



Kaui User Guide - DRAFT

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Table of Contents

| | |
|---|----|
| Introduction | 1 |
| How to Use This Guide | 1 |
| About Screenshots | 1 |
| Other Learning Resources | 1 |
| Videos | 1 |
| Glossary | 2 |
| Accounts | 4 |
| Account Page Layout | 4 |
| Create an Account | 6 |
| Account Field Descriptions | 8 |
| Edit an Account | 9 |
| Add Additional Contact Emails | 10 |
| Delete Additional Contact Emails | 12 |
| Close an Account | 12 |
| Add a Tag to an Account | 13 |
| Link to Parent Account | 15 |
| Add Credit to an Account | 16 |
| Create a Charge on an Account | 17 |
| Payment Methods | 20 |
| About Payment Plugin Names | 20 |
| View Payment Method Details | 20 |
| Set a Payment Method as the Default | 21 |
| Add Payment Method | 21 |
| Payment Method Field Descriptions | 22 |
| Applying Transactions to a Payment Method | 23 |
| Process Transaction Field Descriptions | 25 |
| Delete Payment Method | 26 |
| Subscriptions | 28 |
| Open Subscriptions Page | 28 |
| Add a Subscription | 28 |
| Add Subscription Field Descriptions | 29 |
| Add an Add-On Product to a Subscription | 29 |
| Add New Add-On Field Descriptions | 30 |
| Pause/Resume Subscriptions | 30 |
| Change a Subscription | 32 |
| Cancel a Subscription | 33 |
| Cancellation Options | 34 |
| Update the Billing Cycle Day | 35 |

| | |
|--|----|
| Invoices..... | 36 |
| Invoices Page..... | 36 |
| Invoice Details Page..... | 36 |
| Open Invoice Details | 37 |
| Make a Payment on an Invoice..... | 37 |
| Process Payment Field Descriptions | 38 |
| Write Off or Void an Invoice | 39 |
| Write Off an Invoice | 39 |
| Void an Invoice..... | 40 |
| Pay All Unpaid Invoices | 41 |
| Generate a Dry-Run Invoice | 42 |
| Payments | 44 |
| Payments Page | 44 |
| About Automatic Invoice Payments | 44 |
| Payment Details Page | 45 |
| Open Payment Details..... | 45 |
| Refund a Payment | 46 |
| Process Refund Field Descriptions..... | 47 |
| Perform a Chargeback | 48 |
| Timeline | 50 |
| Users, Roles, and Permissions | 52 |
| Overview | 52 |
| Additional Resources..... | 52 |
| Managing Users with a Third-Party System | 52 |
| Managing Users with Kill Bill | 52 |
| Create a User Role | 53 |
| Open the User List | 53 |
| Add a User | 54 |
| Edit a User | 55 |
| Add New User Field Descriptions..... | 57 |
| Delete a User | 57 |
| Add an Allowed User to the Tenant..... | 58 |
| Remove a User from the Tenant..... | 59 |
| Tags | 61 |
| Custom Fields | 62 |
| Plugin Manager | 63 |
| Analytics | 64 |
| Tenants | 65 |
| Admin | 66 |
| FAQs | 67 |

Introduction

How to Use This Guide

[navigation_and_interface] explains how to **navigate** in Kaui and its **basic interface features**.

For administering **customer accounts** and all aspects of it, see:

- [Accounts](#)
- [Subscriptions](#)
- [Payment Methods](#)
- [Invoices](#)
- [Payments](#)
- [Timeline](#)

Advanced and administrative features are covered later in the guide:

- [\[Users\]](#)
- [Tags](#)
- [Custom Fields](#)
- [Plugin Manager](#)
- [Analytics](#)
- [Tenants](#)
- [Admin](#)

The [FAQs] are great for **basic questions** like, *How do I create an invoice?*

About Screenshots

The screenshots displayed in this guide may differ from what you see on your Kaui screen. That's because your user permissions control what features you can access (i.e., what you see on the screen).

If you have any questions about why your Kaui screen doesn't match what you see in this guide, ask your Kaui administrator.

Other Learning Resources

Videos

We regularly add new overviews and tutorials to [our YouTube videos](#), so check in from time to time.

Glossary

The terms listed below are used frequently in this guide. We've provided an abbreviated description below. For a full description, see the [Kill Bill Glossary](#).

Account (a.k.a. customer account)

A record that contains details about the customer (name, address, etc.).

Child

An account that is associated with a parent account.

External Key

An alternative unique ID for an object.

Parent

An account that contains one or more child accounts.

Payment Method

A record of the details required for Kill Bill to trigger a payment.

Permissions

In Kill Bill, a defined action that can be performed in a system (for example, `TAG_CAN_ADD` OR `ACCOUNT_CAN_CREATE`). You can assign one or more permissions to a role, which can then be associated with a user. The user can only perform the permissions associated with that role.

Plan

Define how much a customer pays for a product and the frequency of the payment.

Plugin

Software that runs alongside Kill Bill in order to provide additional functionality.

Phase (a.k.a plan phase)

Time periods within a subscription during which certain rules apply.

Subscription

A contract between you (the business) and a customer that associates an account with a plan and a specific start date.

Tag

A property that can be added to an object (for example, an account or a subscription) for information purposes or to affect the behavior of the system.

Tenant

The division or organization that is using Kill Bill as a group of users. Note that an organization can have more than one tenant, as Kill Bill supports multitenancy.

User

A person who logs on to use Kaui.

User Role

A group of permissions that specify which actions the user is allowed to perform in Kaui. A user can have multiple roles. A role can have multiple permissions.

Accounts

This section helps you become familiar with customer accounts and the layout of the Account page.

The Account page provides information about a specific customer, such as email address, physical address, and so forth. It is also the central location for the customer's billing information, subscriptions, invoices, and payment methods.

To find a customer in the system, use [\[Basic Search\]](#) or [\[Advanced Search\]](#). To open the customer account, click the customer ID in the search results.

[Basic Search](#) [Advanced Search](#)

The next section explains how the Account page is laid out. To skip this and see the task-based steps, go to [Create an Account](#).

Account Page Layout

The Account page has the following sections:

1. Sub-menu
2. Account information
3. Billing info
4. Personal info
5. Payment methods

The screenshot shows the Account page interface with the following sections highlighted:

- Sub-menu (1):** A teal header bar with tabs: Katelynn Lemke, ACCOUNT (highlighted), SUBSCRIPTIONS, INVOICES, PAYMENTS, TIMELINE, TAGS, and CUSTOM FIELDS.
- Account Information (2):** A card containing account details:

| | |
|--------------|--------------------------------------|
| ID | 0dbc634d-2ad5-4d0e-b3a7-c0feec20e1c1 |
| External Key | 9946162130 |
| Currency | EUR |
| Timezone | America/Tijuana |
| Locale | en |
| Notes | N/A |
| Parent | |
- Billing Info (3):** A card containing billing statistics:

| | |
|-------------------|------|
| Account balance | \$10 |
| Account credit | \$0 |
| Overdue status | Good |
| Bill cycle day | N/A |
| Next Invoice Date | N/A |

With buttons for PAY ALL INVOICES, ADD CREDIT, and CREATE CHARGE.
- Personal Information (4):** A card with a "Show/Hide Content" button.
- Payment Methods (5):** A card showing a single method: ★ _EXTERNAL_PAYMENT_.

1. Account Sub-Menu

The **Account** sub-menu organizes and provides access to different areas of the customer's account:

| | | | | | | | |
|----------------|---------|---------------|----------|----------|----------|------|---------------|
| Katelynn Lemke | ACCOUNT | SUBSCRIPTIONS | INVOICES | PAYMENTS | TIMELINE | TAGS | CUSTOM FIELDS |
|----------------|---------|---------------|----------|----------|----------|------|---------------|

To see these areas, click the relevant item on the sub-menu. To return to the customer's Account page, click **Account** on the sub-menu.

2. Account Information

This section of the screen displays a summary of the customer's account information, such as their ID, currency, and time zone. To edit this information, click **Edit** next to Account Information.

Here you can perform the following tasks for the customer account:

- [Edit an Account](#)
- [Link to Parent Account](#)
- [Add a Tag to an Account](#)

3. Personal Information

This section of the screen displays the customer's personal contact information (read only).

By default, Personal Information details are hidden for GDPR Compliance and customer privacy. To see the information, click **Show/Hide Content**.

To edit this information, see the [Edit an Account](#) section.

4. Billing Info

Here you can perform the following tasks for the customer:

- [Pay all unpaid invoices](#)
- [Add a credit](#)
- [Create a charge](#)

You can also see a summary of billing information:

| Field | Description |
|-----------------|--|
| Account balance | Amount of money due on the account, including any account credits. |
| Account credit | Amount of any money owed to the customer. |

| Field | Description |
|----------------------|--|
| Overdue status | <p>The status of the customer's account that indicates if they are overdue or up-to-date on their invoice payments.</p> <p>Note: The account can have a negative account balance, but not be overdue. That's because overdue status depends on invoice due dates and how late payments are defined based on a company's business policy. For example, an invoice may not be overdue if a company allows a 15-day grace period (a.k.a. NET terms) to make a payment.</p> |
| Bill cycle day (BCD) | <p>The day of the month on which the system generates an invoice for this account. This field applies to accounts that are subscribed to monthly subscriptions (or a multiple of monthly, such as quarterly, annually, etc.). For more information, see the Account Field Descriptions table.</p> |
| Next invoice date | The date on which the system generates the customer's next invoice. |

The **Trigger invoice generation** feature lets you generate an invoice, either as a test or in a committed state.

5. Payment Methods

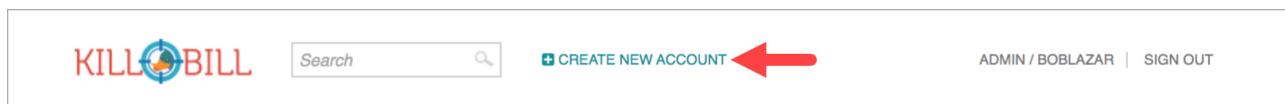
This section of the Account page lets you:

- [Add a payment method](#)
- [Set a payment method as default](#)
- [Delete a payment method](#)
- [Apply a transaction to a payment method \(authorize, charge, credit, etc.\)](#)

For more information on payment methods, see the [Payment Methods](#) section.

Create an Account

1. At the top right of the screen, click **Create New Account**:



2. Kauí opens the Add New Account screen:

Add New Account

| | |
|--------------------------------------|--|
| Name | <input type="text"/> |
| First name length <small>(?)</small> | <input type="text"/> |
| External key | <input type="text"/> |
| Email | <input type="text"/> |
| Bill cycle day | <input type="text"/> |
| Currency | <input type="text"/> USD |
| Timezone | <input type="text"/> (GMT+00:00) UTC |
| Locale | <input type="text"/> English United States (en_US) |
| Address line 1 | <input type="text"/> |
| Address line 2 | <input type="text"/> |
| Zip code | <input type="text"/> |
| Company | <input type="text"/> |
| City | <input type="text"/> |
| State | <input type="text"/> |
| Country | <input type="text"/> United States |
| Phone | <input type="text"/> |
| Notes | <input type="text"/> |
| <input type="checkbox"/> Migrated? | |
| SAVE | |

3. Fill in the fields. For field descriptions, see [Account Field Descriptions](#).

4. Click the **Save** button.

Account Field Descriptions

| Field | Description |
|-----------------------------------|--|
| Name | The customer's first and last name. |
| First name length | This field sets the length of the customer's first name. Kill Bill automatically calculates this number based on the location of the space between the first and last name. You can overwrite it with a different number, if necessary. Note: This field is used if your organization needs to extract customers' first or last names for communication (invoices, emails, etc.). The field lets an organization accommodate variations of names used across the globe. |
| External key | An optional alternate ID for the account. Once this is saved for the customer, you cannot change it. Tip: The external key feature is helpful if you integrate Kill Bill with another system, such as a CRM, and want to use that system's ID in Kill Bill (for identification, searching, and so forth). Once this is set and saved for the customer, you cannot change it. |
| Email | The main email address to use for communicating with the customer. |
| Bill cycle day (BCD) | For monthly or quarterly subscriptions, what day of the month the invoice is created. Once this is saved for the customer, you cannot change it. Note: The system has three types of billing (date) alignment that affect the BCD: ACCOUNT , SUBSCRIPTION , and BUNDLE . For more information about the three billing alignment types, see Catalog Examples and "Billing Alignment Rules" in the Subscription Guide . |
| Currency | The currency that the customer uses to make purchases. Once this is saved for the customer, you cannot change it. |
| Timezone | The time zone in which the customer resides. Once this is saved for the customer, you cannot change it. |
| Locale | Indicates the language that Kaui uses to send communication to the customer (invoices, emails, etc.) If your organization communicates with customers in a language that's different than the system's default language, it's important to select the appropriate locale for the customer. For more information, see the Internationalization manual. |
| Address line 1 and Address line 2 | The street address where the customer resides. |
| Zip code | The zip code for the area in which the customer resides. |
| Company | If relevant, the company/organization the customer works for. |
| City | The city in which the customer resides. |

| Field | Description |
|-------------------------|--|
| State | The state in which the customer resides. |
| Country | The country in which the customer resides. |
| Phone | The customer's phone number. |
| Notes | Additional information about the account. These notes are not viewable by the customer. |
| Migrated? | This field is for informational purposes only. You can check this box if you have migrated this customer account into Kill Bill. |
| Contact email addresses | Additional addresses to which account-related emails will be sent. The email addresses listed here will receive the same emails as the main Email address. For more information, see Add Additional Contact Emails . |

Edit an Account

You can make changes to most of the account fields after it has been created.



Note: You cannot change the following fields: Bill Cycle Day, Currency, External Key, and Time Zone.

1. Open the account on the Account page.
2. Next to Account Information, click **Edit**.

Kauí opens the Update Account screen:

Update Account

| | |
|------------------------------------|---------------------------------|
| Name | Frieda Lancaster |
| First name length <small>?</small> | 6 |
| Email | frieda.lancaster@email.com |
| Locale | English United States (en_US) ▾ |
| Address line 1 | 123 Madison Terrace |
| Address line 2 | Apt 1-B |
| Zip code | 37040-3555 |
| Company | Big Results, LLC |
| City | Clarkesville |
| State | Tennessee ▾ |
| Country | United States ▾ |
| Phone | 555-321-7654 |
| Notes | VIP |

SAVE

3. Make changes to the fields. For field descriptions, see [Account Field Descriptions](#).
4. Click the **Save** button.

Add Additional Contact Emails

If a customer wants to receive email at more than one email address (which is the one defined in the **Email** field for the account), you can add more email addresses.

1. Open the account on the Account page.
2. In the Personal Information section, click the gray down arrow (▼) to expand the section.

Personal Information

Show/Hide Content ▾

| | |
|----------------|--------------------|
| Name | Grayson Busch |
| Address1 | 101 Starburst Way |
| Address2 | |
| City | Atlanta |
| State | GA |
| Country | US |
| Postal Code | 30301 |
| Phone | |
| Company | Grayson Realty LLC |
| Primary email | grayson@email.com |
| Contact emails | + |

3. Click the plus sign (+) next to **Contact emails**.

Kauai opens the Add New Email screen:

Add New Email

Email

SAVE

4. Type in a single email address.
5. Select the **Save** button. Kauai returns to the Account page.
6. To see the email address you added, expand the Personal Information section:

Personal Information

Show/Hide Content

| | |
|----------------|-------------------------------------|
| Name | Grayson Busch |
| Address1 | 101 Starburst Way |
| Address2 | |
| City | Atlanta |
| State | GA |
| Country | US |
| Postal Code | 30301 |
| Phone | |
| Company | Grayson Realty LLC |
| Primary email | grayson@email.com |
| Contact emails | Pierre@mail.com ✘ mary@mail.com ✘ + |

- To add another email address, repeat steps 2 - 5.

Delete Additional Contact Emails



Warning: Kaui does not ask you to confirm your deletion; use this feature with caution.

To remove additional contact emails:

- Open the account on the Account page.
- In the Personal Information section, click the gray down arrow (▼) to expand the section.
- Next to the email you want to delete, click the red X (✘). Kaui immediately deletes the email address.

Close an Account

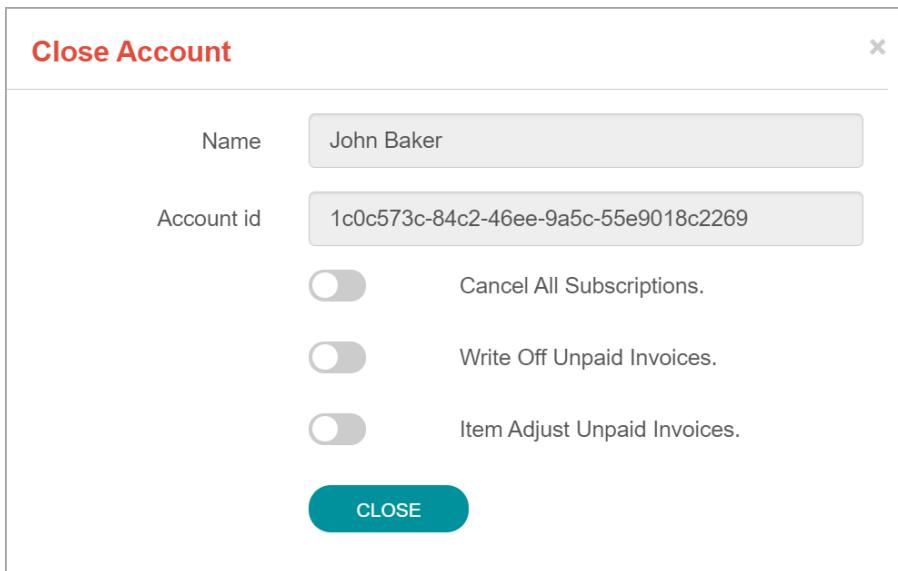
Use the steps in this section to indicate you will no longer be doing business with a customer. If the customer has unpaid invoices, using the steps below, you can choose to either write off or item-adjust them.



Note: Closing an account does not delete it. It only indicates the account is no longer a customer of yours. Once you close the account, its data becomes read-only, and you cannot make changes to it.

- Open the account on the Account page.
- Next to Account Information, click **Close**.

Kaui displays the Close Account pop-up:



3. Check the **Name** and **Account ID** fields to ensure you are closing the correct account.
4. Toggle any of the following options:
 - **Cancel All Subscriptions**—Stops any subscriptions that are current for this account.
 - **Write Off Unpaid Invoices**—Brings the balance for all unpaid invoices to zero. When you choose to write off the invoice, it is removed from Account Receivables.
 - **Item Adjust Unpaid Invoices**—Adds an invoice line item with a negative amount to bring each unpaid invoice's balance to zero.



Note: The last two options are mutually exclusive (i.e., you can only select one of them).

5. Click the **Close** button.

Kaui displays a message that lets you know the account was closed. In addition, the **Account** sub-menu displays "Closed":

| | | | | | | | | |
|------------|---------|---------------|----------|----------|----------|------|---------------|--------|
| John Baker | ACCOUNT | SUBSCRIPTIONS | INVOICES | PAYMENTS | TIMELINE | TAGS | CUSTOM FIELDS | CLOSED |
|------------|---------|---------------|----------|----------|----------|------|---------------|--------|

Add a Tag to an Account

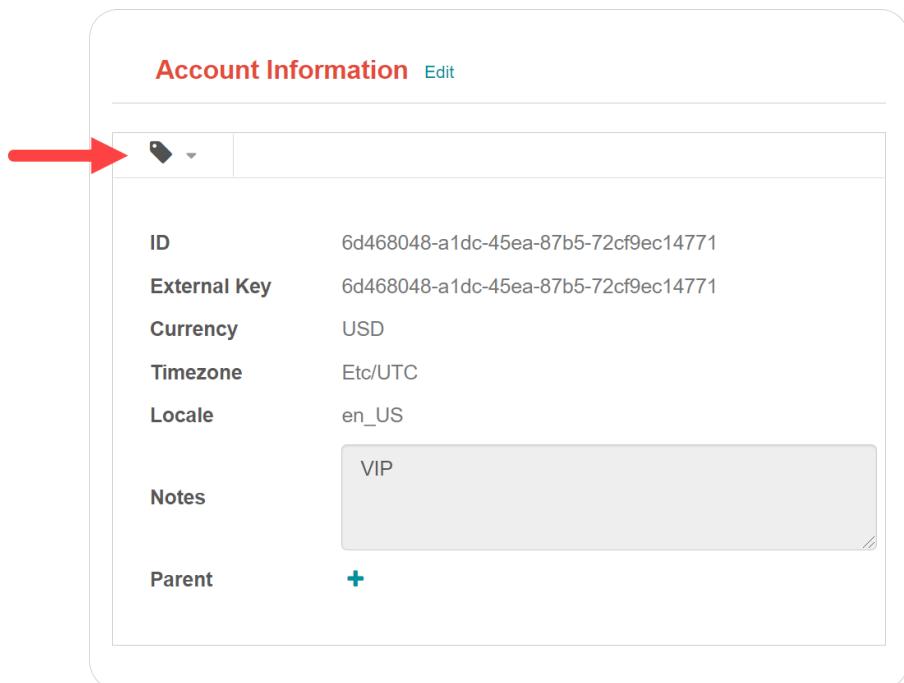
A "tag" is a way to attach specific information to an account (*Example: good_user*) or a specify a certain behavior (*Example: AUTO_INVOICING_OFF*). Kill Bill includes two types of tags:

- **System tags:** Written in ALL CAPS characters, system tags can affect the behavior of the system.
- **User tags:** Written in all lowercase characters, user tags do not affect the object they're attached to. User tabs are for informational purposes only.

For more information on Tags, including a list of default tags, see the "["Tag"](#) section in the [REST API Reference Manual](#).

To add a tag to a customer account:

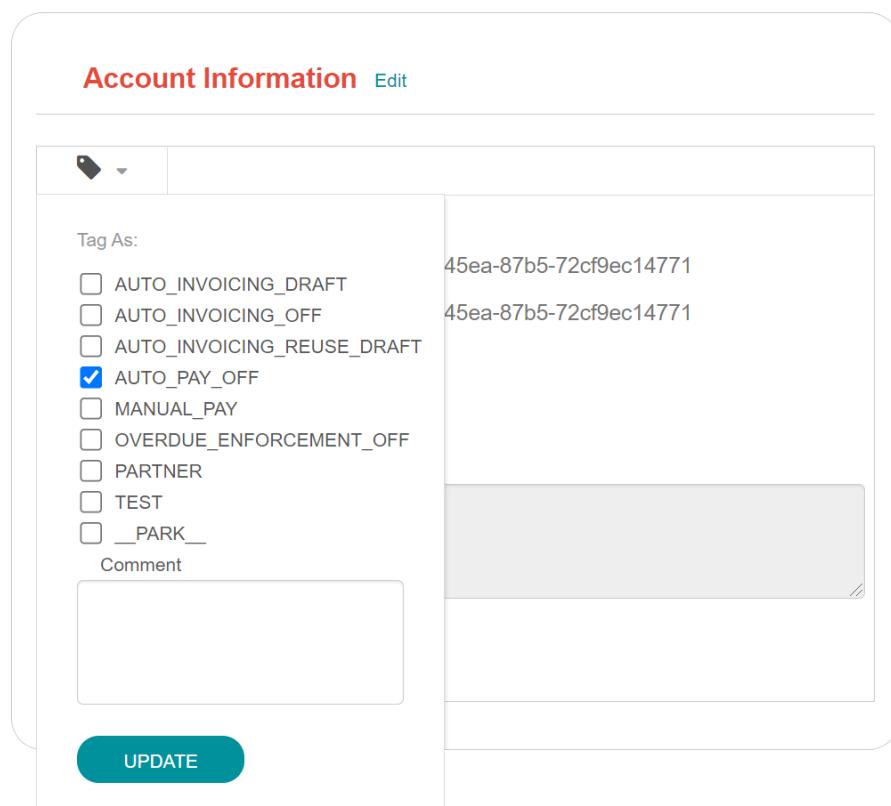
1. Open the account on the Account page.
2. In the Account Information section, click the tag icon in the upper left corner:



The screenshot shows the 'Account Information' page with various account details. At the top left, there is a tag icon with a dropdown arrow. A large red arrow points to this icon, indicating where the user should click to manage tags.

| ID | 6d468048-a1dc-45ea-87b5-72cf9ec14771 |
|--------------|--------------------------------------|
| External Key | 6d468048-a1dc-45ea-87b5-72cf9ec14771 |
| Currency | USD |
| Timezone | Etc/UTC |
| Locale | en_US |
| Notes | VIP |
| Parent | + |

3. Select the checkboxes of the tags you want to assign to the account.



The screenshot shows the 'Account Information' page with the 'Tag As:' section expanded. This section lists several tag options with checkboxes. One checkbox, 'AUTO_PAY_OFF', is checked and highlighted with a blue border. To the right of the checkboxes, two tag identifiers are listed: '45ea-87b5-72cf9ec14771' and '45ea-87b5-72cf9ec14771'. Below the checkboxes is a 'Comment' input field and a 'UPDATE' button at the bottom.

| Tag As: | |
|---|------------------------|
| <input type="checkbox"/> AUTO_INVOICING_DRAFT | 45ea-87b5-72cf9ec14771 |
| <input type="checkbox"/> AUTO_INVOICING_OFF | 45ea-87b5-72cf9ec14771 |
| <input type="checkbox"/> AUTO_INVOICING_REUSE_DRAFT | |
| <input checked="" type="checkbox"/> AUTO_PAY_OFF | |
| <input type="checkbox"/> MANUAL_PAY | |
| <input type="checkbox"/> OVERDUE_ENFORCEMENT_OFF | |
| <input type="checkbox"/> PARTNER | |
| <input type="checkbox"/> TEST | |
| <input type="checkbox"/> __PARK__ | |

4. Click the **Update** button to save your changes.

Link to Parent Account

When you link an account to a *parent* account, the account becomes a *child* account. Defining a parent-child association between accounts lets you define which entity is responsible for paying the invoice. For more information on this feature, see the [Hierarchical Accounts Tutorial](#).

1. As a preparation step, open the parent account and copy the account ID in the Account Information section.
2. Open the account that will become the child account.
3. In the Account Information section of the child account, click the plus sign icon (+) next to the **Parent** field:

The screenshot shows the 'Account Information' section of a child account. The 'Parent' field contains a blue plus sign icon, which is highlighted with a large red arrow pointing towards it. Other fields visible include ID, External Key, Currency, Timezone, Locale, and Notes.

Kaui opens a pop-up:

The pop-up window is titled 'Link To Parent'. It has a 'Parent account id' input field, a checkbox for 'Is payment delegated to parent?', and a 'SAVE' button.

4. Click in the **Parent account id** field and paste in the account ID that you copied in step 1.
5. To set the parent as responsible for all payments associated with this account, check the **Is payment delegated to a parent?** box. If you do not check this box, the child account is responsible for its own payments.

6. Click the **Save** button. Kaui displays the parent account ID as a link in the Account Information section.

The screenshot shows the 'Account Information' section of the Kaui interface. It includes fields for ID, External Key, Currency, Timezone, Locale, Notes (containing 'VIP'), and Parent (containing 'cb736a4f-9b56-4074-ae07-1d37b37cb69'). A red arrow points to the Parent field, highlighting the account ID.

| ID | 6d468048-a1dc-45ea-87b5-72cf9ec14771 |
|--------------|---|
| External Key | 6d468048-a1dc-45ea-87b5-72cf9ec14771 |
| Currency | USD |
| Timezone | Etc/UTC |
| Locale | en_US |
| Notes | VIP |
| Parent | cb736a4f-9b56-4074-ae07-1d37b37cb69 |

You can open the parent account by clicking the account ID link.

Add Credit to an Account

Issuing a credit in Kaui creates a credit memo. For accounting purposes, the memo is saved with the customer account's invoices.

1. On the Account page, click **Add Credit** at the top of the Billing Info section.

The screenshot shows the 'Billing Info' section of the Kaui interface. It includes buttons for PAY ALL INVOICES, ADD CREDIT (highlighted with a red arrow), and CREATE CHARGE. Below these are account details: Account balance (\$10), Account credit (\$0), Overdue status (Good), Bill cycle day (N/A), and Next Invoice Date (N/A). At the bottom, there is a 'Trigger invoice generation' button, a dry-run checkbox (unchecked), and a pencil icon.

| Billing Info | |
|----------------------------|---|
| PAY ALL INVOICES | ADD CREDIT |
| CREATE CHARGE | |
| Account balance | \$10 |
| Account credit | \$0 |
| Overdue status | Good |
| Bill cycle day | N/A |
| Next Invoice Date | N/A |
| Trigger invoice generation | <input type="button"/> |
| | <input checked="" type="checkbox"/> Dry-run |

Kaui opens the **Add New Credit** screen:

Add New Credit

| | |
|----------|---|
| Amount | <input type="text"/> |
| Currency | USD ▼ |
| Reason | 100 - Courtesy ▼ |
| Comment | <input type="text"/> |

SAVE

2. Fill in the fields:

- **Amount**—The amount of the credit.
- **Currency**—The currency defaults from the customer account and should not need to be changed.
- **Reason**—The reason is automatically selected based on [Kauí configuration settings](#). However, you can make a different selection.
- **Comment**—The text you enter here displays on the [Timeline](#) page after saving the credit. Adding comments is optional.

3. Click the **Save** button. To view the credit, select **Invoices** on the sub-menu.

On the Account page (in the Billing Info section), Kauí adjusts the account balance and account credit accordingly.

Create a Charge on an Account

Creating a charge in Kauí creates a new invoice. To create a charge:

1. On the Account page, click **Create Charge** at the top of the Billing Info section.

Billing Info

PAY ALL INVOICES **ADD CREDIT** **CREATE CHARGE** ↗

| | |
|-------------------|------|
| Account balance | \$0 |
| Account credit | \$0 |
| Overdue status | Good |
| Bill cycle day | N/A |
| Next Invoice Date | N/A |

Trigger invoice generation Dry-run

Kaui opens the **Add New Charge** screen:

Add New Charge

Auto-commit?

Amount

Currency

Description

Comment

SAVE

2. To set the invoice as a draft instead of immediately committing it, uncheck the **Auto-commit** box.
3. Fill in the fields:
 - **Amount**—The amount of the charge.
 - **Currency**—The currency defaults from the customer account and should not need to be changed.
 - **Description** and **Comment**—What you type here displays on the customer’s invoice. Both fields are optional.
4. Click **Save** and Kaui generates an invoice.
5. If you unchecked the **Auto-commit** box and have changed your mind, you can click the text **Commit** at the top of the page.

If you do not commit the invoice, it will stay in Draft mode. You can commit it by opening it from the Invoices page and clicking **Commit**.

On the Account page (in the Billing Info section), Kaui adjusts the account balance to reflect the amount of the charge.

Payment Methods

A customer account can have several payment methods to allow for making payments in different ways, such as credit cards, debit cards, PayPal, and so forth. The payment method includes the details needed for Kill Bill to process a payment against an invoice.

Saving this information in Kaui makes it easier to accept payments from the customer because the customer or service staff don't need to repeatedly provide their payment method details.

In production systems, payment method information is typically added via gateway-specific data flows. However, developers can use the Payment Method section for testing purposes.



*Note:*Although you can't edit a payment method, you can delete it.



Warning! For PCI compliance, *do not* enter any genuine payment information in these fields.

About Payment Plugin Names

Each payment method is associated with a payment plugin, a type of software that performs the backend processing for that specific payment method. The **Plugin name** field specifies the name of this payment plugin. (*Example: killbill-stripe*).

The plugin name is typically mentioned in the plugin's [readme](#) file. For example, in the [Stripe plugin readme file](#), the plugin name is specified in the command line.

View Payment Method Details

To view a payment method after it's created:

1. Open the account on the Account page.
2. In the **Payment Methods** area, click the gray down arrow (▼) next to the payment method.

Kaui expands the details for the payment method:

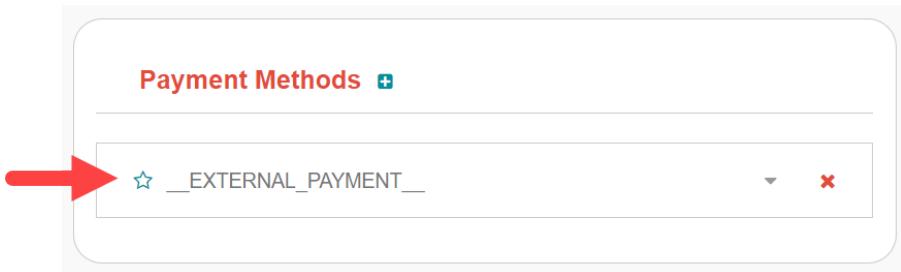
The screenshot shows a modal window titled "Payment Methods" with a plus sign icon. Inside, a section for "EXTERNAL_PAYMENT" is expanded, showing three buttons: "AUTHORIZE", "PURCHASE", and "CREDIT". Below these buttons, the "Name:" field contains the value "EXTERNAL_PAYMENT_" and the "ID:" field contains the value "0f700362-2669-4e33-98e3-5de85e840c04".

Set a Payment Method as the Default

Kill Bill uses the default payment method to automatically pay invoices (whether that invoice is generated by the system or manually by a user).

To set a payment method as the default:

1. Open the account on the Account page.
2. In the Payment Methods section, click the star icon () next to the relevant payment method:

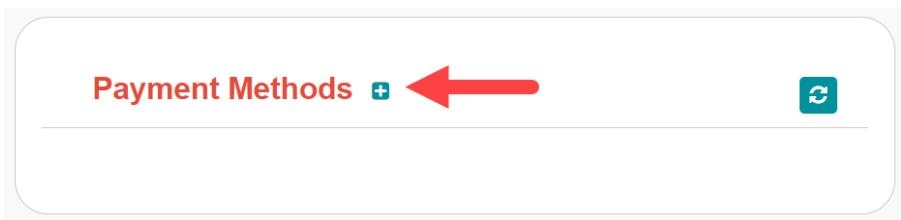


The filled star () indicates it's now the default payment method.

Add Payment Method

To add a payment method:

1. Open the account on the Account page.
2. Next to **Payment Methods**, click the plus sign:



Kaui displays the Add New Payment Method screen:

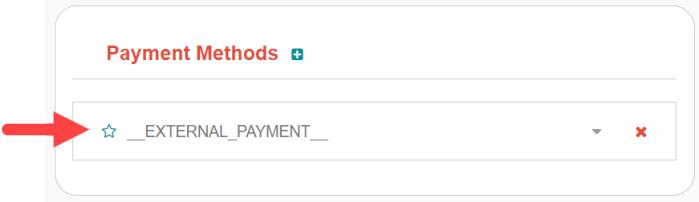
Add New Payment Method

| External key | | | | | |
|--|----------------------|------|-------|--|--|
| Plugin name | __EXTERNAL_PAYMENT__ | | | | |
| Card type | | | | | |
| Card holder name | | | | | |
| Expiration month | | | | | |
| Expiration year | | | | | |
| Credit card number | | | | | |
| Address 1 | | | | | |
| Address 2 | | | | | |
| City | | | | | |
| ZIP code | | | | | |
| State | | | | | |
| Country | | | | | |
| <input type="button" value="+ add property"/> <table border="1"> <thead> <tr> <th>NAME</th> <th>VALUE</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> </tr> </tbody> </table> | | NAME | VALUE | | |
| NAME | VALUE | | | | |
| | | | | | |
| <input type="checkbox"/> Default payment method? | | | | | |
| <input type="button" value="SAVE"/> | | | | | |

3. Fill in the fields. For field descriptions, see [Payment Method Field Descriptions](#).
4. Click the **Save** button.

Payment Method Field Descriptions

| Field | Description |
|--------------|---|
| External key | An optional alternate ID for the payment method. Once this is saved for the customer, you cannot change it. |

| Field | Description |
|--|---|
| Plugin name | <p>Type in the name of the plugin that is associated with this type of payment method.</p> <p>Each payment method is associated with a payment plugin that does the backend processing related to the payment method. The Plugin name field specifies the name of the payment plugin associated with the payment method (<i>Example: killbill-stripe</i>).</p> <p>The Plugin name is typically mentioned in the plugin's readme file. For example, in the Stripe plugin readme file, the plugin name is specified in the command line.</p> |
| Card type | The name of the credit or debit card. |
| Card holder name | The name that appears on the card. |
| Expiration month | The month and year the card expires. Enter month as <i>mm</i> and year as <i>yy</i> . (<i>Examples: 07</i> for the month of July and <i>23</i> for the year 2023.) |
| Expiration year | |
| Credit card number | The credit card number, typed without dashes. |
| Address 1, Address 2, City, ZIP code, State, Country | The billing address associated with this card. |
| Add property (Name/Value) | <p>Use the Name/Value fields to assign custom fields and values to the payment method.</p> <p>Note: Custom fields are an advanced feature. For more information, see Custom Fields.</p> |
| Default payment method? | <p>Check the box to set this payment method as the default. Kill Bill uses the default payment method to automatically pay invoices (whether the invoice is generated by the system or manually by a user).</p> <p>Note: If you forget to select this box, you can set the payment method as the default by clicking the star icon next to the payment method on the Account page:</p>  |

Applying Transactions to a Payment Method

This section explains how to apply a transaction to a payment method. These transactions are directly applied on the payment instrument (as opposed to being applied to the unpaid invoice).

Use this functionality only for transactions *unrelated to invoices and/or payments*.

Example: After paying her final invoice, a customer cancels her subscription and demands a full refund because she is dissatisfied. In this case, you would process this transaction (the refund) against the payment method as explained in this section.

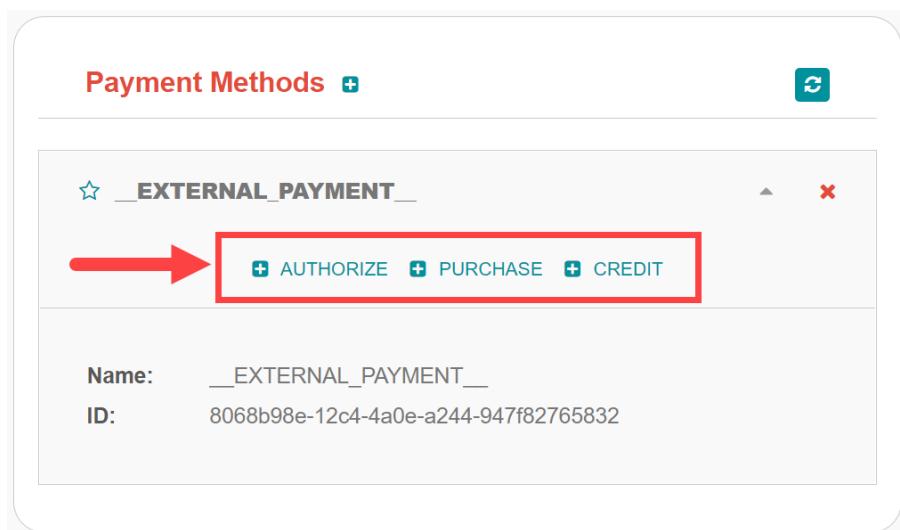
You can perform the following transactions from the Payment Methods section:

- Authorize
- Capture
- Credit (see note)
- Purchase (i.e., charge)
- Refund
- Void



Note: "Credit" here refers to depositing funds directly to the customer card and is unrelated to account credits.

1. Open the account on the Account page.
2. In the **Payment Methods** area, click the gray down arrow (▼) next to the payment method.
3. Select the type of transaction you want to perform:



Note: This area lists Authorize, Purchase, and Credit. For other transaction types, click any of these options. You will be able to change the transaction type on the next screen.

Kauai displays the Process Transaction screen:

Process Transaction

| | |
|------------------|--------------------------|
| Transaction type | AUTHORIZE |
| Amount | |
| Currency | USD |
| Payment key | |
| Transaction key | |
| Reason | 600 - Alt payment method |
| Comment | |

CONTROL PLUGIN NAME

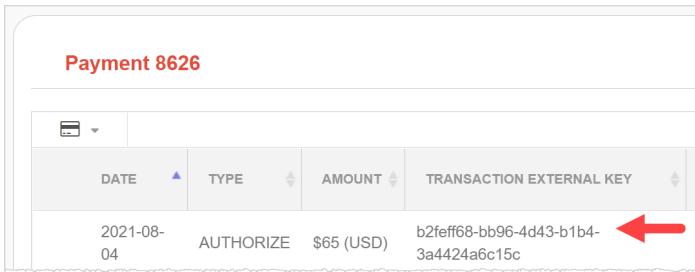
NAME **VALUE**

SAVE

4. Fill in the fields. For field descriptions, see [Process Transaction Field Descriptions](#).
5. Click the **Save** button. Kaui saves the transaction and displays it on the Payments page.

Process Transaction Field Descriptions

| Field | Description |
|------------------|---|
| Transaction type | From the dropdown list, select the type of transaction you want to perform. |
| Amount | The amount of the transaction. |
| Currency | The currency to use for the transaction. This field defaults from the customer account. |

| Field | Description |
|------------------------------|--|
| Payment key | <p>The unique payment key (ID) to which you want to apply the transaction. This field is required for transaction types that are applied to a specific payment (Capture, Chargeback, Refund, Void).</p> <p>Note: You can copy the payment key for a specific transaction from the External Key column of the Payments page. Or you can copy it from the URL displayed on your browser's address line:</p> <p><i>Example:</i></p> <p>URL: https://demo.killbill.io/accounts/cb736a4f-9b56-4074-ae07-1d37b37cb69f/payments/0d1e11e5-2df6-4b6b-992f-e9ff2de38cef</p> <p>Payment key: 0d1e11e5-2df6-4b6b-992f-e9ff2de38cef</p> |
| Transaction key | Kill Bill automatically generates an external transaction key for Authorize, Purchase, and Credit transactions. To process a transaction that requires the transaction key, open the payment detail from the Payments screen and copy the key from the Transaction External Key column.  |
| Reason | The reason is automatically selected based on Kaui configuration settings . However, you can make a different selection. |
| Comment | The text you enter here displays on the Timeline page after the transaction is complete. Adding comments is optional. |
| Add control plugin | For information on control plugins, see Plugin Manager . |
| Add property (Name/Value) | Use this area to assign custom fields and values to the transaction. For information on custom fields, see Custom Fields . |

Delete Payment Method



Warning: Kaui does not ask you to confirm your deletion; use this feature with caution.

To delete a payment method:

1. Open the account on the Account page.
2. In the **Payment Methods** area, click the red X () next to the payment method. Kaui

immediately removes the payment method.

Subscriptions

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 Kaui lists the subscriptions associated with an account.

The screenshot shows a table with one row of data. The columns are labeled: CATEGORY, NAME, PHASE TYPE, START DATE, CHARGED THROUGH DATE, CANCEL INFORMATION, and ACTIONS. The data in the table is:

| 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](#)
- [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. For information on adding plans to the catalog, see [\[part_6_tenants_and_admin\]](#).

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

The screenshot shows the 'Subscription Bundles' button highlighted with a large red arrow pointing to it. Below the button, there is a table with one row of data, identical to the one shown in the previous screenshot.

Kaui 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. |

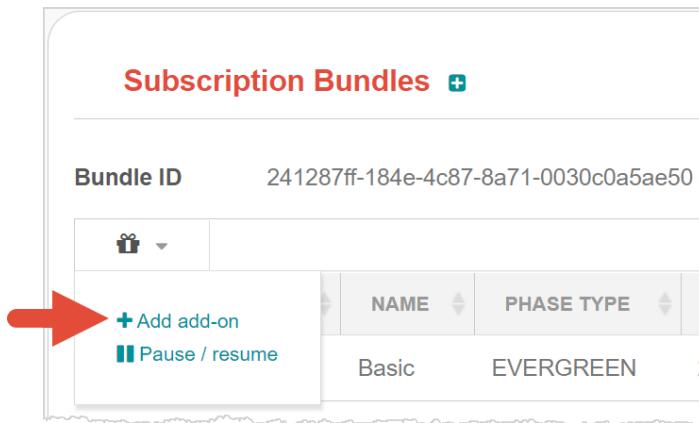
Add an Add-On Product to a Subscription

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. For information on adding an add-on to the catalog, see [\[part_6_tenants_and_admin\]](#).

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:

The screenshot shows the 'Add New Add-On' form. It has fields for 'Subscription Key', 'Plan' (set to 'Auto-update-monthly'), and 'Price Override'. Below these are two radio buttons: 'Immediate Creation' (selected) and 'Specify a date'. At the bottom is a blue 'SAVE' button.

- 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

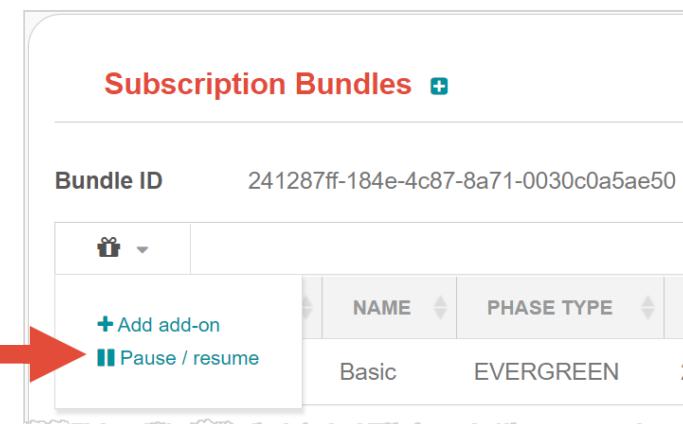
Pausing and resuming happens at the subscription bundle level. In other words, pause/resume affects *all* subscriptions and add-ons in the customer's account.



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
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:

The screenshot shows a 'Pause / Resume' dialog box. It contains three input fields: 'Pause date', 'Resume date', and 'Comment'. Below these fields is a teal-colored 'PAUSE / RESUME' button.

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.

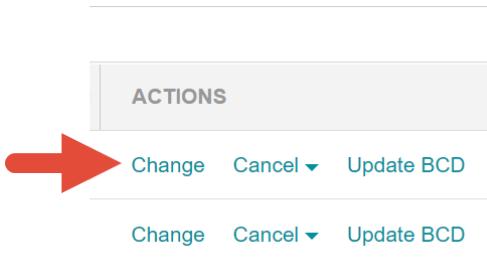
1. Click the **Pause / Resume** button. Kaui displays a success message at the top of the screen.

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:

The screenshot shows a modal dialog titled "Change Subscription". It contains the following fields:

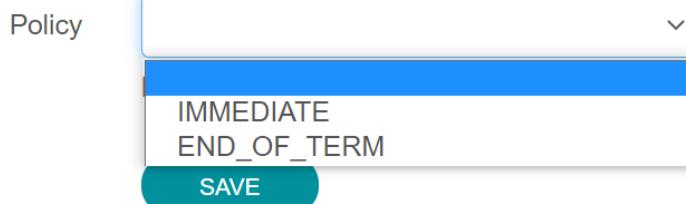
- New plan: A dropdown menu currently set to "Basic".
- Price Override: An empty input field.
- Policy Selection: A group of three radio buttons:
 - Default policy
 - Specify Policy
 - Specify a date
- SAVE: A blue rounded rectangular button at the bottom.

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 [see \[- **Specify Policy:** You can select either **IMMEDIATE** or **END_OF_TERM**. For information on these two policies, see the "\\[Subscription Alignment Rules\\]\\(#\\)" in the *Subscription Guide*.\]\(https://docs.killbill.io/latest/userguide_subscription.html#plan_change_timing\['Plan Change Timing'\] in the _Subscription Guide.</p></div><div data-bbox=\)](https://docs.killbill.io/latest/userguide_subscription.html#plan_change_timing['Plan Change Timing'] in the _Subscription Guide.)

- Default policy
- Specify Policy
- Specify a date



- **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.

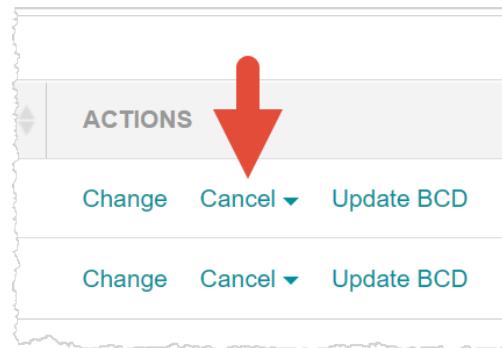
- Default policy
- Specify Policy
- Specify a date

| | |
|---|------------|
| Change Date | 2022-01-11 |
| <input style="background-color: #009640; color: white; border-radius: 50px; border: none; padding: 5px 20px; font-weight: bold; width: 150px; height: 30px;" type="button" value="SAVE"/> | |

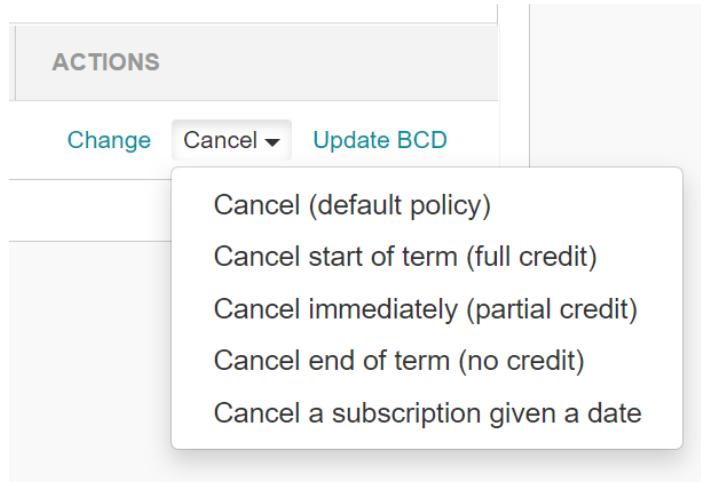
Cancel a Subscription

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 | If you select this option, Kaui displays a pop-up from which to choose a date: |

Cancel A Subscription Given A Date

Date 2022-01-11

Use requested date for billing?

SAVE

Notice

- When **Use requested date for billing?** is checked, then entitlement date and billing date are going to be equal to the requested date.
- When **not** checked, then the entitlement date will be set with requested date, and billing date will default to now.

Use requested date for billing: To set the entitlement date and billing date the same as the date you just selected, check this box.

Otherwise, if you leave the checkbox empty, the entitlement date is the same as you just selected BUT the billing date defaults to *immediate*.

Update the Billing Cycle Day

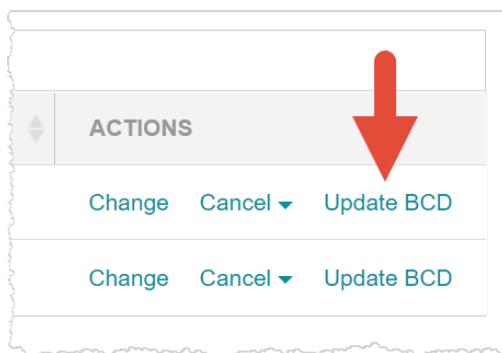
Follow the steps below to update the billing cycle day (BCD) defined for a subscription. These steps assume the subscription is billed on a monthly basis.

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:

| | |
|----------------|------------|
| Bill Cycle Day | 12 |
| Effective Date | 2022-01-12 |

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.

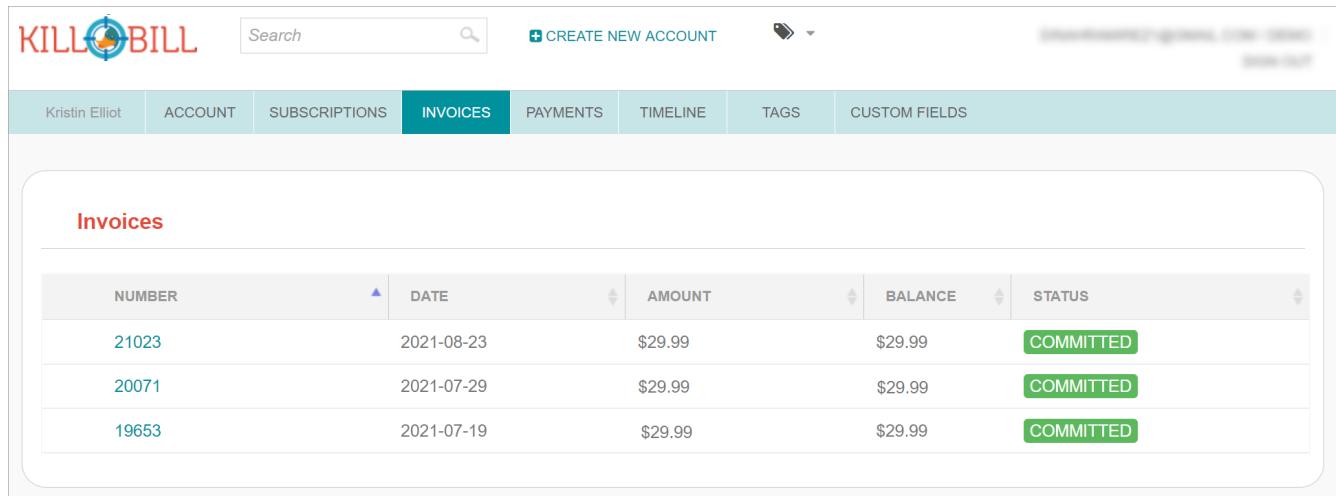
Invoices

This section helps you become familiar with the Invoices and Invoice Details pages.

For more information on invoices, see the "[Invoicing](#)" section of the *Subscription Guide*.

Invoices Page

The Invoices page lists the invoices for the currently selected account. To open the Invoices page, open the account and select **Invoices** on the sub-menu.



The screenshot shows the Kill Bill Invoices page. At the top, there is a navigation bar with the Kill Bill logo, a search bar, and a "CREATE NEW ACCOUNT" button. Below the navigation bar is a menu bar with links: Kristin Elliot, ACCOUNT, SUBSCRIPTIONS, INVOICES (which is highlighted in blue), PAYMENTS, TIMELINE, TAGS, and CUSTOM FIELDS. The main content area is titled "Invoices". It displays a table with three rows of invoice data:

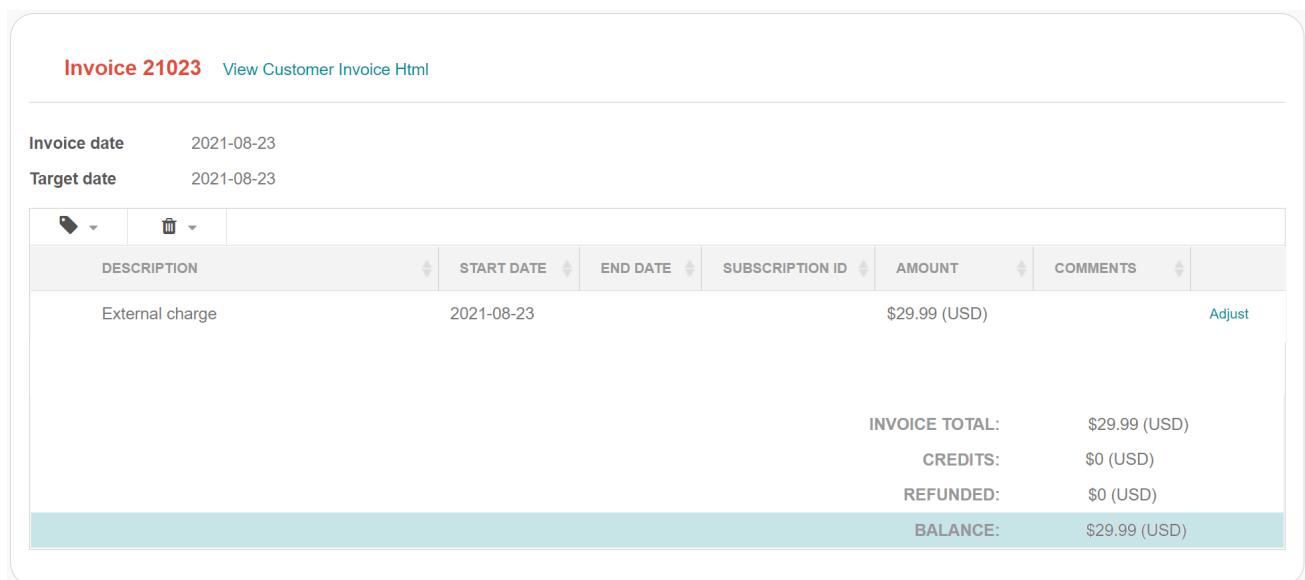
| NUMBER | DATE | AMOUNT | BALANCE | STATUS |
|--------|------------|---------|---------|-----------|
| 21023 | 2021-08-23 | \$29.99 | \$29.99 | COMMITTED |
| 20071 | 2021-07-29 | \$29.99 | \$29.99 | COMMITTED |
| 19653 | 2021-07-19 | \$29.99 | \$29.99 | COMMITTED |

Kill Bill generates invoices automatically based on the customer's subscriptions. However, you can manually create an invoice by [creating a charge](#) on the customer's account.

Click the invoice number to open the Invoice Details page.

Invoice Details Page

The Invoice Details page displays information about the invoice, such as the date it was generated, amount, and so forth.



The screenshot shows the Kill Bill Invoice Details page for invoice 21023. At the top, it says "Invoice 21023" and "View Customer Invoice Html". Below that, there are two date fields: "Invoice date" (2021-08-23) and "Target date" (2021-08-23). The main content area has a table with one row:

| DESCRIPTION | START DATE | END DATE | SUBSCRIPTION ID | AMOUNT | COMMENTS |
|-----------------|------------|----------|-----------------|---------------|----------|
| External charge | 2021-08-23 | | | \$29.99 (USD) | Adjust |

At the bottom, there are summary totals:

| | |
|----------------|---------------|
| INVOICE TOTAL: | \$29.99 (USD) |
| CREDITS: | \$0 (USD) |
| REFUNDED: | \$0 (USD) |
| BALANCE: | \$29.99 (USD) |

On the Invoice Details page, you can:

- Make a payment against an invoice
- Write off or void an invoice
- See the payment details (if the invoice was paid)



Note: You can perform two other invoice-related tasks on the Accounts page: [Generate a Dry-Run Invoice](#) and [Pay All Unpaid Invoices](#).

Open Invoice Details

To get to the Invoice Details page:

1. Open an account.
2. Click **Invoices** on the sub-menu.
3. Select an invoice number.



Note: To see any associated payment details, you may need to scroll down the page.

Make a Payment on an Invoice

To make a manual payment against an invoice:

1. [Open the Invoices Details page](#) for the invoice.

The screenshot shows the 'Invoice 21023' details. At the top, there's a link to 'View Customer Invoice Html'. Below that, the 'Invoice date' is listed as 2021-08-23 and the 'Target date' as 2021-08-23. A table lists a single item: 'External charge' with a start date of 2021-08-23 and an amount of \$29.99 (USD). There's an 'Adjust' button next to the amount. At the bottom, summary statistics are shown: INVOICE TOTAL: \$29.99 (USD), CREDITS: \$0 (USD), REFUNDED: \$0 (USD), and BALANCE: \$29.99 (USD).

2. Hover over the credit card icon and select **Make Payment**.

The screenshot shows the 'Invoice 21023' detail page. At the top, there's a 'View Customer Invoice Html' link. Below that, the 'Invoice date' is listed as '2021-08-23'. Underneath it, the 'Target date' is also '2021-08-23'. A row of icons follows: a credit card icon, a banknote icon, a trash bin icon, and a plus sign icon. Below these icons is a button labeled '+ Make payment'. A large red arrow points to this button. To the right of the button is a 'START DATE' field containing '2021-08-23'. The rest of the page contains standard invoice details like 'Customer Name' and 'Address'.



Note: If the invoice has already been fully paid, the credit card icon doesn't show, and the payment details are displayed below the invoice.

- Kaui displays the Process Payment screen:

The screenshot shows the 'Process Payment' screen. It includes fields for 'External?' (checkbox), 'Amount' (29.99), 'Currency: USD', 'Payment Method' (dropdown with note 'Leave blank to use account's default'), 'Reason' (dropdown with value '600 - Alt payment method'), and 'Comment' (text area). A 'SAVE' button is at the bottom.

- Fill in the fields. For field descriptions, see [Process Payment Field Descriptions](#).
- Click **Save**. The invoice detail shows the balance due on the invoice. Below the invoice, Kaui displays the payment details, including the status of the payment.

Process Payment Field Descriptions

| Field | Description |
|-----------|---|
| External? | Select this checkbox if the customer is making a payment outside of the Kill Bill system (such as with a check). Note that if this checkbox is selected, it overrides anything selected in the Payment Method field. |
| Amount | The amount defaults from the invoice balance. If the customer is making a partial payment, you can change this amount. |

| Field | Description |
|----------------|--|
| Payment Method | To use the account's default payment method, leave the field blank. Otherwise, select the payment method from the drop-down. |
| Reason | The reason is automatically selected based on Kaui configuration settings . However, you can make a different selection. |
| Comment | The text you enter here displays on the Timeline page after the payment is complete. Adding comments is optional. |

Write Off or Void an Invoice

This section explains how to write off an invoice and void an invoice. "Write-off" and "void" have different meanings in Kill Bill:

- **Write off:** Brings the balance of an unpaid invoice to \$0. This method is typically used when closing an account with unpaid invoices (or when you are sure the invoice is uncollectible). When you write off an invoice, Kaui applies the **WRITTEN_OFF** tag to the invoice. For more information on system tags, see the "[Tags](#)" section in the *Subscription Guide*.
- **Void:** Changes the invoice's status to VOID, in which case it is ignored by the system. An invoice *cannot* be voided if:
 - It was partially or fully paid.
 - It contains positive credit items.
 - Any invoice item was internally adjusted by the system. (In this situation, you could refund the payment before voiding the invoice.)

Write Off an Invoice

To write off an invoice:

1. [Open the Invoices Details page](#) for the invoice.

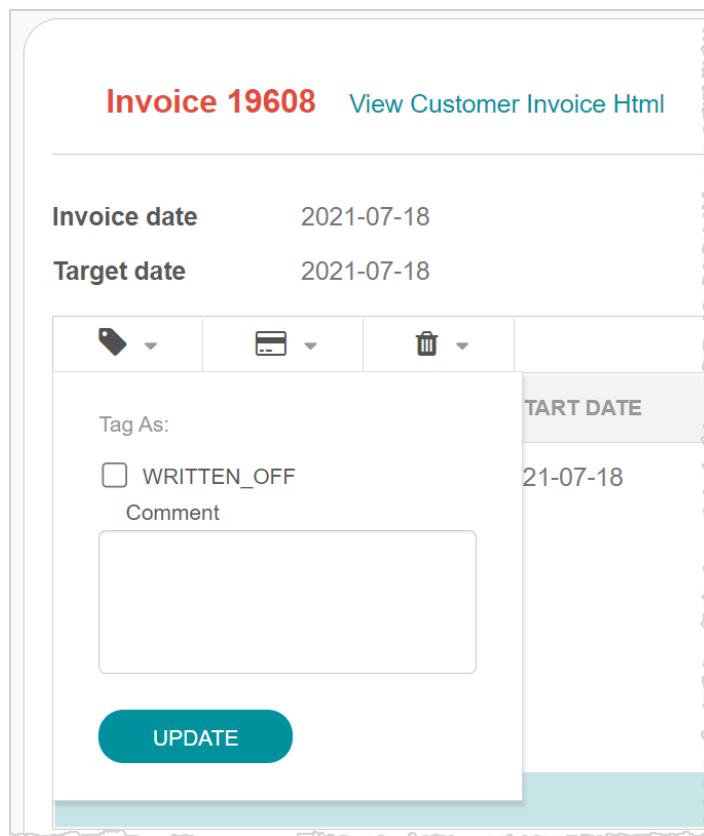
Invoice 19608 [View Customer Invoice Html](#)

| | |
|--------------|------------|
| Invoice date | 2021-07-18 |
| Target date | 2021-07-18 |

| DESCRIPTION | START DATE | END DATE | SUBSCRIPTION ID | AMOUNT | COMMENTS |
|----------------|------------|----------|-----------------|--------------|------------------------|
| Add-on service | 2021-07-18 | | | \$4.99 (USD) | Adjust |

| | |
|----------------|--------------|
| INVOICE TOTAL: | \$4.99 (USD) |
| CREDITS: | \$0 (USD) |
| REFUNDED: | \$0 (USD) |
| BALANCE: | \$4.99 (USD) |

2. Hover over the tag icon (🏷️). Kaui displays a drop-down:



3. Select the **WRITTEN_OFF** checkbox and (optionally) type text in the **Comment** field.
 4. Click the **Update** button.

If the write-off is successful, Kaui displays "This invoice has been written off" at the top of the Invoice Detail.

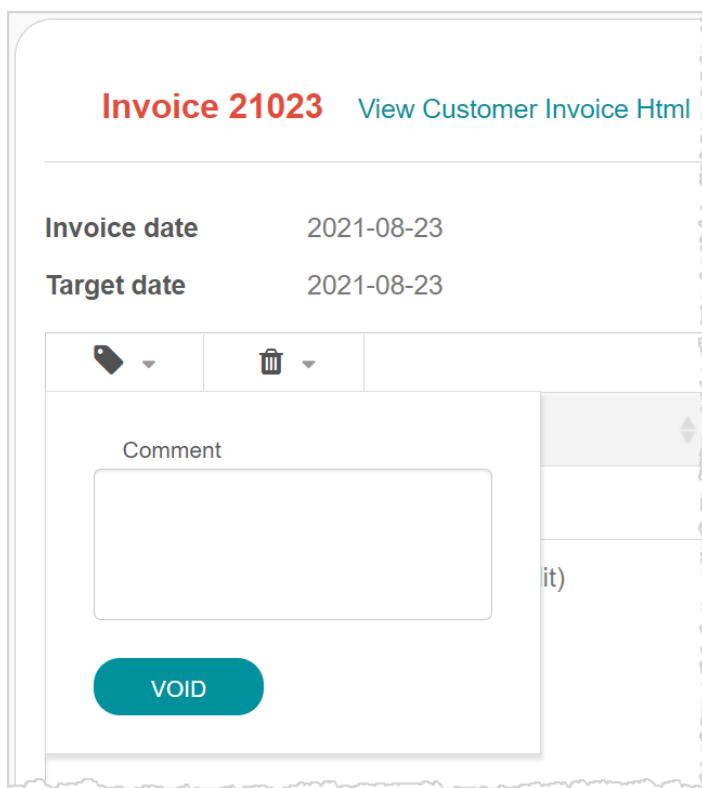
Void an Invoice

To void an invoice:

1. Open the Invoices Details page for the invoice.

| Invoice 21023 View Customer Invoice Html | | | | | | | | | | | | | | | | | |
|---|------------|-------------|---|----------------|---------------|-------------|------------|----------|-----------------|--------|----------|-----------------|------------|--|--|---------------|--------|
| Invoice date | 2021-08-23 | Target date | 2021-08-23 <th data-cs="2" data-kind="parent"></th> <th data-kind="ghost"></th> | | | | | | | | | | | | | | |
| <table border="1"> <thead> <tr> <th>DESCRIPTION</th><th>START DATE</th><th>END DATE</th><th>SUBSCRIPTION ID</th><th>AMOUNT</th><th>COMMENTS</th></tr> </thead> <tbody> <tr> <td>External charge</td><td>2021-08-23</td><td></td><td></td><td>\$29.99 (USD)</td><td>Adjust</td></tr> </tbody> </table> | | | | | | DESCRIPTION | START DATE | END DATE | SUBSCRIPTION ID | AMOUNT | COMMENTS | External charge | 2021-08-23 | | | \$29.99 (USD) | Adjust |
| DESCRIPTION | START DATE | END DATE | SUBSCRIPTION ID | AMOUNT | COMMENTS | | | | | | | | | | | | |
| External charge | 2021-08-23 | | | \$29.99 (USD) | Adjust | | | | | | | | | | | | |
| | | | | INVOICE TOTAL: | \$29.99 (USD) | | | | | | | | | | | | |
| | | | | CREDITS: | \$0 (USD) | | | | | | | | | | | | |
| | | | | REFUNDED: | \$0 (USD) | | | | | | | | | | | | |
| | | | | BALANCE: | \$29.99 (USD) | | | | | | | | | | | | |

2. Hover over the trashcan icon (). Kauai displays a drop-down:



3. If desired, type text in the **Comment** field.

4. Click the **Void** button.

If the void is successful, Kauai displays "This invoice has been voided" at the top of the Invoice Detail.

Pay All Unpaid Invoices

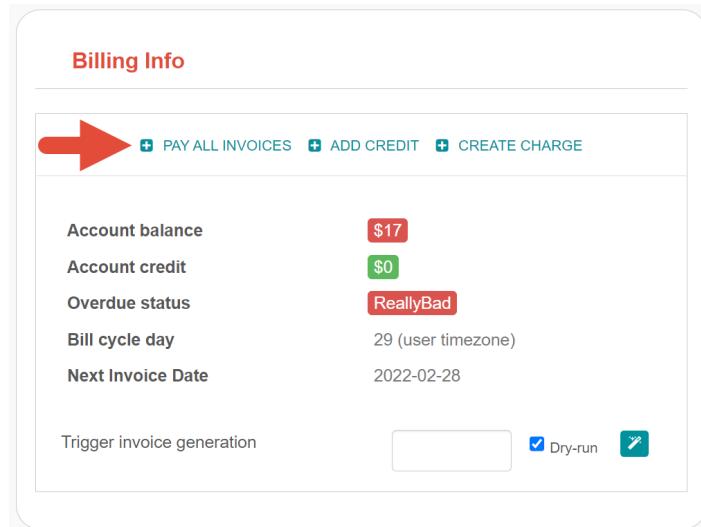
You can pay all unpaid invoices if a customer account has at least one outstanding invoice. Before you begin, make sure the customer has a valid payment method (see Note).



Note: If the invoices have gone unpaid because of issues with the customer's payment method (for example, an expired credit card), make sure you [delete the old payment method](#) and [add a new one](#).

To pay all invoices:

1. Open the account on the Account page.
2. In the **Billing Info** section, click **Pay all invoices**.



If the payments are completed, Kaui displays a success message at the top of the screen. To see the payment details, click **Payments** on the sub-menu.

Generate a Dry-Run Invoice

A dry-run invoice lets you see how a customer's invoice will look without actually committing it. This feature creates a draft invoice as if it's being generated on the customer's bill cycle day. It's a helpful feature for testing. (You cannot generate a dry-run invoice for an invoice generated from a charge.)

After you generate the invoice, which is in **DRAFT** mode, you have the choice to commit it. If you do not commit the **DRAFT** invoice, it remains in the system as a draft.

In order to generate a dry-run invoice, the customer account must be associated with a subscription that has a billing date in the future.

1. Open the account on the Account page.
2. In the **Billing Info** section, make sure the **Dry-run** checkbox is selected.

Billing Info

[PAY ALL INVOICES](#) [ADD CREDIT](#) [CREATE CHARGE](#)

| | |
|--|--|
| Account balance | \$17 |
| Account credit | \$0 |
| Overdue status | ReallyBad |
| Bill cycle day | 29 (user timezone) |
| Next Invoice Date | 2022-02-28 |
| Trigger invoice generation | <input type="button" value="Trigger"/> |
| <input checked="" type="checkbox"/> Dry-run Edit | |

3. In the field next to **Dry-run**, enter the date that matches the invoice's upcoming invoice date.

Billing Info

[PAY ALL INVOICES](#) [ADD CREDIT](#)

| | |
|--|--|
| Account balance | \$1 |
| Account credit | \$0 |
| Overdue status | Re |
| Bill cycle day | 29 |
| Next Invoice Date | 20 |
| Trigger invoice generation | <input type="button" value="Trigger"/> |
| <input checked="" type="checkbox"/> Dry-run Edit | |

FEBRUARY 2022

| SU | MO | TU | WE | TH | FR | SA |
|----|----|----|----|----|----|----|
| 30 | 31 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |

4. Click the magic wand button:



Kaui generates and displays the draft invoice. A message at the top indicates it is a draft invoice.



Note: To change the invoice from **DRAFT** to **COMMITTED**, click "trigger an invoice run" in the message at the top of the invoice.

Payments

This section helps you become familiar with the Payments and Payment Details pages.

For more information on payments, see:

- "Payment" section of the *Subscription Guide*
- *Payment Guide*

Payments Page

The Payments page lists any payments applied to invoices for the customer account. This page also lists information about scheduled payment retries for failed payments.

To open the Payments page, open the account and select **Payments** on the sub-menu.



Note: If a customer account has a default payment method, Kaui automatically makes a payment when an invoice is generated in the system. See [About Automatic Invoice Payments](#) for more information.

The screenshot shows the Kill Bill interface with the 'ACCOUNT' tab selected. The main content area is titled 'Payments' and displays a table of payment records. The columns include: NUMBER, DATE, AUTH AMOUNT, CAPTURE AMOUNT, REFUND AMOUNT, LAST TRANSACTION STATUS, and EXTERNAL KEY. The data in the table is as follows:

| NUMBER | DATE | AUTH AMOUNT | CAPTURE AMOUNT | REFUND AMOUNT | LAST TRANSACTION STATUS | EXTERNAL KEY |
|--------|------------|-------------|----------------|---------------|-------------------------|--------------------------------------|
| 10237 | 2021-11-15 | \$7 | \$7 | \$0 | SUCCESS | 771367a9-a83c-4d50-859b-fc2f2d4c3043 |
| 9801 | 2021-10-19 | \$3.49 | \$3.49 | \$0 | SUCCESS | 5bbfa22a-6b25-4aa7-8e4d-e29eac884c33 |
| 9800 | 2021-10-19 | \$4.99 | \$4.99 | \$0 | SUCCESS | 0ca170cb-0334-4b26-8b25-cab88556f4a8 |
| 9782 | 2021-10-18 | \$25 | \$25 | \$0 | SUCCESS | 9d5fb49c-42a5-48e8-a17a-57129e029081 |

About Automatic Invoice Payments

Kill Bill automatically generates a payment for an invoice if an account:

- Has an outstanding, unpaid invoice AND
- Has a default and valid payment method

Kill Bill *does not* automatically generate an invoice payment if:

- No default payment method exists for the account
- The default payment method is invalid (e.g., expired credit card)
- The **AUTO_PAY_OFF** or **MANUAL_PAY** system tags are defined for the account



Note: For invoices that Kill Bill does not automatically pay, you can use the "Pay all Invoices" feature. For more information, see [Pay All Unpaid Invoices](#).

Payment Details Page

The Payment Details page displays information about a specific payment, such as the date it was generated, amount, and so forth. Below the payment information is information about the payment method used.

Payment 8960

| | |
|--------------|--------------------------------------|
| Invoice ID | a1e0c754-c8cf-4418-b01f-259ea5f3feaf |
| External key | 4a3f80aa-5ca1-4abe-a698-61edcd0b6a26 |

| DATE | TYPE | AMOUNT | TRANSACTION EXTERNAL KEY | FIRST ID | SECOND ID | GATEWAY CODE | GATEWAY MESSAGE | STATUS |
|------------|----------|--------------|--------------------------------------|----------|-----------|--------------|-----------------|---------|
| 2021-08-26 | PURCHASE | \$4.99 (USD) | 6e6dae1e-0979-4092-848c-8df791158401 | | | | | SUCCESS |

Payment Method Details

| | |
|------------------|--------------------------------------|
| Name: | killbill-stripe |
| ID: | 11b455b2-e848-4cf5-b239-223babd882b4 |
| card_brand | Visa |
| card_country | US |
| card_exp_month | 10 |
| card_exp_year | 2022 |
| card_fingerprint | U6o8Z4JtemC3AYFe |
| card_funding | credit |
| card_last4 | 4242 |

On the Payment Details page, you can: [refund a payment](#) or [perform a chargeback](#).

Open Payment Details

To get to the Payment Details page:

1. Open an account.
2. Click **Payments** on the sub-menu.
3. Select a payment number.



Note: To see the associated payment method information, you may need to scroll down the page.

Refund a Payment

When you refund a payment from the Payment Details page, it brings the invoice amount to zero (i.e., the invoice will have no balance). You can also perform a partial refund in which the partial refund amount is added as an invoice line item. ←-NOT SURE THIS IS RIGHT

The refund is applied to the same payment method used in the original payment.



Note: You can also perform a refund directly on the payment method that was originally used. For more information, see [Applying Transactions to a Payment Method](#).

To refund a payment:

1. Open the Payment Detail page for the payment.

Payment 9734

Invoice ID: 36b604ed-2694-4c7d-a159-42d1cbc031b8
External key: 83a3dc47-4958-433f-bd4e-153fce09b4a4

| DATE | TYPE | AMOUNT | TRANSACTION EXTERNAL KEY | FIRST ID | SECOND ID | GATEWAY CODE | GATEWAY MESSAGE | STATUS |
|------------|----------|------------|--------------------------------------|----------------------------|-----------|--------------|-----------------|---|
| 2021-10-15 | PURCHASE | \$10 (USD) | 69166faa-6b0f-4a55-bb45-ae44c65e2f83 | ch_3JksNRlSp8QfnMk2i9WO4LB | | | | SUCCESS kbPaymentMethodId=11b454cf5-b239-223babd882b4} last_charge_object: charge last_charge_outcome: {networkStatus=approved_b} |

2. Hover over the credit card icon and select Refund.

Payment 9734

Invoice ID: 36b604ed-2694-4c7d-a159-42d1cbc031b8
External key: 83a3dc47-4958-433f-bd4e-153fce09b4a4

| TYPE | AMOUNT | TRANSACTION EXTERNAL KEY |
|---|--------|--------------------------|
| <input checked="" type="radio"/> Refund | | |
| <input type="radio"/> Chargeback | | |

Kaui opens the Process Refund screen.

Process Refund

No Invoice Adjustment
 Invoice Item Adjustment

Amount: 10.0
 Currency: USD

Reason: 500 - Courtesy

Comment:

SAVE

3. Fill in the fields. For field descriptions, see [Process Refund Field Descriptions](#).
4. Click the **Save** button. Kaui saves the refund and displays it as a separate row on the Payments Details page:

Payment 9734

| Invoice ID | | c9369e16-67d9-4aaa-91d4-8a683c778216 | | | | | | |
|--------------|----------|--------------------------------------|--------------------------------------|----------|-----------|--------------|-----------------|---------|
| External key | | 9d5fb49c-42a5-48e8-a17a-57129e029081 | | | | | | |
| DATE | TYPE | AMOUNT | TRANSACTION EXTERNAL KEY | FIRST ID | SECOND ID | GATEWAY CODE | GATEWAY MESSAGE | STATUS |
| 2021-10-18 | PURCHASE | \$25 (USD) | cdf3d494-1c0e-424c-b60f-77276dd6dd03 | | | | | SUCCESS |
| 2022-01-05 | REFUND | \$25 (USD) | 34bb7f7a-33f8-4cec-8b88-a4d83290890c | | | | | SUCCESS |

Process Refund Field Descriptions

| Field | Description |
|-------------------------|--|
| No Invoice Adjustment | If you are refunding the entire balance of the invoice, select No Invoice Adjustment . However, if you are providing a partial refund, select Invoice Item Adjustment . ←-NOT SURE THIS IS RIGHT |
| Invoice Item Adjustment | |
| Amount | The amount of the refund. Kaui automatically fills this in based on the invoice balance. |
| Reason | The refund reason is automatically selected based on Kaui configuration settings . However, you can make a different selection. |
| Comment | The text you enter here displays on the Timeline page after the payment is complete. Adding comments is optional. |

Perform a Chargeback

If your business receives a chargeback notice for a payment, you can record that chargeback in Kill Bill.

1. Open the Payment Detail page for the payment.

Payment 9782

Invoice ID: c9369e16-67d9-4aaa-91d4-8a683c778216
External key: 9d5fb49c-42a5-48e8-a17a-57129e029081

| DATE | ▲ TYPE | AMOUNT | TRANSACTION EXTERNAL KEY | FIRST ID | SECOND ID | GATEWAY CODE | GATEWAY MESSAGE | STATUS |
|------------|----------|------------|--------------------------------------|----------|-----------|--------------|-----------------|--------|
| 2021-10-18 | PURCHASE | \$25 (USD) | cdf3d494-1c0e-424c-b60f-77276dd6dd03 | | | | SUCCESS | |

2. Hover over the credit card icon and select Chargeback.

Payment 9782

Invoice ID: c9369e16-67d9-4aaa-91d4-8a683c778216
External key: 9d5fb49c-42a5-48e8-a17a-57129e029081

18 PURCHASE \$25 (USD) cdf3d49-77276dc

Kaui opens the Process Chargeback screen with the **Amount** and **Reason** fields already filled in.

Process Chargeback

Amount: 25.0
Currency: USD

Reason: 400 - Canceled Recurring Transaction

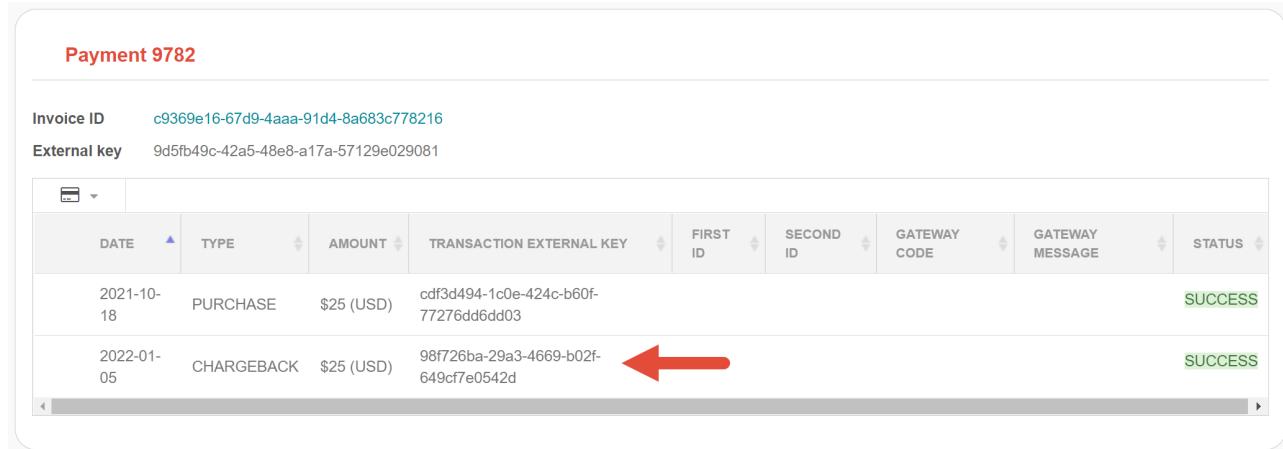
Cancel account subscriptions?

Comment:

SAVE

3. If necessary, select a different **Reason**. (The chargeback reason is automatically selected based on [Kaui configuration settings](#). However, you can make a different selection.)

4. If the subscription associated with the payment needs to be canceled, check the **Cancel account subscriptions** box.
5. Fill in the **Comment** field (optional). The text you enter here displays on the [Timeline](#) page.
6. Click the **Save** button. Kaui saves the chargeback and displays it as a separate row on the Payments Details page:



| Payment 9782 | | | | | | | | |
|--------------|------------|------------|--------------------------------------|----------|-----------|--------------|-----------------|---------|
| DATE | TYPE | AMOUNT | TRANSACTION EXTERNAL KEY | FIRST ID | SECOND ID | GATEWAY CODE | GATEWAY MESSAGE | STATUS |
| 2021-10-18 | PURCHASE | \$25 (USD) | cdf3d494-1c0e-424c-b60f-77276dd6dd03 | | | | | SUCCESS |
| 2022-01-05 | CHARGEBACK | \$25 (USD) | 98f726ba-29a3-4669-b02f-649cf7e0542d | | | | | SUCCESS |

Timeline

The Timeline displays a chronological list of events (that is, an audit log) that occurred for a specific customer account. You cannot make changes to the timeline.

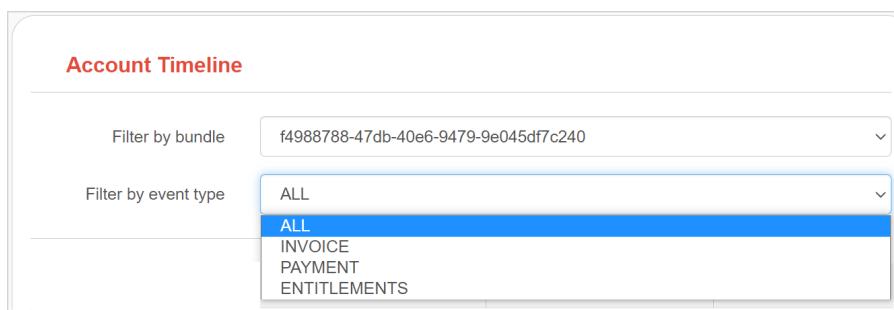
To see the Timeline, open an account and click **Timeline** on the sub-menu:

The screenshot shows the 'Account Timeline' page with two events listed:

| EFFECTIVE DATE | BUNDLE | EVENT TYPE | DETAILS | REASON CODE / COMMENTS |
|----------------|---------------------------|------------|--|--|
| 2021-05-29 | | PURCHASE | Amount: \$10 (USD) SUCCESS Payment # 7632 Invoice # 16407 | INSERT by [redacted] @gmail.com: 699 - OTHER UPDATE by [redacted] @gmail.com: 699 - OTHER |
| 2021-05-29 | 4dbb63f7-...-e31396c8c0e1 | PURCHASE | Amount: \$29.99 (USD) SUCCESS Payment # 7633 Invoice # 17586 | INSERT by [redacted] @gmail.com: 600 - Alt payment method UPDATE by [redacted] @gmail.com: 600 - Alt payment method |

On the Timeline page, you can:

- **Filter events:** Make selections in the **Filter by event type** or **Filter by bundle** fields to display only specific events (e.g., **PURCHASE**, **INVOICE**) and/or by a specific subscription bundle.



- **Sort rows:** Click the up/down arrows to the right of the column header to sort by the contents of that column. The blue arrow indicates which column's contents are currently sorted.

The screenshot shows the 'Account Timeline' page with two events listed, and a red arrow points to the up arrow in the 'Event Type' column header.

| EFFECTIVE DATE | BUNDLE | EVENT TYPE | DETAILS | REASON CODE / COMMENTS |
|----------------|---------------------------|-------------------|-----------------|----------------------------------|
| 2022-01-19 | f4988788-...-9e045df7c240 | START_ENTITLEMENT | Basic-evergreen | INSERT by writer@flowwriting.com |
| 2022-01-19 | f4988788-...-9e045df7c240 | START_BILLING | Basic-evergreen | INSERT by writer@flowwriting.com |

- **Open linked documents:** Click the document link in the **Details** column.

| EFFECTIVE DATE | BUNDLE | EVENT TYPE | DETAILS | REASON CODE / COMMENTS |
|----------------|---------------------------|-------------------|--|--------------------------------------|
| 2022-01-19 | f4988788-...-9e045df7c240 | INVOICE | Amount: \$11.99 (USD) Balance: \$11.99 (USD) Invoice # 27291 | INSERT by SubscriptionBaseTransition |
| 2022-01-19 | f4988788-...-9e045df7c240 | START_ENTITLEMENT | Basic-evergreen | INSERT |

Invoice 27291 [View Customer Invoice Html](#)

Invoice date 2022-01-19
 Target date 2022-01-19

| DESCRIPTION | START DATE | END DATE | SU |
|-------------|------------|------------|-----|
| Basic | 2022-01-19 | 2022-02-19 | 0e2 |

Users, Roles, and Permissions

Overview

In this guide, "users" refers to those who log in to Kaui to perform actions (add a charge, generate a dry-run invoice, etc.). However, other parts of the documentation also use the term "user" when referring to users of the API.

In order for Kaui users to be able to log in and perform tasks, you need to create a *user profile* for each one. A user profile stores the username and password as well as the following:

- The user's roles (i.e., permissions in the system)
- The tenants the user can access

In this section, you'll learn how to manage users in Kaui, which includes:

- Creating user roles
- Creating and editing users
- Assigning roles and tenants to users

This section assumes that you can log in as a Kaui admin or as a user with the correct permissions for working with users, roles, and permissions.

Additional Resources

For additional information on managing users, roles, and permissions in Kill Bill, see the following:

- [Users, Roles, and Permissions Management](#)
- [Multi-Tenancy and Authorization](#)
- [List of user permissions](#)

Managing Users with a Third-Party System

If your organization uses a third-party system, such as LDAP, Okta, or Auth0, to manage Kill Bill users and roles, first configure them in that system, then add them in Kaui. For more information, see [Users, Roles, and Permissions Management](#).

In Kaui, all that's required is to add the username per the [Add a User](#) section, then [edit the user profile](#) to define passwords and roles.

Managing Users with Kill Bill

If you are using the Kill Bill database to store user data, adding a user profile in Kaui automatically creates it in Kill Bill.

Create a User Role

The role (or roles) assigned to a user defines which tasks the user can perform in the system (for example, perform a chargeback or add a custom field).

To create a user role:

1. Open the Add New Role Definition screen, either from the User Update screen (see [Edit a User](#)) or by accessing https://<your_host>/kaui/role_definitions/new.

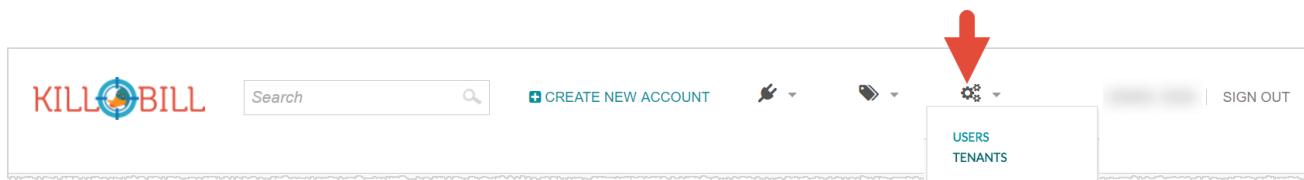
The screenshot shows a modal window titled "Add New Role Definition". It contains two input fields: "Role name" and "Permissions". Below the "Permissions" field is a note: "Comma separated, e.g. account:create,entitlement:change_plan,invoice:credit". At the bottom is a blue "SAVE" button.

2. Enter the **Role name** for the user. Do not use any spaces in the role name.
3. Enter all the **Permissions** that are associated with this role. See the [list of Kill Bill user permissions](#) as a reference.
4. Click the **Save** button.

Open the User List

To open a list of Kaui users:

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



Kaui displays the Kaui Users screen.

The screenshot shows the Killo Bill user management interface. At the top, there is a navigation bar with the Killo Bill logo, a search bar, and links for 'CREATE NEW ACCOUNT', 'SIGN OUT', and other system settings. Below the navigation bar is a section titled 'Kauai Users' with a plus icon. A table lists three users: 'admin', 'admin1', and 'admin2'. The table has columns for 'NAME' and 'DESCRIPTION'.

On this screen, you can [add a user](#) by clicking the plus icon. To open a user's details to [edit](#) or [delete](#), click the username.

Add a User

1. [Open the users list.](#)
2. Select the plus icon () next to **Kauai Users**.

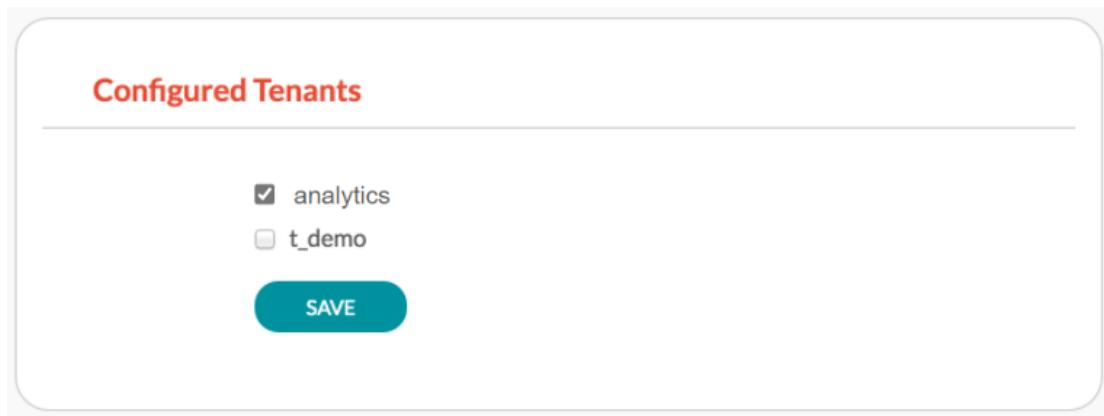
Kauai displays the Add New User pop-up:

The 'Add New User' pop-up form contains the following fields:

- A checkbox labeled 'Managed externally (LDAP, Okta, etc.)?'
- A 'Name' input field.
- A 'Password' input field.
- A 'Description' input field.
- A 'Roles' input field with placeholder text: 'Comma separated, e.g. customer_support,finance.' and a link 'Create a new role [here](#)'.

A 'SAVE' button is at the bottom of the form.

3. Fill in the user fields. For field descriptions, see [Add New User Field Descriptions](#).
4. Click the **Save** button. Kauai displays the Configured Tenants pop-up:



5. Select the tenant(s) the user has access to.
6. Click the **Save** button.

Edit a User

Use the steps in this section to change the user's name, password, or role.

1. Open the user list.

A screenshot of the Kauï Users list screen. At the top, there is a navigation bar with the Kill Bill logo, a search bar, and links for "CREATE NEW ACCOUNT", "SIGN OUT", and other account management options. Below the navigation is a table titled "Kauï Users" with a plus sign icon. The table has two columns: "NAME" and "DESCRIPTION". The data rows are: admin, admin1, and admin2.

2. Select the user you want to edit.

Kauï displays the User Details screen with the user's allowed tenants below.

User Details [Edit](#)

Name: admin1

Description:

Roles:

Configured Tenants

- bob
- tenant
- tenant2
- greylogin
- multi3
- analytics

SAVE

3. To edit the *tenant*, select or deselect the appropriate boxes and click the **Save** button.
4. To edit other user information, click **Edit** (next to **User Details**).

Kauai displays the Update User screen:

Update User

Managed externally (LDAP, Okta, etc.)?

Name: [REDACTED]

Password: [REDACTED]

Description: Managed User

Roles: consumer-role

Comma separated, e.g. customer_support,finance.
Create a new role [here](#).

SAVE

5. Fill in the user fields. For field descriptions, see [Add New User Field Descriptions](#).
6. Click the **Save** button.

Add New User Field Descriptions

| Field | Description |
|--|--|
| Managed externally (LDAP, Okta, etc.)? | Check this box if you are managing users in a third-party system. Otherwise, leave it unchecked. |
| Name | Enter the user's name. |
| Password | Enter the user's password. For security, Kaui does not display any existing passwords in this field, but you can type in a different one. It may be easier to copy and paste the password into this field. |
| Description | To provide a brief description of this user or his/her role, type it here. Kaui displays this description on the Allowed Users list on the Tenant screen. |
| Roles | Enter the roles that are associated with this user. You also have the option to create a new role . |

Delete a User

The following steps explain how to delete a user from the system (i.e., for both Kaui and Kill Bill). Deleting a user also removes the user's access to any assigned tenants.

1. Open the user list.

The screenshot shows the Kill Bill user management interface. At the top, there is a navigation bar with the Kill Bill logo, a search bar, and links for 'CREATE NEW ACCOUNT', 'SIGN OUT', and other system settings. Below the navigation bar, a section titled 'Kaui Users' contains a table with two columns: 'NAME' and 'DESCRIPTION'. The table lists four users: 'admin', 'admin1', and 'admin2'. The 'NAME' column is sorted in ascending order, indicated by an upward arrow icon.

| NAME | DESCRIPTION |
|--------|-------------|
| admin | |
| admin1 | |
| admin2 | |

2. Select the user you want to delete.

Kaui displays the User Details screen (with the user's allowed tenants below).

The screenshot shows the 'User Details' page with a red 'X' icon in the top right corner. Below it, there are fields for 'Name' (admin1), 'Description', and 'Roles'. A modal window titled 'Configured Tenants' is open, listing several tenant names with checkboxes: bob (checked), tenant, tenant2, greylogin, multi3, and analytics. A 'SAVE' button is at the bottom of the modal.

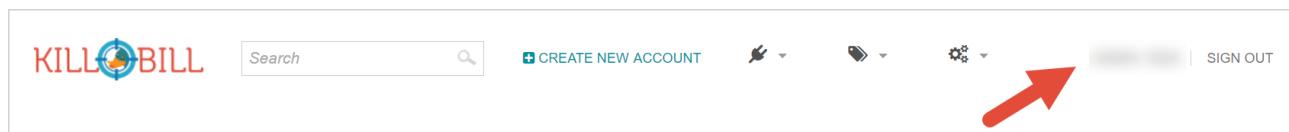
3. Click the icon. Kaui displays a message to confirm the deletion.
4. Click OK.
5. Kaui displays the login screen and asks you to confirm your login credentials.

After you successfully log in, Kaui deletes the user.

Add an Allowed User to the Tenant

The steps below explain how to add an existing user to the list of users who can access the tenant.

1. Log in to the tenant for which you want to allow access.
2. Click on your username and tenant name in the upper right corner:



Kaui displays the Tenant screen.

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

Tenant Details

Name: bob
Tenant ID: b6f05279-3fa3-4354-be65-677571853169
API Key: bob

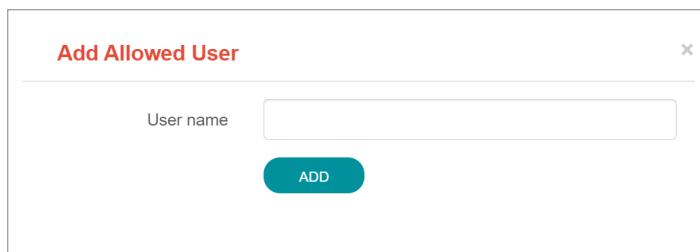
Allowed Users

| NAME | DESCRIPTION |
|-------|-------------|
| admin | |

Useful Links

- Parked accounts
- AUTO_INVOICING_OFF accounts
- AUTO_PAY_OFF accounts
- PENDING payments
- UNKNOWN and PLUGIN_FAILURE payments
- Queues

Kaui displays the Add Allowed User pop-up.



4. Type the user name into the **User name** field.
5. 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:

KILL BILL

Search

CREATE NEW ACCOUNT

SIGN OUT

Kaui displays the Tenant screen.

2. Click the black X to the right of the user to remove:

Tenant Details

Name: bob 

Tenant ID: b6f05279-3fa3-4354-be65-677571853169

API Key: bob

Useful Links

- Parked accounts
- AUTO_INVOICING_OFF accounts
- AUTO_PAY_OFF accounts
- PENDING payments
- UNKNOWN and PLUGIN_FAILURE payments
- Queues

Allowed Users 

| NAME | DESCRIPTION | |
|------|--------------|---|
| mary | Managed User |  |

3. Click OK.

Tags

IN PROCESS

Custom Fields

IN PROCESS

Plugin Manager

IN PROCESS

Analytics

Tenants

IN PROCESS

Admin

IN PROCESS

FAQs

IN PROCESS