

# 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 flows 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 create overdue (dunning) flows for a tenant:

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

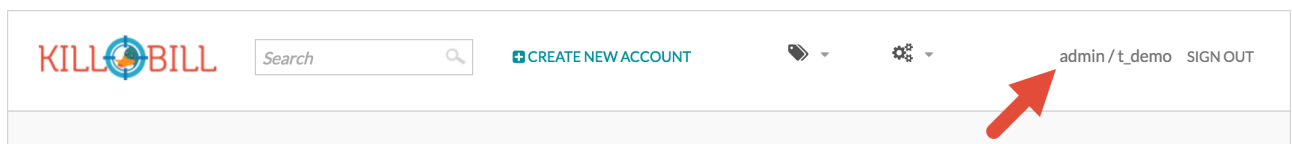
## Additional Overdue Resources

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

## View Overdue Configuration

If any overdue (dunning) flows 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

## Create 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

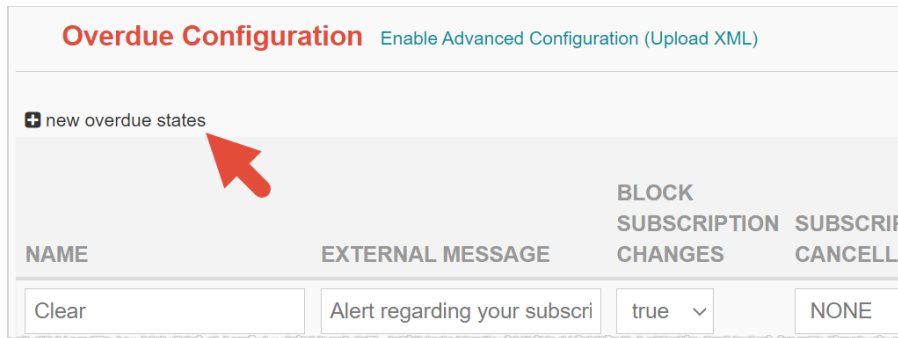
| NAME  | EXTERNAL MESSAGE | BLOCK SUBSCRIPTION CHANGES | SUBSCRIPTION CANCELLATION | DAYS SINCE EARLIEST UNPAID INVOICE | TAG INCLUSION | TAG EXCLUSION | NUMBER OF UNPAID INVOICES | TOTAL UNPAID INVOICE BALANCE |
|-------|------------------|----------------------------|---------------------------|------------------------------------|---------------|---------------|---------------------------|------------------------------|
| Clear |                  | false                      | NONE                      | 0                                  | NONE          | NONE          | 0                         | 0                            |

SAVE

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

Descriptions table.

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



- When you are done adding configuration rows, click the **Save** button. Kauai displays a success message at the top of the screen and displays the new overdue flow(s) on the Overdue Show tab.

|              |              |                  |                     |                     |               |
|--------------|--------------|------------------|---------------------|---------------------|---------------|
| Catalog Show | Overdue Show | Invoice Template | Invoice Translation | Catalog Translation | Plugin Config |
|--------------|--------------|------------------|---------------------|---------------------|---------------|

| <b>Existing Overdue Config</b> + View Overdue Xml |                    |   |  |
|---|--------------------|---|--|
| NAME  | EXTERNAL MESSAGE   | ACTIONS   | CONDITIONS   |
| WARNING   | Warning State      |   | <ul style="list-style-type: none"><li>Time Since earliest unpaid invoice &gt;= 5DAYS</li><li>Number of unpaid invoices &gt;= 0</li><li>Total unpaid invoice balance &gt;= 0</li></ul>  |
| CANCELLATION                                      | Cancellation state | <ul style="list-style-type: none"><li>Block changes:true</li><li>Cancel subscriptions:true (policy:END_OF_TERM)</li></ul> | <ul style="list-style-type: none"><li>Time Since earliest unpaid invoice &gt;= 10DAYS</li><li>Number of unpaid invoices &gt;= 0</li><li>Total unpaid invoice balance &gt;= 0</li></ul> |



**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. |

| Field                              | Description  |
|------------------------------------|--|
| Subscription Cancellation          | <p>Select the option that describes how Kill Bill behaves regarding a cancellation in this overdue flow:</p> <ul style="list-style-type: none"> <li>• <b>NONE</b>: The subscription is not cancelled.</li> <li>• <b>POLICY_NONE</b>: ??? <i>Maybe some to do with the default cancellation policy in the catalog? Not sure...</i></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.   |
| 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 "<a href="#">Tags</a>" section of the <i>Subscription Guide</i>.</p>  |
| Tag Exclusion                      | 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.   |
| Number of Unpaid Invoices          | Specifies that the overdue flow will occur if the number of unpaid invoices equals or exceeds the specified value.   |
| Total Unpaid Invoice Balance       | Specifies that the overdue action will occur if the total unpaid invoice balance equals or exceeds the specified value.  |

## 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 Kaui.

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 |
|---------------|---------|----------------------------|---------------------------|------------------------------------|---------------|---------------|---------------------------|------------------------------|
|---------------|---------|----------------------------|---------------------------|------------------------------------|---------------|---------------|---------------------------|------------------------------|

**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 success message at the top of the screen and displays the overdue flow(s) on the Overdue Show tab.

|                              |                              |                                  |                                     |                                     |                               |
|------------------------------|------------------------------|----------------------------------|-------------------------------------|-------------------------------------|-------------------------------|
| <a href="#">Catalog Show</a> | <a href="#">Overdue Show</a> | <a href="#">Invoice Template</a> | <a href="#">Invoice Translation</a> | <a href="#">Catalog Translation</a> | <a href="#">Plugin Config</a> |
|------------------------------|------------------------------|----------------------------------|-------------------------------------|-------------------------------------|-------------------------------|

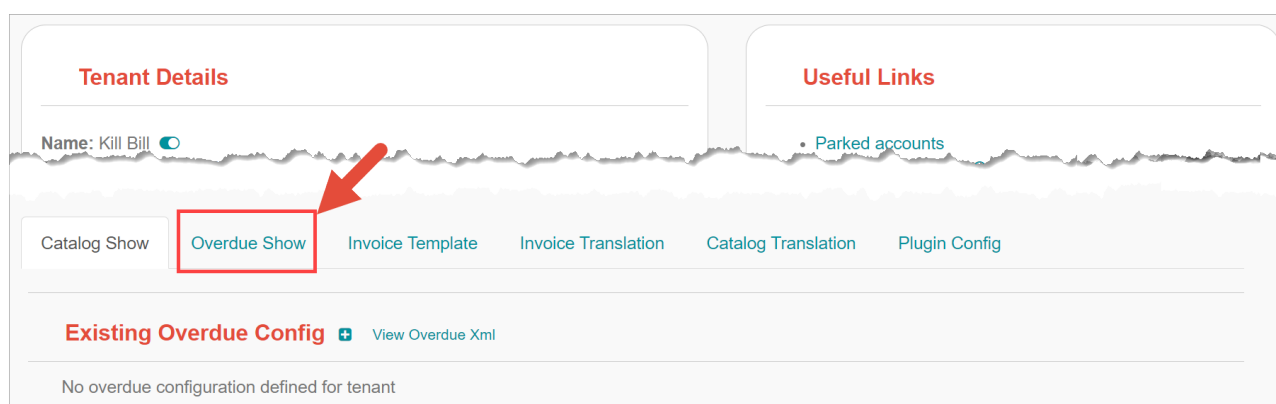
Existing Overdue Config [+](#) [View Overdue Xml](#)

| NAME         | EXTERNAL MESSAGE     | ACTIONS   | CONDITIONS  |
|--------------|----------------------|---|---|
| WARNING      | Reached WARNING      | <ul style="list-style-type: none"> <li>Block changes:true</li> <li>Cancel subscriptions:true (policy:NONE)</li> </ul> | <ul style="list-style-type: none"> <li>Time Since earliest unpaid invoice &gt;= 10DAYS</li> </ul> |
| BLOCKED      | Reached BLOCKED      | <ul style="list-style-type: none"> <li>Block changes:true</li> </ul>  | <ul style="list-style-type: none"> <li>Time Since earliest unpaid invoice &gt;= 14DAYS</li> </ul> |
| CANCELLATION | Reached CANCELLATION |   | <ul style="list-style-type: none"> <li>Time Since earliest unpaid invoice &gt;= 21DAYS</li> </ul> |

## View Overdue Configuration as XML

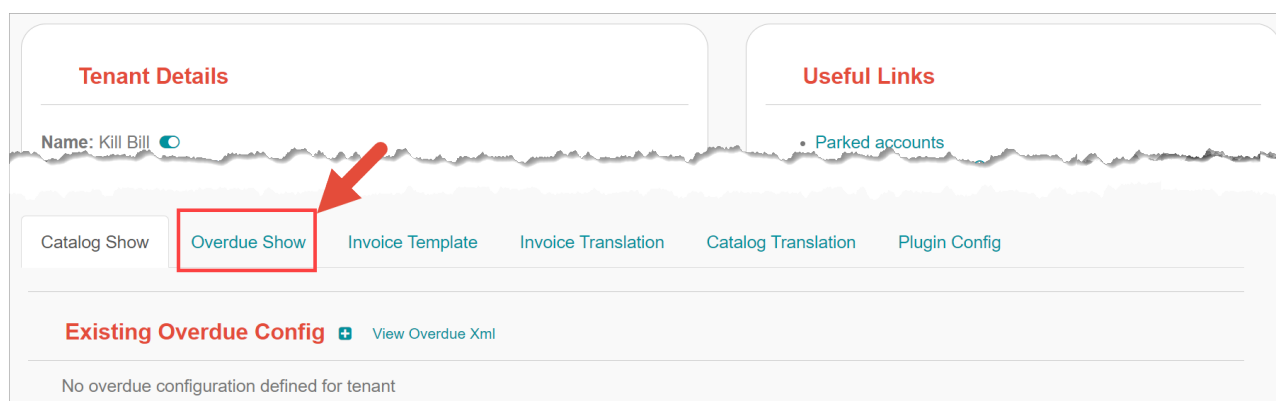
1. Go to the [Overdue Show tab](#) on the Tenant Configuration page.



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

## Delete Overdue Flows

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.

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

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

 new overdue states

| NAME                                 | EXTERNAL MESSAGE  | BLOCK<br>SUBSCRIPTION<br>CHANGES   | SUBSCRIPTION<br>CANCELLATION              | DAYS SINCE<br>EARLIEST<br>UNPAID<br>INVOICE | TAG INCLUSION                     | TAG EXCLUSION                     | NUMBER OF<br>UNPAID<br>INVOICES | TOTAL<br>UNPAID<br>INVOICE<br>BALANCE |   |
|--------------------------------------|---|------------------------------------|---|---|-----------------------------------|-----------------------------------|---------------------------------|---------------------------------------|---|
| <input type="text" value="Alert"/>   | <input type="text" value="Alert regarding your subscri"/> | <input type="text" value="false"/> | <input type="text" value="NONE"/>         | <input type="text" value="5"/>              | <input type="text" value="NONE"/> | <input type="text" value="NONE"/> | <input type="text" value="2"/>  | <input type="text" value="22"/>       |  |
| <input type="text" value="Warning"/> | <input type="text" value="Warning about your subscri"/>   | <input type="text" value="false"/> | <input type="text" value="NONE"/>         | <input type="text" value="10"/>             | <input type="text" value="NONE"/> | <input type="text" value="NONE"/> | <input type="text" value="2"/>  | <input type="text" value="22"/>       |  |
| <input type="text" value="Final"/>   | <input type="text" value="Your subscription has been"/>   | <input type="text" value="true"/>  | <input type="text" value="POLICY_IMMED"/> | <input type="text" value="18"/>             | <input type="text" value="NONE"/> | <input type="text" value="NONE"/> | <input type="text" value="2"/>  | <input type="text" value="22"/>       |  |

**SAVE**

4. Click the **Save** button.

Kaui removes the overdue configuration row(s) from the Overdue Show tab and displays a delete confirmation message.