Overview

For each Kill Bill deployment, you can run multiple tenants. A few examples of running different tenants for your organization incude:

- Software development environments (coding, testing, production, etc.)
- Product lines (brick-and-mortar, online ecommerce, etc.)
- Regions (north, southeast, central, etc.)

Important: If you have already created tenants using the API, you must also add them in Kaui in order for Kaui to recognize them.

Additional Resources

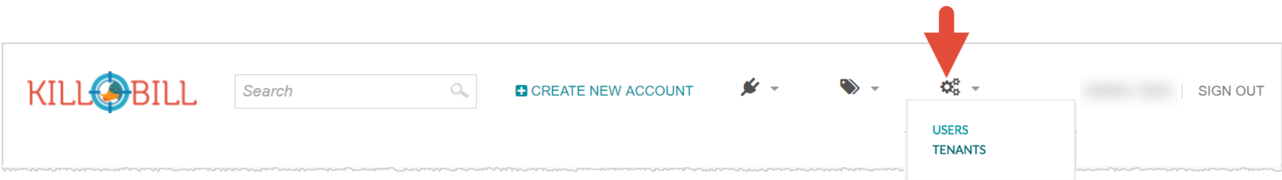
- Tenant API
- Multi-Tenancy and Authorization
- Per Tenant Properties

Create a Tenant

The *first time* that you login after installing Kaui, you will see the Add New Tenant screen. Start at step 3 below.

To create *additional* tenants, follow the steps below.

1. At the top of the screen, click the gears icon ( ) and select **Tenants**.

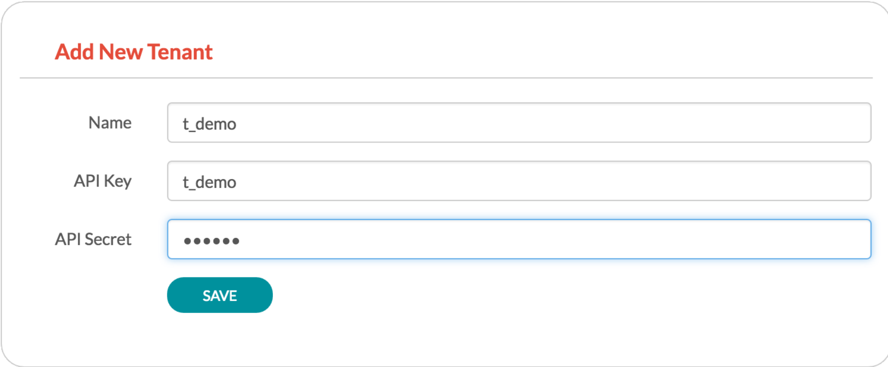


   Kaui displays a list of tenants on the Tenants screen:

   --→ I NEED A SCREENSHOT HERE (don't have permissions) ←--

2. Click the plus sign ( ) next to **Kaui Tenants**.

   Kaui displays the Add New Tenant screen:

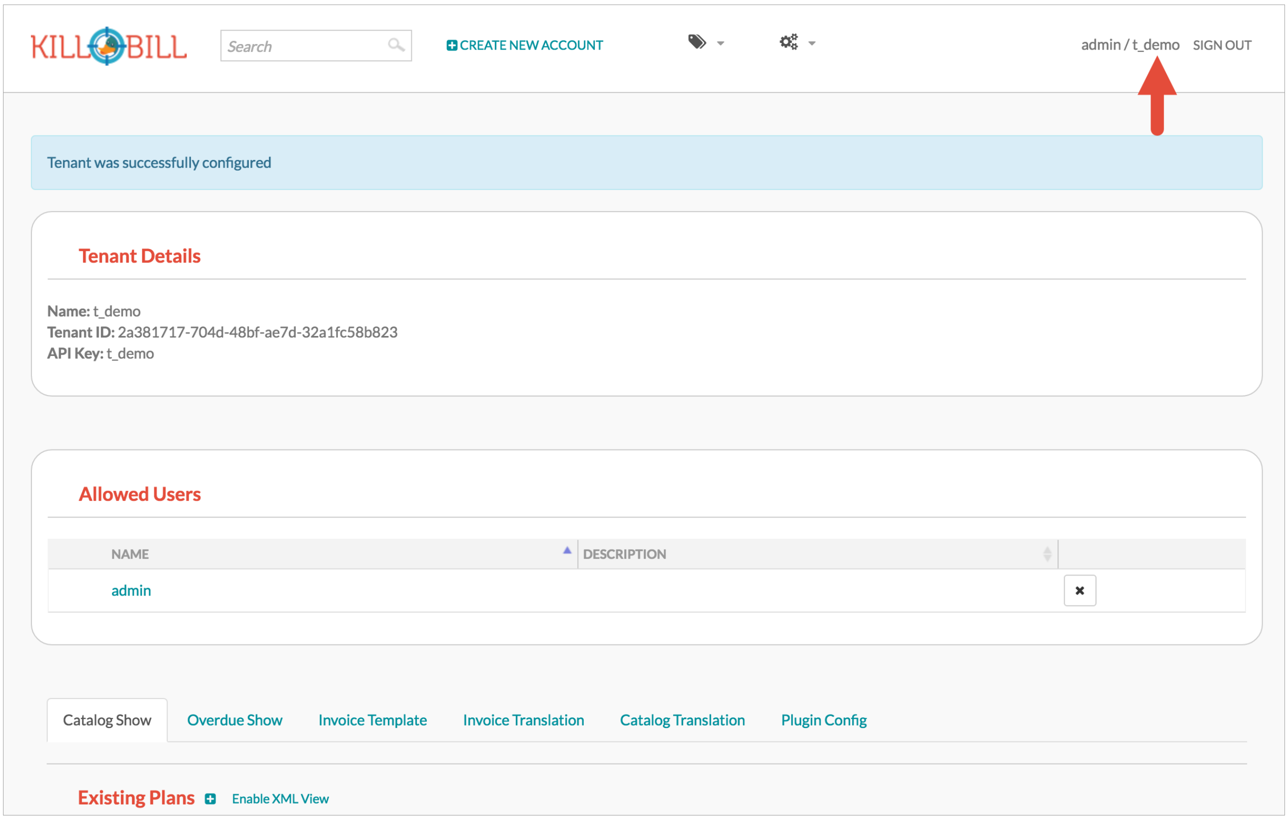


3. Enter the tenant **Name**, **API Key**, and **API Secret**.

> **Note:** The API key and API secret pair are used in all HTTP requests to ensure that the user issuing the request has the correct permissions to access the tenant.

4. Click the **Save** button.

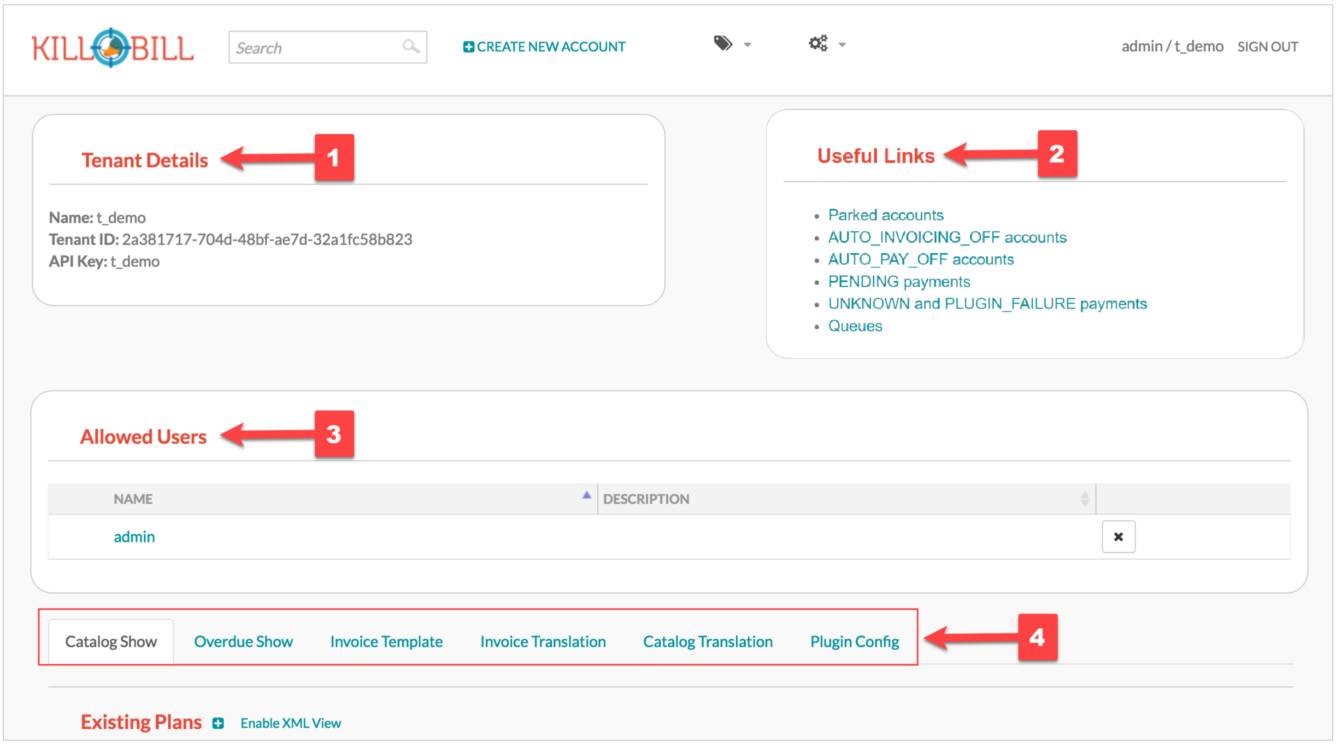
   Kaui displays the Tenant Configuration page with the new tenant name in the upper right corner:



QST: ^^AFTER THE 1ST TENANT IS CREATED, THIS IS WHAT HAPPENS. BUT IS IT ALSO TRUE FOR TENANTS CREATED AFTER THAT? IT'S POSSIBLE THE LIST OF TENANTS IS DISPLAYED INSTEAD. PLEASE CONFIRM.

Tenant Configuration Page

This section explains the main areas of the Tenant Configuration page.



1 Tenant Details

This read-only area displays basic information about the tenant.

2 Useful Links

Click on a link to go to the associated list. -→DO YOU THINK I SHOULD DESCRIBE EACH LINK? ALSO, IS THIS CONFIGURABLE SOMEWHERE BEHIND THE SCENES?

3 Allowed Users

This section displays the users who have permission to log on to this tenant. You can click on the user name to view that users's details or click on the plus sign ( ) to add a new user for the current tenant.

To add a user from this screen, see Add an Allowed User to the Tenant. For more information, see the Users, Roles, and Permissions chapter.

4 Tenant Configuration Tabs

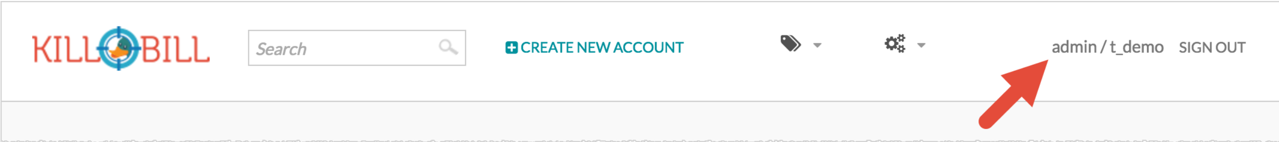
The tabs at the bottom of the Tenant Configuration page allow you upload various files that are specific to the current tenant:

- Catalog Show Tab—Create and manage catalog XML files.
- **Overdue Show**—Create and manage the XML configuration file that helps to control Kill Bill's overdue (dunning) functionality.
- **Invoice Template**—Upload invoice template files.
- **Invoice Translation**—Upload translated invoice files.
- **Catalog Translation**—Upload translated catalog strings files.
- **Plugin Config**—Upload plugin configuration files.

Add an Allowed User to the Tenant

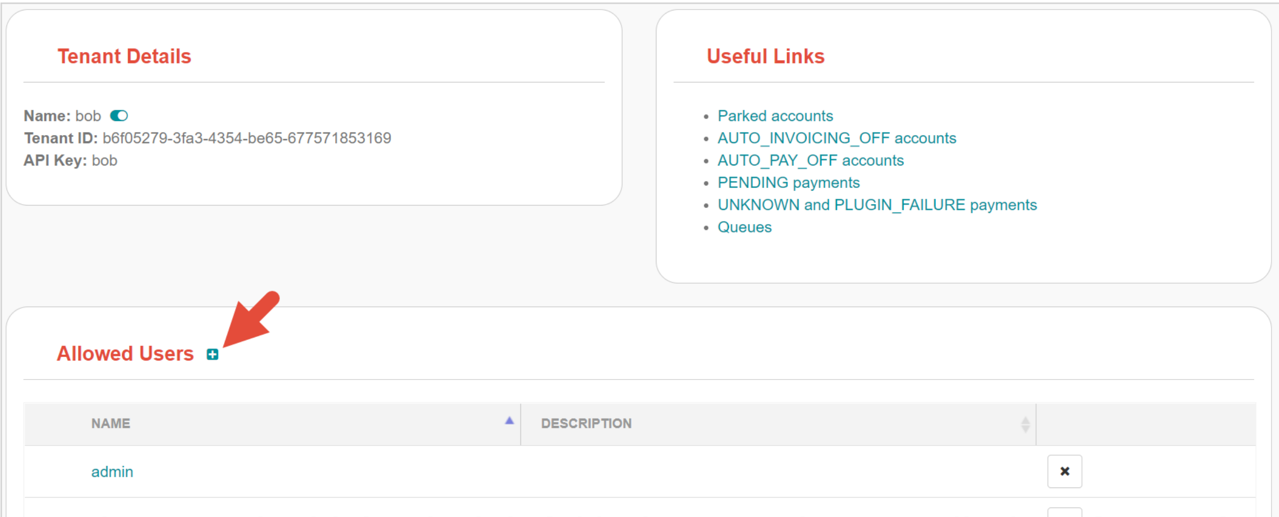
The steps below explain how to add an *existing* user to the current tenant. Before you begin, you should have created the user in the Kill Bill system by following the steps in the "Add a User" section.

1. Click on your username and tenant name in the upper right corner:

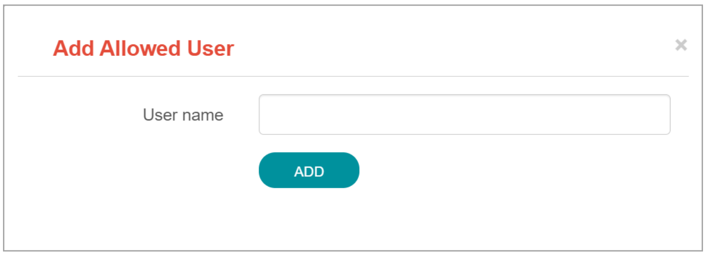


   Kaui displays the Tenant Configuration page.

2. To the right of **Allowed Users**, click the plus icon ( ).



   Kaui displays the Add Allowed User pop-up.



3. Type the user name into the **User name** field.
4. Click the **Add** button.

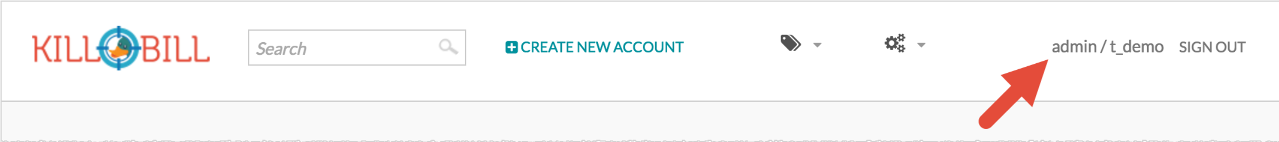
   Kaui displays the newly added user to the Allowed Users list for the tenant.

Remove a User from the Tenant

Perform the steps below to remove a user from the list of users who can access the current tenant.

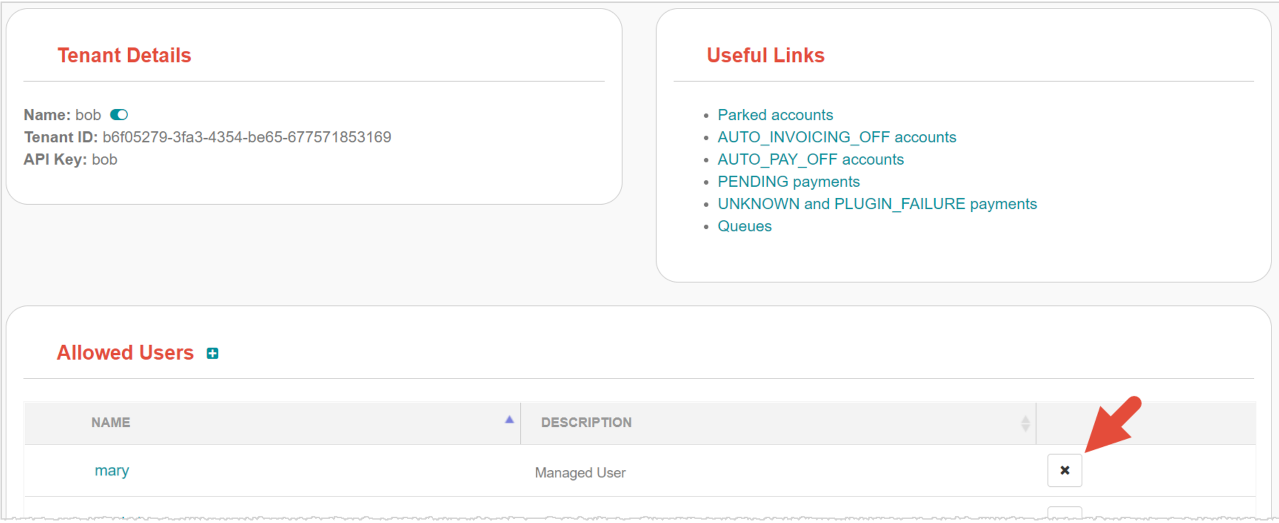
Note: Removing a user from a tenant does not remove them from the Kill Bill system.

1. Click on your username and tenant name in the upper right corner:



   Kaui displays the Tenant Configuration page.

2. In the **Allowed Users** section, click the black **X** to the right of the user to remove:



3. Click **OK** to confirm the deletion.

Catalog Show Tab

This section explains how to use the Catalog Show tab to create and manage catalogs:

- View Catalog Products and Plans
- Create a Simple Catalog
- Upload an XML Catalog
- View the Raw XML Catalog
- Delete a Catalog
- Download the catalog

On this tab, you can also add a currency to a plan.

Note: You cannot edit a raw XML catalog in Kaui.

Additional Resources

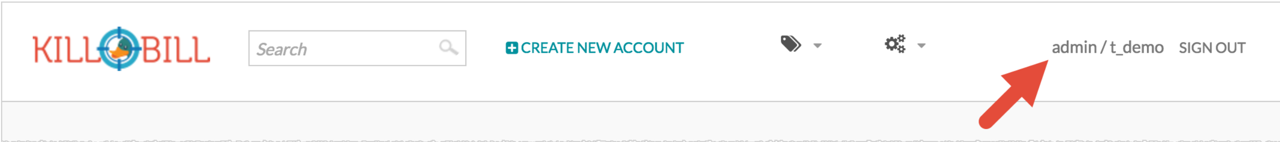
- Catalog API
- "Catalog" section in *Subscription Guide*

View Catalog Products and Plans

You can view the current catalog's products and plans on the Catalog Show tab located at the bottom of the Tenant Configuration page.

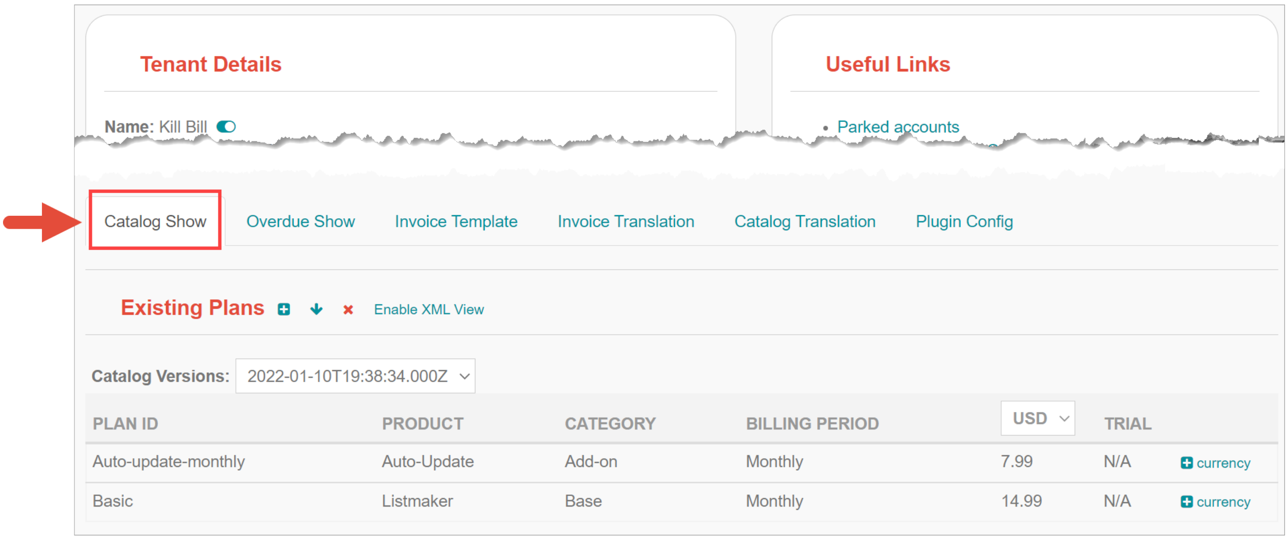
To get there:

1. Click on your username and tenant name in the upper right corner:



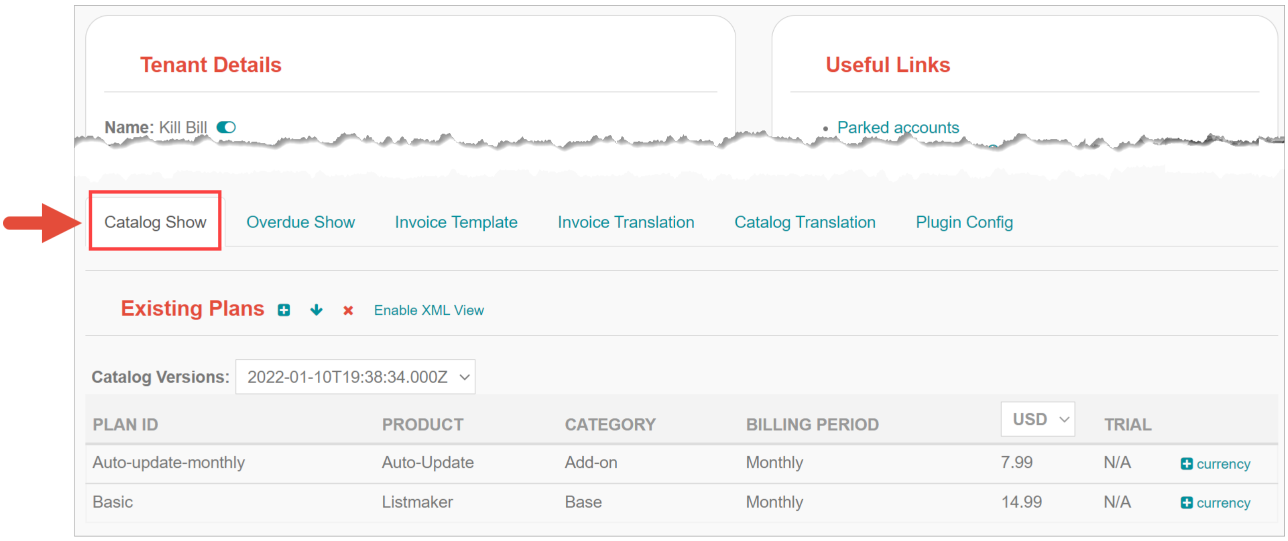
   Kaui displays the Tenant Configuration page.

2. Scroll down until you see the Catalog Show tab:



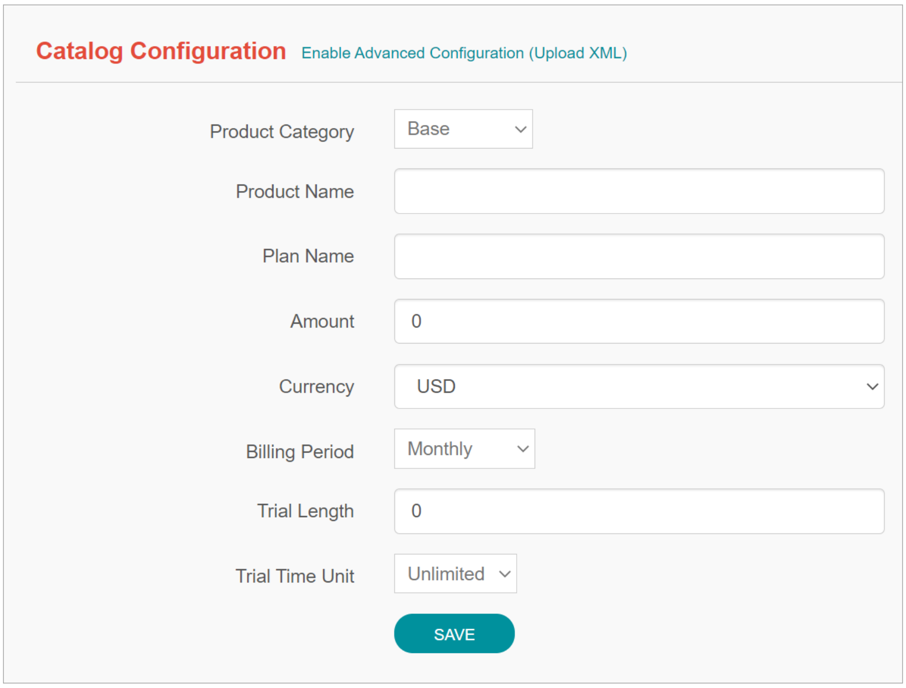
Create a Simple Catalog

1. Go to the Catalog Show tab on the Tenant Configuration page.



2. Click the plus sign ( ) next to **Existing Plans**.

Kaui opens the Catalog Configuration screen:



3. Fill in the fields. For field descriptions, see Catalog Configuration Field Descriptions.
4. Click the **Save** button.

Catalog Configuration Field Descriptions

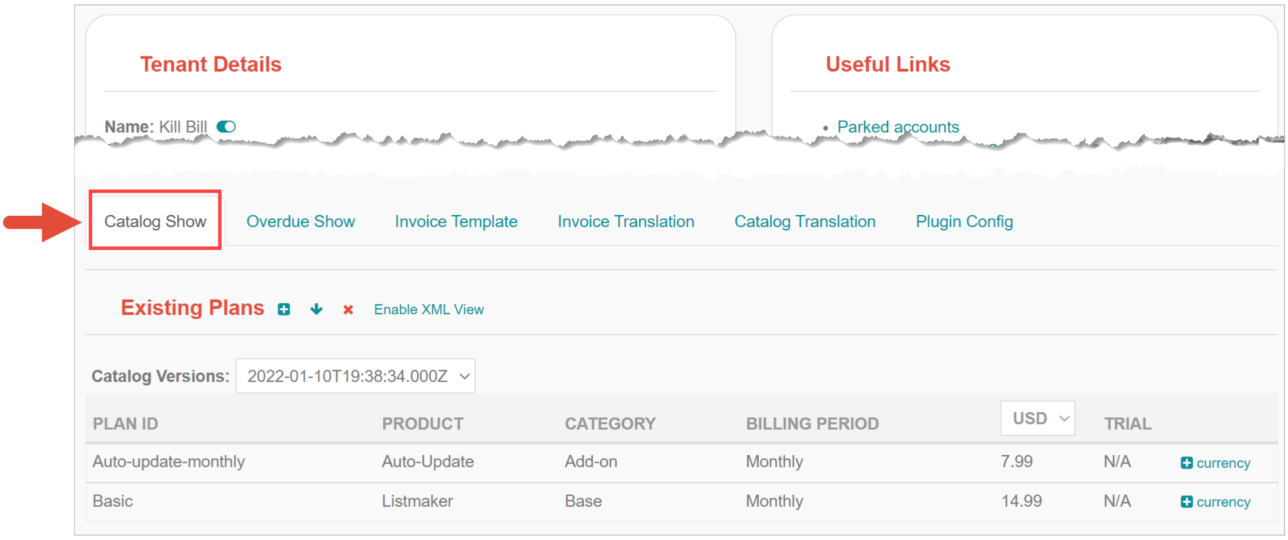
For additional field information, see the Catalog API.

Field	Description
Product Category	Define whether this product is of the `BASE`, `ADDON`, or `STANDALONE` category: • Base products can have one or more addons. • Add-on products can be bundled with a base product. • Standalone products cannot have any add-ons.
Product Name	The name assigned to the product you are selling.
Plan Name	The name of the plan, which defines how the product will be sold (for example, a monthly subscription or a one-time purchase).
Amount	The price of the plan to be paid every billing period.
Currency	The currency this plan uses. If you need to add more currencies, you can do so by adding a currency to a plan.
Billing Period	The period for which the customer is billed.
Trial Length	Along with a unit of time (**Trial Time Unit** below), defines the length of the trial.
Trial Time Unit	Along with the **Trial Length** number above, specifies the time interval for the trial.

Add a Currency to a Plan

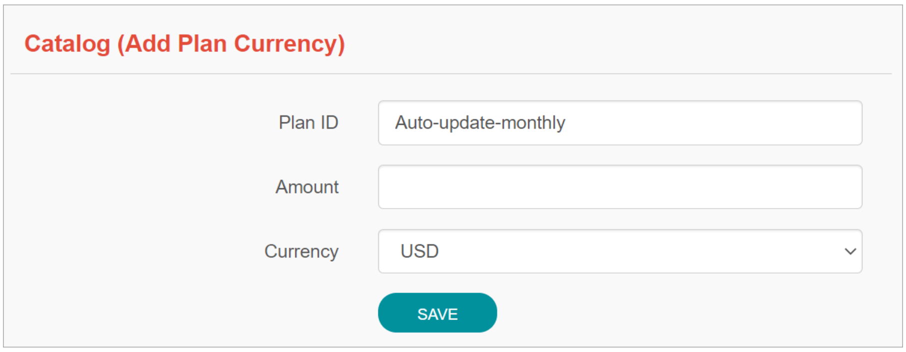
I’m having trouble with this functionality. I get the error message "Error while creating plan: plan [NAME] already exists." There might be some rules around creating a new currency. Maybe can’t do it with a simple plan?

1. Go to the Catalog Show tab on the Tenant Configuration page.



2. On the row of the plan for which you want to add a currency, click + **currency** on the far right.

   Kaui displays the Add Plan Currency screen:



3. Fill in the fields:
   - **Plan ID**—By default, Kaui fills in this field based on the plan you selected, but you can change it to a different plan ID.
   - **Amount**—The cost of the plan in the new currency you’re adding.
   - **Currency**—The currency you are adding.
4. Click the **Save** button. Kaui displays the new currency on the Catalog Show tab.

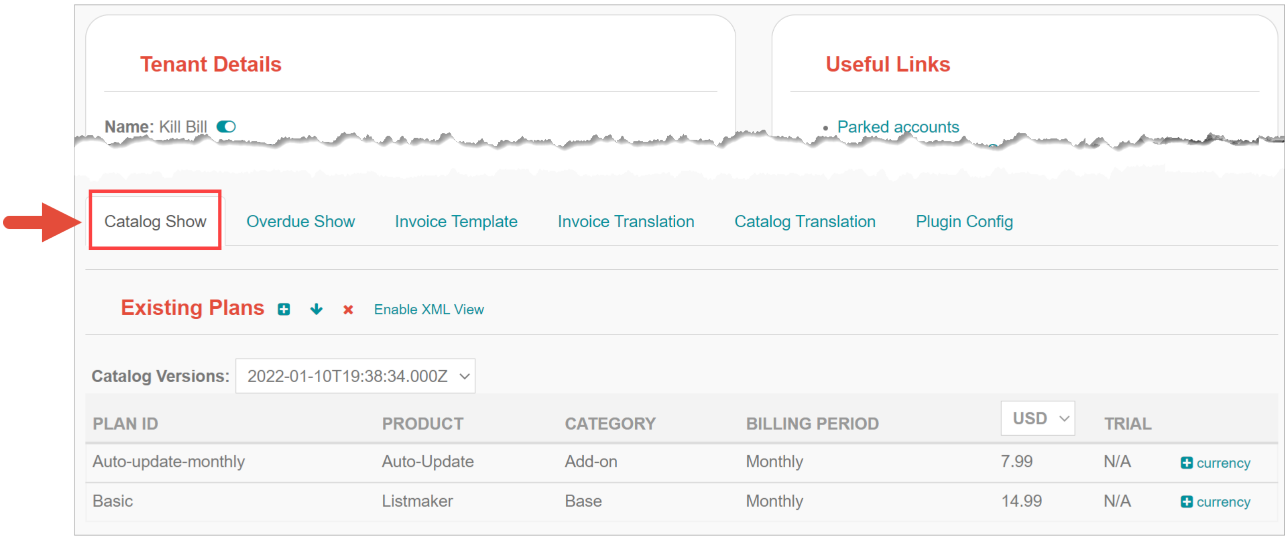
Upload an XML Catalog

Something I’m not sure of is if you create a simple catalog, can you overwrite it by uploading an XML file? Seems like you should be able to do this, but I get an error when I attempt it. First, I get the Cloudflare error if I haven’t removed the <?xml version="1.0" encoding="UTF-8" standalone="no"?> on the first line. After I clear that, I still get the KB error: "Error while communicating with the Kill Bill *server: Invalid catalog for tenant: [TENANT #]." When I upload the same catalog on a new tenant, I don’t have this problem. It loads fine.*

Note: To ensure a successful catalog file upload, check its validity with the Kill Bill catalog validation tool here.

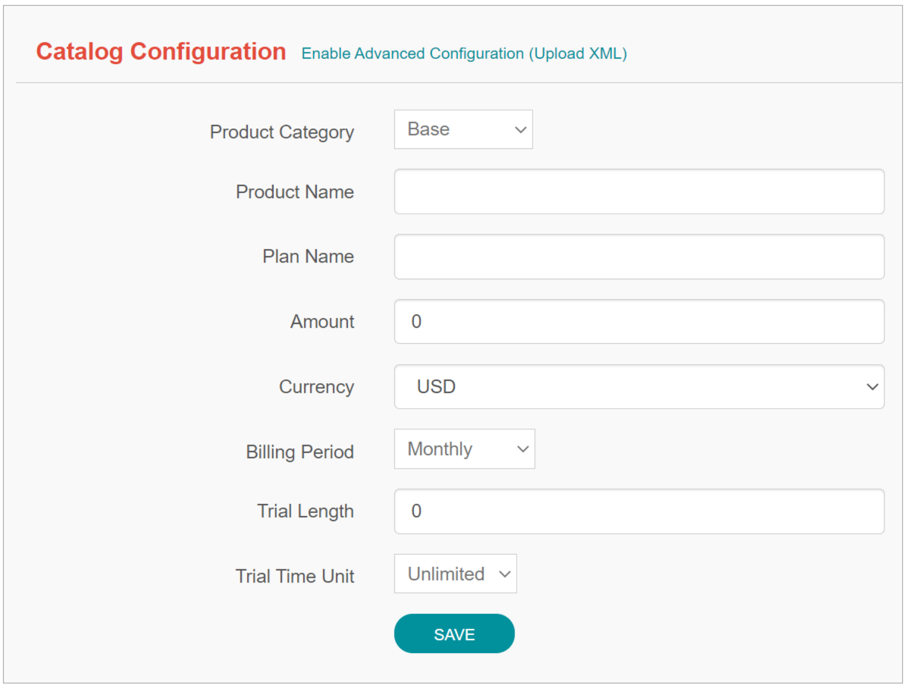
To upload an XML catalog in Kaui:

1. Go to the Catalog Show tab on the Tenant Configuration page.



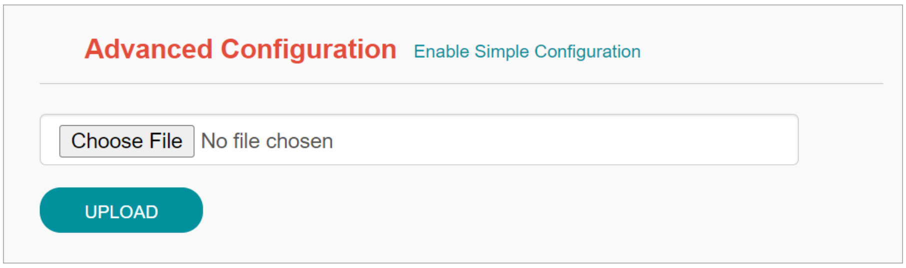
2. Click the plus sign ( ) next to **Existing Plans**.

   Kaui opens the Catalog Configuration screen:



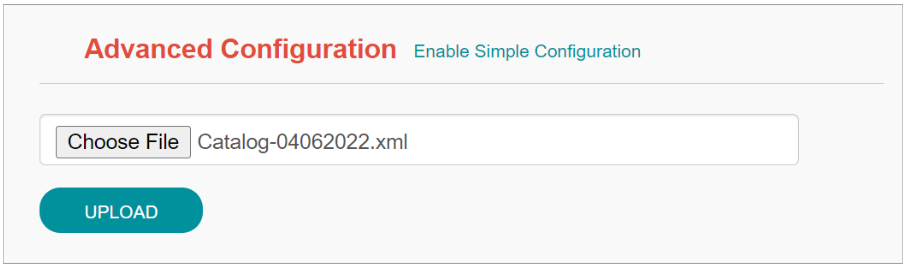
3. Click on **Enable Advanced Configuration (Upload XML)**.

   Kaui displays an upload screen:



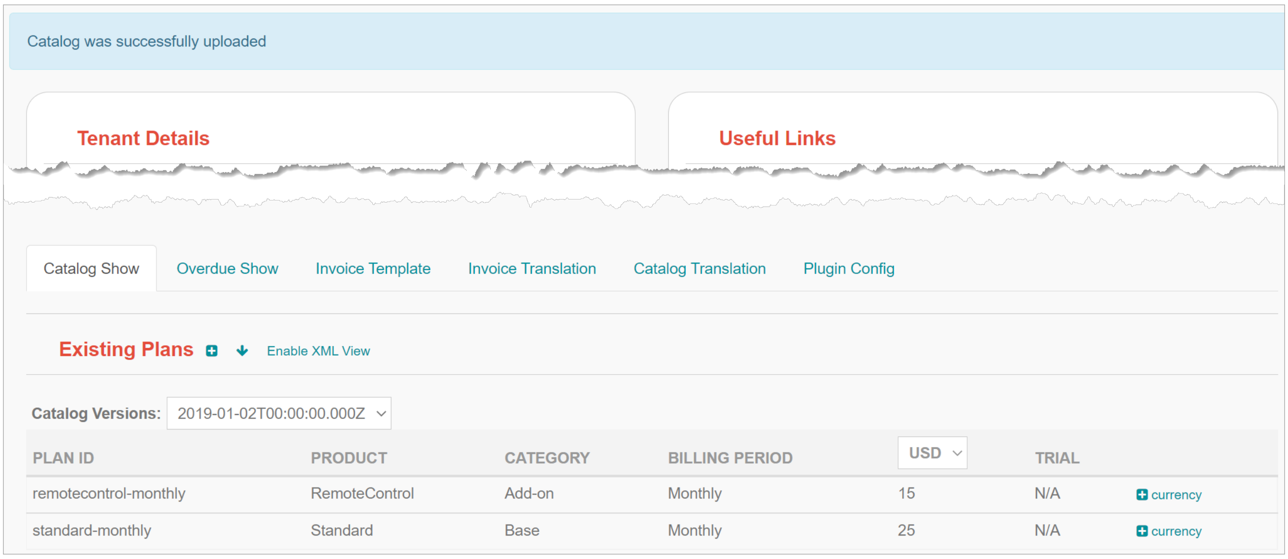
4. Click the **Choose File** button, locate the XML file, and select it.

   Once you have selected the file, Kaui displays the filename next to the **Choose File** button.



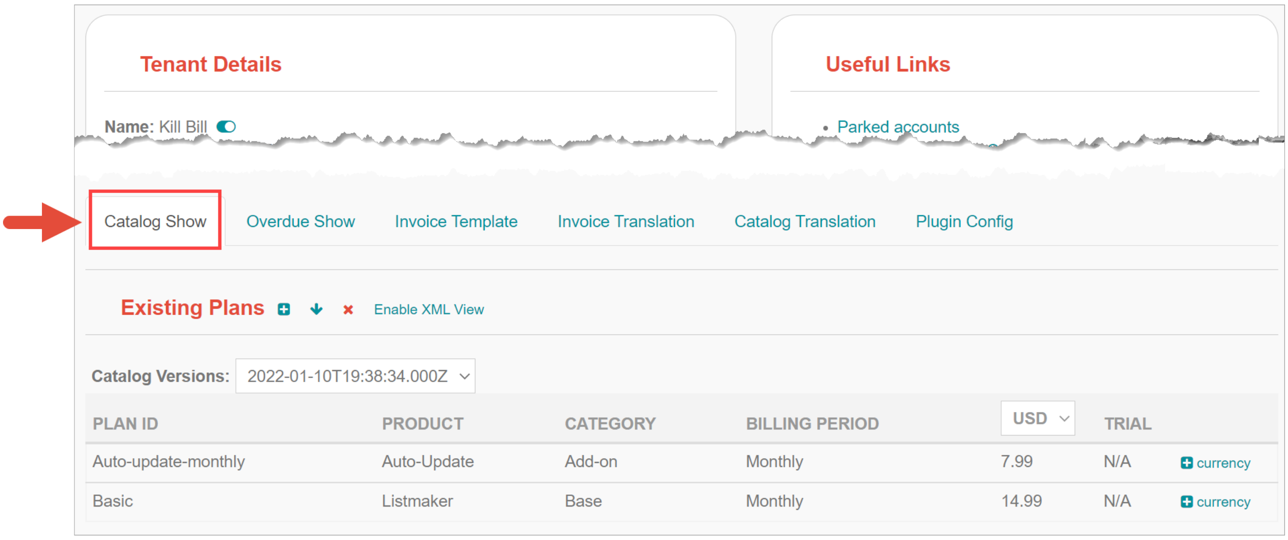
5. Click the **Upload** button.

   If the upload is successful, Kaui displays a confirmation message along with a list of plans on the Catalog Show tab:



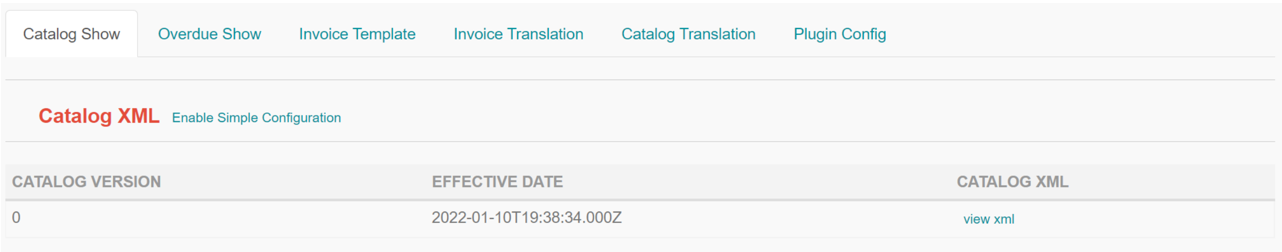
View the Catalog as XML

1. Go to the Catalog Show tab on the Tenant Configuration page.



2. Click **Enable XML View**.

   Kaui displays the a list of catalog versions:



3. Click **view xml**. Kaui displays the raw XML (uneditable in this view).

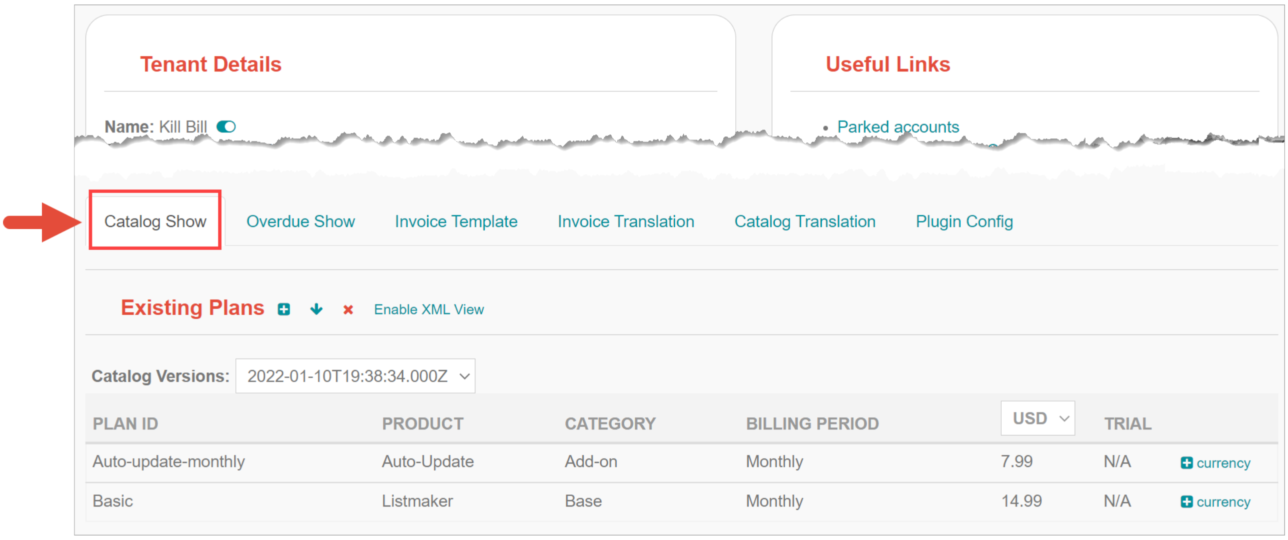
```
▼<catalog xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="CatalogSchema.xsd">
   <effectiveDate>2022-01-10T19:38:34Z</effectiveDate>
   <catalogName>DEFAULT</catalogName>
  ▼<currencies>
     <currency>USD</currency>
   </currencies>
   <units/>
  ▼<products>
    ▼<product name="Auto-Update" prettyName="Auto-Update">
       <category>ADD_ON</category>
       <included/>
       <available/>
       <limits/>
     </product>
    ▼<product name="Listmaker" prettyName="Listmaker">
       <category>BASE</category>
       <included/>
      ▼<available>
         <addonProduct>Auto-Update</addonProduct>
       </available>
       <limits/>
     </product>
   </products>
```

4. To return to Kaui, click the Back arrow button of your browser.

Delete a Catalog

When I click delete catalog, I'm taken to the Kaui home page. So, I assume I don't have permission to delete the catalog?

1. Go to the Catalog Show tab on the Tenant Configuration page.



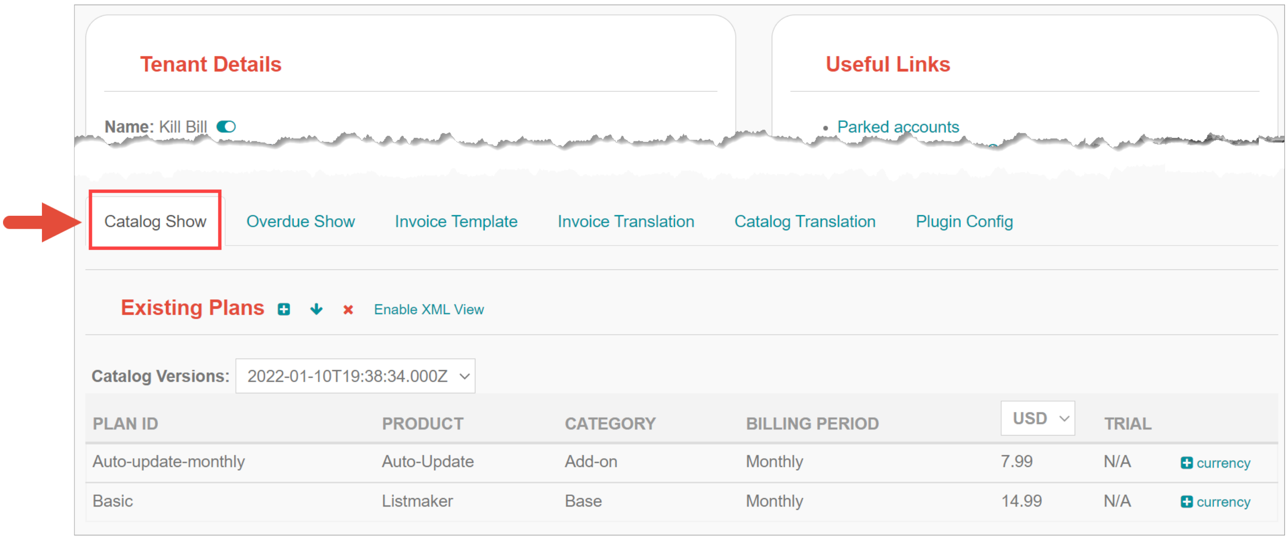
2. Click the red X ( ) to the left of **Enable XML View**.

   What is supposed to happen here?

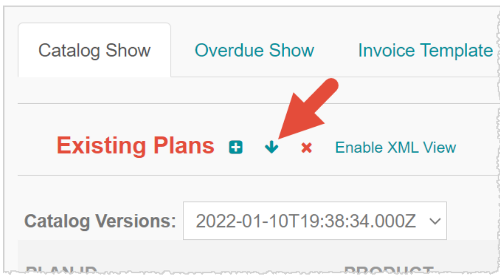
Download the Catalog

The steps below explain how to download the current Kill Bill catalog in XML format.

1. Go to the Catalog Show tab on the Tenant Configuration page.



2. Click the down arrow ( ).



   Kaui downloads the .xml file to your default download folder on your local drive.