (far right), click **Update BCD**.



Kaui opens the Update Subscription BCD screen:

A screenshot of the 'Update Subscription BCD' form. The title 'Update Subscription BCD' is in red at the top. Below the title, there are two input fields. The first field is labeled 'Bill Cycle Day' and contains the value '12'. The second field is labeled 'Effective Date' and contains the value '2022-01-12'. At the bottom of the form, there is a teal button labeled 'SAVE'.

3. In the **Billing Cycle Day** field, Kaui displays the currently defined BCD. Enter the number for the day of the month on which to bill.
4. For this change to be effective immediately, leave the **Effective Date** field at its current setting. Otherwise, you can define a later date for this change to occur.



Note: If **Effective Date** is the same as today's date, you will not see this change take place immediately.

5. Click the **Save** button. On the Account page, the **Next Invoice Date** is adjusted to reflect the new BCD.