Kaui Guide

May 2022

Table of Contents

Introduction

What Is Kaui?

"Kaui" (KAUI) stands for Kill (Bill) Admin User Interface. This self-contained web application interacts with Kill Bill over HTTPS.

Backoffice staff (for example, Support or Finance) will find Kaui useful to process refunds, credits, chargebacks, and so forth. Kaui also enables the Kill Bill administrator to perform more advanced tasks, such as managing tags, uploading a catalog, and configuring the tenant(s).

Other types of users who might find Kaui useful are developers (for testing), operations, and product managers.

Note: For Developers: Kaui functionality is provided via a series of Ruby on Rails mountable engines. You can extend its functionality (for example, to provide a custom UI for your plugins) by mounting your own engine(s).

How to Use This Guide

The first half of this guide explains the more basic components:

- Getting Started
- Basic search and Advanced search
- Accounts
- Payment methods
- Subscriptions
- Invoices
- Payments
- Timeline

Advanced and administrative features are covered in the second half of the guide:

- Tenants
- Users, roles, and permissions
- Catalog
- Overdue
- Translation files
- Tags
- Custom fields

Note: The Plugin Manager and Analytics functionality is currently undocumented.

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.

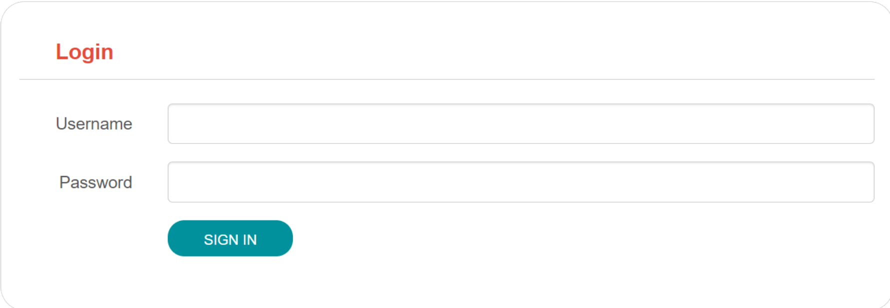
Getting Started

First-Time Login

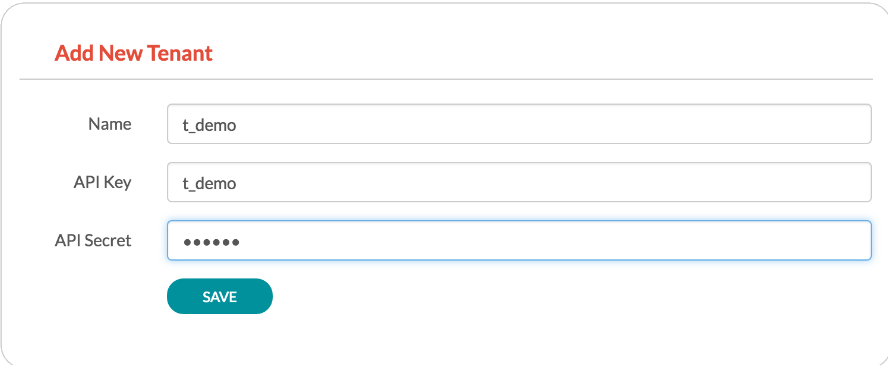
Note: Authentication is handled by Kill Bill. The method your organization uses to manage users is highly configurable. For information on managing users and permissions, see the Users chapter.

To log in to Kaui:

1. Type in your username and password, then select the **Sign In** button.



Kaui displays the Add New Tenant screen:



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

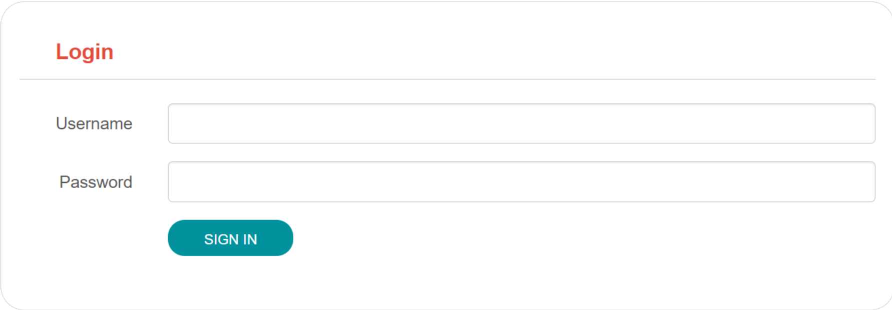
Note: The API key and API secret pair are used in all HTTP requests to ensure that the user issuing the request has the correct permissions to access the tenant.

3. Click the **Save** button.

Log In to Kaui

To log in to Kaui:

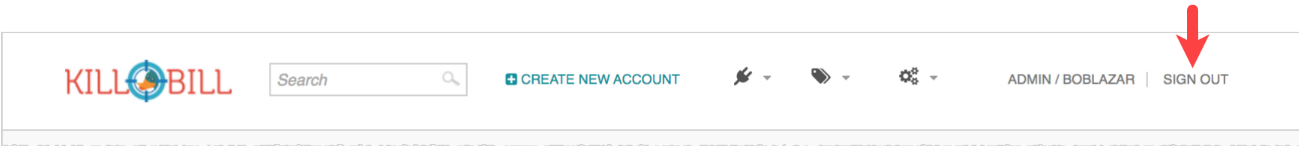
1. Type in your username and password, then select the **Sign In** button.



2. If your organization uses more than one Kill Bill tenant, select the tenant from the dropdown.
3. Click the **Save** button:

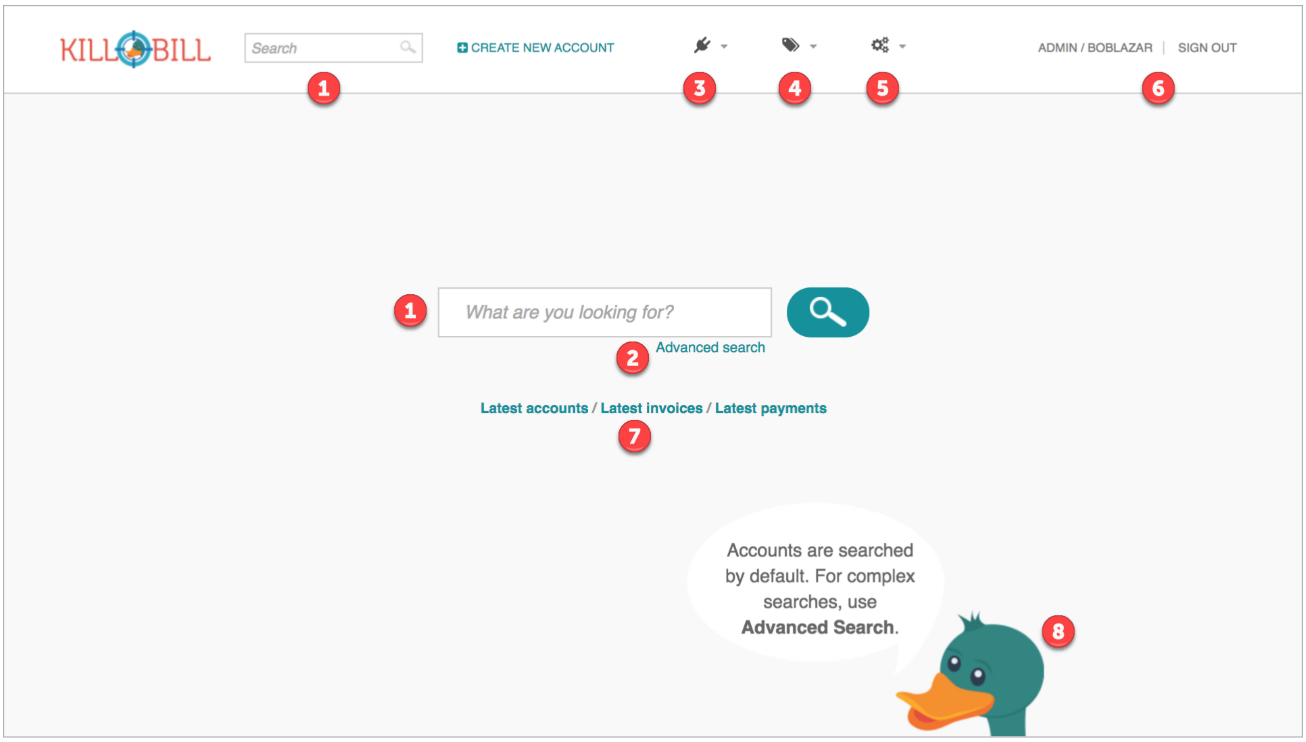
Log Out of Kaui

To log out of Kaui, select **SIGN OUT** in the upper right corner of the Kill Bill homepage:



Homepage Layout

The homepage is the screen that Kaui displays after you first log in.



1. Basic Search
2. Advanced Search
3. [Plugin Manager] and [Analytics] *Not yet documented.*
4. Tags and Custom Fields
5. Users, Tenants, and [Admin] *Not yet documented.*
6. Username / Tenant name and Sign Out
7. Latest invoices, accounts, and payments (latest records created for this tenant)
8. This is Killian, the Kill Bill mascot!

Return to Homepage

From any screen in Kill Bill, you can return to the homepage by clicking the logo in the upper left corner:

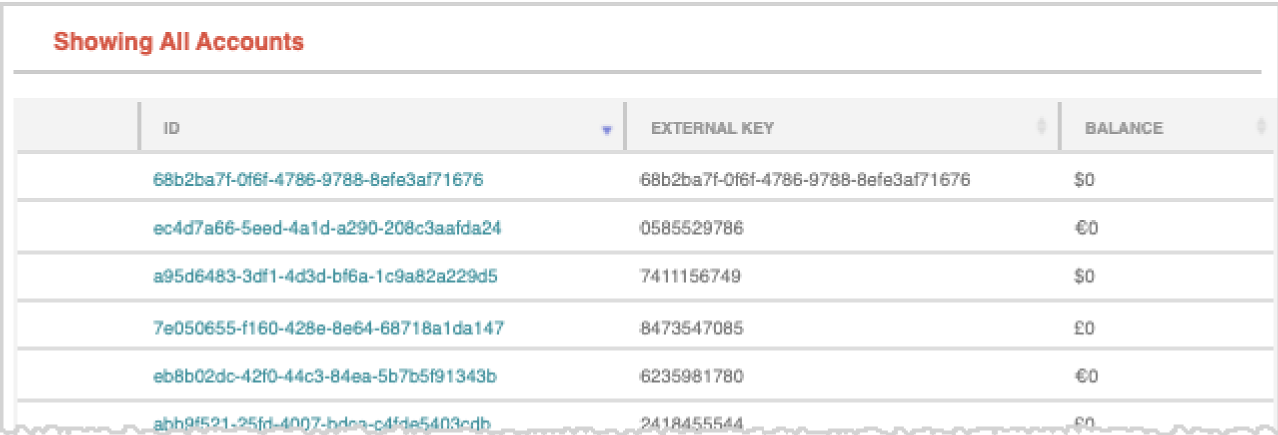
Icons

Icon	Description
	Add—Indicates you can add an item, such as a payment method, credit, charge, etc.
	Dry-run invoice—Appears on the Account page. Clicking it manually triggers a committed or dry-run invoice.
	Expand—Expand a section or dropdown menu.
	Collapse—Collapse a section.
	Tags—_Admin-level feature:_ On the home page, click to access Tags, Tag Definitions, and Custom Fields. *All users:* In other locations in Kaui, click to select a tag to apply to the current object (for example, an account).
	Kaui Package Manager—Appears at the top of the screen and gives you access to plugin specific screens. (Also known as Kill Bill Plugin Manager.)
	Add-on—Appears on the Subscription screen and lets you add an add-on to the account's subscription.

Icon	Description
	Make a payment—Appears on the Invoice screen and lets you make a payment against the invoice.
	Users, Tenants, & Admin—_Admin level feature:_ Appears at the top of the screen and gives you access to Users, Tenants, and Admin.
	Appears in the Payment Methods section of the Account page, clicking the Refresh icon triggers a refresh for each payment plugin installed in Kill Bill, for that account. When you refresh a payment method, Kill Bill retrieves the latest payment information from where it's stored (for example, from Stripe or another payment gateway). **Note:** This icon does not display if the only payment method listed is `EXTERNAL_PAYMENT`.

Grids/Tables

Grids (also referred to as *tables*) appear throughout Kaui to keep lists organized:



ID	EXTERNAL KEY	BALANCE
68b2ba7f-0f6f-4786-9788-8efe3af71676	68b2ba7f-0f6f-4786-9788-8efe3af71676	$0
ec4d7a66-5eed-4a1d-a290-208c3aafda24	0585529786	€0
a95d6483-3df1-4d3d-bf6a-1c9a82a229d5	7411156749	$0
7e050655-f160-428e-8e64-68718a1da147	8473547085	£0
eb8b02dc-42f0-44c3-84ea-5b7b5f91343b	6235981780	€0

For very large grids, use the pagination controls to view different "pages:"

To sort columns on a grid, click the up/down arrow in that column's header:

Invoices

NUMBER ▲	DATE	AMOUNT	BALANCE
18577	2021-06-23	$4.54	$4.54
18576	2021-06-23	$2.49	$0
18575	2021-06-23	$7.33	$0
18574	2021-06-23	$59.98	$59.98

Kaui shows you which column is currently sorted by the purple arrow:

Invoices

NUMBER	DATE	AMOUNT ▲	BALANCE
18574	2021-06-23	$59.98	$59.98
18573	2021-06-23	$59.98	$59.98
18538	2021-06-22	$29.99	$29.99
17587	2021-05-29	$29.99	$0

The direction of the arrow (up or down) indicates if the column is sorted in ascending or descending order.

If relevant, you can click a link in the grid to view that item's detail. For example, on the Invoices grid, click the link to open that specific invoice:

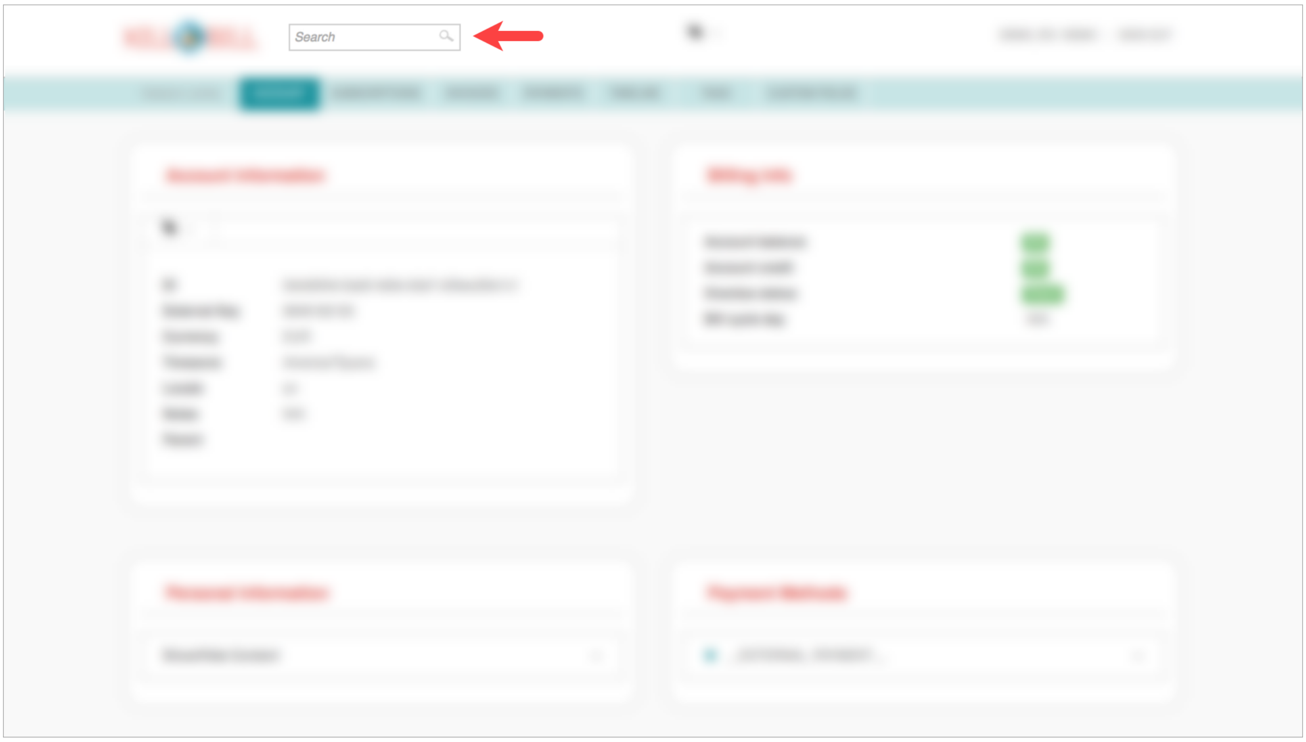
Invoices

NUMBER	DATE	AMOUNT ▲	BALANCE
18574	2021-06-23	$59.98	$59.98
18573	2021-06-23	$59.98	$59.98
18538	2021-06-22	$29.99	$29.99
17587	2021-05-29	$29.99	$0

Basic Search

Tip: To view all accounts, place your cursor in the search field and press the Enter key.

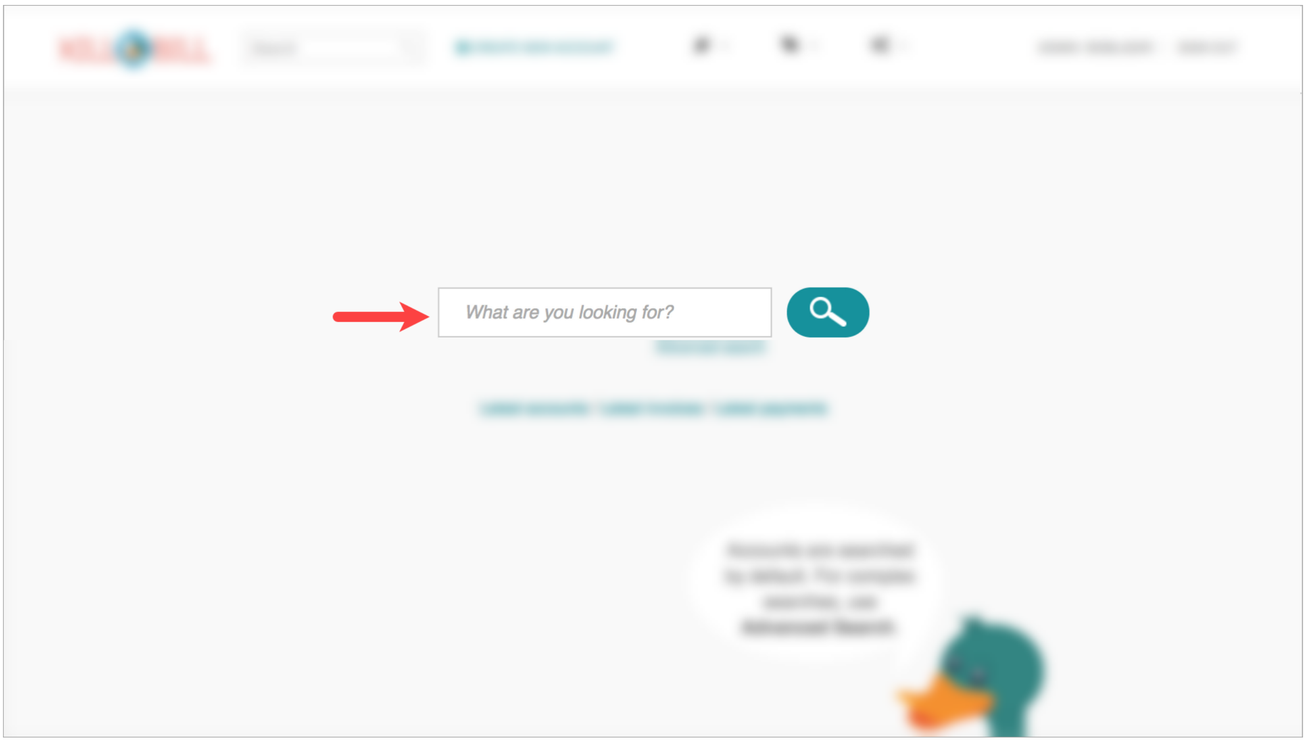
To search for customer accounts, use the basic search. Basic search is available at the top of the screen no matter where you are in Kaui.



You can search for an account using the following criteria:

- Account ID
- External key
- Name
- Email address

Basic search is also available in the center of the **homepage**:



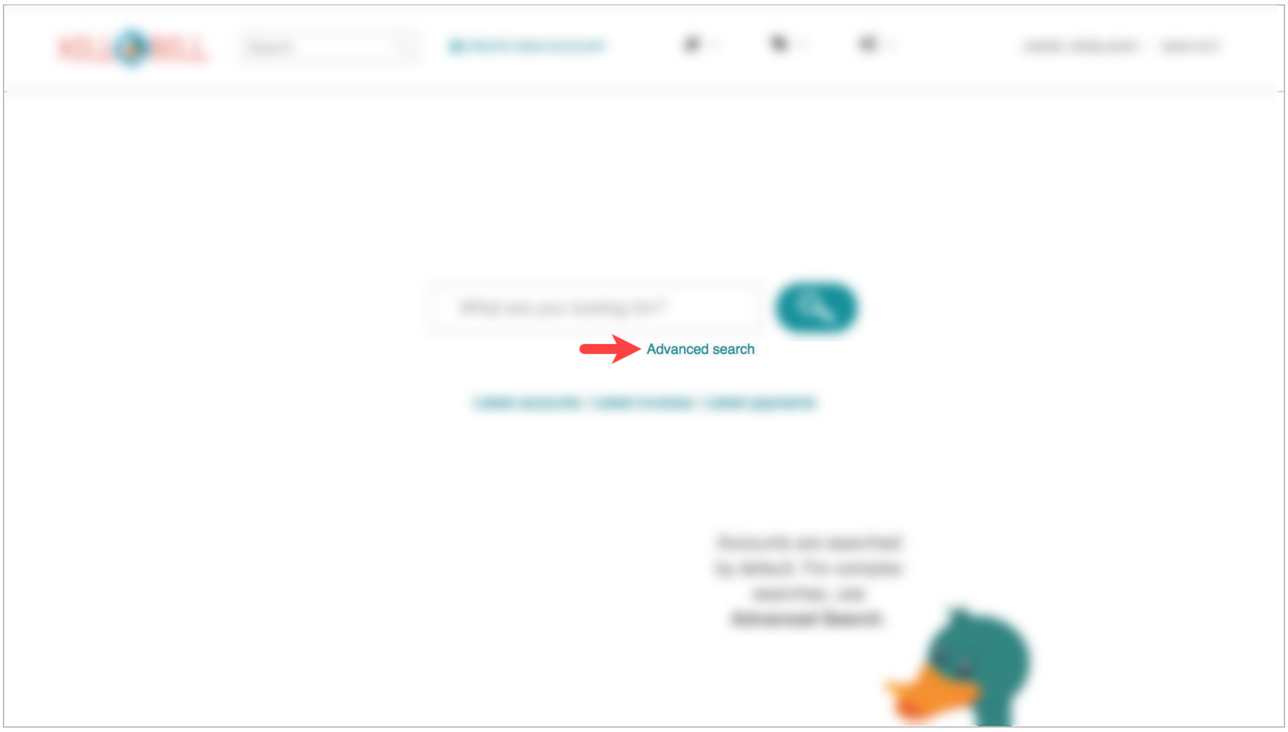
Advanced Search

An advanced search can help you find account information as well as other types of objects in the system:

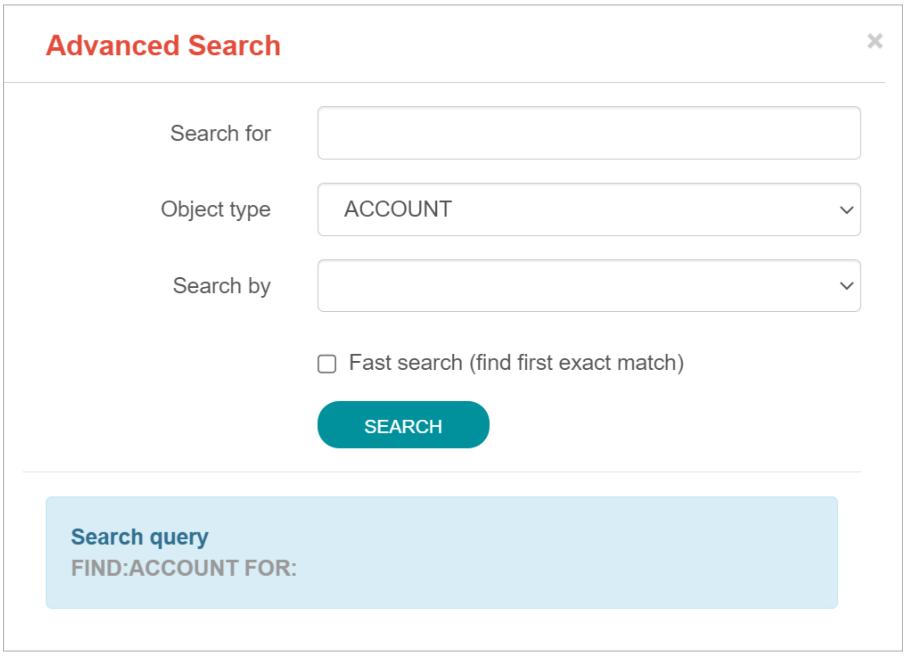
- Bundle
- Credit
- Custom field
- Invoice
- Invoice payment
- Payment
- Subscription
- Tag
- Tag definition
- Transaction

To perform an advanced search:

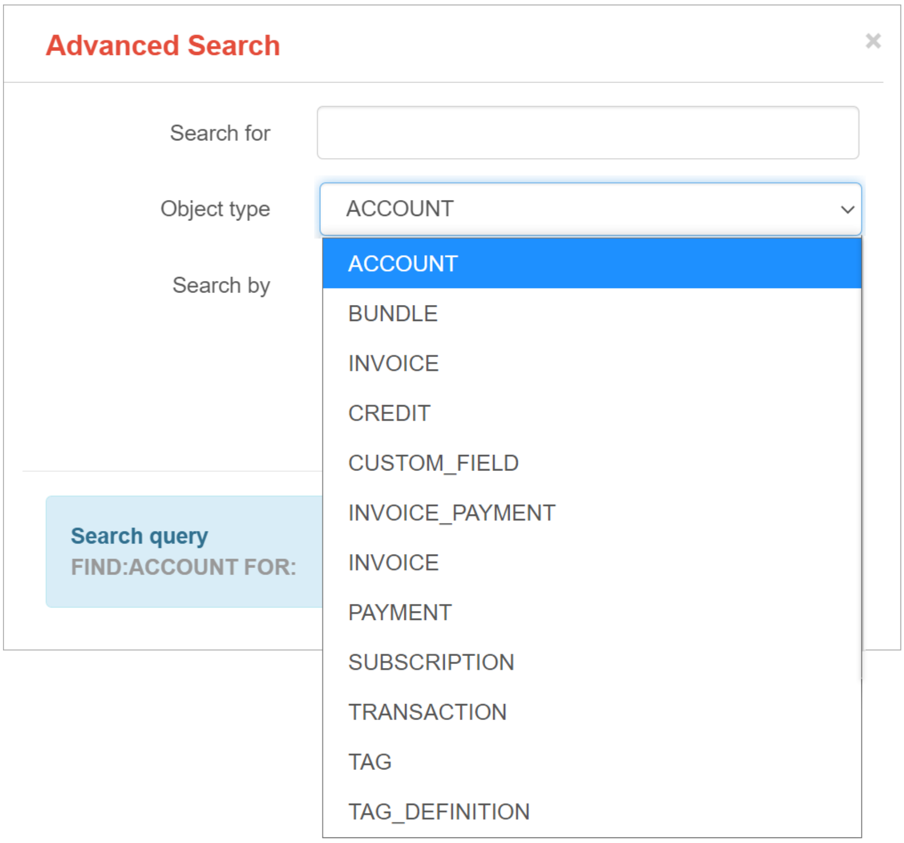
1. On the homepage, click **Advanced search:**



Kaui displays the Advanced Search pop-up:



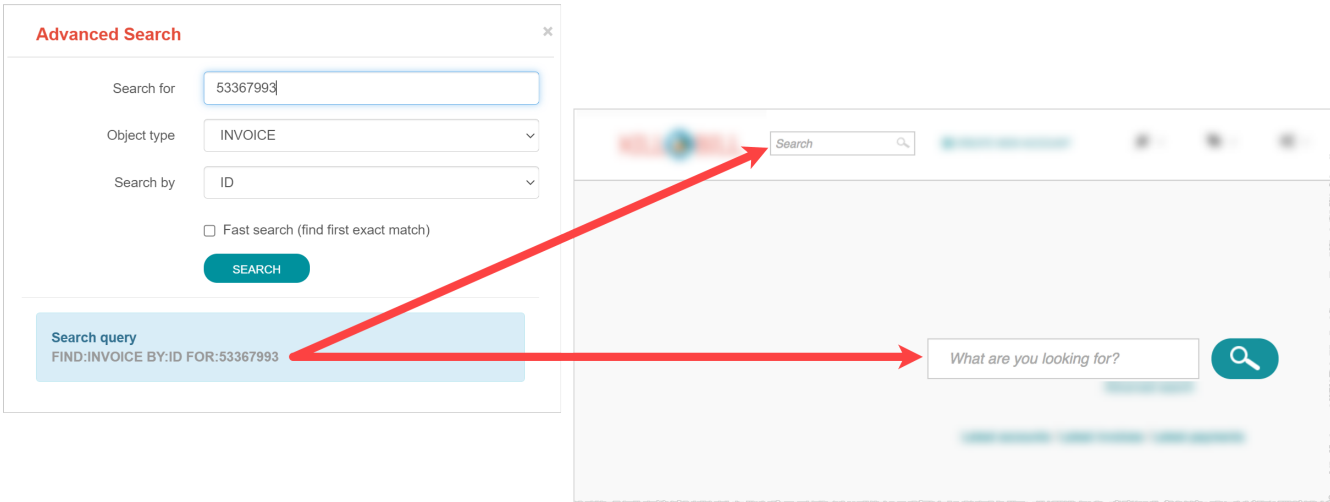
2. In the **Object type** field, select the object type you want to search for:



Note: For information on which fields are searched for each object type, see the table in the next section.

3. In the **Search for** field, enter the identifier (ID) of the object you're searching for. (*Example:* If you're searching for a specific invoice, type in the invoice number.)
4. If you want Kaui to search and display the first record in the search results, click the **Fast search** checkbox.
5. Click the **Search** button. Kaui displays the search results.

Tip: At the bottom of the Advanced Search pop-up, Kaui displays the search syntax. You can copy and paste this advanced search syntax into a basic search field. This is helpful if you frequently perform the same kinds of advanced searches. For example:



Searchable Fields by Object Type

Object Type	Searchable Fields
Account	account ID, name, email, company name, external key
Bundle	account ID, bundle ID, external key
Credit	invoice item ID
Custom field	custom field ID, field name, field value, object type
Invoice	invoice number, invoice ID, account ID, currency
Invoice payment	payment ID
Payment	payment ID, external key
Payment method	payment method ID, external key
Subscription	subscription ID, external key
Tag	tag ID
Tag definition	tag definition ID
Transaction	transaction ID, external key

Accounts

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

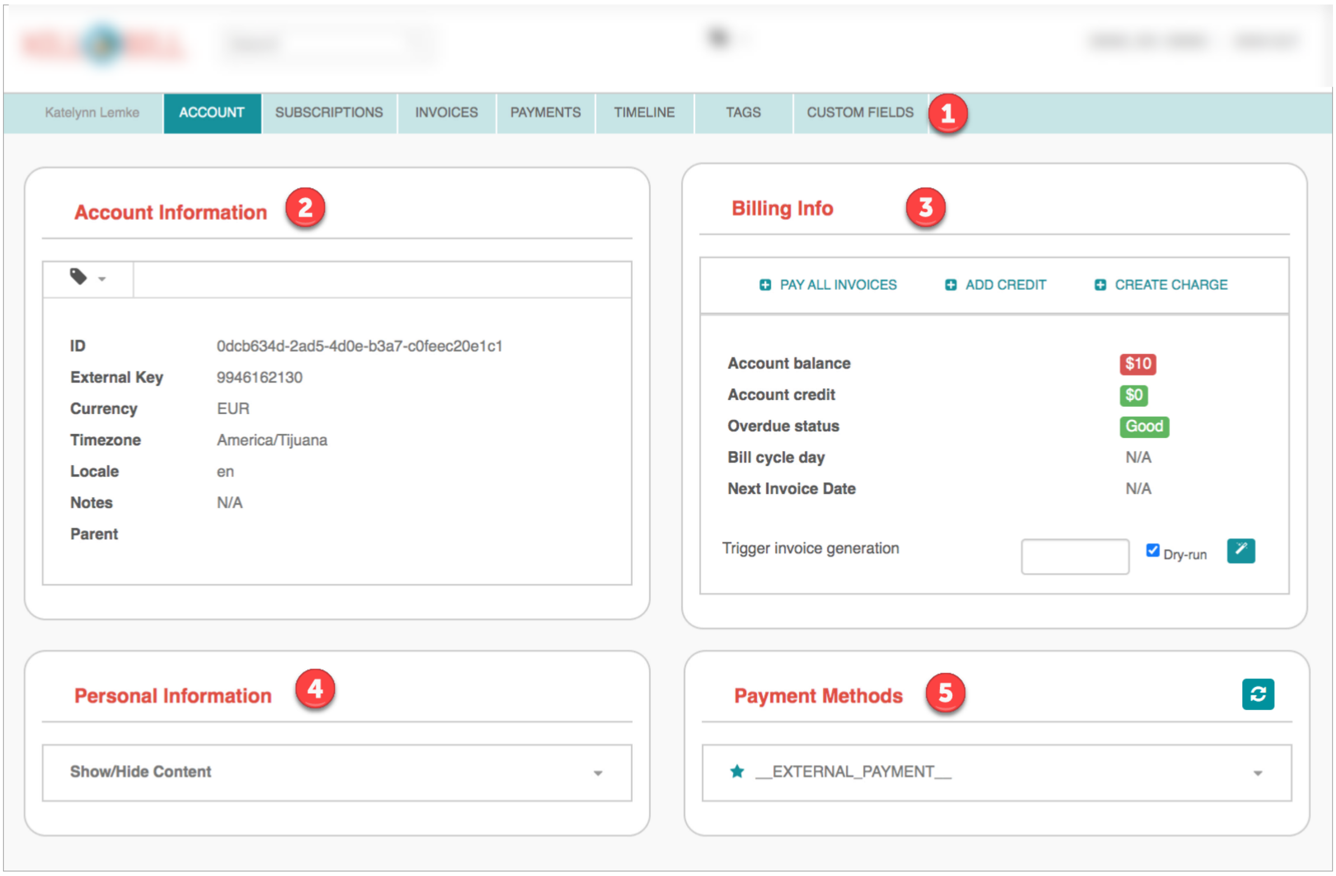
The Account page provides information about a specific customer, such as email address, physical address, and so forth. It is also the central location for the customer's billing information, subscriptions, invoices, and payment methods.

The next section explains how the Account page is laid out. To skip this and see the task-based steps, see 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



1. Account Sub-Menu

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

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
- Attach 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.
Overdue status	The status of the customer's account that indicates if they are overdue or up-to-date on their invoice payments. **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.

Field	Description
Bill cycle day (BCD)	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.
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

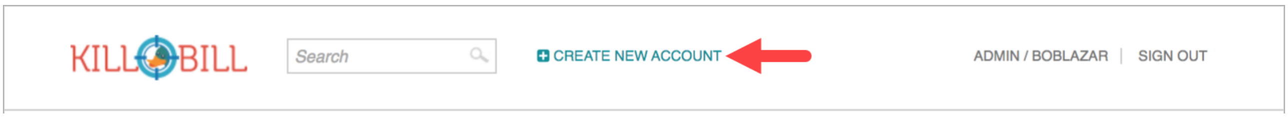
This section of the Account page lets you:

- 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.)

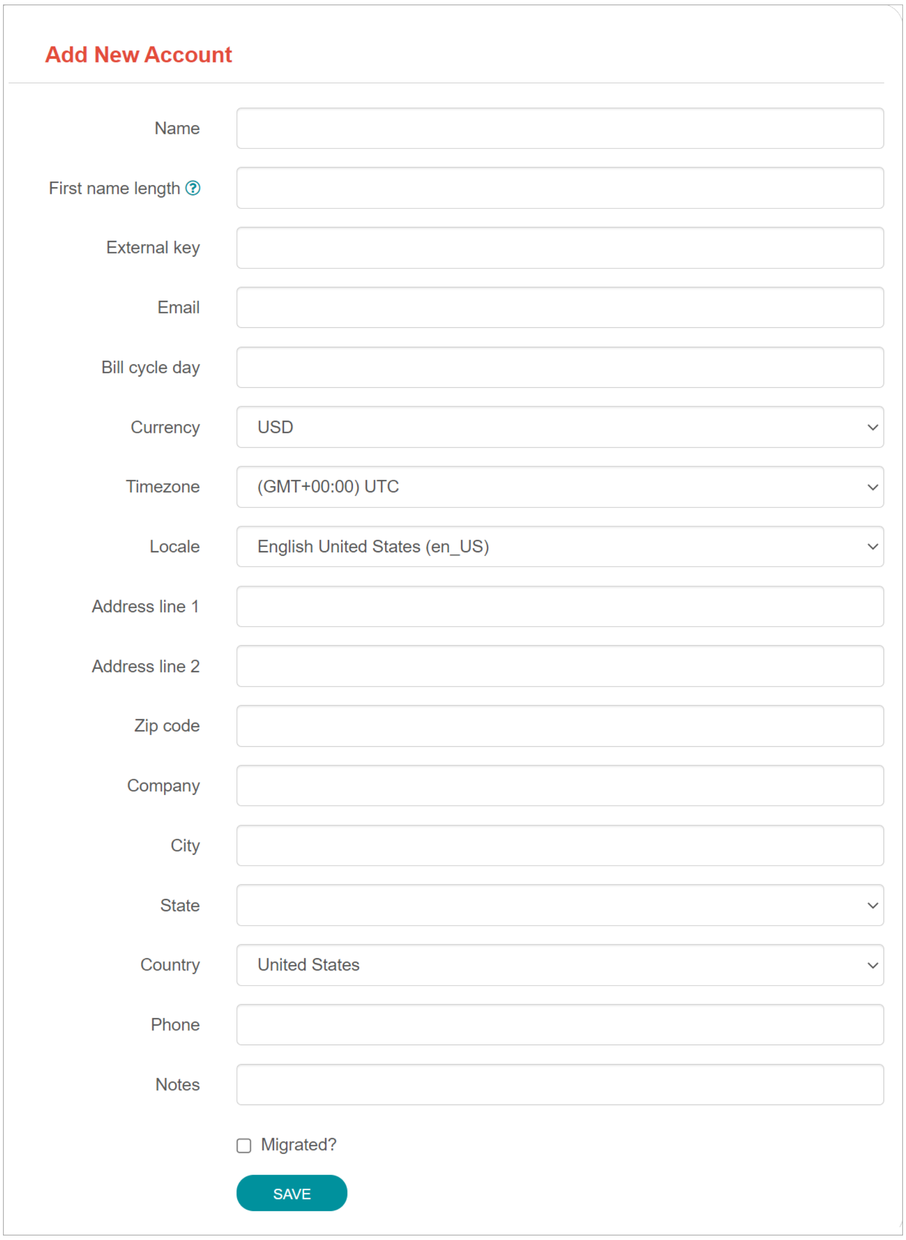
For more information on payment methods, see the Payment Methods chapter.

Create an Account

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



2. Kaui opens the Add New Account screen:



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 organizaton 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 overview document.
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.

Field	Description
City	The city in which the customer resides.
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.

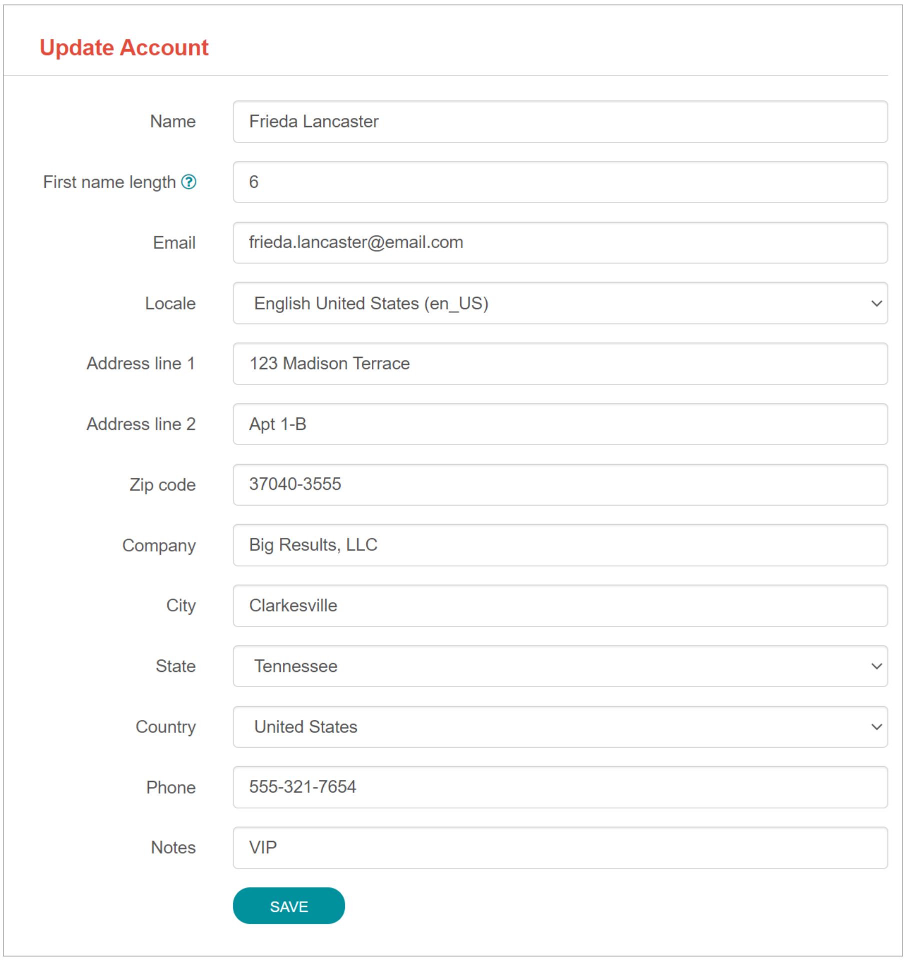
Edit an Account

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**.

   Kaui opens the Update Account screen:

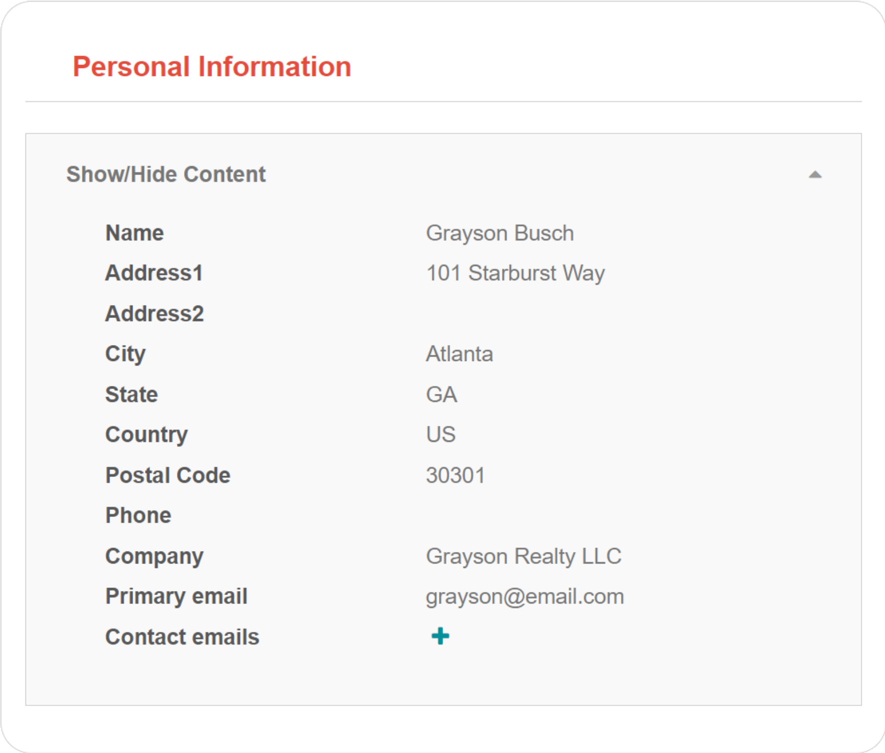


3. Make changes to the fields. For field descriptions, see Account Field Descriptions.
4. Click the **Save** button.

Add Additional Contact Emails

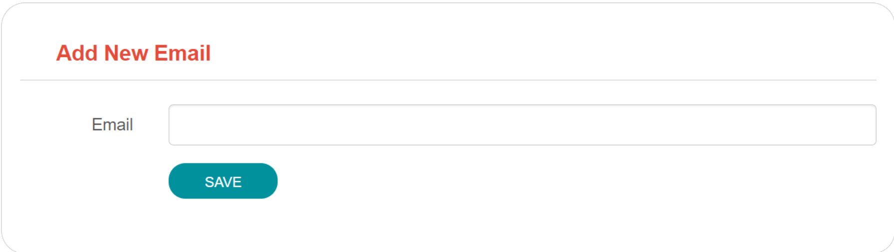
If a customer wants to receive email at more than one email address (which is the one defined in the **Email** field for the account), you can add more email addresses.

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

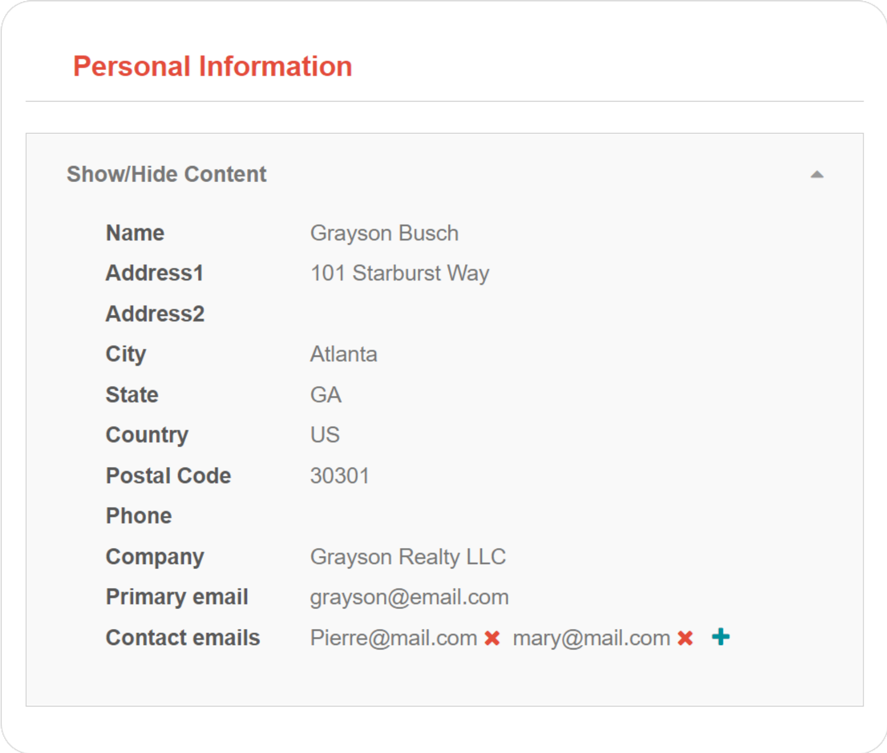


3. Click the plus sign (+) next to **Contact emails**.

   Kaui opens the Add New Email screen:



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



7. 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:

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

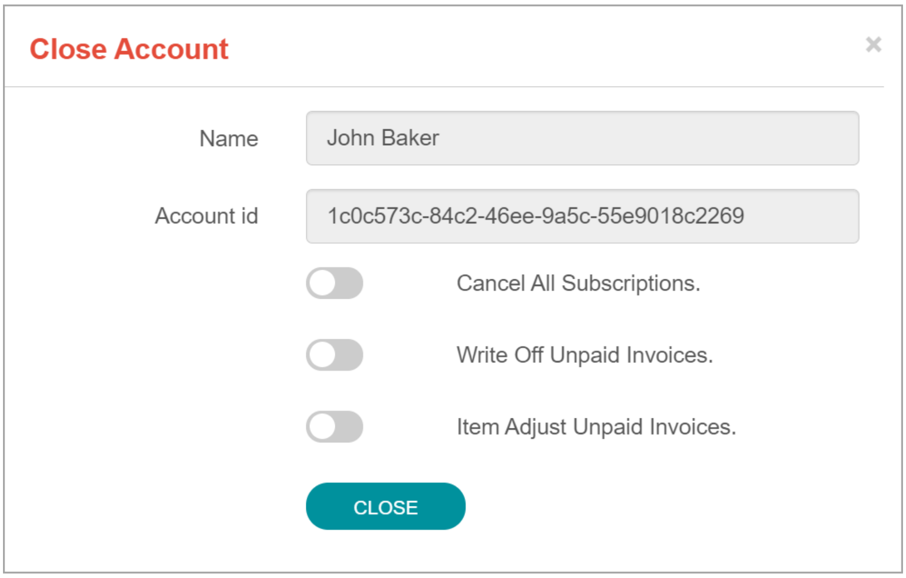
Close an Account

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.

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

Kaui displays the Close Account pop-up:

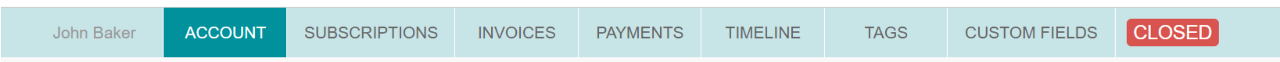


3. Check the **Name** and **Account ID** fields to ensure you are closing the correct account.
4. Toggle any of the following options:
   - **Cancel All Subscriptions**—Stops any subscriptions that are current for this account.
   - **Write Off Unpaid Invoices**—Brings the balance for all unpaid invoices 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.

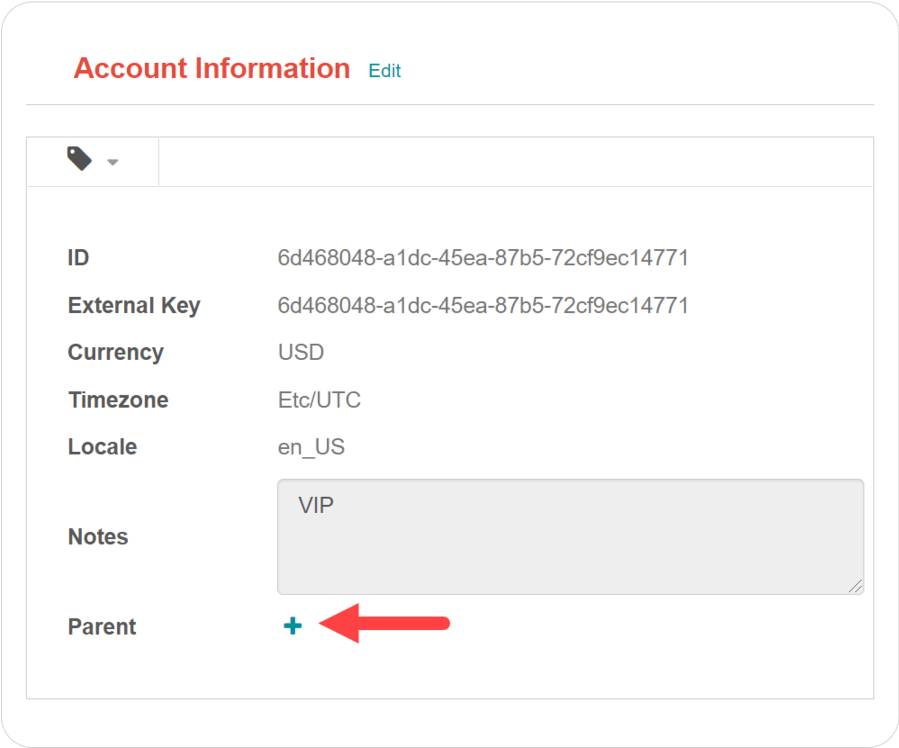
   Kaui displays a message that lets you know the account was closed. In addition, the **Account** sub-menu displays "Closed:"



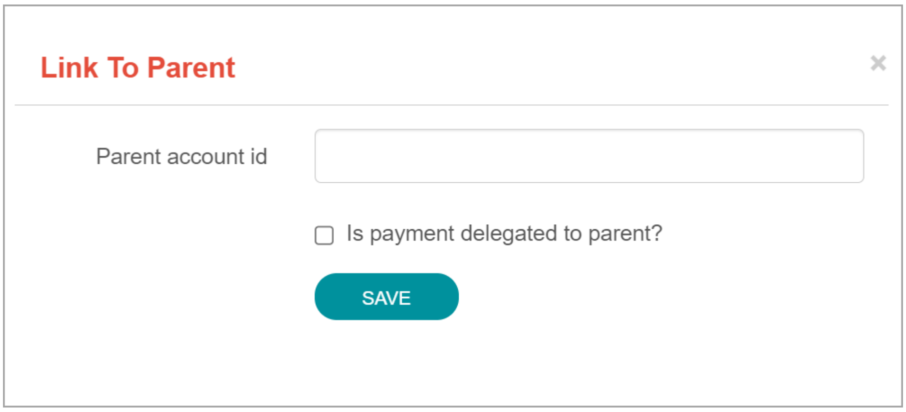
Link to Parent Account

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*.

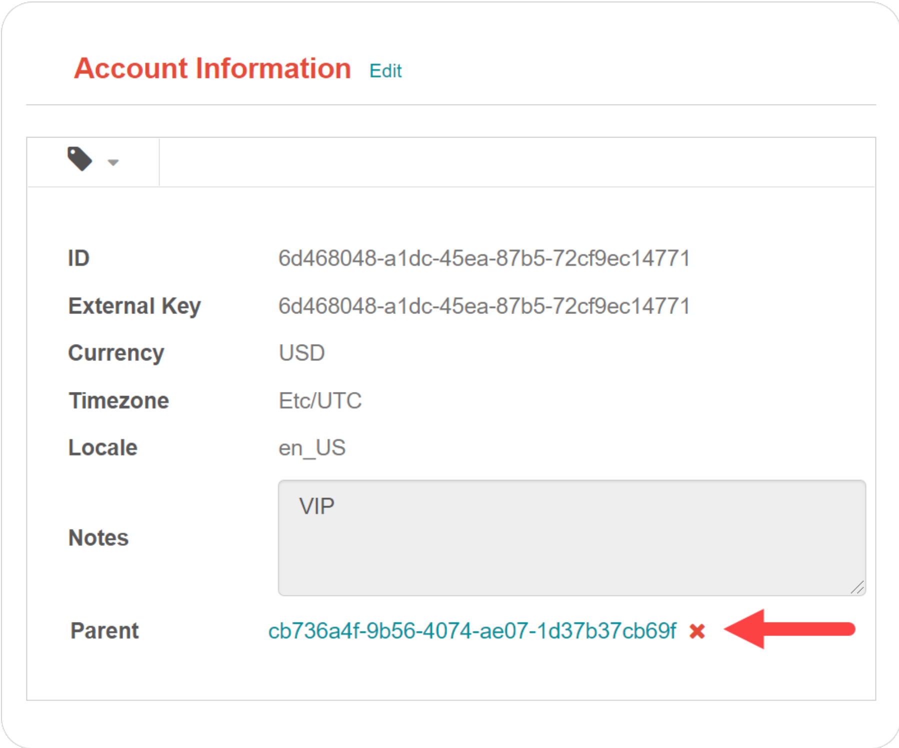
1. As a preparation step, open the parent account and copy the account ID in the Account Information section.
2. Open the account that will become the child account.
3. In the Account Information section of the child account, click the plus sign icon ( ) next to the **Parent** field:



Kaui opens a pop-up:



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.

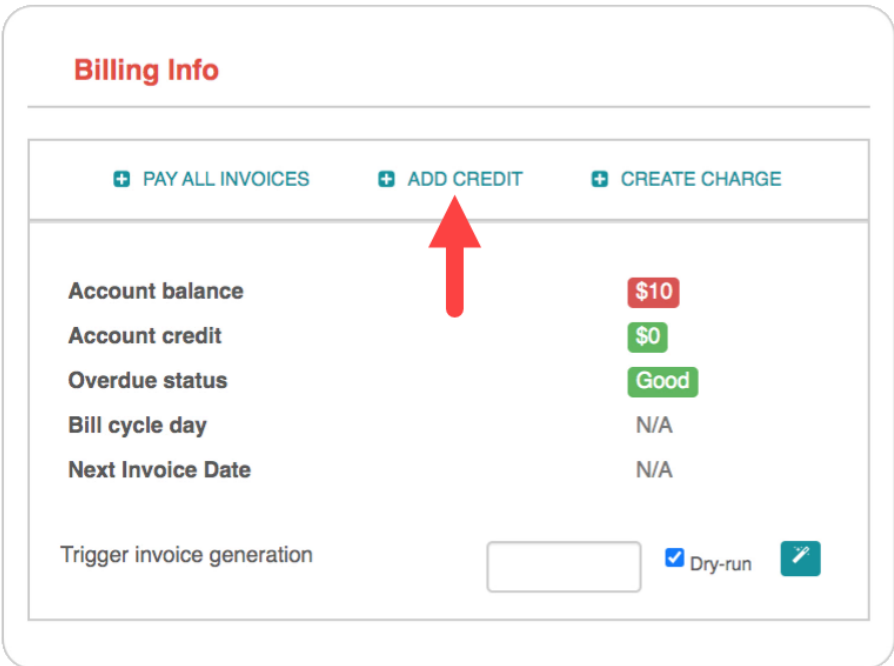


You can open the parent account by clicking the account ID link.

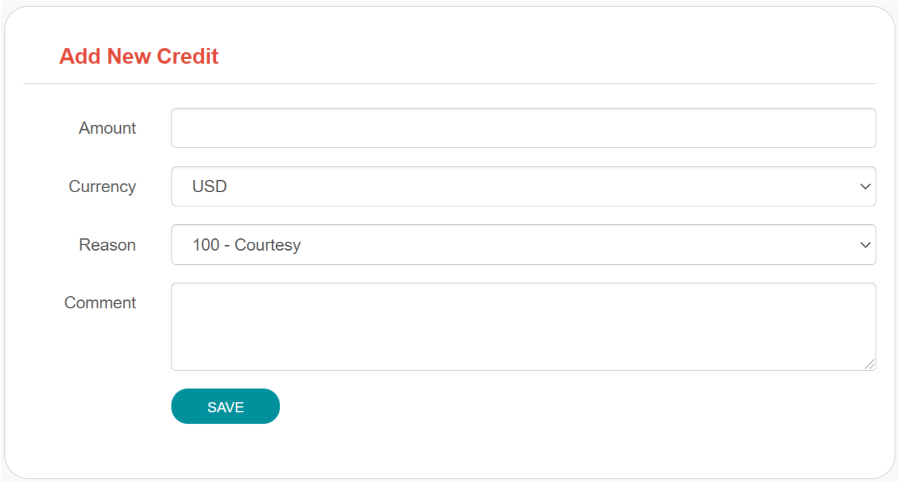
Add Credit to an Account

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.



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



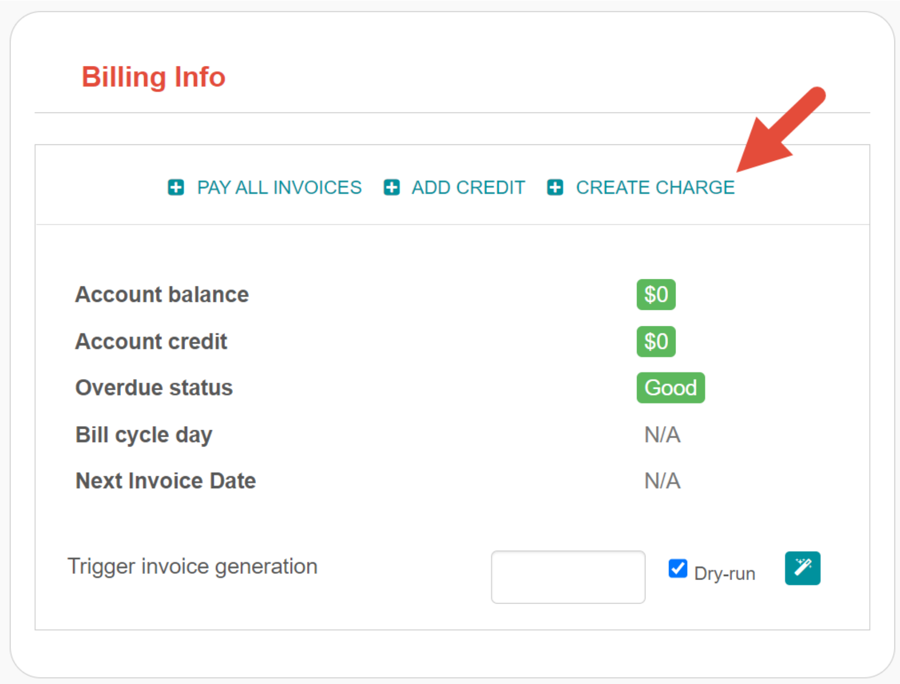
2. Fill in the fields:
    - **Amount**—The amount of the credit.
    - **Currency**—The currency defaults from the customer account and should not need to be changed.
    - **Reason**—The reason is automatically selected based on Kaui configuration settings. However, you can make a different selection.
    - **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), Kaui adjusts the account balance and account credit accordingly.

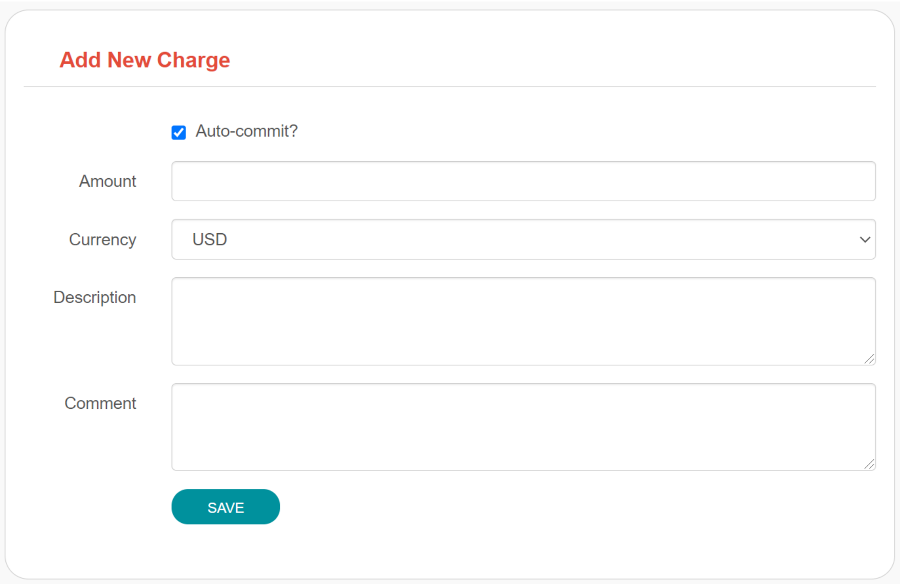
Create a Charge on an Account

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

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



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



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`).

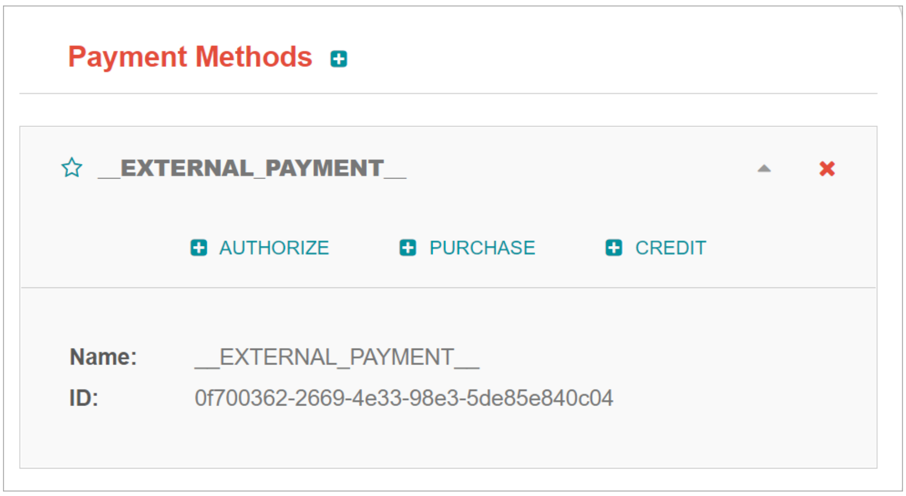
The plugin name is typically mentioned in the plugin's `readme` file. For example, in the Stripe plugin `readme` file, the plugin name is specified in the command line.

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:

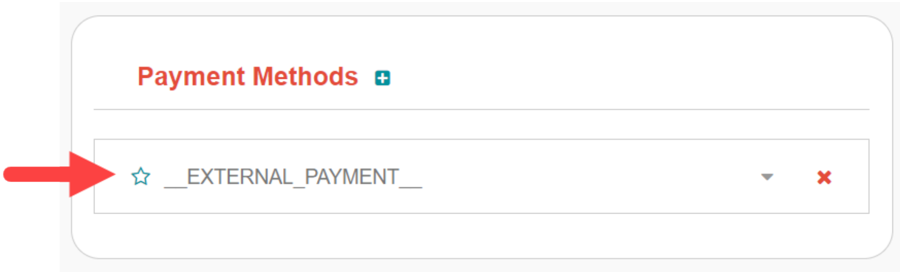


Set a Payment Method as the Default

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:

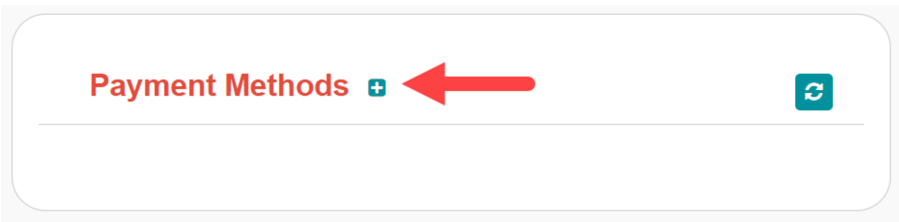


   The filled star ( ) indicates it’s now the default payment method.

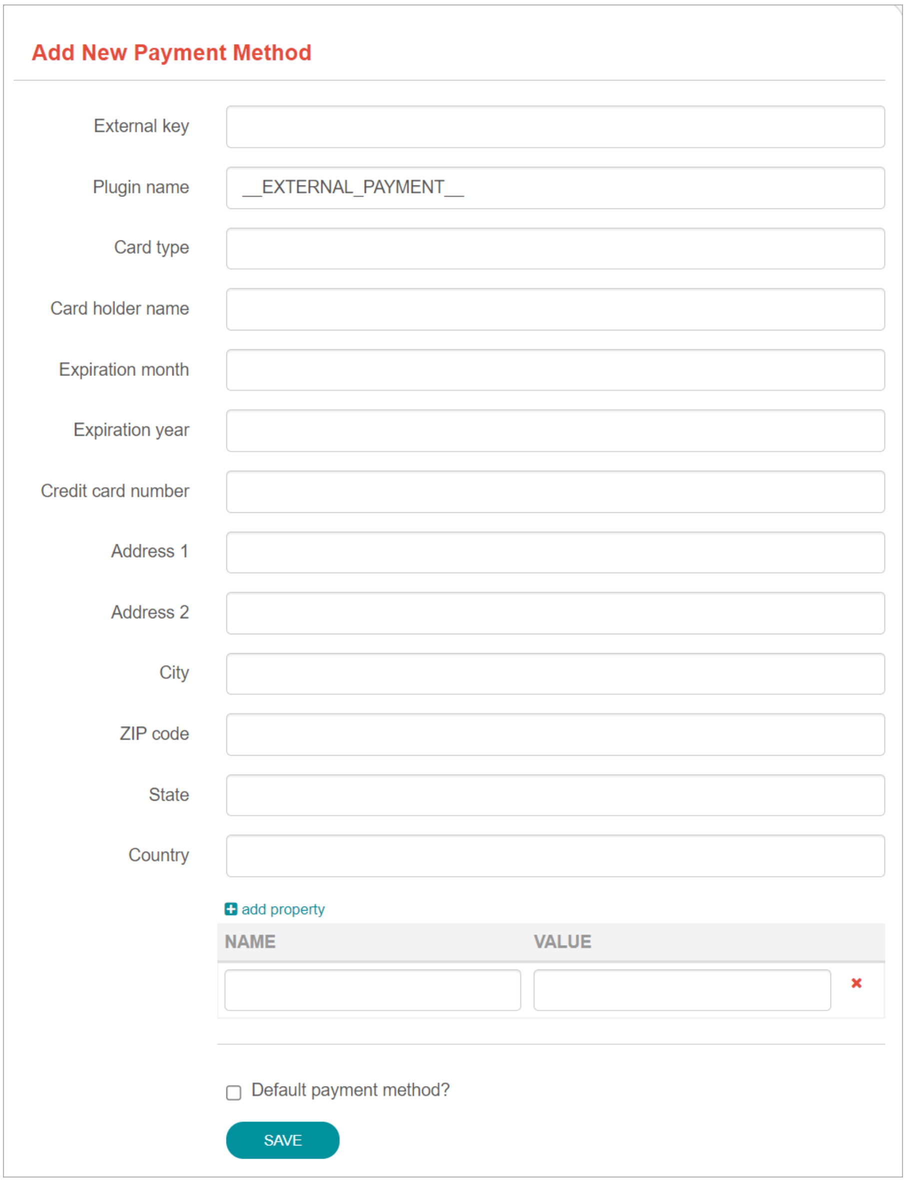
Add Payment Method

To add a payment method:

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



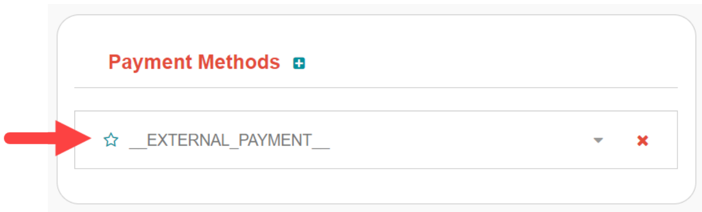
   Kaui displays the Add New Payment Method screen:



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	Type in the name of the plugin that is associated with this type of payment method. 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 (*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.
Card type	The name of the credit or debit card.
Card holder name	The name that appears on the card.
Expiration month Expiration year	The month and year the card expires. Enter month as *mm* and year as *yy*. (*Examples:* `07` for the month of July and `23` for the year 2023.)
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)	Use the **Name/Value** fields to assign custom fields and values to the payment method. **Note:** Custom fields are an advanced feature. For more information, see Custom Fields.
Default payment method?	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). **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: 

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*.

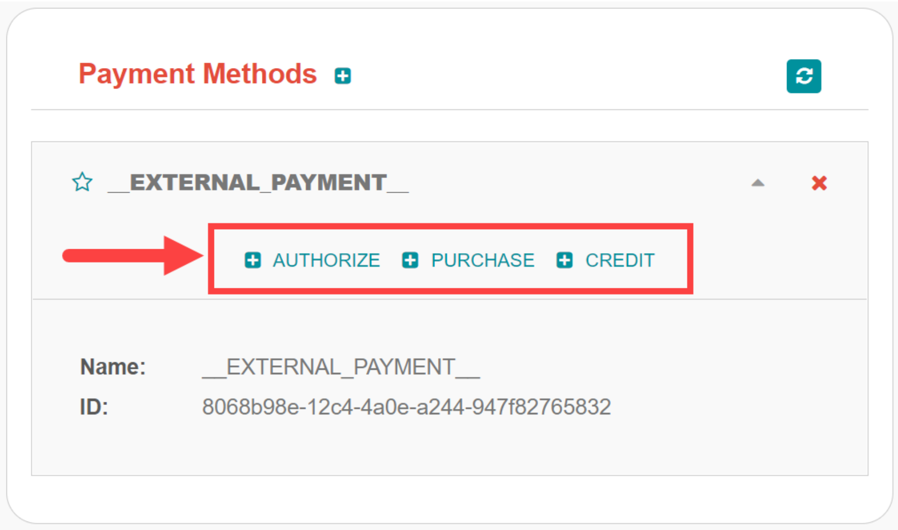
Example: After paying her final invoice, a customer cancels her subscription and demands a full refund because she is dissatisfied. In this case, you would process this transaction (the refund) against the payment method as explained in this section.

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

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

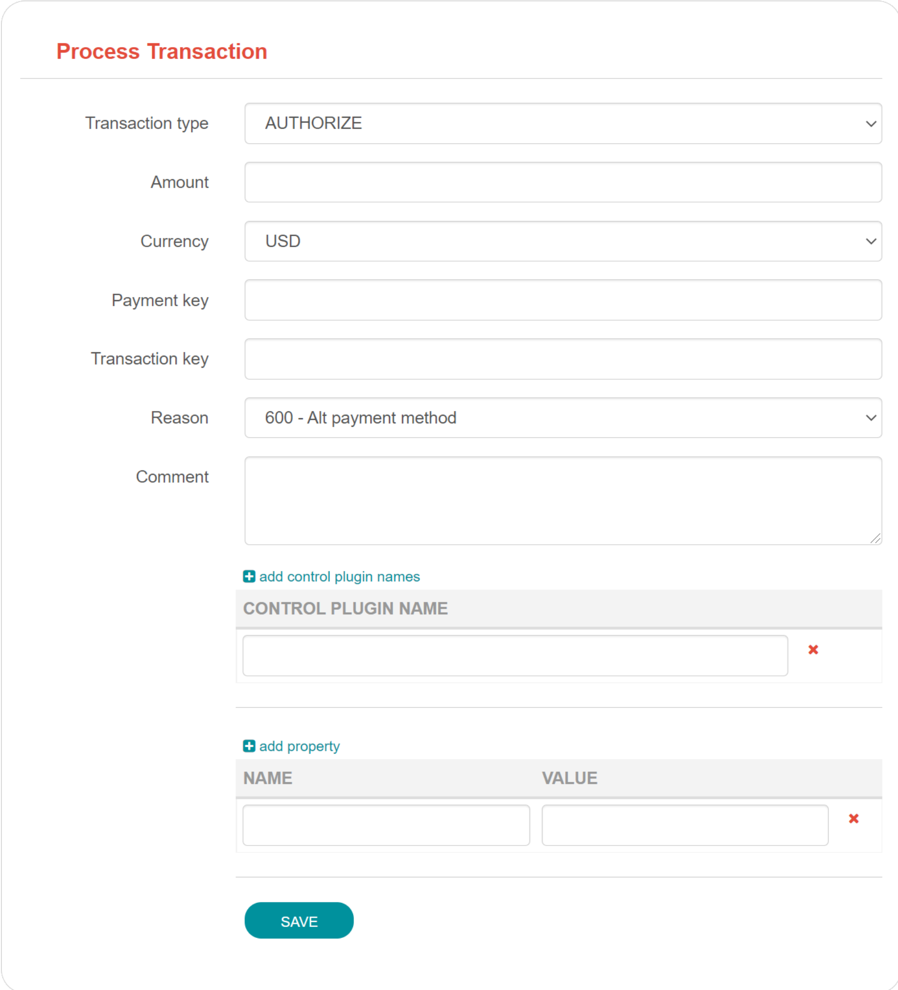
Note: "Credit" here refers to depositing funds directly to the customer card and is unrelated to account credits.

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.

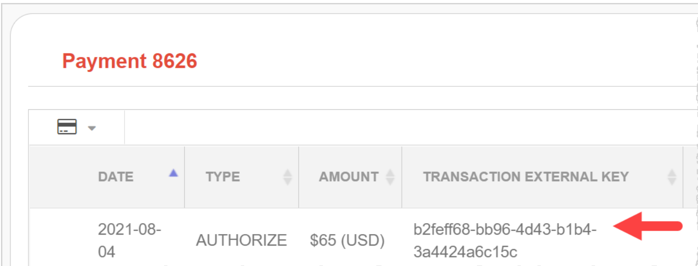
Kaui displays the Process Transaction screen:



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	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). **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: *Example:* URL: `https://demo.killbill.io/accounts/cb736a4f-9b56-4074-ae07-1d37b37cb69f/payments/0d1e11e5-2df6-4b6b-992f-e9ff2de38cef` Payment key: `0d1e11e5-2df6-4b6b-992f-e9ff2de38cef`
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

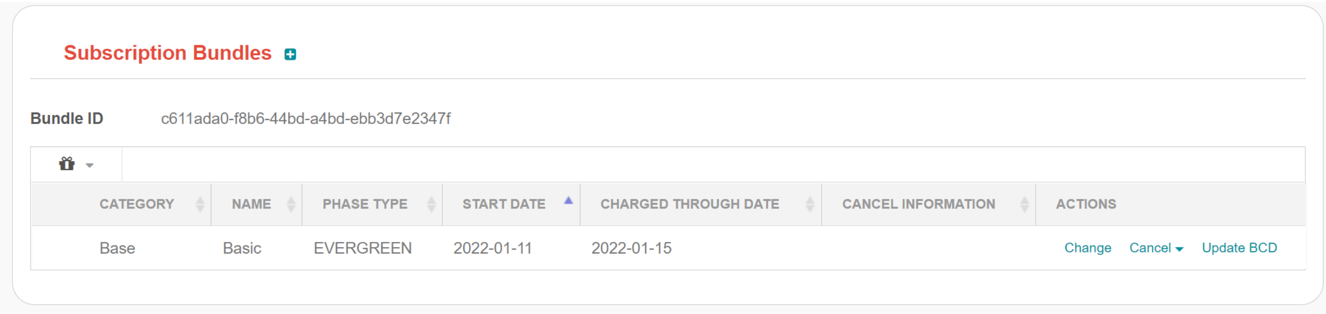
Overview

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

For more information on subscriptions, see the *Subscription Guide*.

Open Subscriptions Page

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



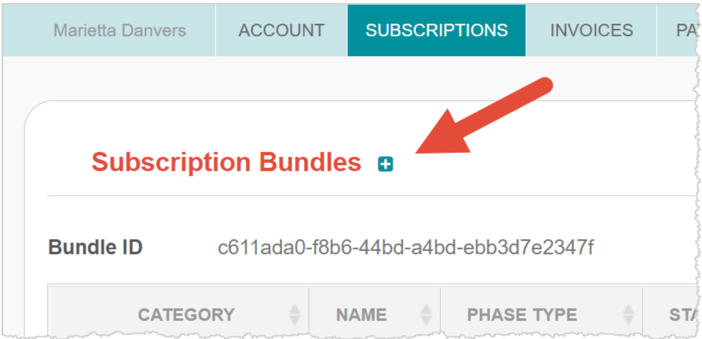
On the Subscriptions page, you can:

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

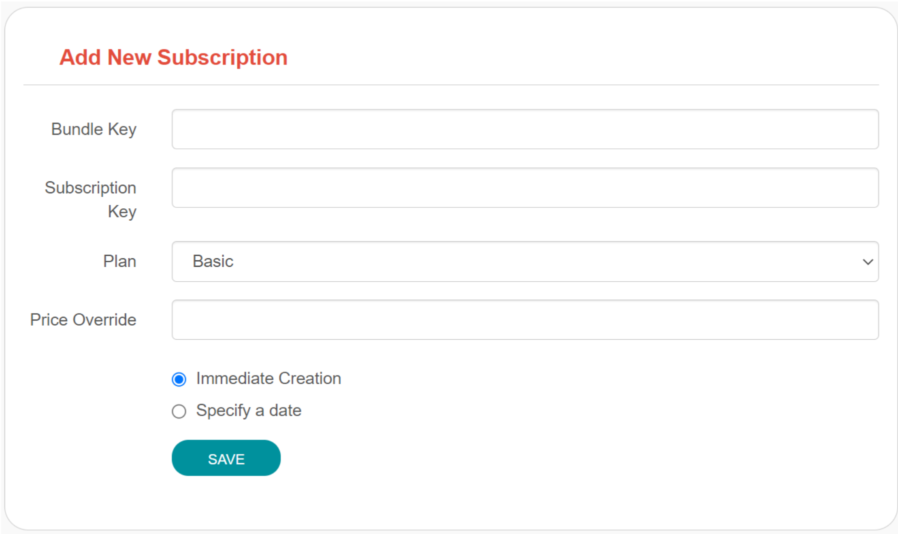
Add a Subscription

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

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



Kaui displays the Add New Subscription screen:



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

Add Subscription Field Descriptions

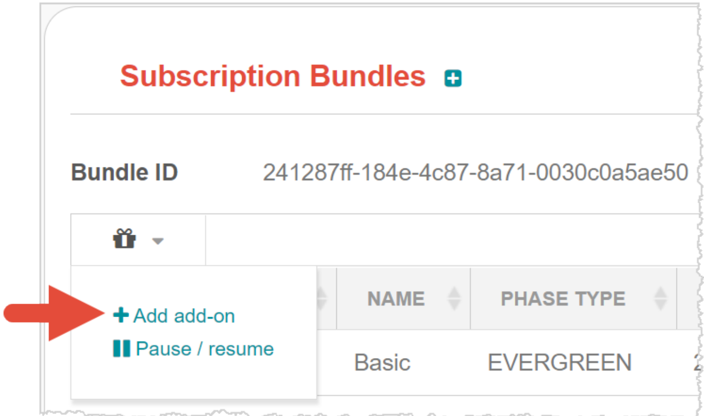
Field	Description
Bundle Key	If you leave this field blank, Kill Bill generates a unique bundle key. If necessary, you can enter a different bundle key.
Subscription Key	If you leave this field blank, Kill Bill generates a unique subscription key. If necessary, you can enter a different subscription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

Add an Add-On Product to a Subscription

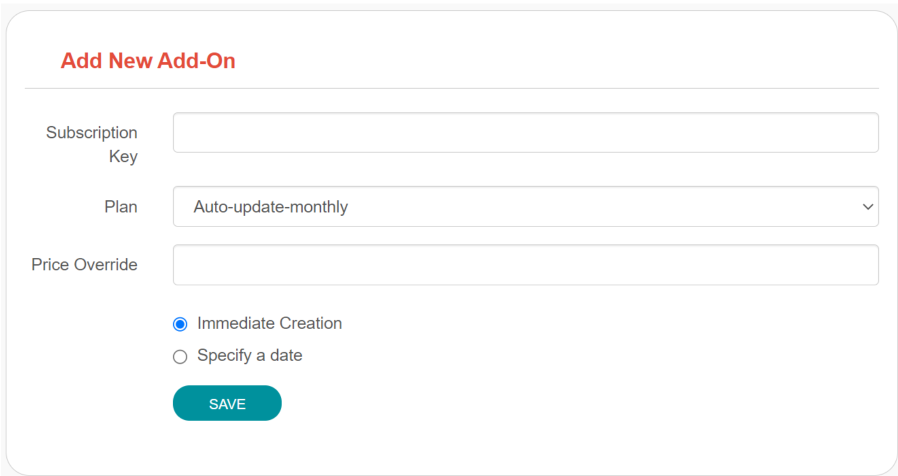
This section explains how to add an add-on product to a customer's subscription.

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

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



Kaui opens the Add New Add-On screen:



3. Fill in the fields. For field information, see Add New Add-On Field Descriptions.

Add New Add-On Field Descriptions

Field	Description
Subscription Key	Note that this subscription key applies to the add-on, not the original subscription. If you leave this field blank, Kill Bill generates a unique subscription key. If necessary, you can enter a different subscription key.
Plan	Select the add-on to add to the subscription.
Price Override	If you need to override the price for the add-on you've selected, enter an amount in this field.

Field	Description
Immediate Creation	Select this option to start the subscription immediately.
Specify a date	To define a specific date on which the subscription begins, select this option, and choose a date from the **Date** field that appears.

Pause/Resume Subscriptions

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

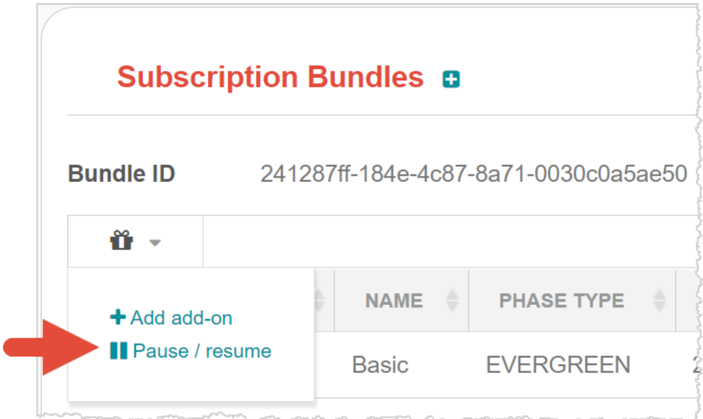
Note: While a customer's subscription bundle is paused, you cannot add any new subscriptions or add-ons to the account.

You can use the pause/resume feature to:

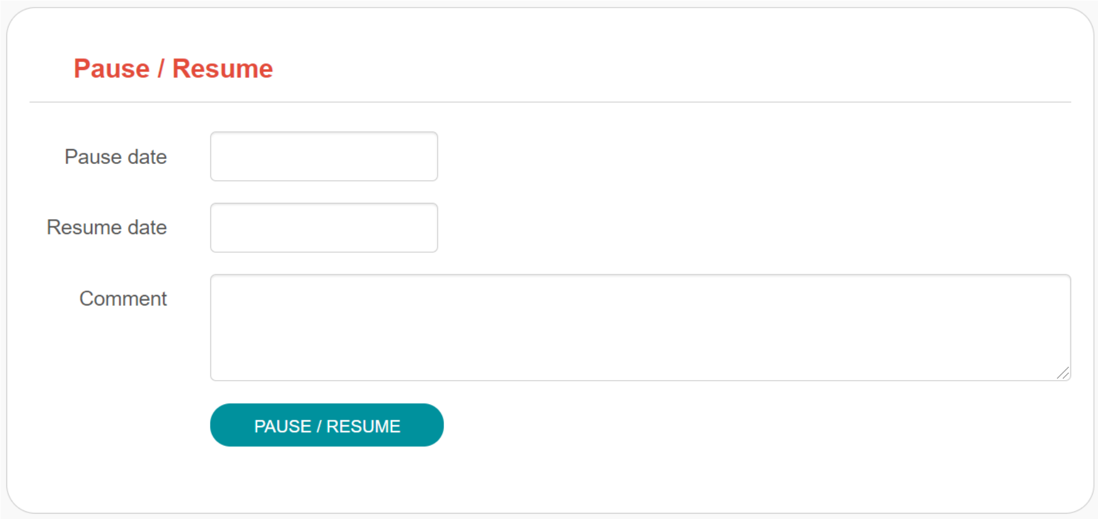
- Stop a subscription bundle indefinitely
- Reactivate a paused subscription bundle
- Set a specific time period during which the bundle is paused and then automatically resumed

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

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



Kaui opens the Pause/Resume screen:



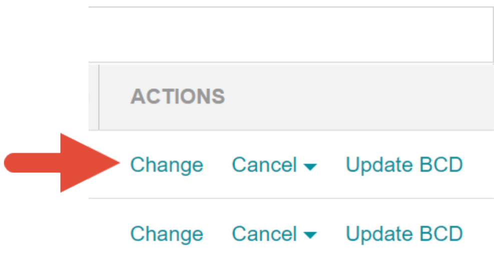
3. Fill in the following fields:
   - **Pause date**—The calendar date on which to temporarily stop the subscription bundle. To resume a paused subscription, leave this field blank.
   - **Resume date**—The calendar date on which to remove the pause from the subscription(s). To set a pause to continue indefinitely, leave this field blank.
   - **Comment**—The text you enter here displays on the Timeline page after saving the pause/resume. Adding comments is optional.
4. Click the **Pause** / **Resume** button. Kaui displays a success message at the top of the screen.

Change a Subscription

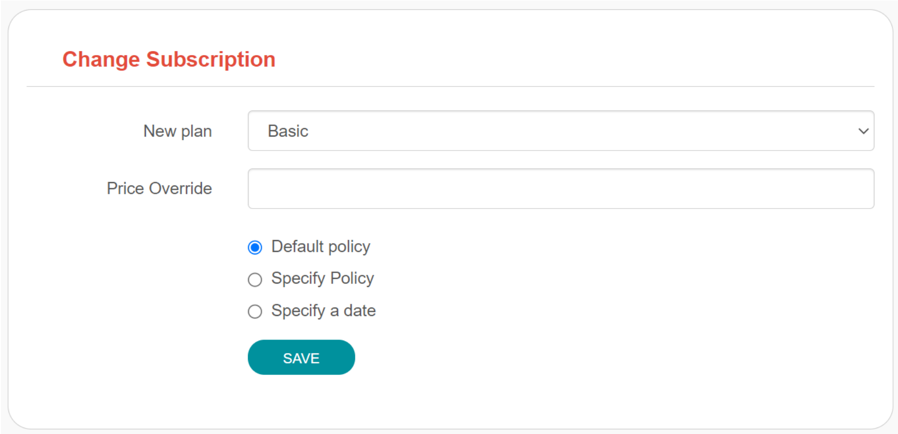
In Kaui, you can change a customer's subscription from one plan to another plan. You can also define a different price than what is set in the catalog and when the change takes effect.

To change an account's subscription:

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



Kaui opens the Change Subscription screen:

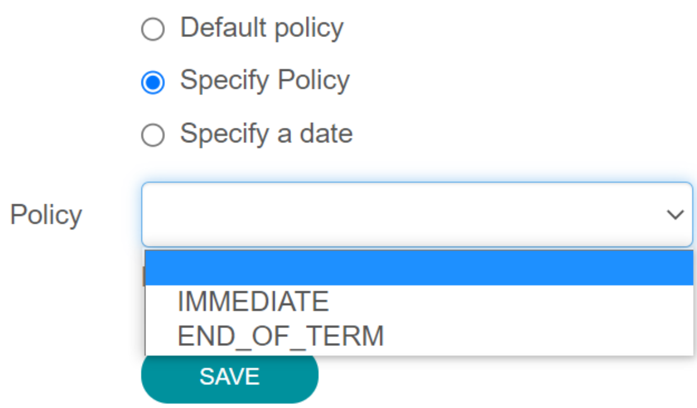


3. In the **New plan** field, select a different plan.
4. If you need to override the price for the plan you've selected, enter the amount in the **Price Override** field.
5. To accept the system's default policy for changing subscriptions (`END_OF_TERM`), leave **Default policy** selected and click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

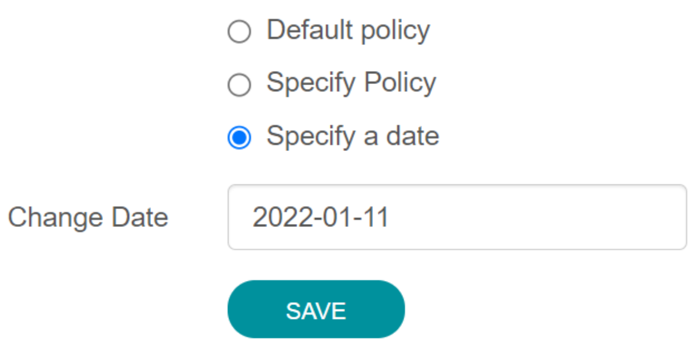
   OR

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

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

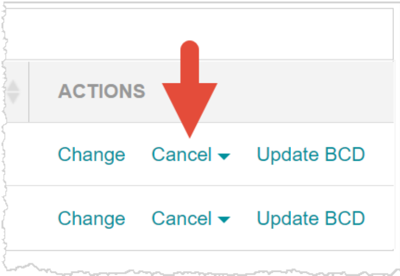
   - **Specify a date**: Click on this and choose a date from the **Change Date** calendar that appears. Make sure to choose an effective date that is in the future.

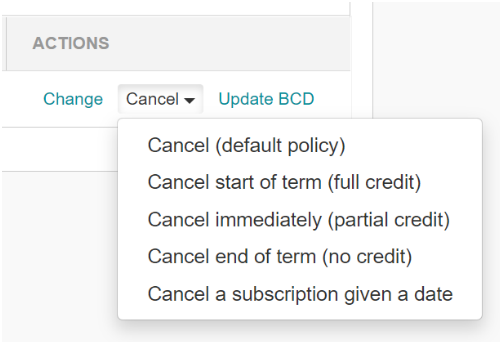
Cancel a Subscription

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).

Option	Description
Cancel a subscription given a date	If you select this option, Kaui displays a pop-up from which to choose a date: image::CancelSubGivenDate.png[width=350,align="center"] **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*.

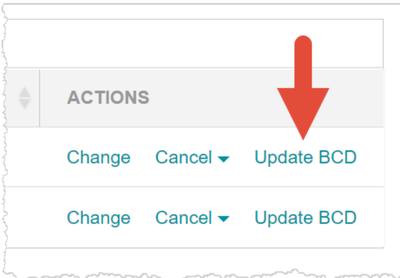
Update the Billing Cycle Day

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.

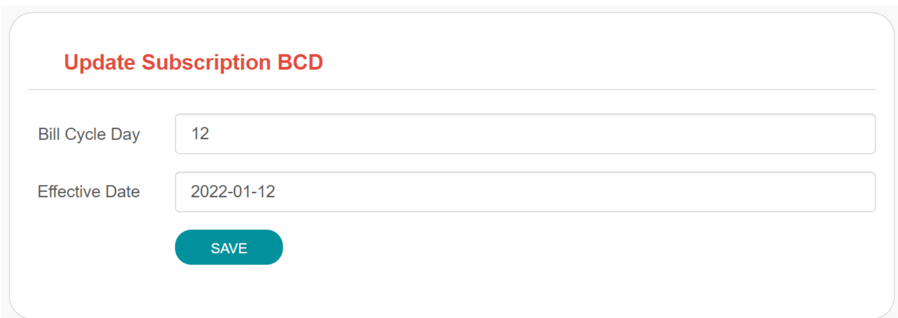
If you update the BCD with these steps, the new BCD overrides what is specified in the billing alignment rules in the catalog.

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:



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.

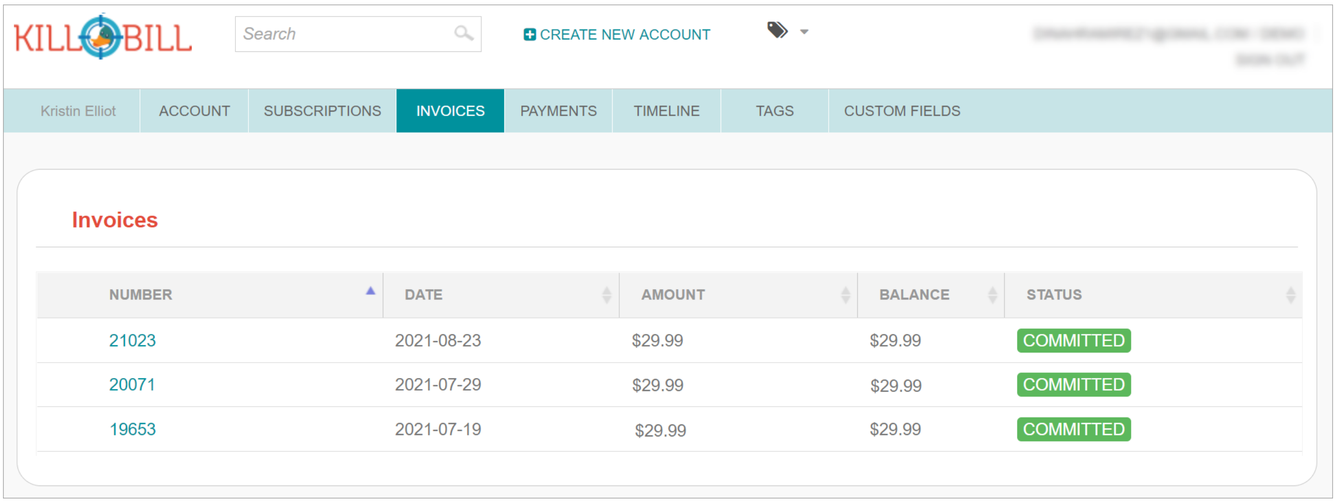
Invoices

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.

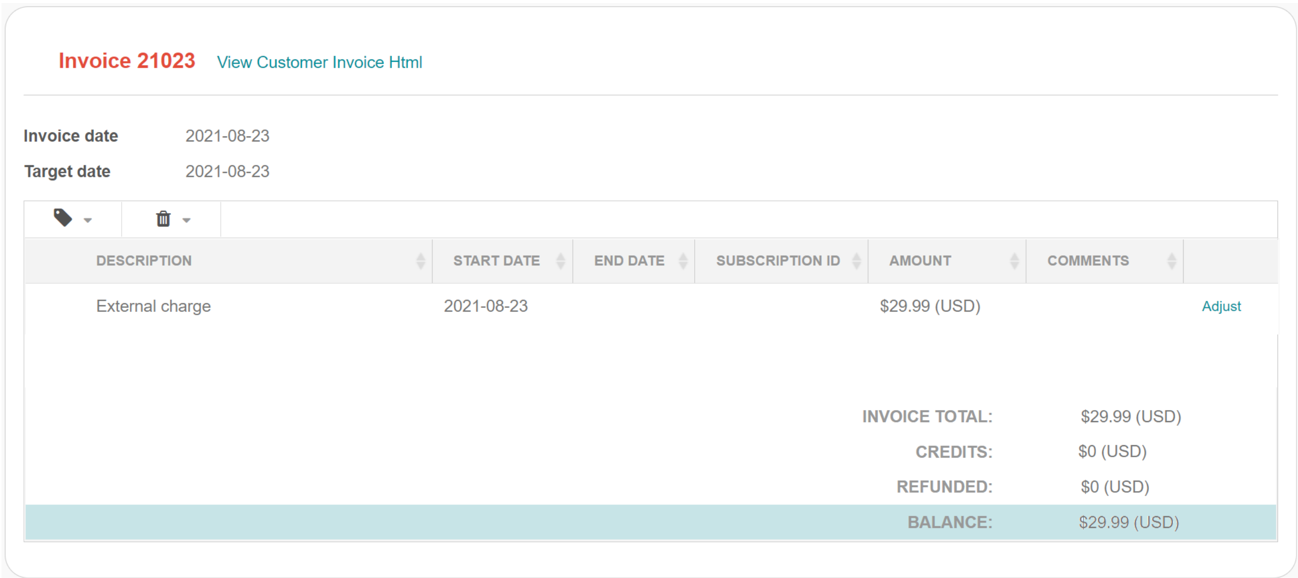


Kill Bill generates invoices automatically based on the customer's subscriptions. However, you can manually create an invoice by creating a charge on the customer's account.

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.



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:

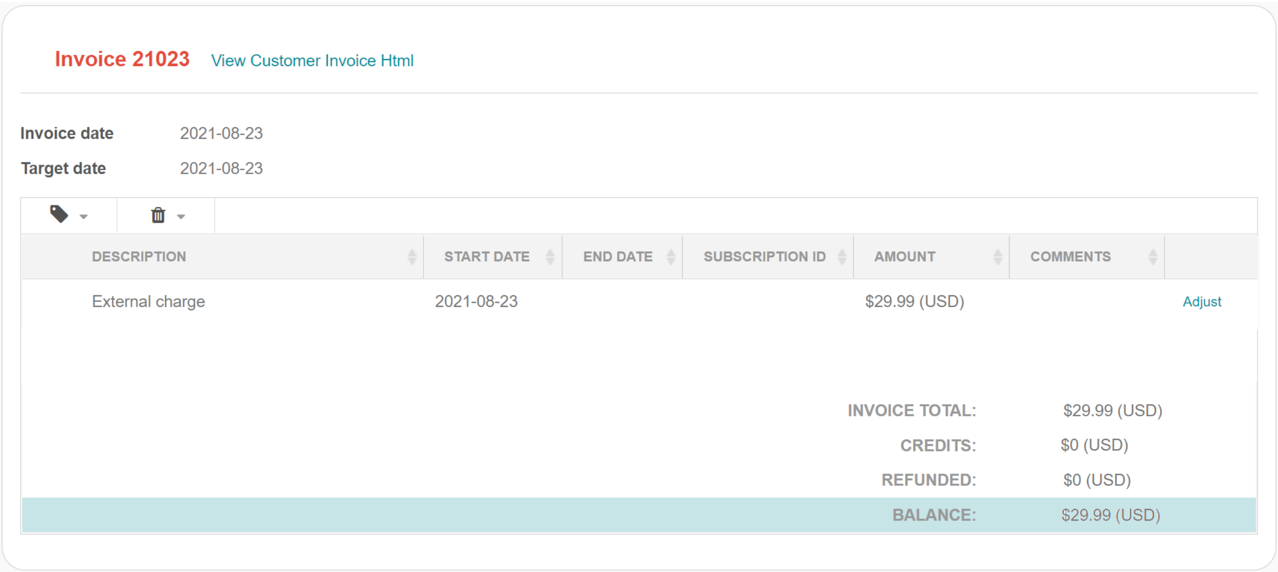
1. Open an account.
2. Click **Invoices** on the sub-menu.
3. Select an invoice number.

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

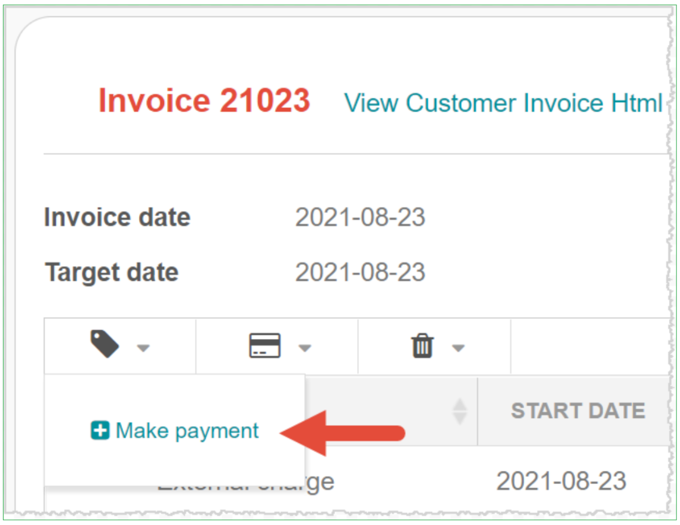
Make a Payment on an Invoice

To make a manual payment against an invoice:

1. Open the Invoices Details page for the invoice.

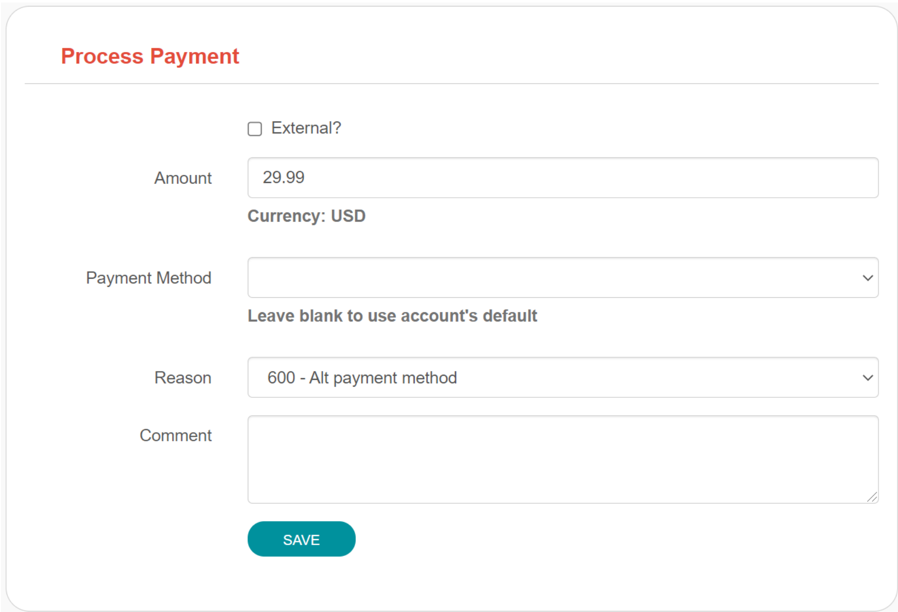


2. Hover over the credit card icon and select **Make Payment**.



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.

3. Kaui displays the Process Payment screen:



4. Fill in the fields. For field descriptions, see Process Payment Field Descriptions.
5. 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

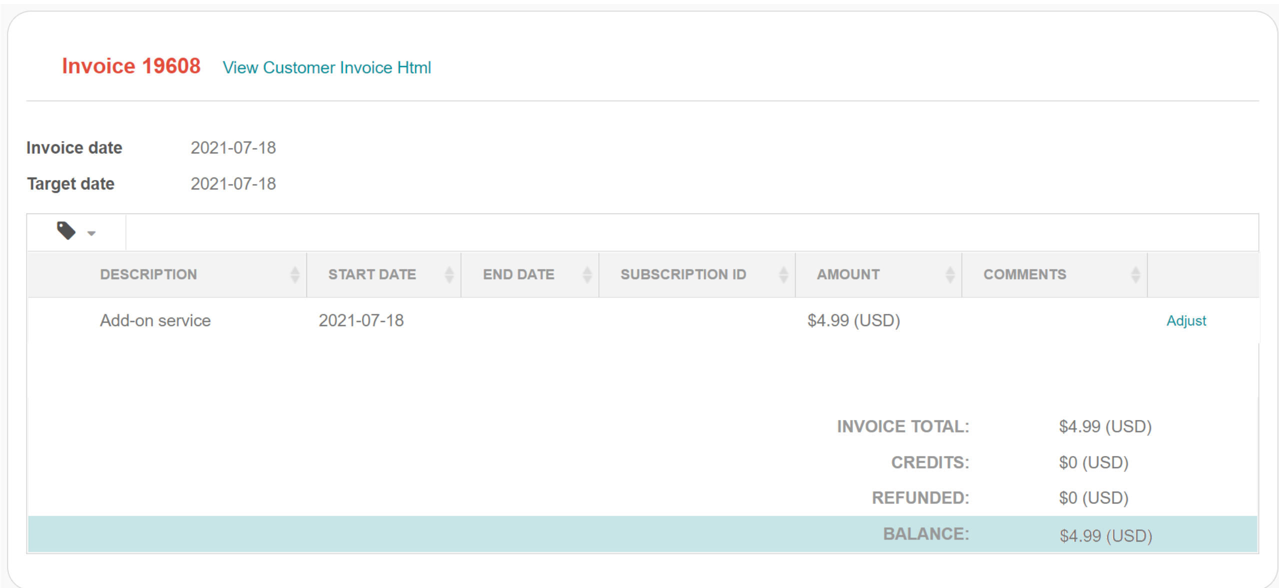
This section explains how to write off an invoice and void an invoice. "Write-off" and "void" have different meanings in Kill Bill:

- **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.)

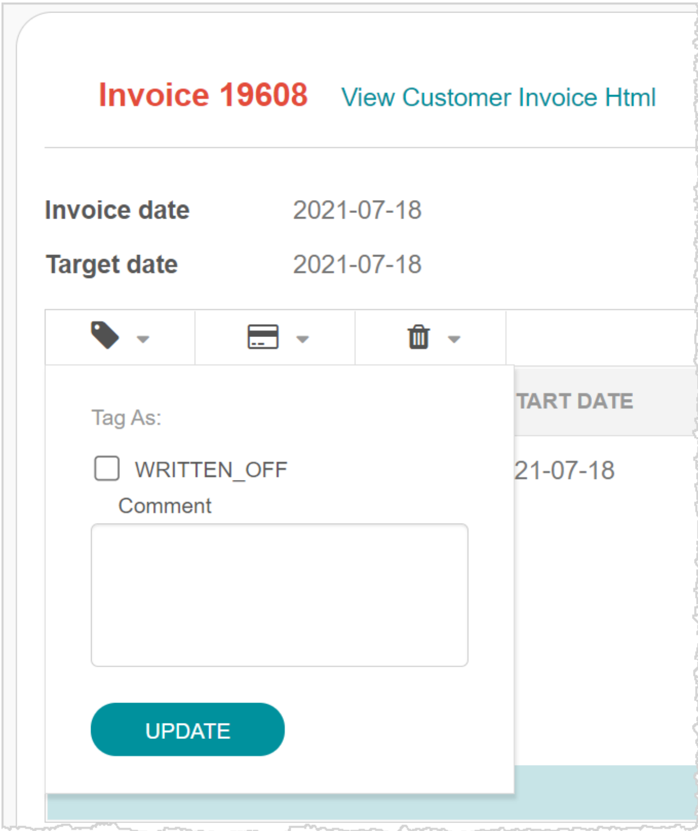
Write Off an Invoice

To write off an invoice:

1. Open the Invoices Details page for the invoice.



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



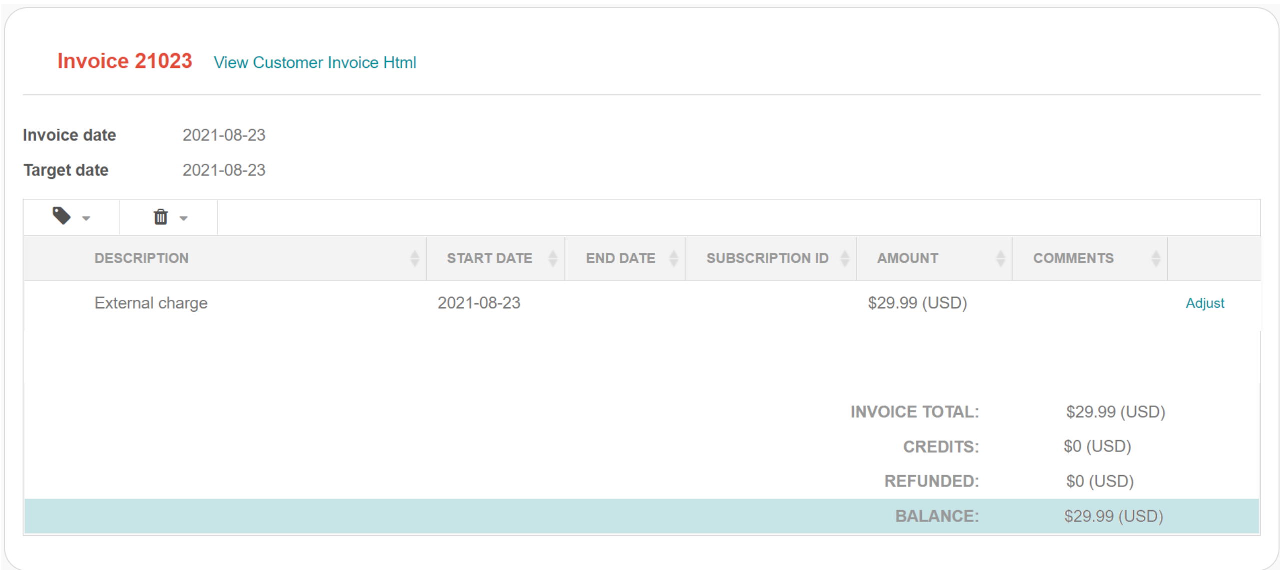
3. Select the **WRITTEN_OFF** checkbox and (optionally) type text in the **Comment** field.
4. Click the **Update** button.

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

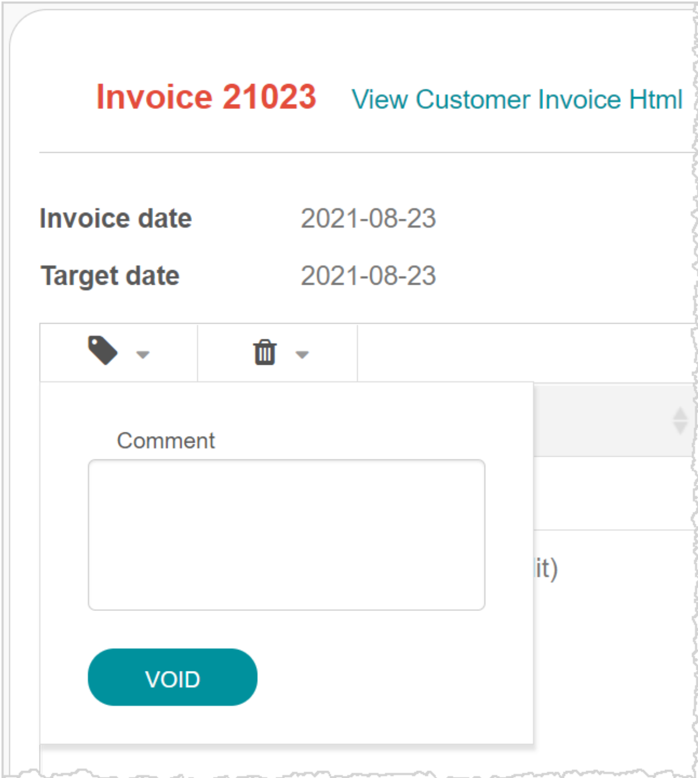
Void an Invoice

To void an invoice:

1. Open the Invoices Details page for the invoice.



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



3. If desired, type text in the **Comment** field.
4. Click the **Void** button.

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

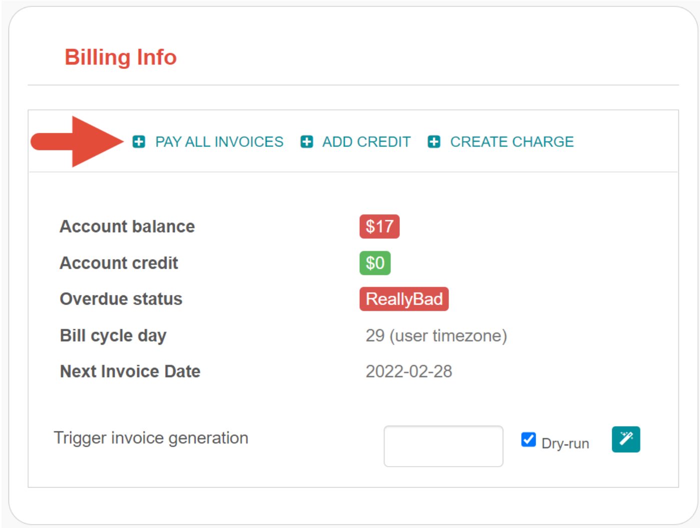
Pay All Unpaid Invoices

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.

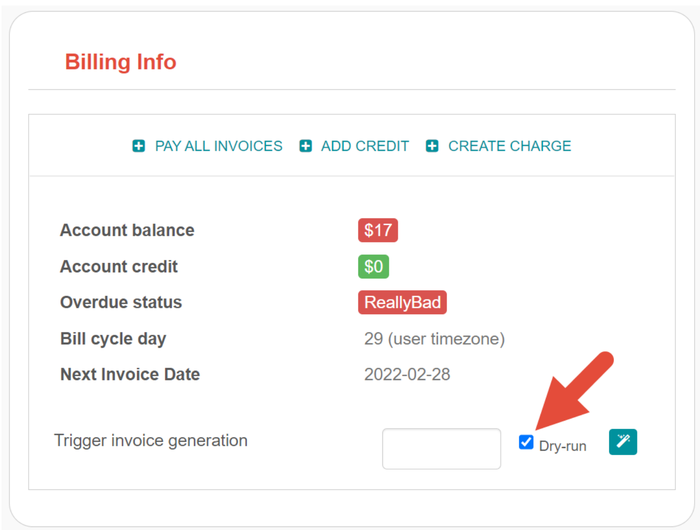
Generate a Dry-Run Invoice

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.)

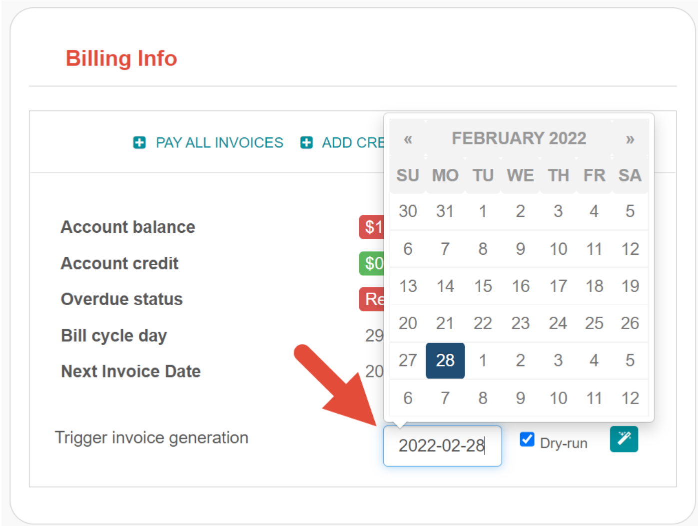
After you generate the invoice, which is in `DRAFT` mode, you have the choice to commit it. If you do not commit the `DRAFT` invoice, it remains in the system as a draft.

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.



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



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:

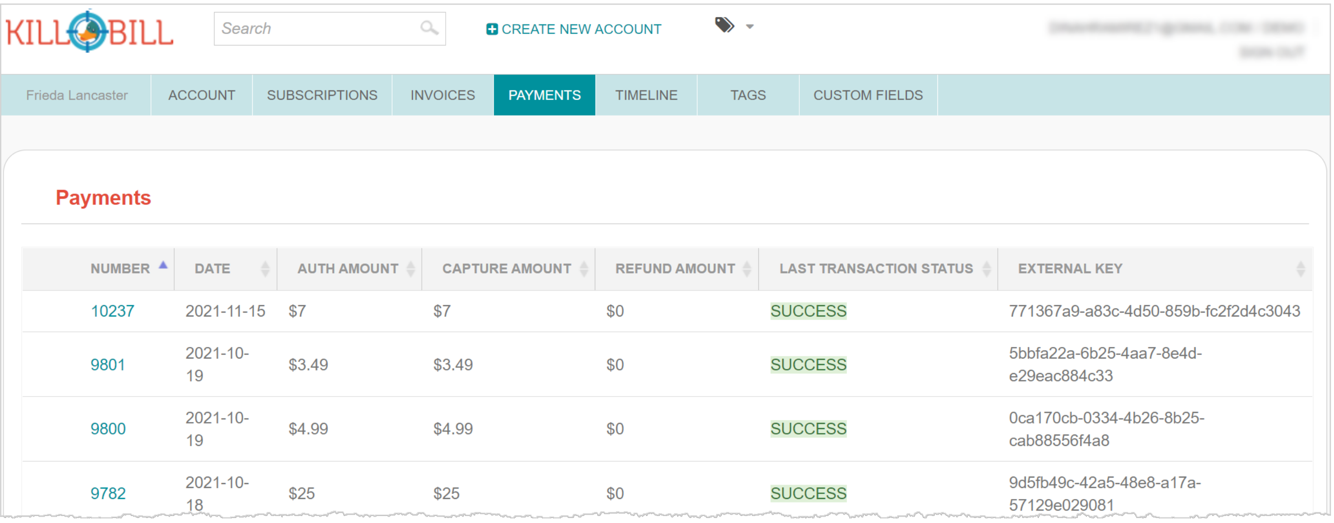
- "Payment" section of the *Subscription Guide*
- *Payment Guide*

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.



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

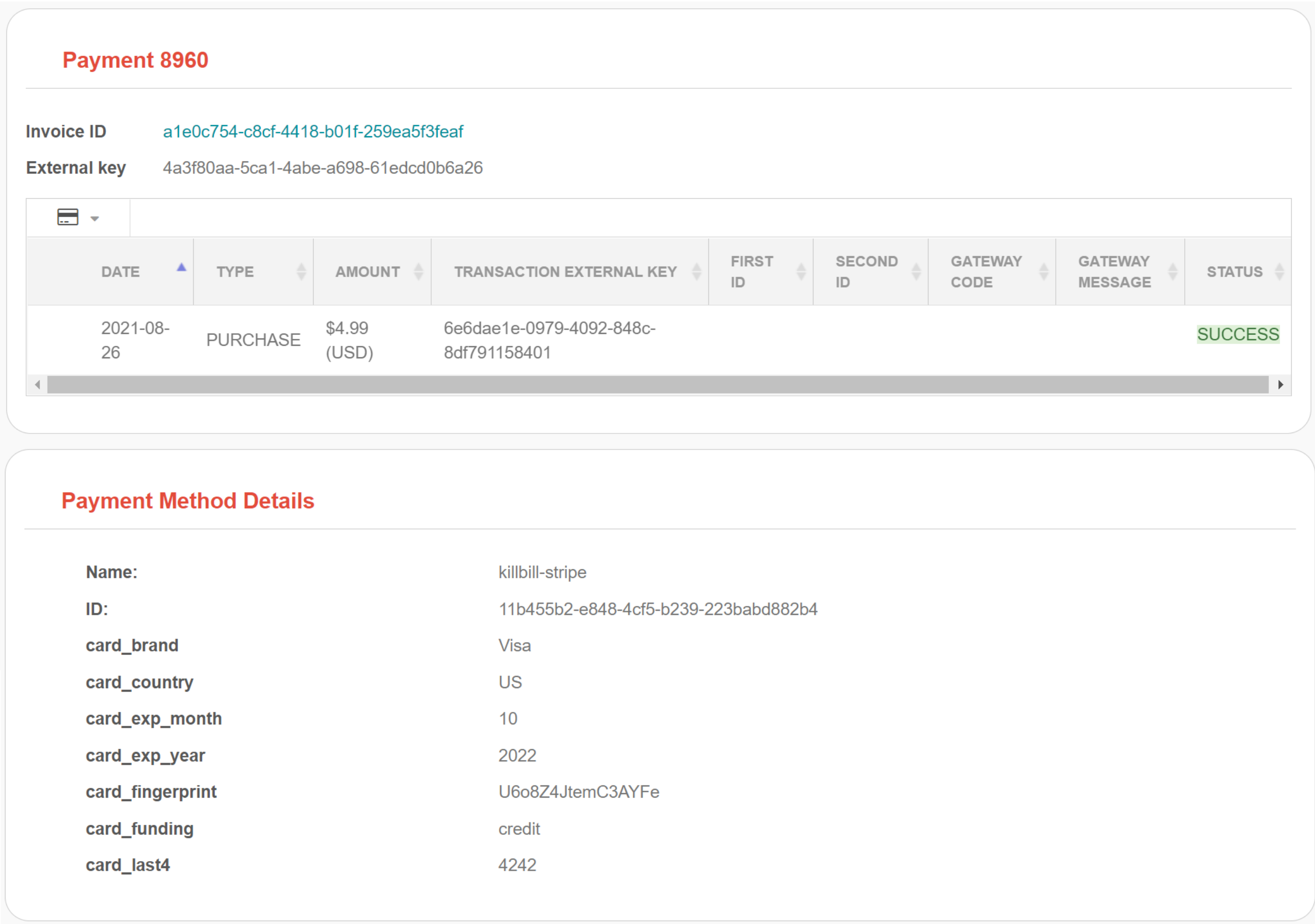
Kill Bill *does not* automatically generate an invoice payment if:

- 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.



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

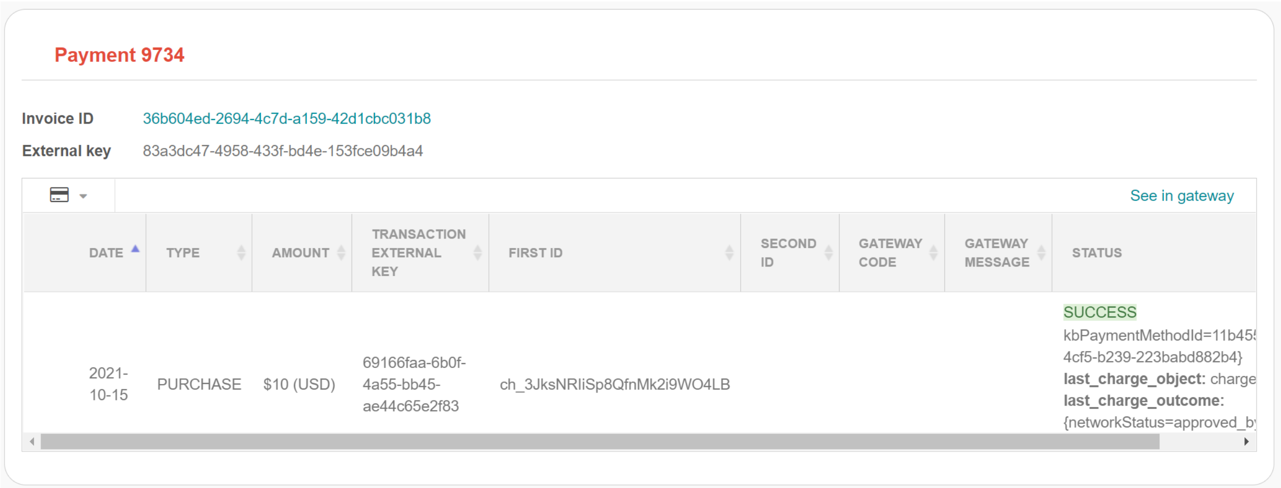
When you refund a payment from the Payment Details page, it brings the invoice amount to zero (i.e., the invoice will have no balance). You can also perform a partial refund in which the partial refund amount is added as an invoice line item.

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

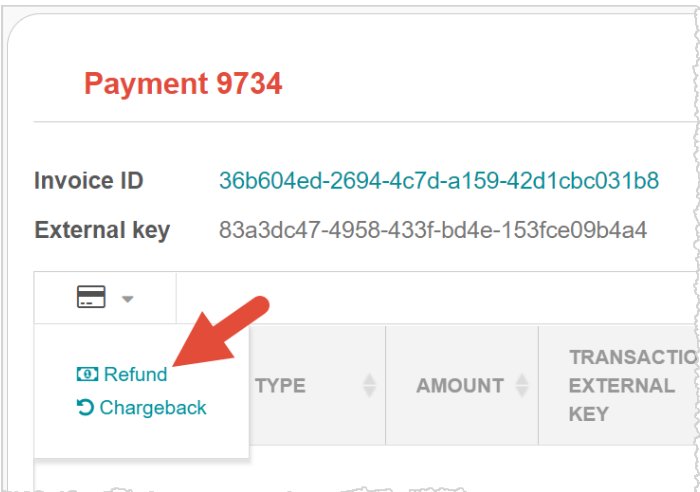
Note: You can also perform a refund directly on the payment method that was originally used. For more information, see Applying Transactions to a Payment Method.

To refund a payment:

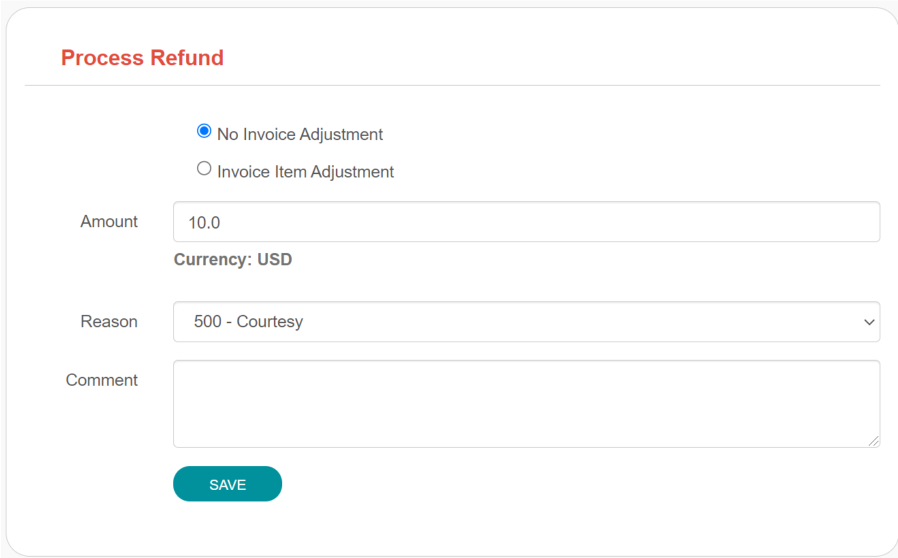
1. Open the Payment Detail page for the payment.



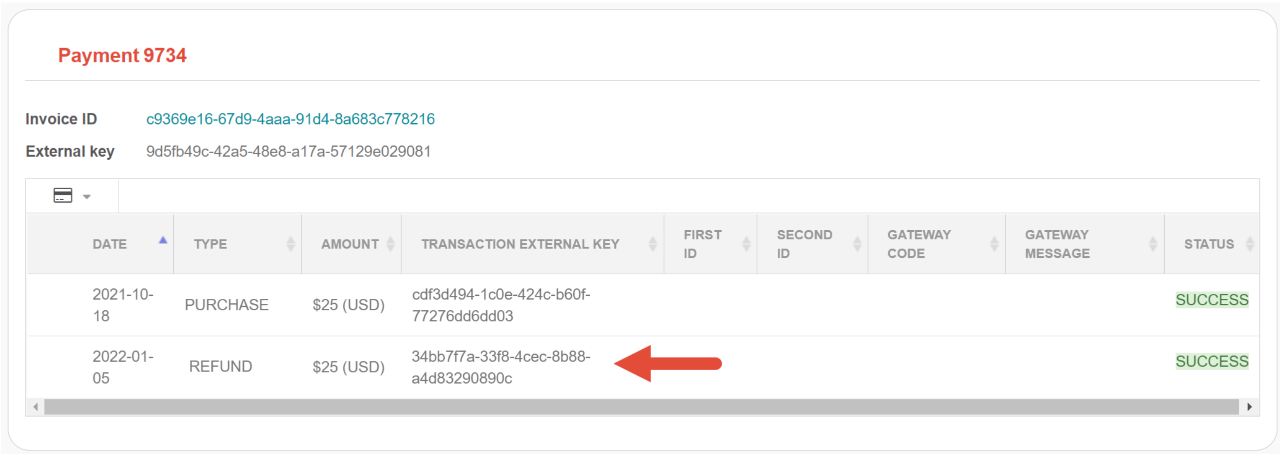
2. Hover over the credit card icon and select **Refund**.



Kaui opens the Process Refund screen.



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:



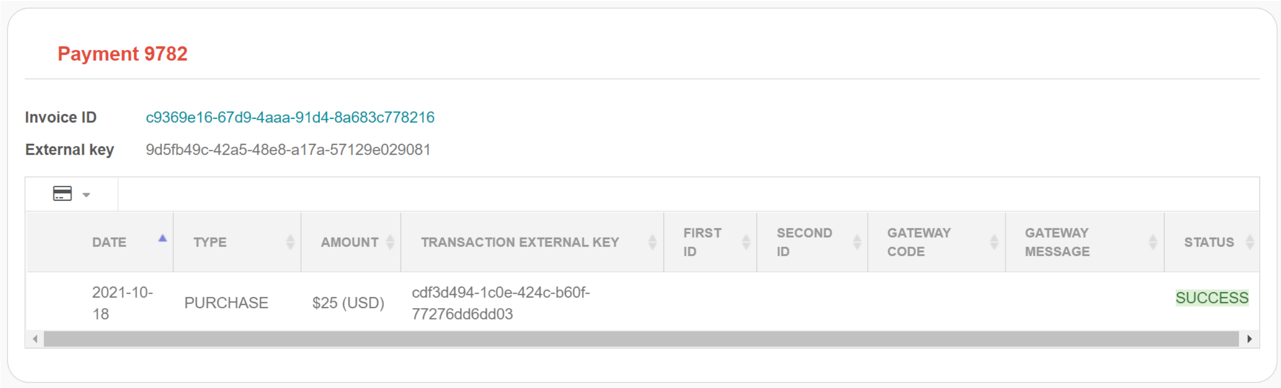
Process Refund Field Descriptions

Field	Description
No Invoice Adjustment Invoice Item 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**.
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.

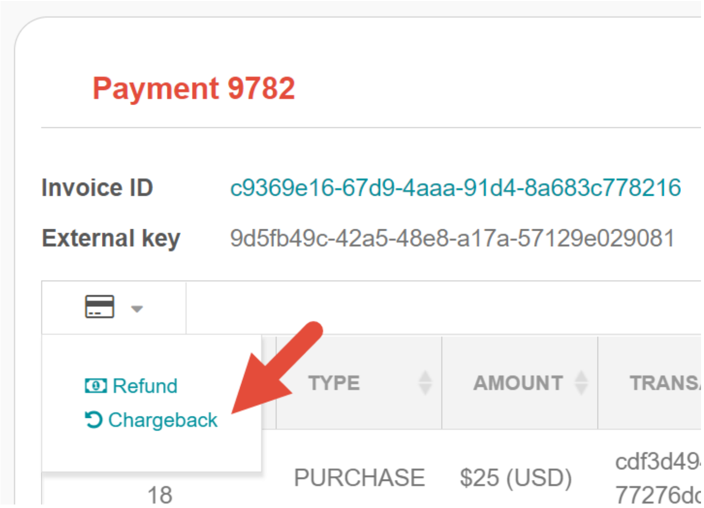
Perform a Chargeback

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

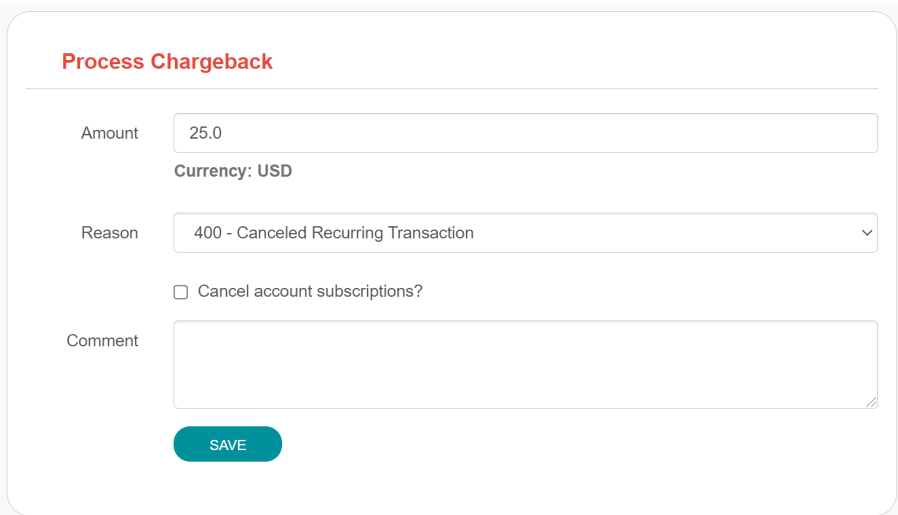
1. Open the Payment Detail page for the payment.



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

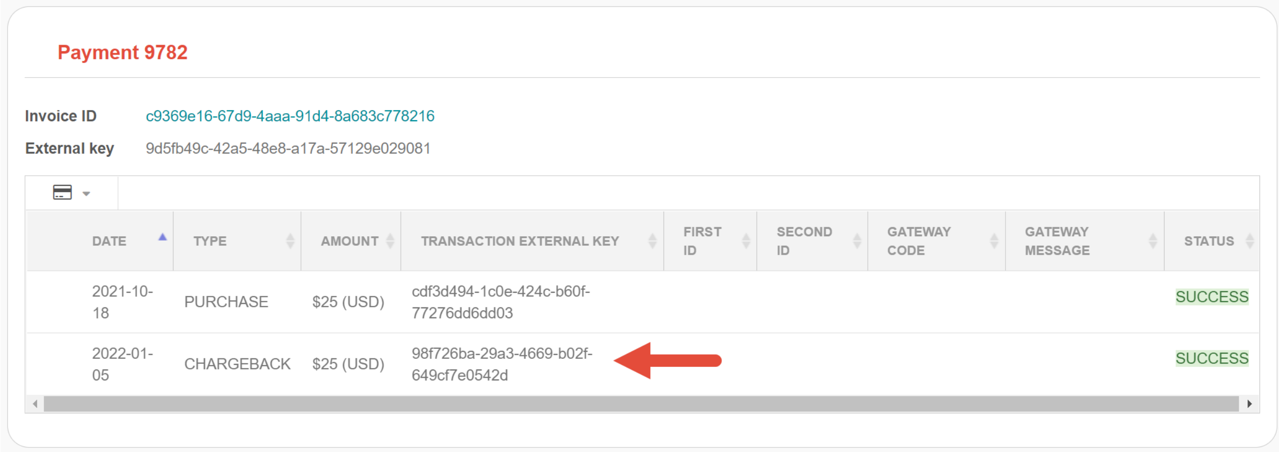


Kaui opens the Process Chargeback screen with the **Amount** and **Reason** fields already filled in.



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.)

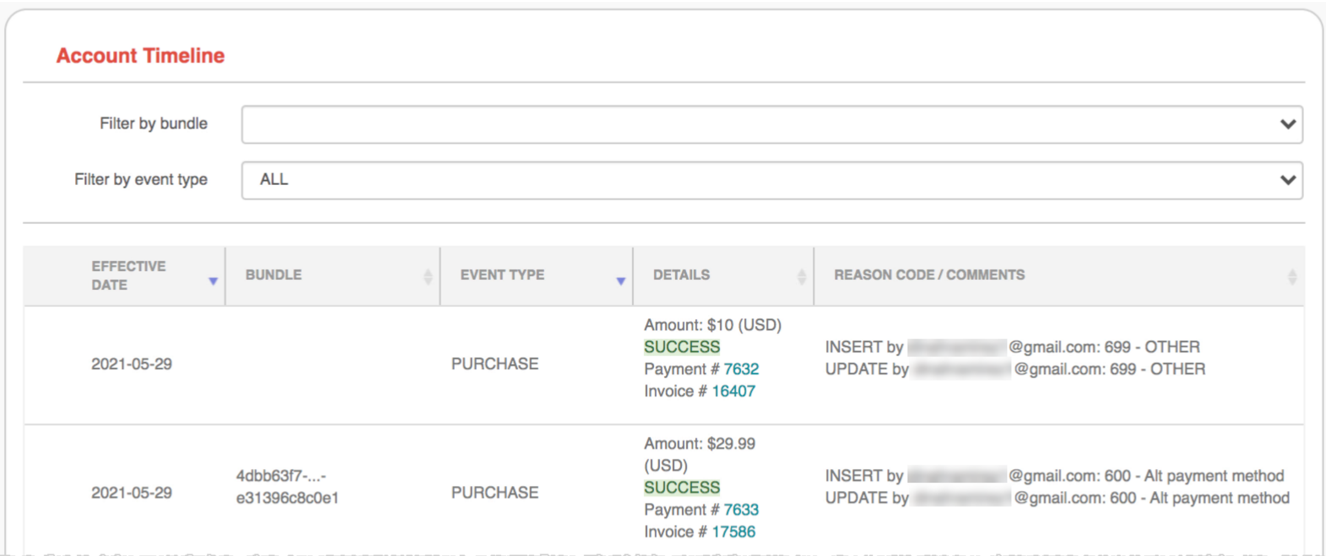
4. If the subscription associated with the payment needs to be canceled, check the **Cancel account subscriptions** box.
5. Fill in the **Comment** field (optional). The text you enter here displays on the Timeline page.
6. Click the **Save** button. Kaui saves the chargeback and displays it as a separate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



Timeline

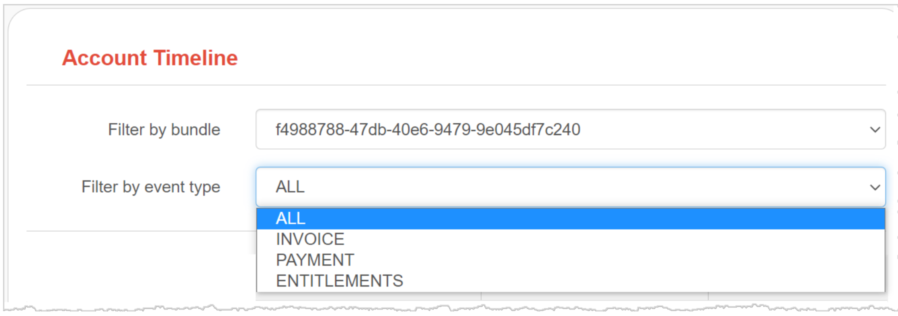
The Timeline displays a chronological list of events (that is, an audit log) that occurred for a specific customer account. You cannot make changes to the timeline.

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

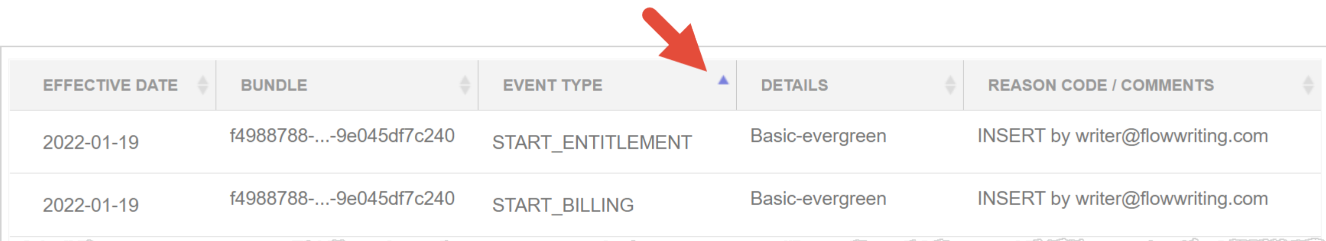


On the Timeline page, you can:

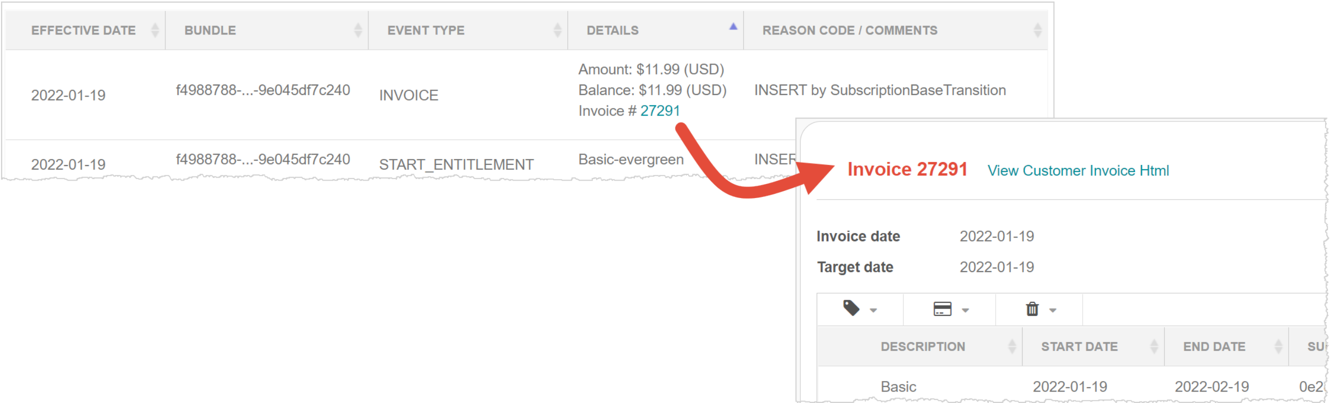
- *Filter events*: Make selections in the **Filter by event type** or **Filter by bundle** fields to display only specific events (e.g., `PURCHASE`, `INVOICE`) and/or by a specific subscription bundle.



- *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.



- *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
INSER
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

Tenants

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.

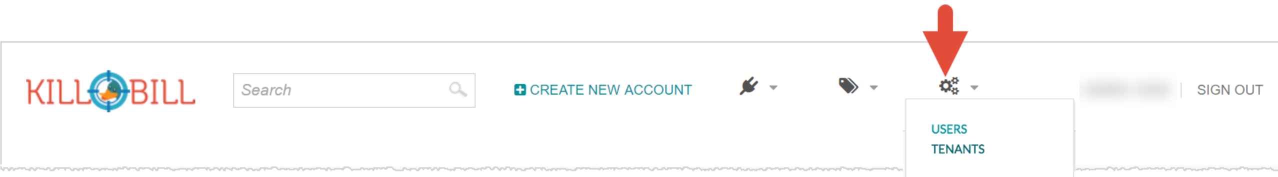
Additional Tenant Resources

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

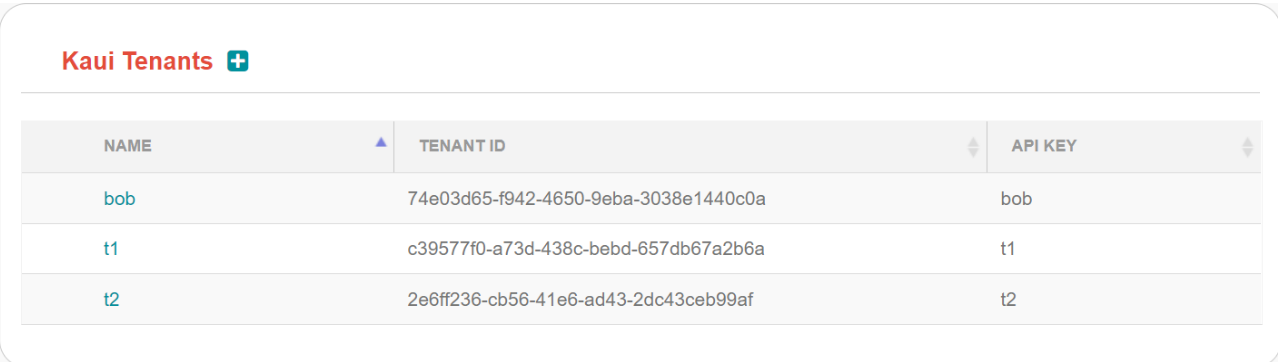
Create a Tenant

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:

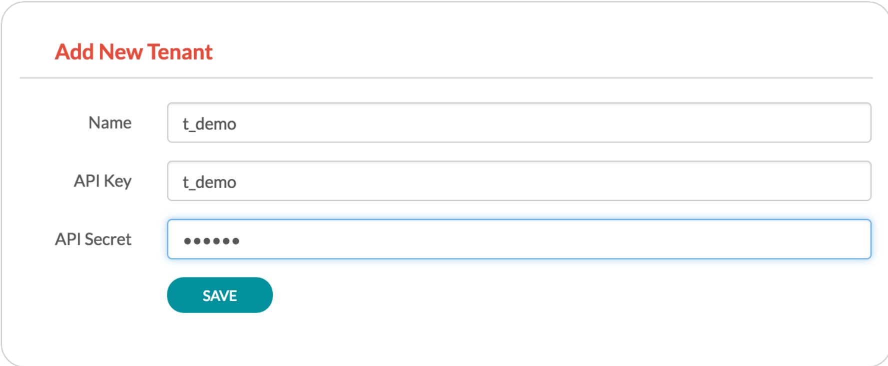


Kaui Tenants

NAME	TENANT ID	API KEY
bob	74e03d65-f942-4650-9eba-3038e1440c0a	bob
t1	c39577f0-a73d-438c-bebd-657db67a2b6a	t1
t2	2e6ff236-cb56-41e6-ad43-2dc43ceb99af	t2

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

Kaui displays the Add New Tenant screen:

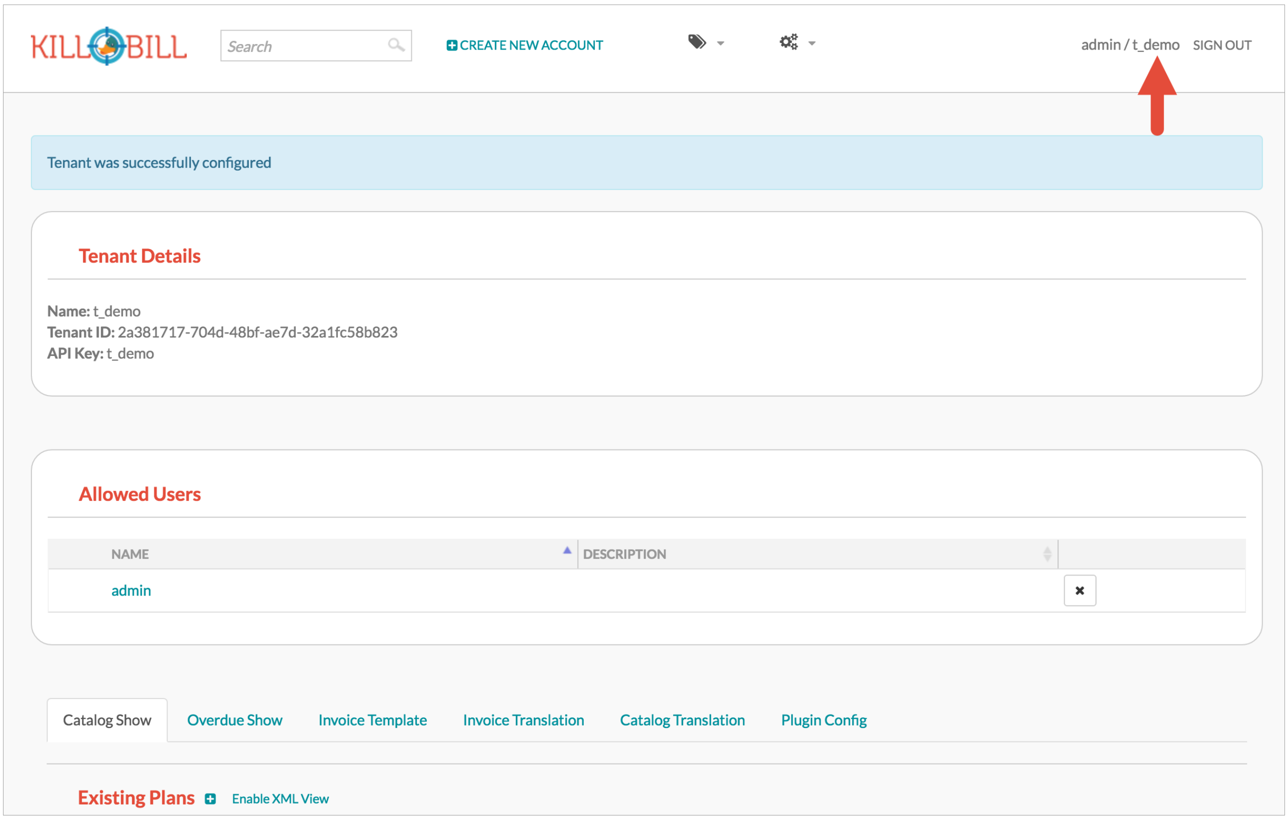


3. Enter the tenant **Name**, **API Key**, and **API Secret**.

> **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.

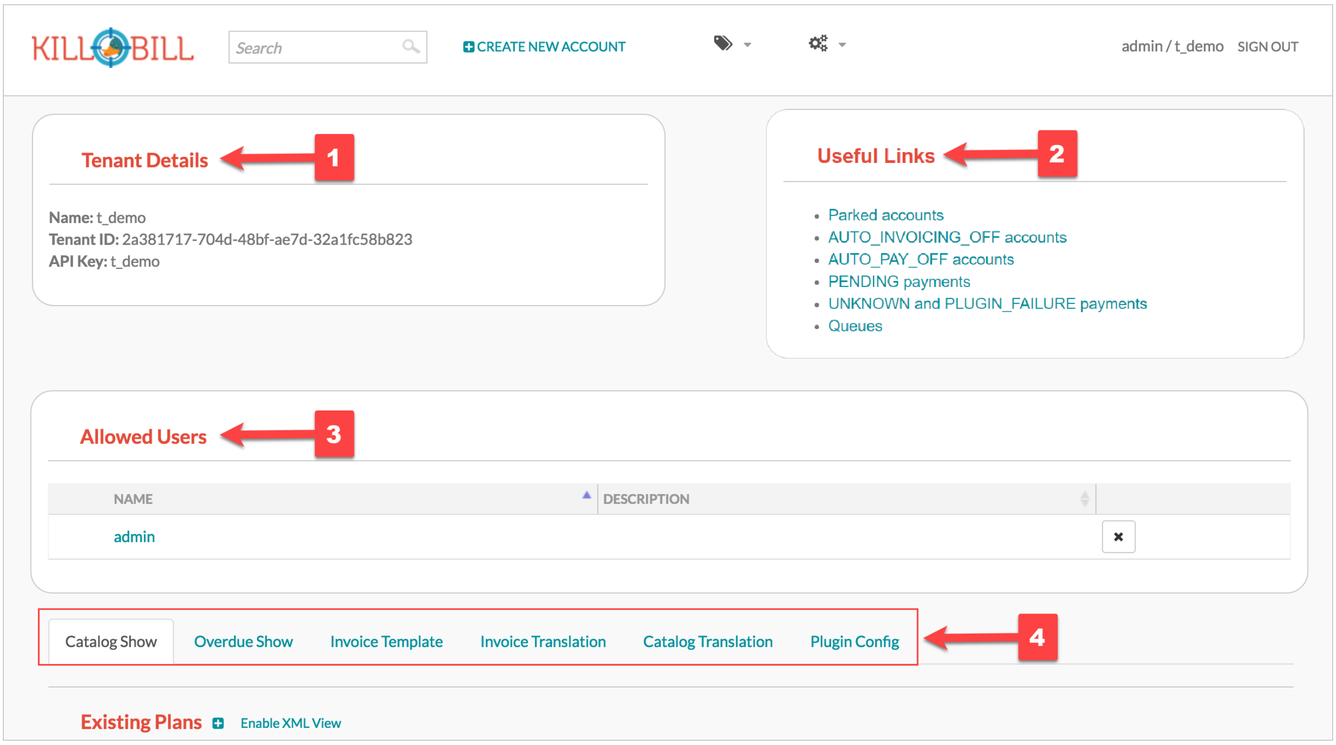
4. Click the **Save** button.

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



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.

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.

By default, the admin user has access to the 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:

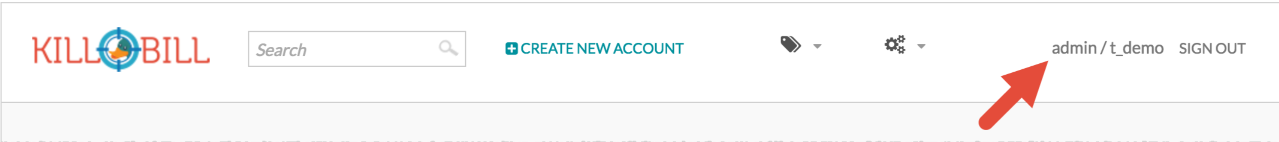
- Catalog Show—Create and manage catalog XML files.
- Overdue Show—Create and manage the XML configuration file that helps to control Kill Bill's overdue (dunning) functionality.
- Invoice Template—Upload invoice template files.
- Invoice Translation—Upload translated invoice files.
- Catalog Translation—Upload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

- **Plugin Config**—Upload plugin configuration files. *Currently undocumented.*

Add an Allowed User to the Tenant

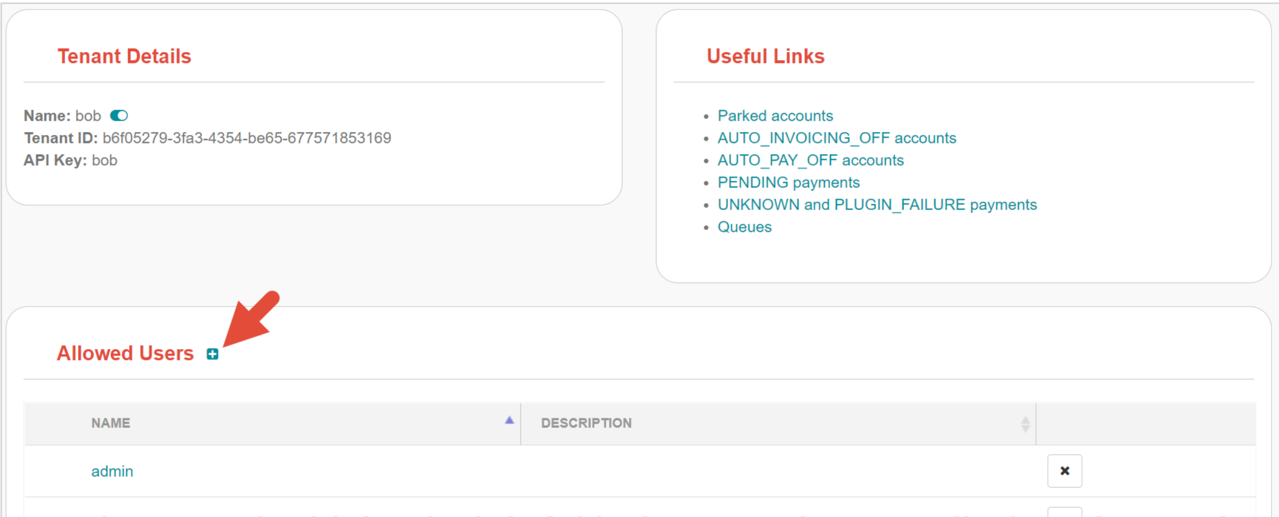
The steps below explain how to add an *existing* user to the current tenant. Before you begin, you should have created the user in the Kill Bill system by following the steps in the "Add a User" section.

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

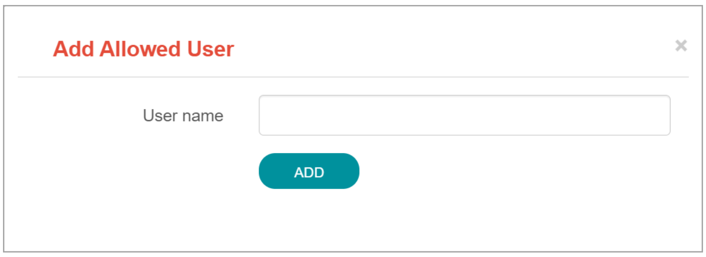


   Kaui displays the Tenant Configuration page.

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.

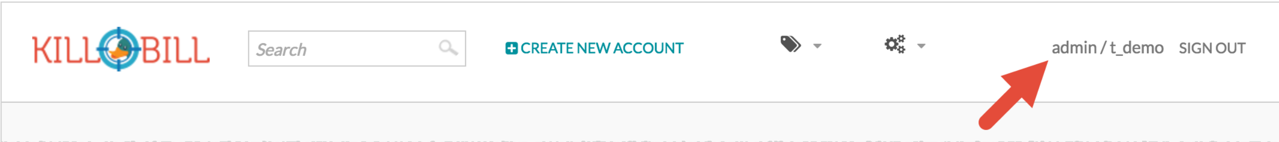
   Kaui displays the newly added user to the Allowed Users list for the tenant.

Remove a User from the Tenant

Perform the steps below to remove a user from the current tenant. Note that this does not delete the user from the Kill Bill system.

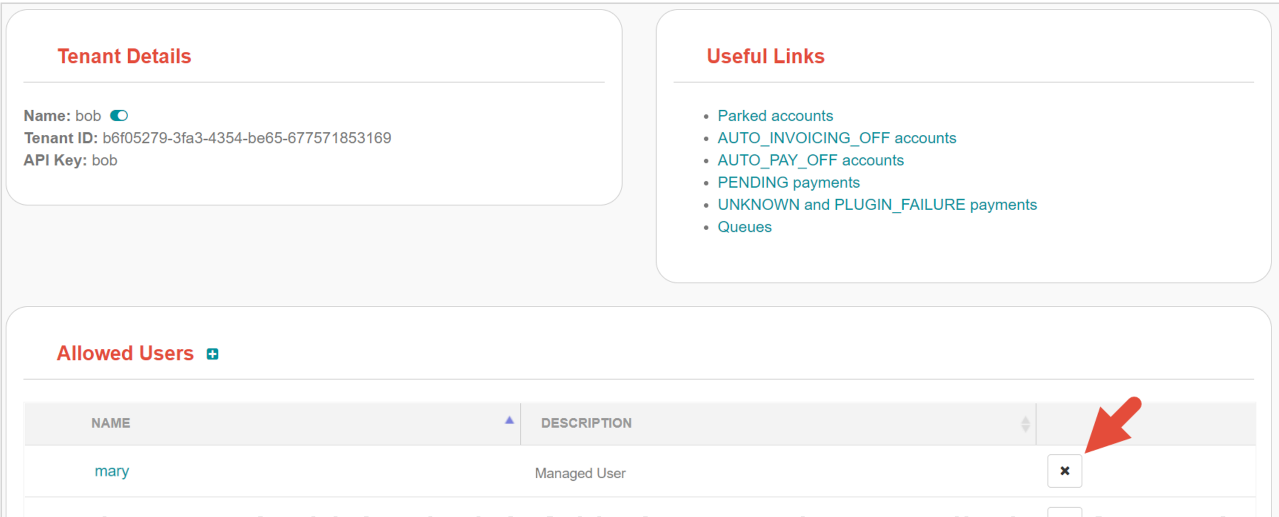
> **Warning:** Deleting the `admin` user for a tenant means will remove administrative access to the tenant.

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.

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

Before You Begin

Before you begin working with users, make sure that:

- You can log in as a Kaui admin. OR
- You can log in as a user with the correct permissions for working with users, roles, and permissions.

In addition, you should already have at least one tenant set up in Kaui.

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

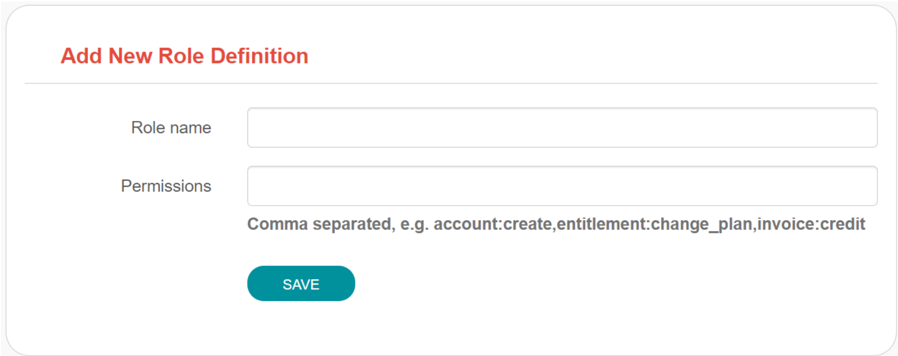
If you are using the Kill Bill database to store user data, adding a user profile in Kaui automatically creates it in Kill Bill.

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.

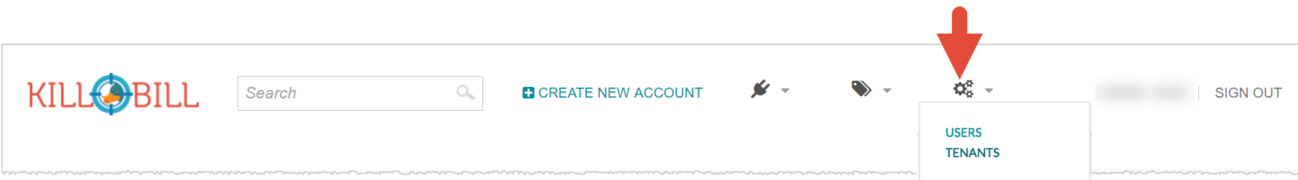


2. Enter the **Role name** for the user. Do not use any spaces in the role name.
3. Enter all the **Permissions** that are associated with this role. See the list of Kill Bill user permissions as a reference.
4. Click the **Save** button.

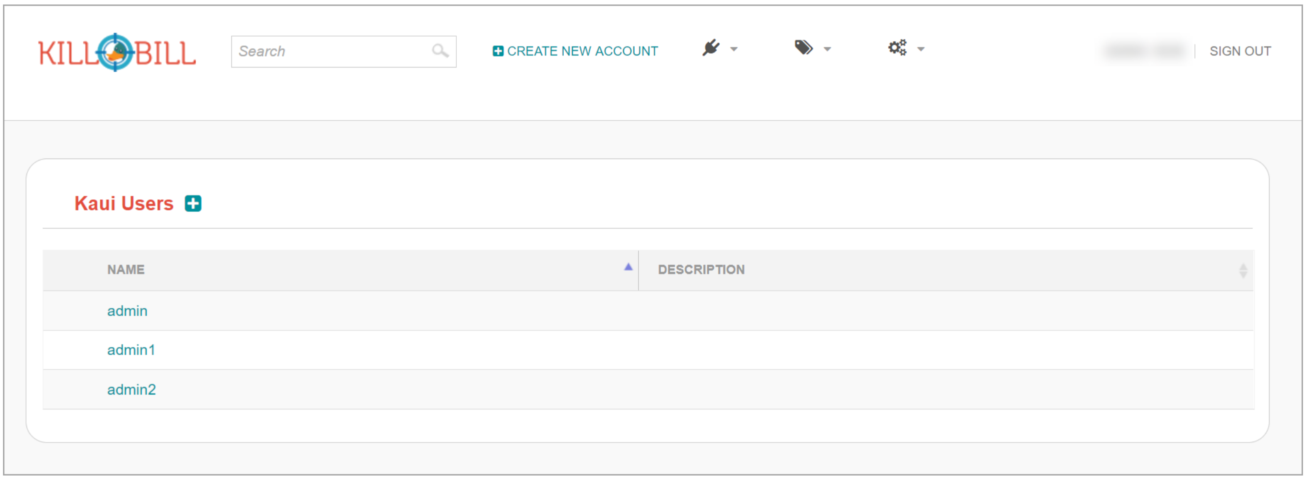
Open the User List

To open a list of Kaui users:

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



Kaui displays the Users screen:

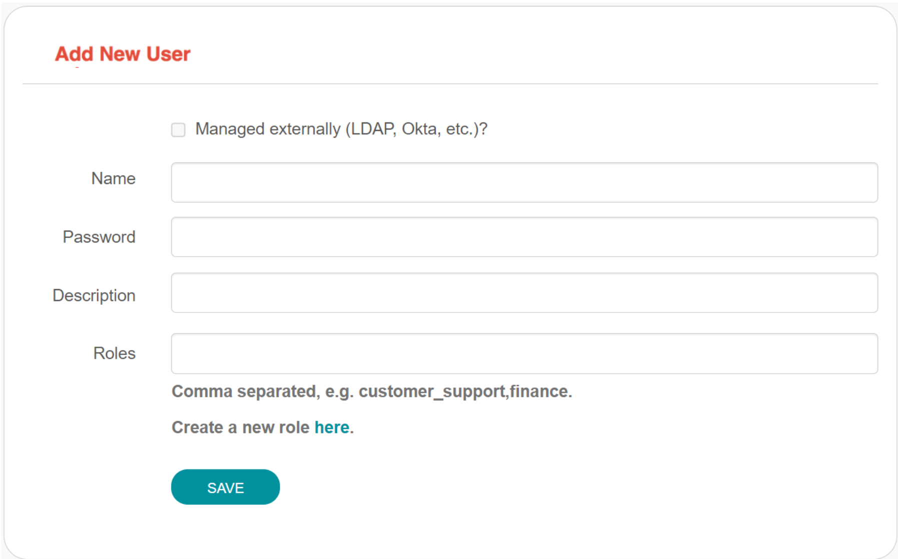


On this screen, you can add a user by clicking the plus icon. To open a user's details to edit or delete, click the username.

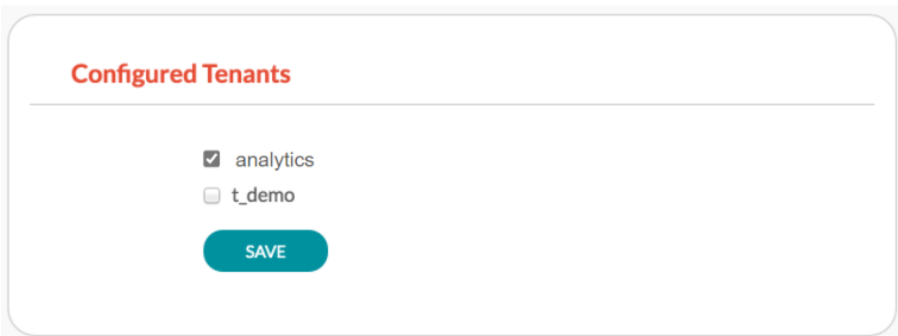
Add a User

1. Open the users list.
2. Select the plus icon (+) next to **Kaui Users**.

   Kaui displays the Add New User pop-up:



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

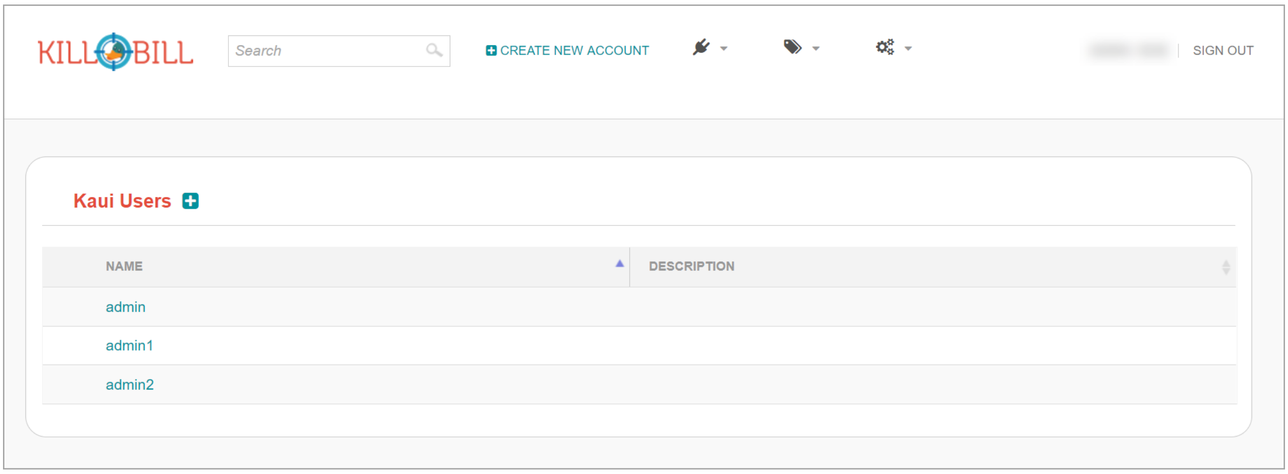


5. Select the tenant(s) the user has access to.
6. Click the **Save** button.

Edit a User

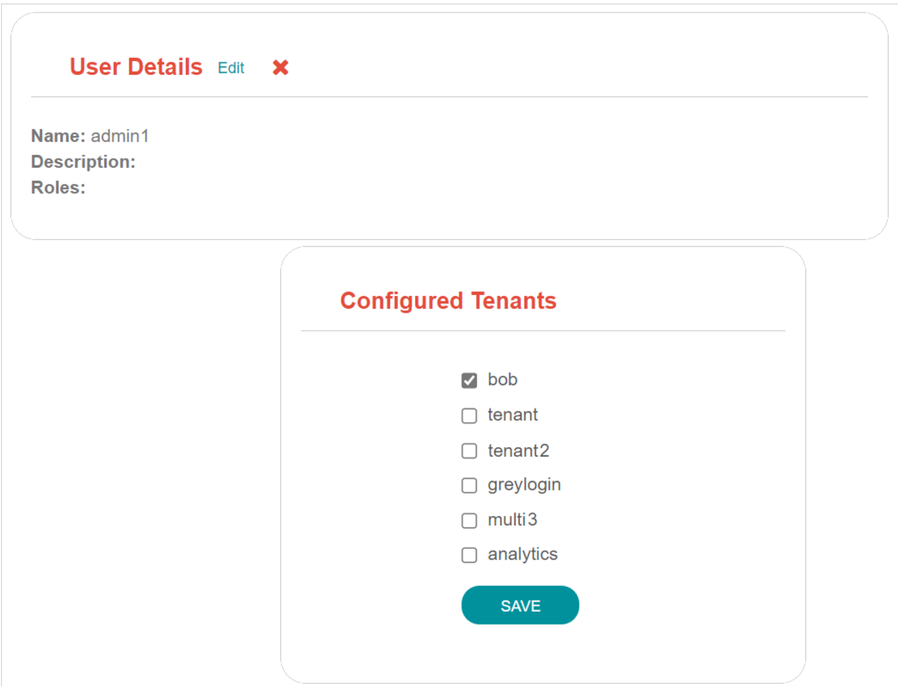
Use the steps in this section to change the user's name, password, or role.

1. Open the user list.



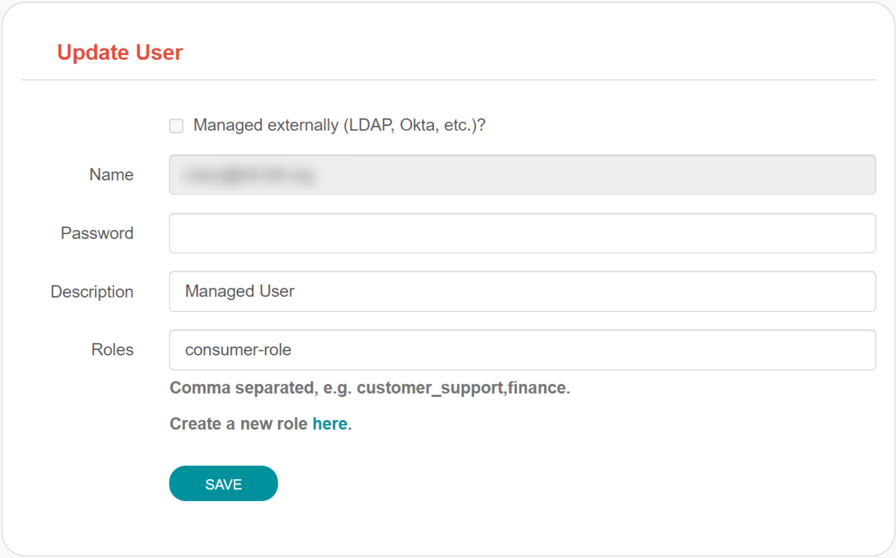
2. Select the user you want to edit.

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



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**).

   Kaui displays the Update User screen:



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

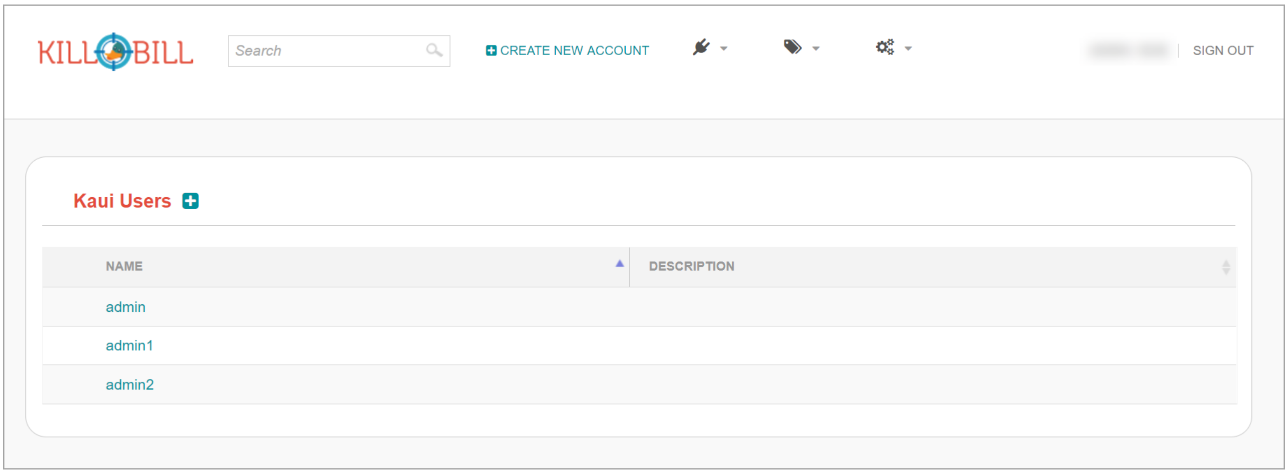
Add New User Field Descriptions

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

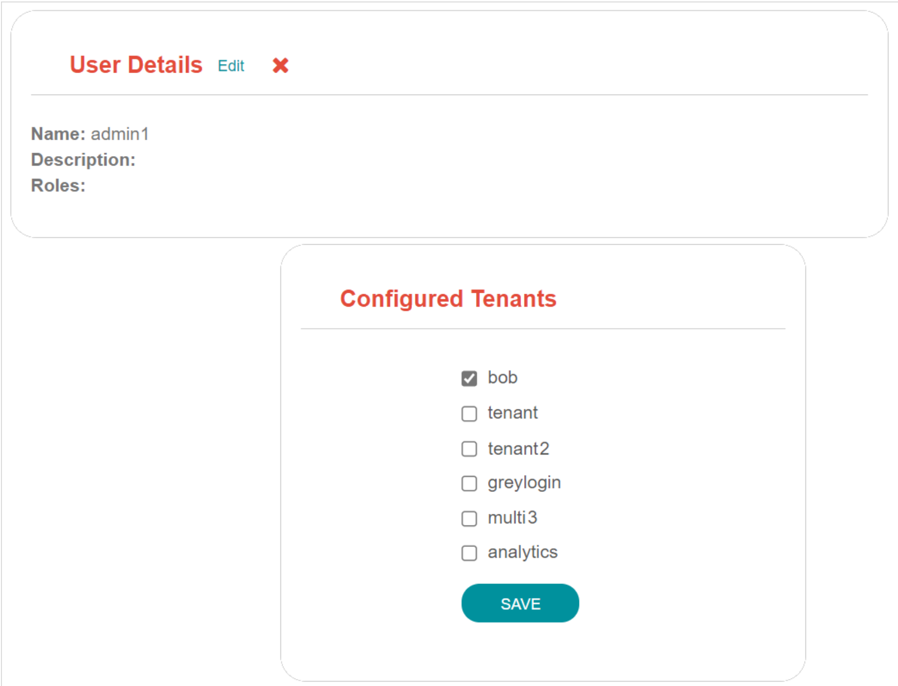
The following steps explain how to delete a user from the system (i.e., for both Kaui and Kill Bill). Deleting a user also removes the user's access to any assigned tenants.

1. Open the user list.



2. Select the user you want to delete.

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



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.

Catalog

Overview

This chapter 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 catalog as XML
- Delete a catalog
- Download the catalog

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

Additional Catalog Resources

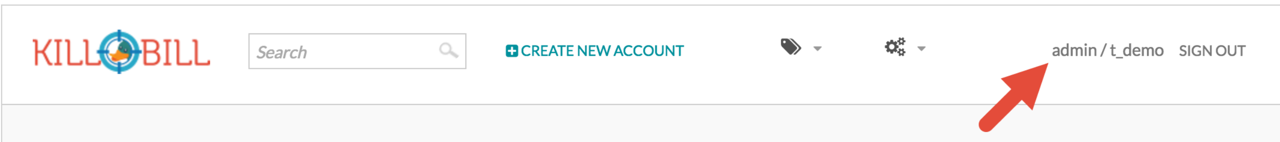
- Catalog API
- "Catalog" section in *Subscription Guide*

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.

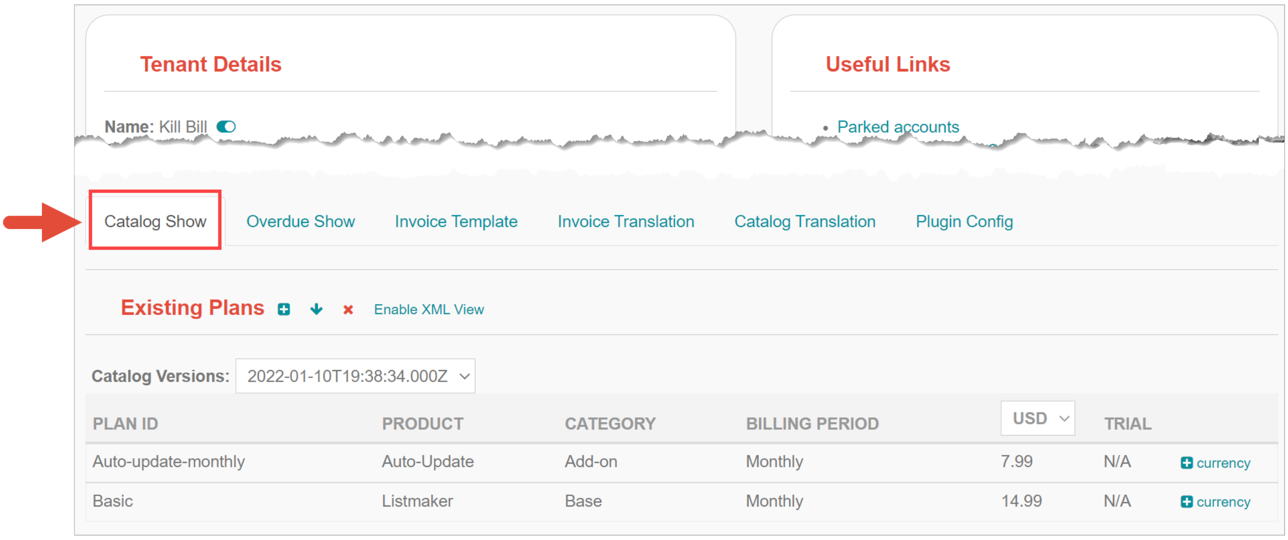
To get there:

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



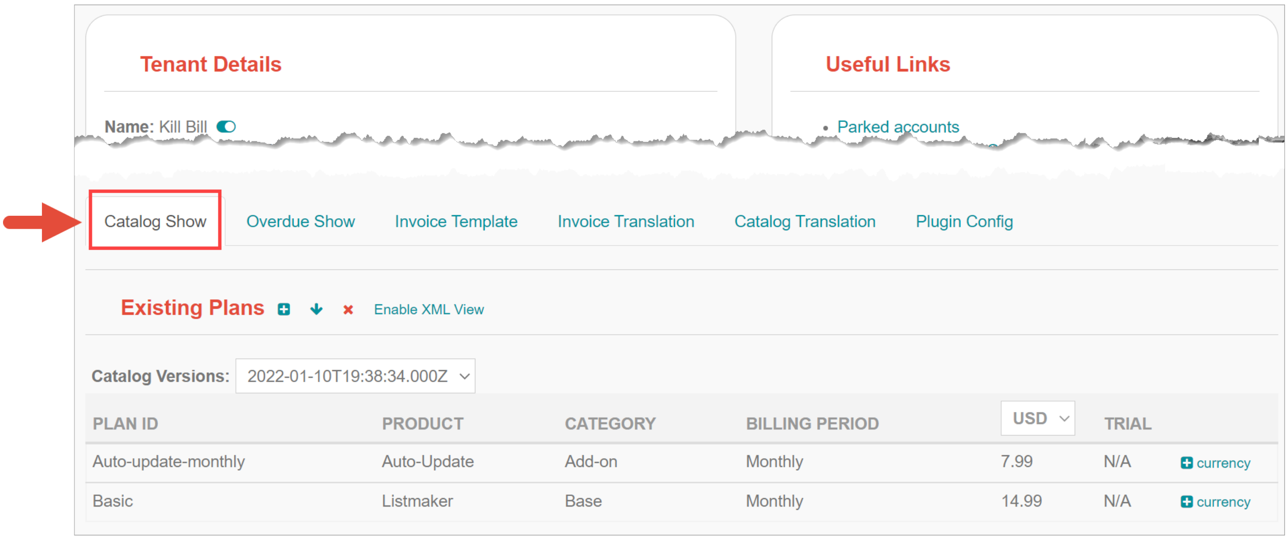
   Kaui displays the Tenant Configuration page.

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



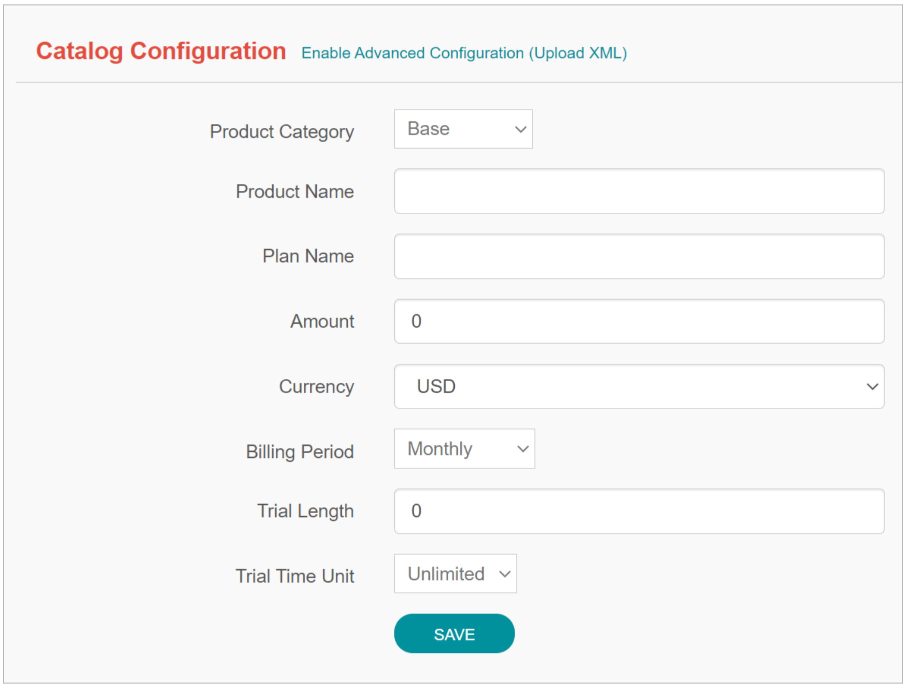
Create a Simple Catalog

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.

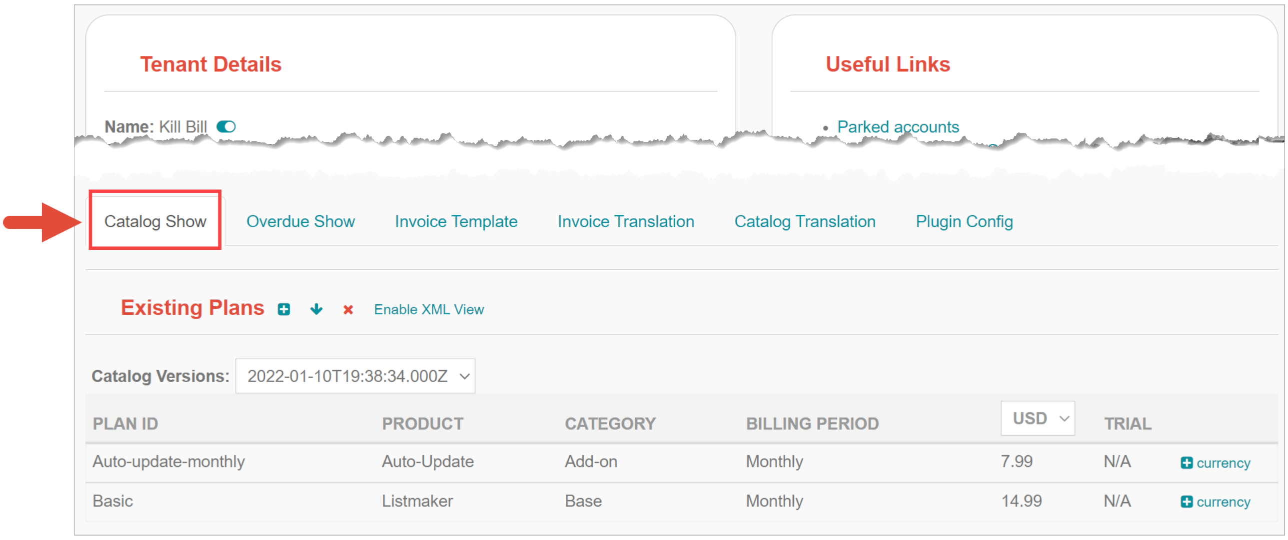
Catalog Configuration Field Descriptions

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.

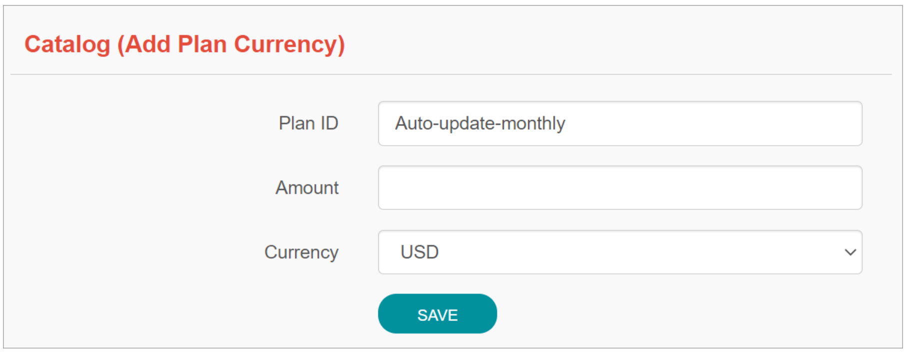
Add a Currency to a Plan

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

The Kill Bill catalog is stored in XML format. This section explains how to upload an XML file that contains the product catalog information.

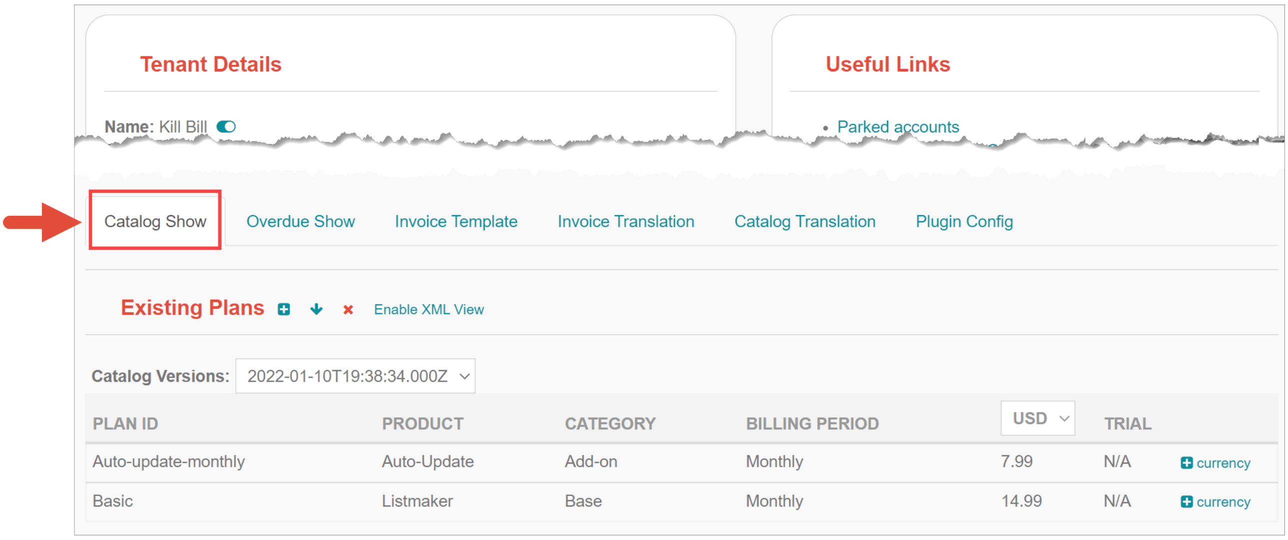
Note: You cannot edit a raw XML catalog in Kaui.

If you are replacing a catalog with a newer version, ensure that `<catalogName>` in the XML file is the same as the existing catalog. The catalog filename does not need to be the same.

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

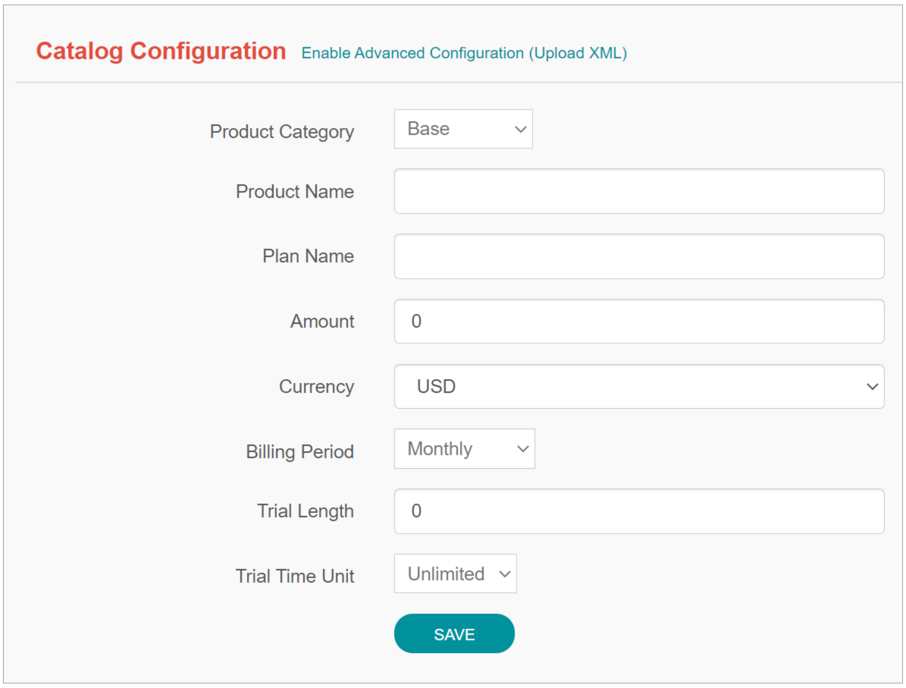
To upload an XML catalog in Kaui:

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



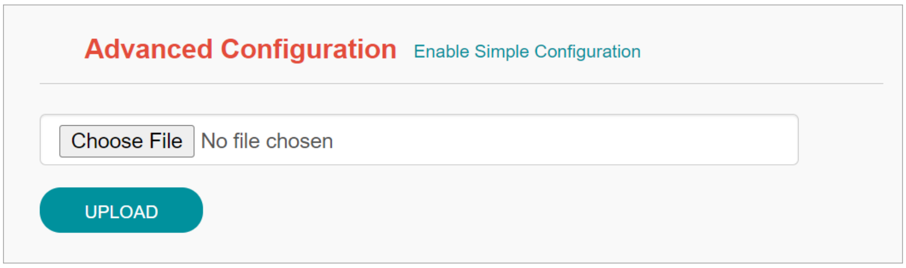
2. Click the plus sign ( ) next to **Existing Plans**.

   Kaui opens the Catalog Configuration screen:



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

   Kaui displays an upload screen:

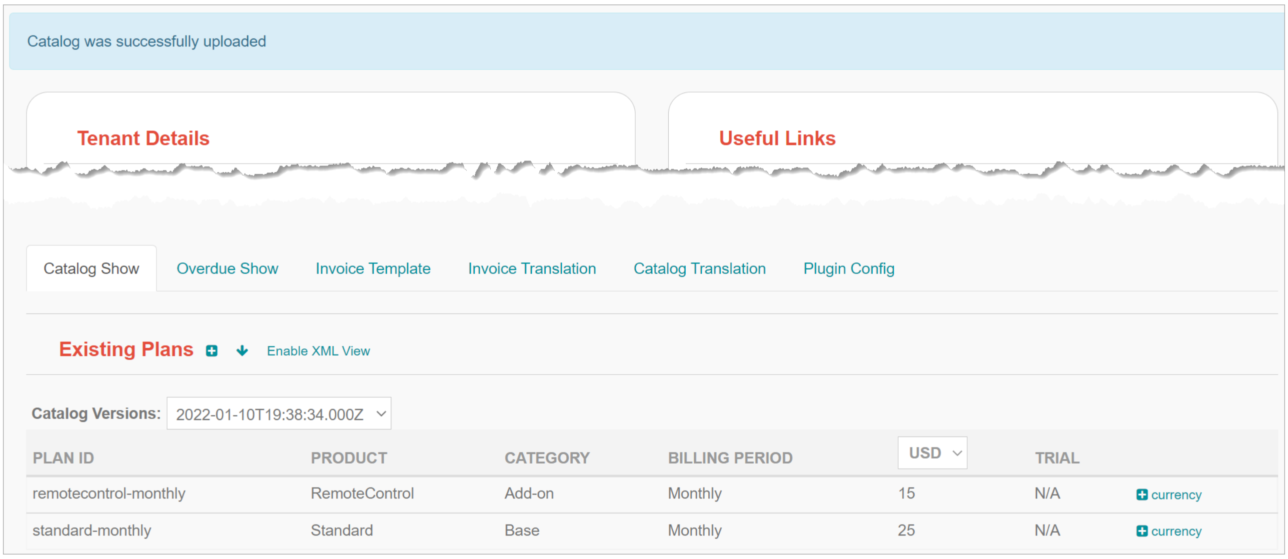


4. Click the **Choose File** button, locate the XML file, and select it.

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

5. Click the **Upload** button.

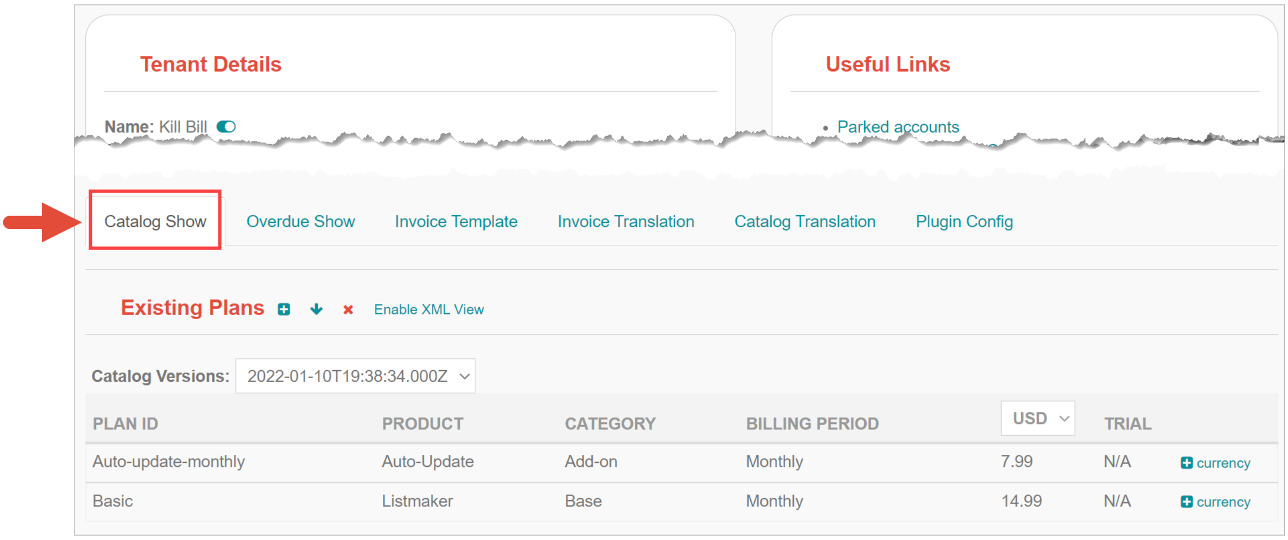
   If the upload is successful, Kaui displays a confirmation message along with a list of plans on the Catalog Show tab:



Note: If you receive an "Invalid catalog for tenant" error, run the catalog through the Kill Bill catalog validation tool (if you haven't already). You can also delete the existing catalog and retry the upload steps.

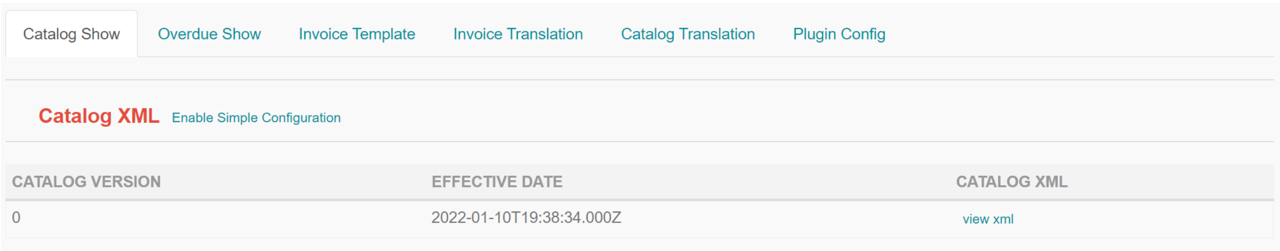
View the Catalog as XML

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:

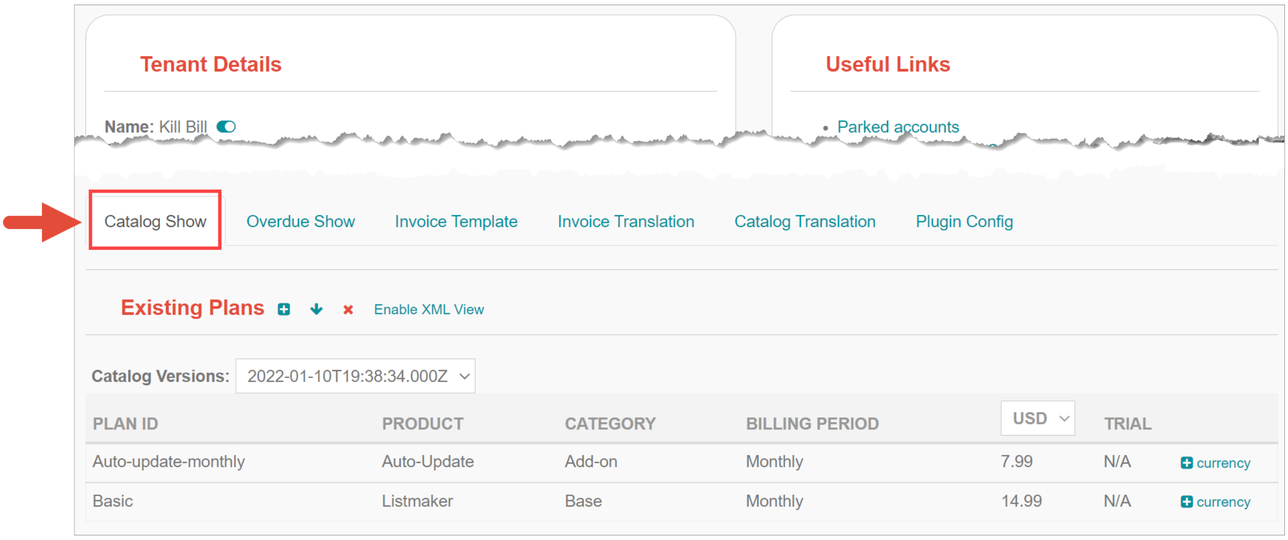


3. Click **view xml**. Kaui displays the raw XML (uneditable in this view).

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

Delete a Catalog

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



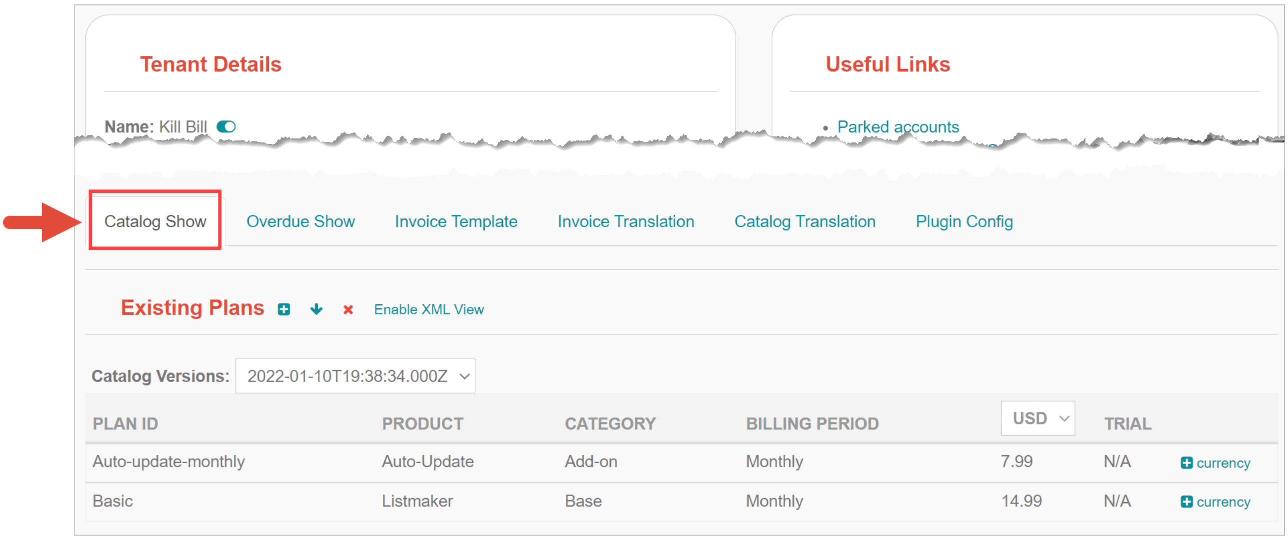
2. Click the red X ( ) to the left of **Enable XML View**.

   Kaui removes the plans from the Catalog Show tab and displays a successful deletion message.

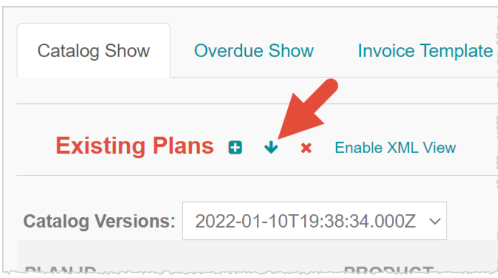
Download the Catalog

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.

Overdue

Overview

Kaui lets you configure basic settings for how the system behaves when an account is overdue. For overdue configuration, you define:

- The various states that the account must go through
- The change in users' entitlements when the account is transitioned from one state to the other
- The period after which the state is re-evaluated

These three pieces of information make up the *overdue flow*.

Overdue configuration applies at the tenant level. However you can also configure overdue flows for the *global* Kill Bill system.

In Kaui, overdue configuration is a subset of the full overdue configuration settings. For more information on the full configuration settings and global settings, see the *Overdue System Guide*.

See the following sections to create overdue (dunning) flows for a tenant:

- View overdue configuration
- Create overdue flows
- Upload an XML overdue configuration file
- View overdue configuration as XML
- Delete overdue flows

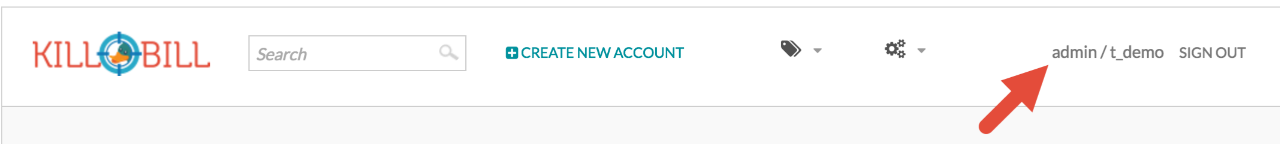
Additional Overdue Resources

- "Overdue" section in the *Subscription Guide*.
- *Overdue System Guide*

View Overdue Configuration

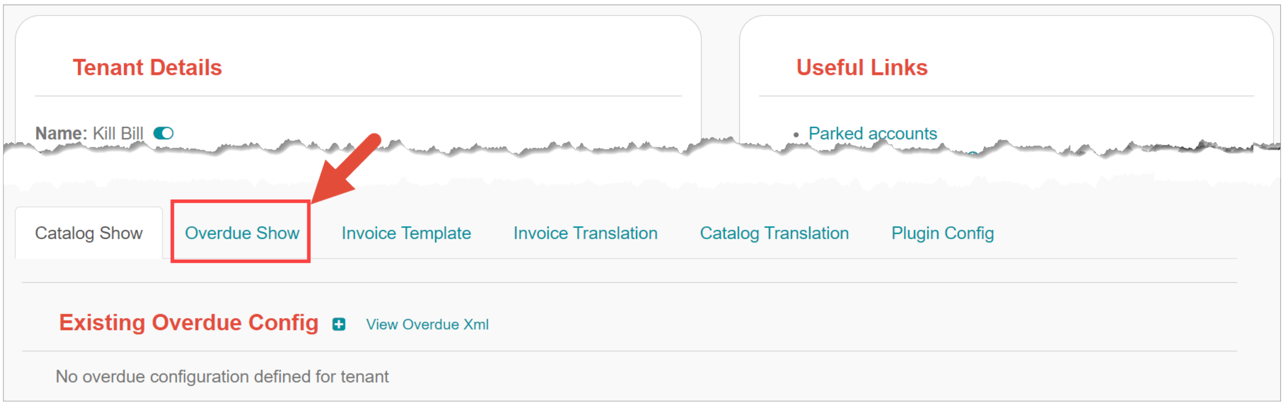
If any overdue (dunning) flows are configured, you can see them on the Overdue Show tab at the bottom of the Tenant Configuration page. To get there:

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



   Kaui displays the Tenant Configuration page.

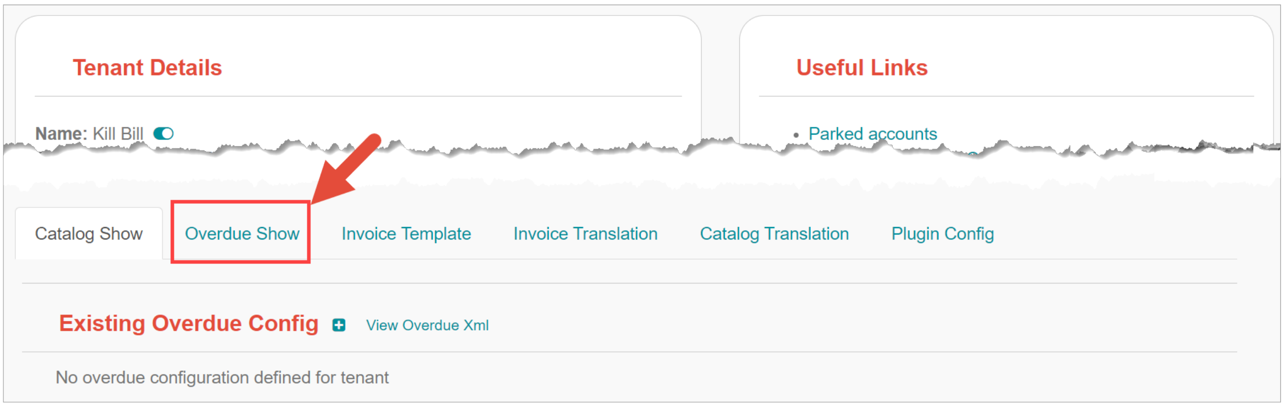
2. Scroll down and click on the Overdue Show tab:



Create Overdue Flows

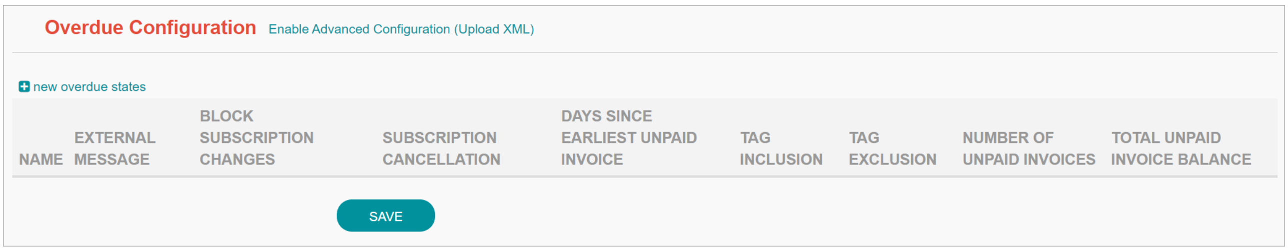
The following steps explain how to set up overdue flows (i.e., actions) for the tenant.

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

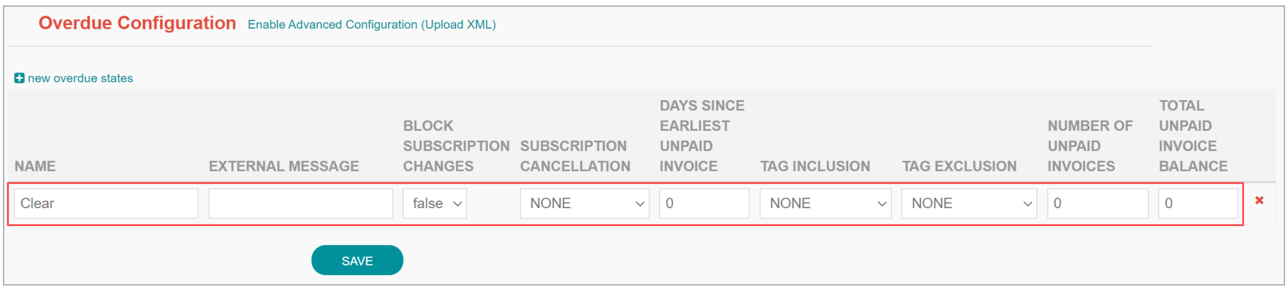


2. Click the plus sign ( ) next to **Existing Overdue Config**.

   Kaui opens the Overdue Configuration screen:



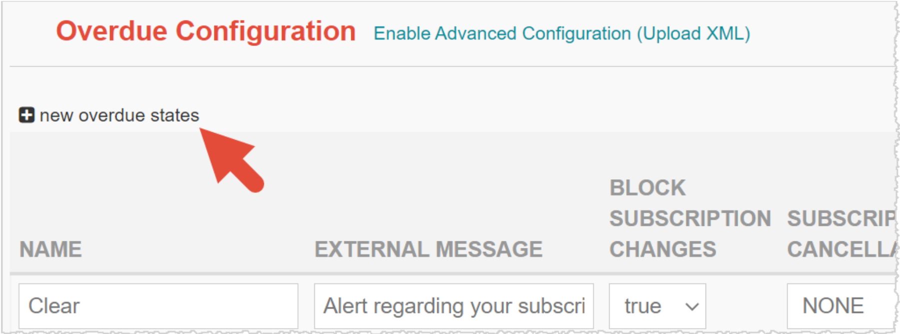
3. Click + **New Overdue States**. Kaui opens the fields for editing:



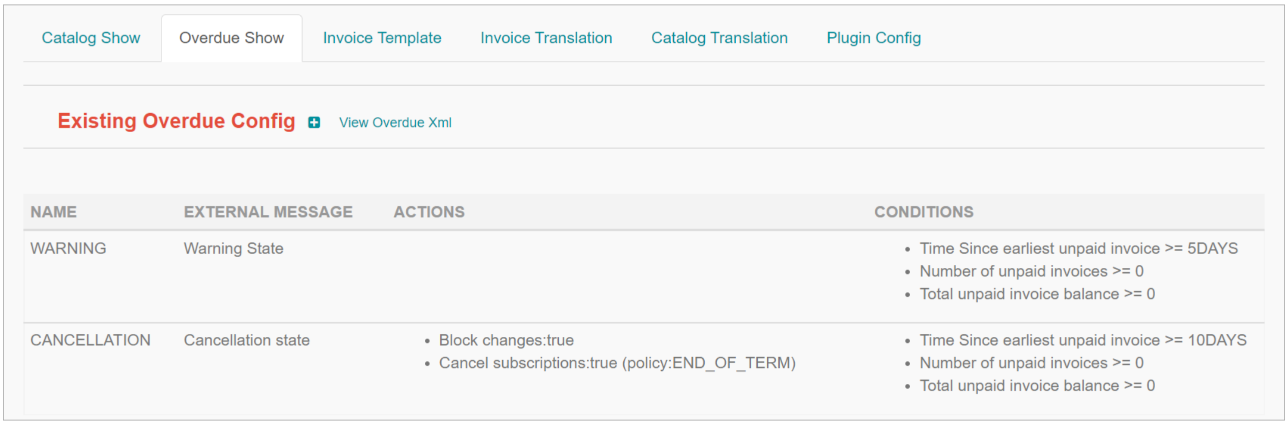
4. Fill in the fields for the current row. For field information, see the Overdue Configuration Field

Descriptions table.

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



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



Note: To edit an existing overdue flow, on the Overdue Show tab, click the plus sign ( ) next to **Existing Overdue Config**. This opens the overdue configuration fields in edit mode.

Overdue Configuration Field Descriptions

Field	Description
Name	The name assigned to the overdue state.
External Message	Message text that other plugins, when listening for overdue events, can retrieve and display to the user. (*Optional*)
Block Subscription Changes	If set to `true`, the customer *cannot* make plan changes to the subscription in this overdue flow. If set to `false`, the customer is allowed to make changes.

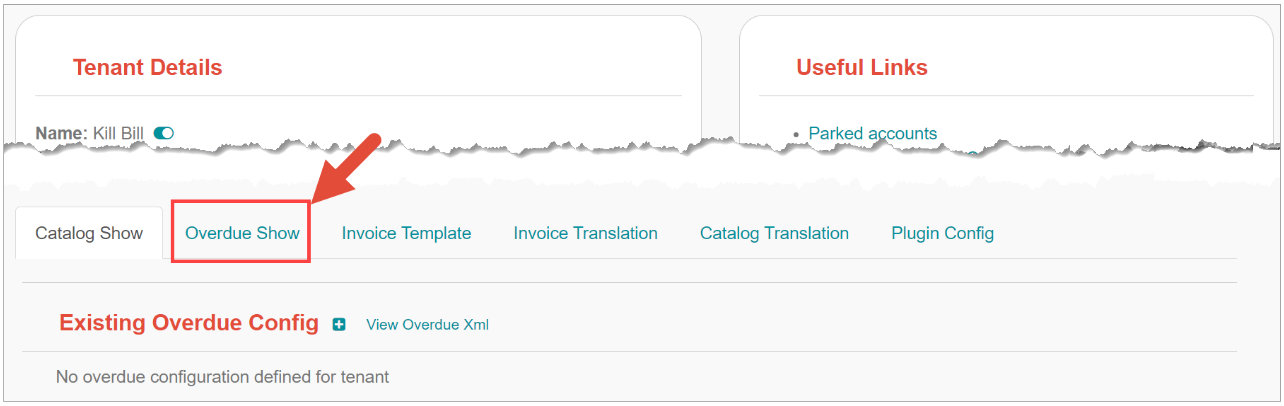
Field	Description
Subscription Cancellation	Select the option that describes how Kill Bill behaves regarding a cancellation in this overdue flow: • `NONE`: Kill Bill ignores this field, and the subscription is not cancelled. • `POLICY_NONE`: Same as `NONE` above. • `POLICY_IMMEDIATE_POLICY`: Cancels the subscription immediately and applies a partial credit to the account based on how much of the service has been consumed. • `POLICY_END_OF_TERM`: Cancels the subscription at the end of the billing period with no refund to the customer (i.e., no proration).
Days Since Earliest Unpaid Invoice	Specifies how many days should pass after the last unpaid invoice before initiating this overdue flow.
Tag Inclusion	Specifies that the overdue flow will occur if the account has a system (control) tag matching the one selected here. To disregard tag inclusion for this overdue flow, leave as the default `NONE` setting. • `AUTO_PAY_OFF` • `AUTO_INVOICING_OFF` • `OVERDUE_ENFORCEMENT_OFF` • `MANUAL_PAY` • `TEST` • `PARTNER` For a description of system tags, see the "Tags" section of the *Subscription Guide*.
Tag Exclusion	Specifies that overdue flow will occur if the account has NO system (control) tags matching the one selected here. To disregard tag exclusion for this overdue flow, leave as the default `NONE` setting.
Number of Unpaid Invoices	Specifies that the overdue flow will occur if the number of unpaid invoices equals or exceeds the specified value.
Total Unpaid Invoice Balance	Specifies that the overdue action will occur if the total unpaid invoice balance equals or exceeds the specified value.

Upload an XML Overdue Configuration File

Kill Bill overdue configuration is stored in XML format. This section explains how to upload an XML file that contains the overdue configuration.

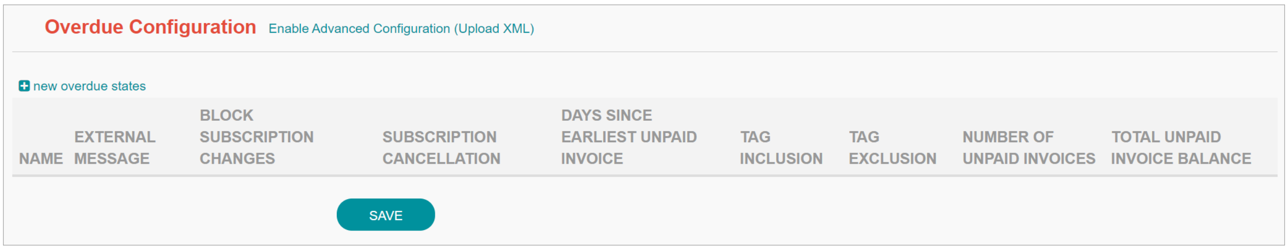
> **Note**: You cannot edit a raw overdue configuration XML file in Kaui.

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

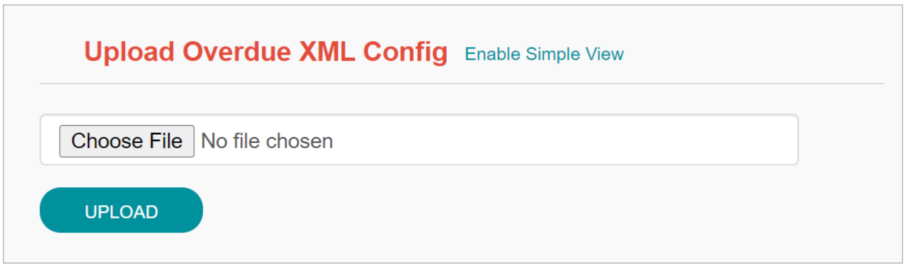


2. Click the plus sign ( ) next to **Existing Overdue Config**.

   Kaui opens the Overdue Configuration screen:

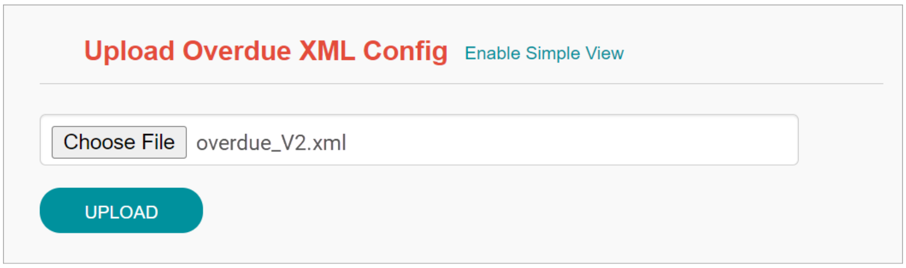


3. Click **Enable Advanced Configuration (Upload XML)**. Kaui displays an upload screen:



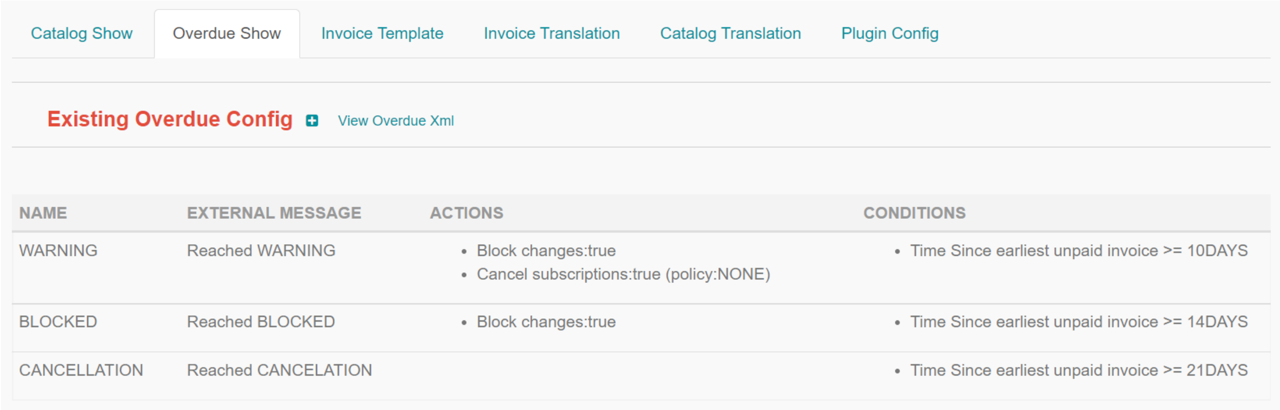
4. Click the **Choose File** button, locate the XML file, and select it.

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



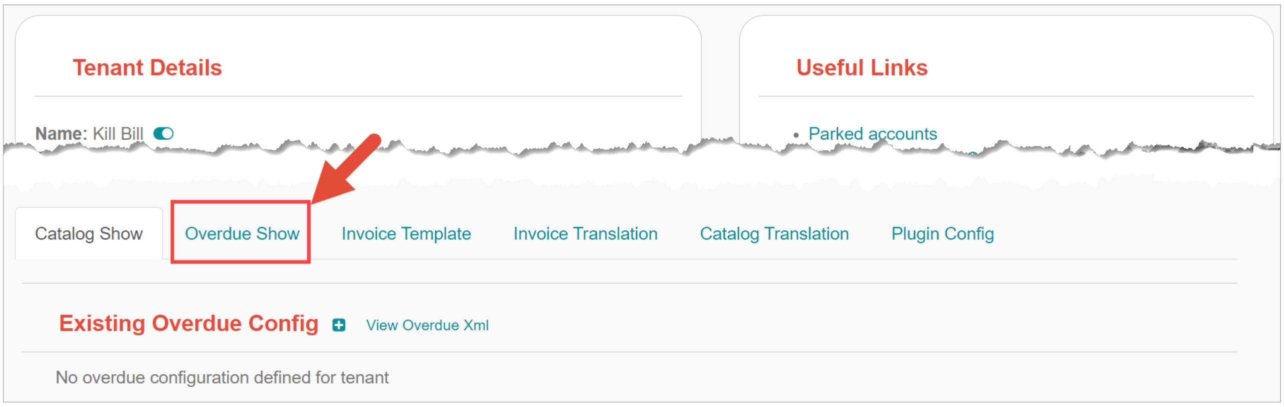
5. Click the **Upload** button.

   If the upload is successful, Kaui displays a success message at the top of the screen and displays the overdue flow(s) on the Overdue Show tab.



View Overdue Configuration as XML

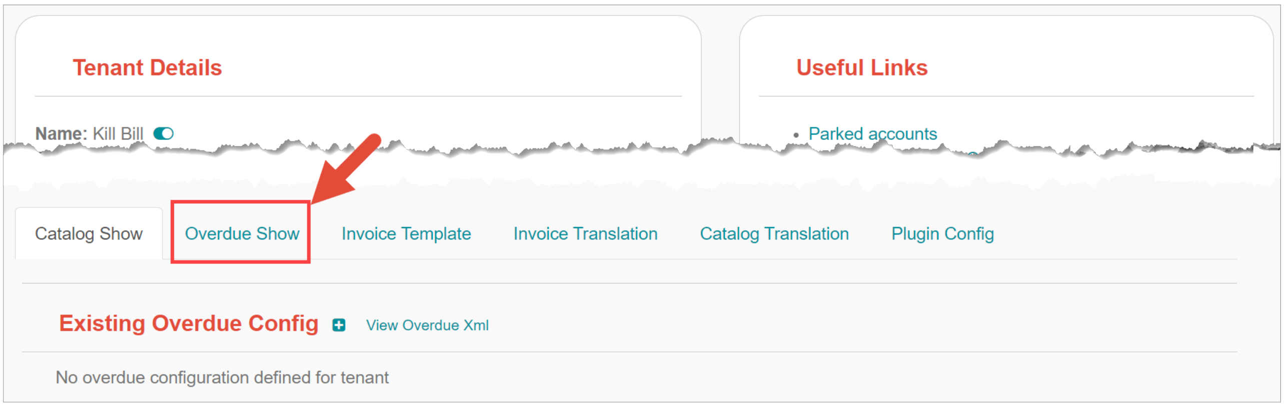
1. Go to the Overdue Show tab on the Tenant Configuration page.



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

Delete Overdue Flows

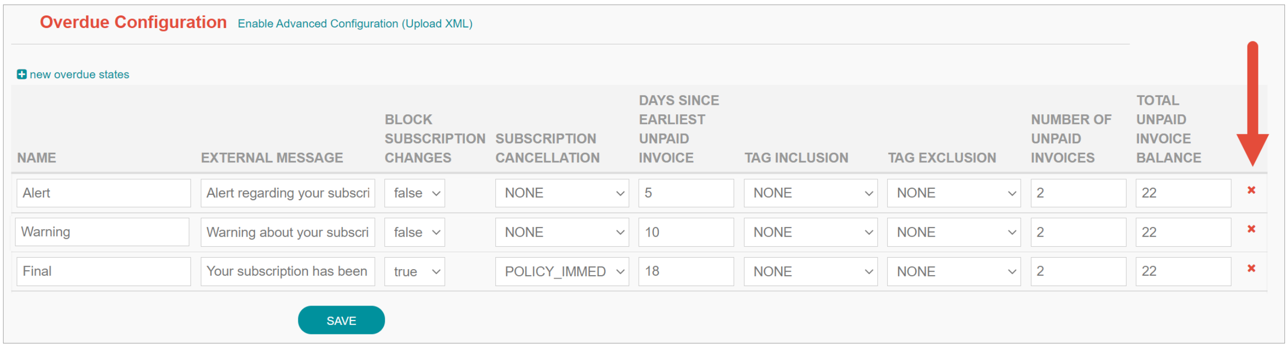
1. Go to the Overdue Show tab on the Tenant Configuration page.



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

   Kaui opens the Overdue Configuration screen.

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



4. Click the **Save** button.

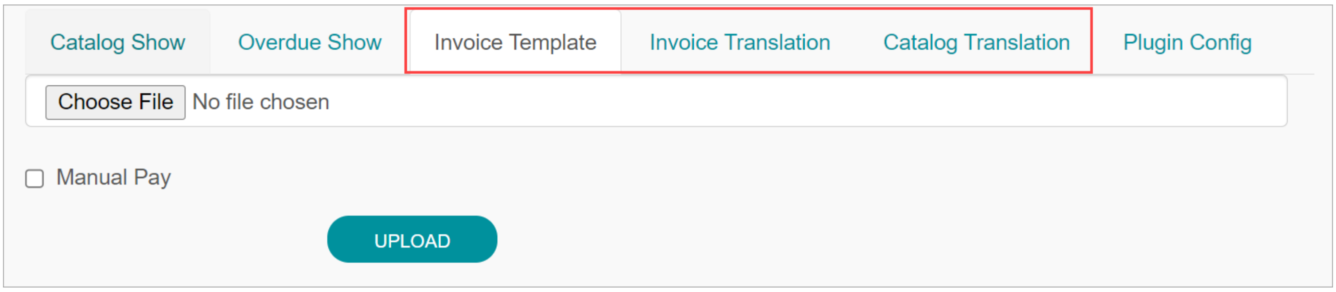
   Kaui removes the overdue configuration row(s) from the Overdue Show tab and displays a delete confirmation message.

Translation Files

Overview

Kill Bill supports the ability to generate emails and invoices in various languages as long as the required translation files are present in the system. Three tabs on the Tenant Configuration page enable you to upload these files:

- Invoice Template
- Invoice Translation
- Catalog Translation



The functionality of these tabs is very similar. To avoid repetition, we've included instructions for just one tab, with any differences noted.

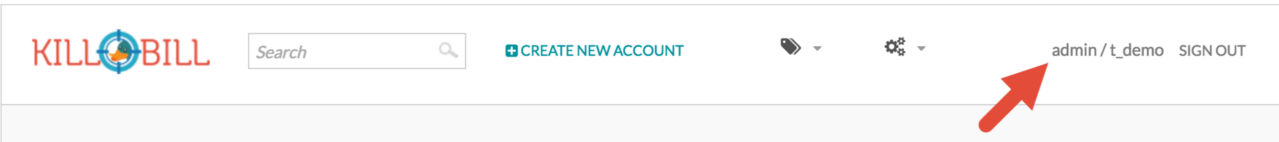
Additional Translation Resources

- *Invoice Templates*
- *Email Notification Plugin*
- *Internationalization*

View Translation Tabs

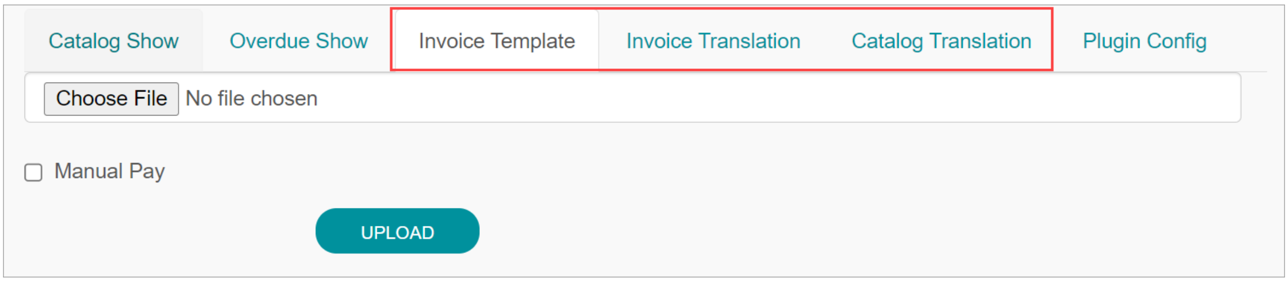
To get there:

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

   Kaui displays the Tenant Configuration page.

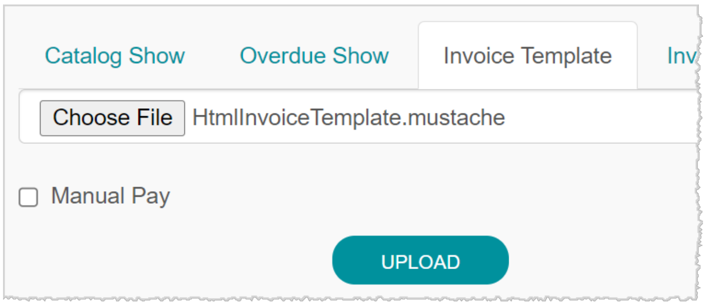
2. Scroll down to see the translation tabs:



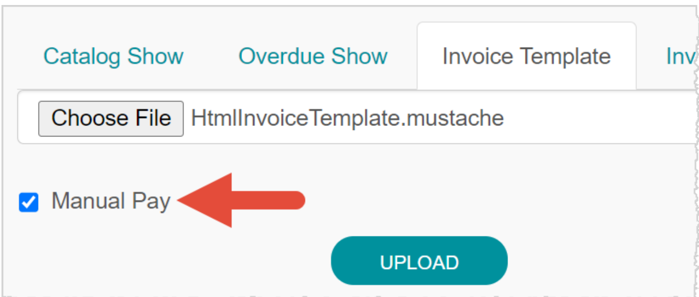
Upload a Translation File

1. Go to the Tenant Configuration page and scroll down to the translation tabs.
2. Select the appropriate translation tab for the file you want to upload.
3. Click the **Choose File** button, locate the translation file, and select it.

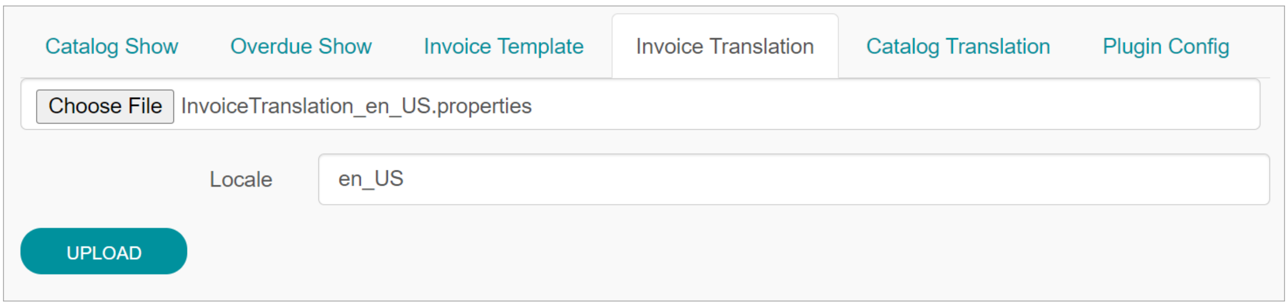
   Once you have selected the file, Kaui displays the filename next to the **Choose File** button.



4. *For Invoice Templates only:* If this invoice template supports the manual pay option (for accounts that have the `MANUAL_PAY` tag), select the **Manual Pay** checkbox. (For more information, see the "Templates" section of the API.)



5. *For Invoice Translation and Catalog Translation only:* In the **Locale** field, specify the language supported by the uploaded file using the ISO *country_language* format.



6. Click the **Upload** button.

If the upload is successful, Kaui displays a success message at the top of the screen and lists the file on the tab.

Tags

Overview

In Kaui, you can apply one or more tags to accounts and invoices, a tag being a single value. Tags in Kill Bill can be used to convey information about an object type. A tag can just provide information about an object (user tag) or it can actually affect how the object is handled in Kill Bill (control tag).

This section explains how to attach tags to accounts and invoices. It also describes the steps for creating the tag definitions on which a tag is based.

Note: You can use the API to attach tags to even more object types, such as payments and subscriptions. For more information, see the "Tags" section of the relevant object type section (for example, Payments) in the API Reference.

Types of Tags

Kill Bill has two types of tags:

- **Control tags**—Also referred to as *system tags*, these tags modify the behavior of the system. In Kaui, you can view and attach these tags, but you cannot add, change, or delete the underlying tag definition. Kill Bill includes several control tags; see the API documentation for a list.
- **User tags**—These tags are not interpreted by Kill Bill; they are a way for admins or third-party systems to annotate specific existing resources. For instance, the support team could tag account resources associated with a specific customer to group them. In Kaui, you can create and delete user tags on the Tag Definition page.

Note: Kill Bill does not include default user tags.

You can view all available tags on the Tag Definitions page.

About Tag Definitions

A tag is based on a *tag definition*. As its name implies, a *tag definition* defines information about a specific tag. In Kaui, you must create a tag definition for a user tag before you can attach it to an account or invoice.

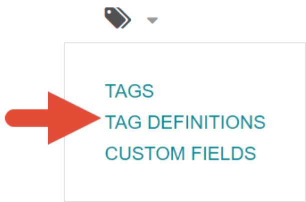
Additional Tag Resources

API Reference:

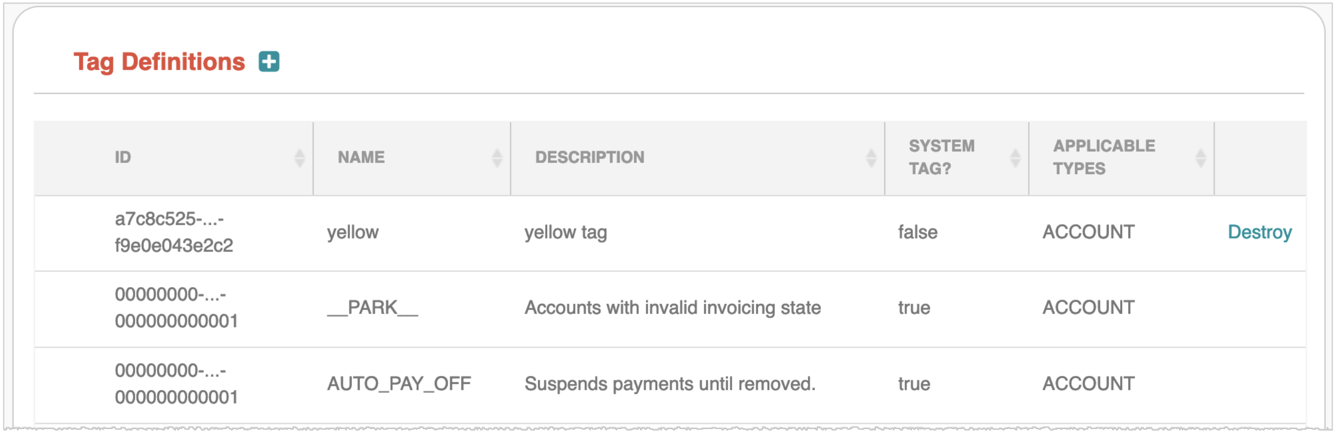
- Tag
- Tag Definition

View All Tags

To see a list of all available tags in the current tenant, select the tag icon at the top of the screen, then select **Tag Definitions**:



Kaui displays the Tag Definitions page.

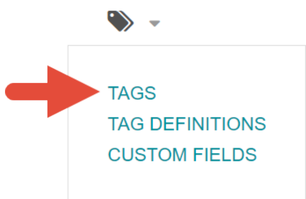


ID	NAME	DESCRIPTION	SYSTEM TAG?	APPLICABLE TYPES	
a7c8c525-...-f9e0e043e2c2	yellow	yellow tag	false	ACCOUNT	Destroy
00000000-...-000000000001	__PARK__	Accounts with invalid invoicing state	true	ACCOUNT	
00000000-...-000000000001	AUTO_PAY_OFF	Suspends payments until removed.	true	ACCOUNT	

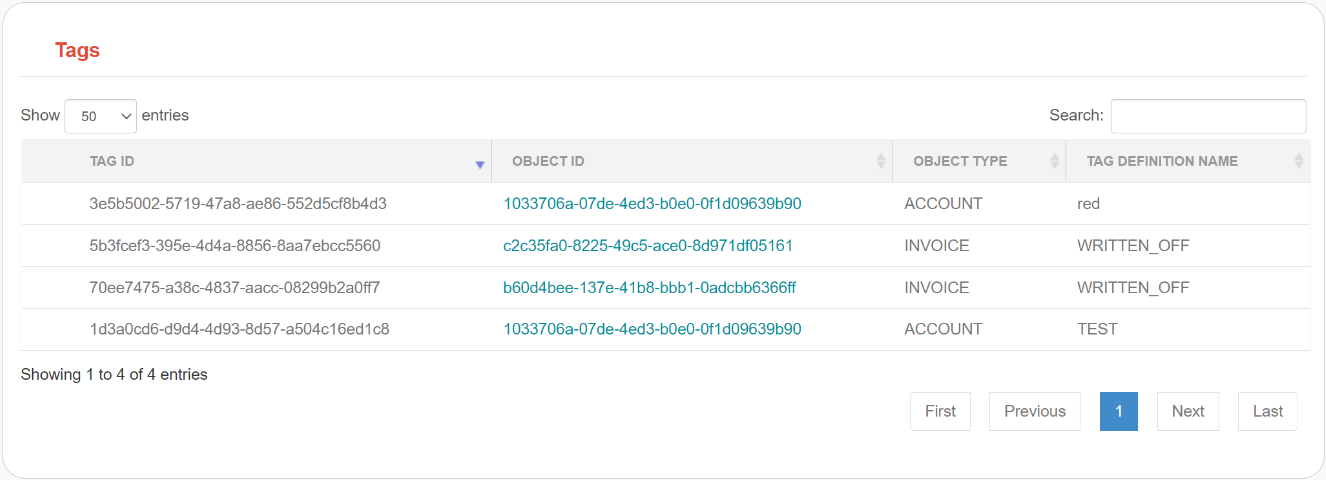
View Objects with Attached Tags

This section explains how to view objects that have attached tags. You can view *all* the objects with tags for the current tenant; you can also view the tags for a specific account (or invoice).

To see a list of *all* the objects in the tenant with an attached tag, select the tag icon at the top of the screen, then select **Tags**:



Kaui displays the Tags page.


Tags

Show 50 entries Search:

TAG ID	OBJECT ID	OBJECT TYPE	TAG DEFINITION NAME
3e5b5002-5719-47a8-ae86-552d5cf8b4d3	1033706a-07de-4ed3-b0e0-0f1d09639b90	ACCOUNT	red
5b3fcef3-395e-4d4a-8856-8aa7ebcc5560	c2c35fa0-8225-49c5-ace0-8d971df05161	INVOICE	WRITTEN_OFF
70ee7475-a38c-4837-aacc-08299b2a0ff7	b60d4bee-137e-41b8-bbb1-0adcbb6366ff	INVOICE	WRITTEN_OFF
1d3a0cd6-d9d4-4d93-8d57-a504c16ed1c8	1033706a-07de-4ed3-b0e0-0f1d09639b90	ACCOUNT	TEST

Showing 1 to 4 of 4 entries

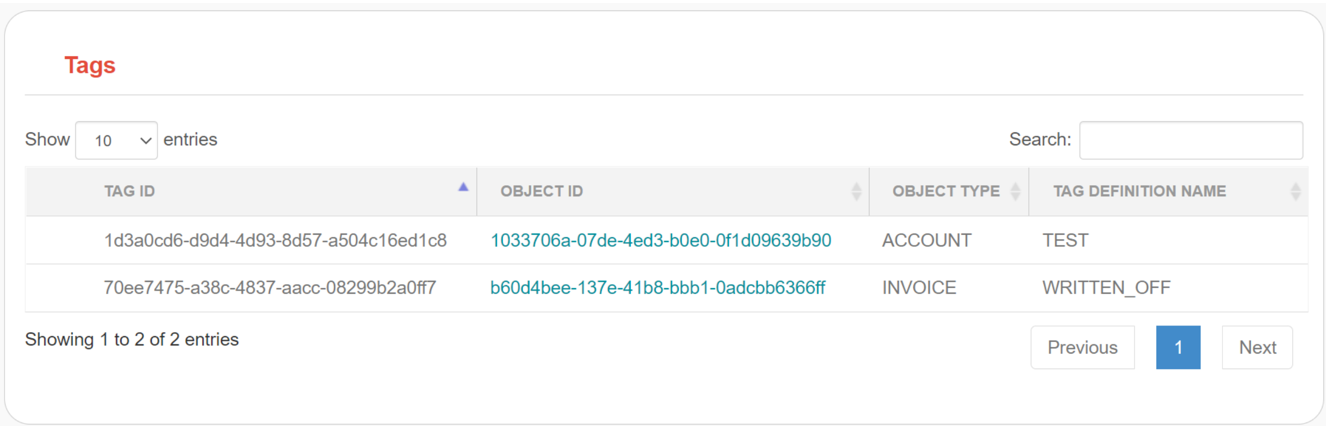
First Previous 1 Next Last

Tip: On the Tags page, you can open the object (account, invoice, etc.) by clicking the link in the Object ID column.

To see any tags assigned to a specific account (or invoice):

1. Open the account on the Account page.
2. Click **Tags** on the sub-menu.

Kaui opens the Tags page and displays only the tags assigned to that account (or its related invoices and subscriptions).


Tags

Show 10 entries Search:

TAG ID	OBJECT ID	OBJECT TYPE	TAG DEFINITION NAME
1d3a0cd6-d9d4-4d93-8d57-a504c16ed1c8	1033706a-07de-4ed3-b0e0-0f1d09639b90	ACCOUNT	TEST
70ee7475-a38c-4837-aacc-08299b2a0ff7	b60d4bee-137e-41b8-bbb1-0adcbb6366ff	INVOICE	WRITTEN_OFF

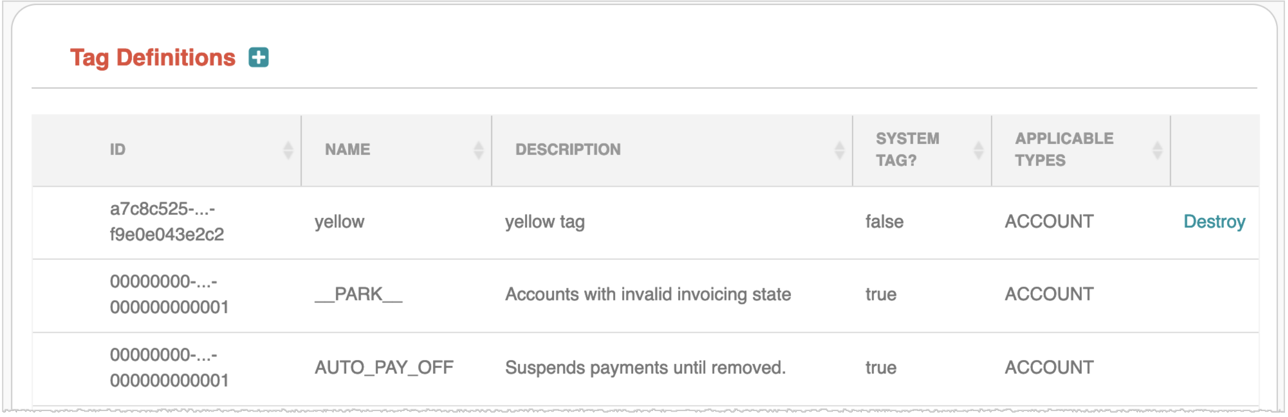
Showing 1 to 2 of 2 entries

Previous 1 Next

Add a Tag Definition

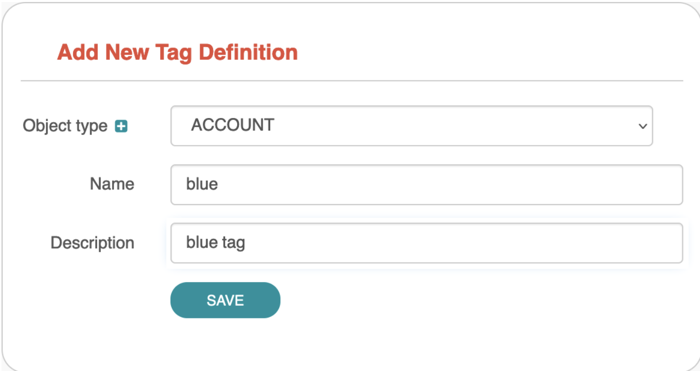
To create a new tag definition:

1. Open the Tag Definitions page as explain in "View All Tags".

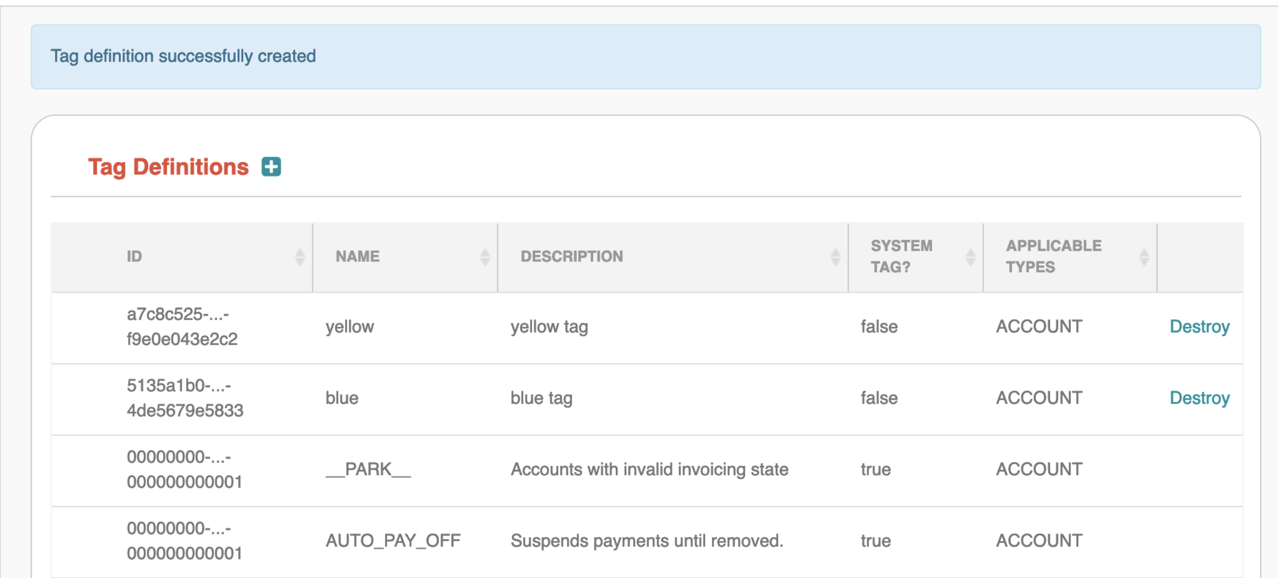


2. Next to **Tag Definitions**, click the plus sign ( ).

   Kaui displays the Add New Tag Definition screen:



3. Fill in the fields:
   - **Object type**—The type of object that the tag can be attached to (for example, accounts). To allow this tag to be applied to other object types, click the plus sign icon ( ) next to **Object type**.
   - **Name**—The name of the tag.
   - **Description**—Text that describes how the tag is used. Kaui will show this text on the Tag Definitions page.
4. Click the **Save** button. Kaui displays the new tag definition on the Tag Definitions page.



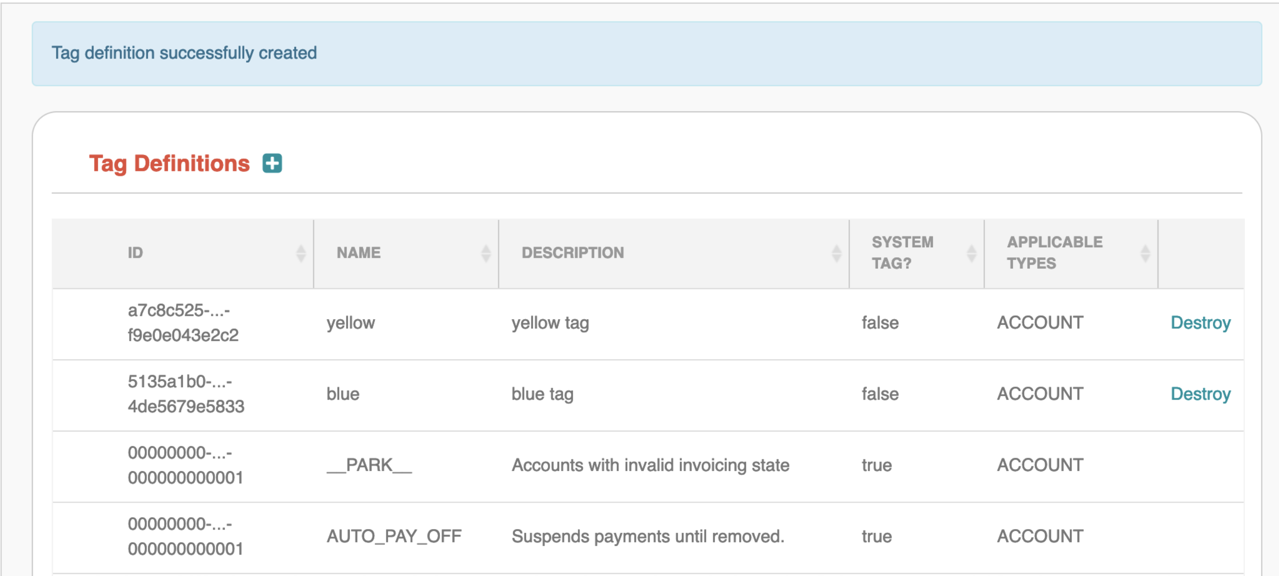
Delete a Tag Definition

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

In Kaui, you can delete a tag definition from the current tenant only if the related tag hasn't been attached to an object. If you try to delete such a tag definition, Kaui will prevent you.

To delete a tag definition:

1. Open the Tag Definitions page as explain in "View All Tags".


Tag definition successfully created

Tag Definitions

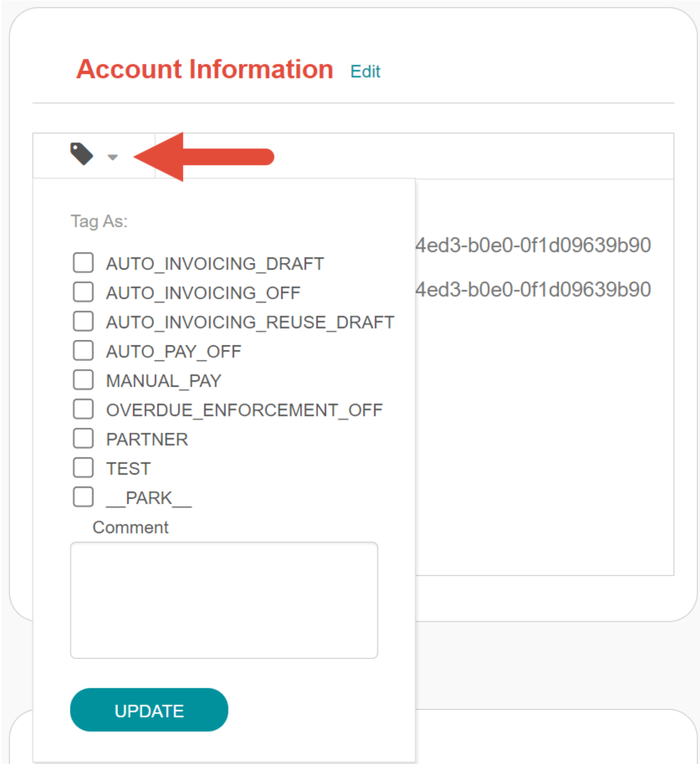
ID	NAME	DESCRIPTION	SYSTEM TAG?	APPLICABLE TYPES	
a7c8c525-...-f9e0e043e2c2	yellow	yellow tag	false	ACCOUNT	Destroy
5135a1b0-...-4de5679e5833	blue	blue tag	false	ACCOUNT	Destroy
00000000-...-000000000001	__PARK__	Accounts with invalid invoicing state	true	ACCOUNT	
00000000-...-000000000001	AUTO_PAY_OFF	Suspends payments until removed.	true	ACCOUNT	

2. On the tag definition row, click **Destroy**.

Attach or Remove a Tag

In Kaui, you can attach tags to accounts, invoices, and subscriptions. Attaching or removing a tag is basically the same whether it's an account, invoice, and subscription. The steps below explain how to attach and remove a tag to an account.

1. Open the account on the Accounts page.
2. Click the tag icon:



3. To *attach* a tag, select its checkbox. You can select more than one checkbox to attach multiple tags.

   To *remove* a tag, click the box to clear it.

4. If you're attaching a tag, you can optionally add text in the **Comment** field. Kill Bill stores the Comment text in the tags audit log (accessible via API).
5. Click the **Update** button.

Custom Fields

Overview

Kill Bill enables you to create custom fields (key/value pairs) and attach them to objects like accounts, payments, and so forth. When used with custom plugins or third-party applications, custom fields can extend Kill Bill's functionality .

This section explains how to create custom fields and attach them to objects.

Note: Kill Bill does not include default custom fields.

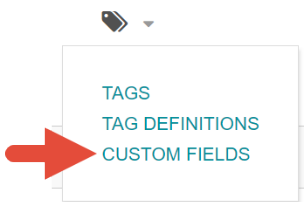
Additional Custom Tag Resources

- API Reference for Custom Field
- "Custom Fields" section for object types in the API Reference.

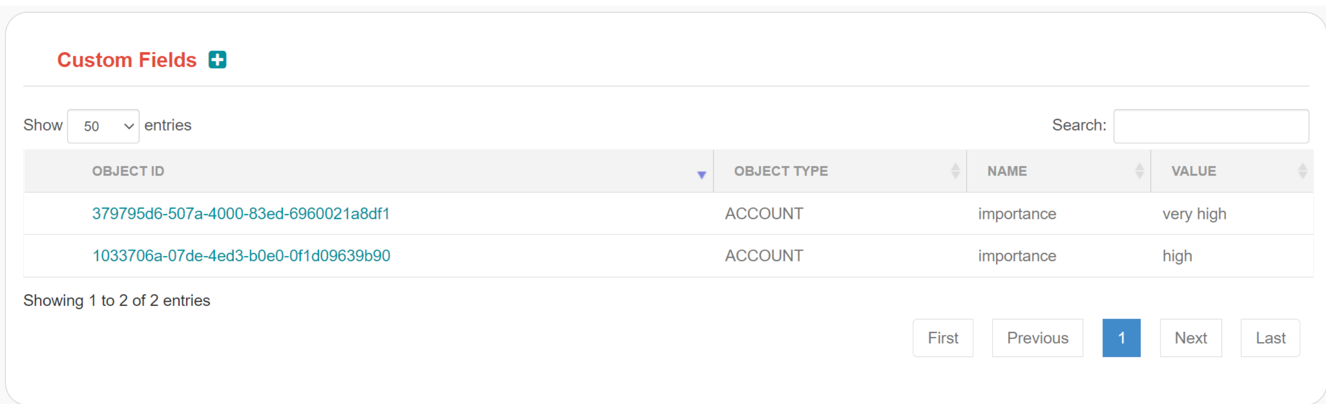
View All Custom Fields

This section explains how to view all of the custom fields defined for the tenant as well as the associated objects.

At the top of the screen, click the tag icon and select **Custom Fields**.



Kaui displays the Custom Fields page:



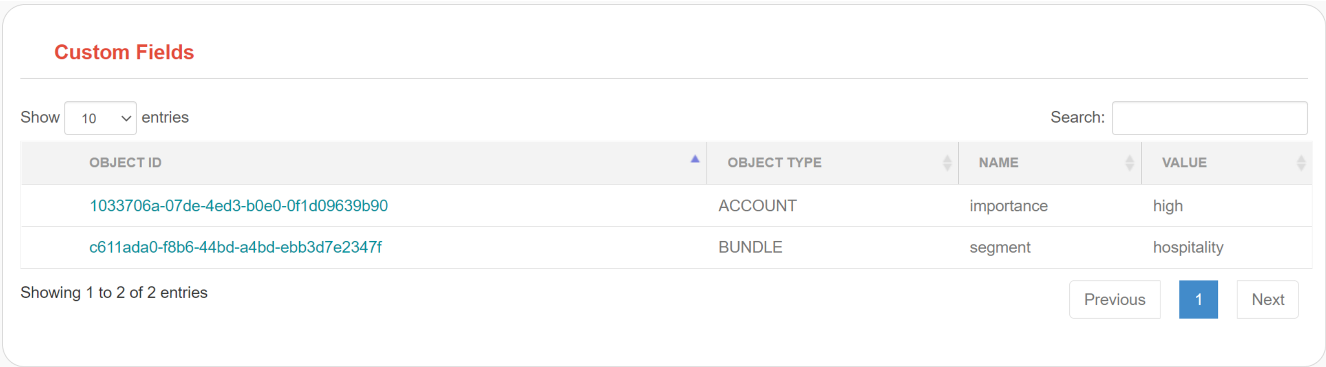
Tip: On the Custom Fields page, you can open the object (account, invoice, etc.) by clicking the link in the Object ID column.

View Custom Fields for an Account

This section explains how to view any custom fields for a specific account or other objects associated with that account (e.g., invoices, payments, subscriptions).

1. Open the account on the Account page.
2. Click **Custom Fields** on the sub-menu.

Kaui opens the Custom Fields page and displays only the custom fields assigned to that account or its related objects:


Custom Fields

Show 10 entries

Search:

OBJECT ID	OBJECT TYPE	NAME	VALUE
1033706a-07de-4ed3-b0e0-0f1d09639b90	ACCOUNT	importance	high
c611ada0-f8b6-44bd-a4bd-ebb3d7e2347f	BUNDLE	segment	hospitality

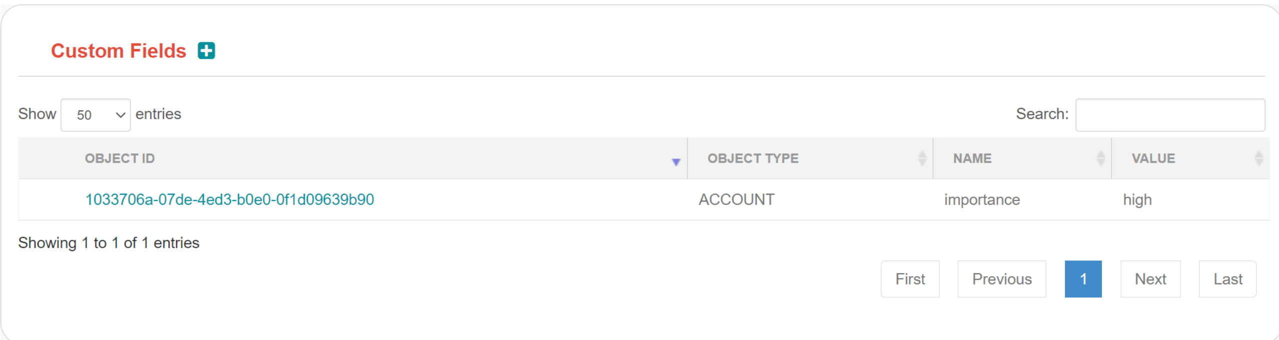
Showing 1 to 2 of 2 entries

Previous 1 Next

Create and Attach a Custom Field

To create a custom field and attach it to an object:

1. Open the Custom Fields page as explain in "View All Custom Fields".


Custom Fields

Show 50 entries

Search:

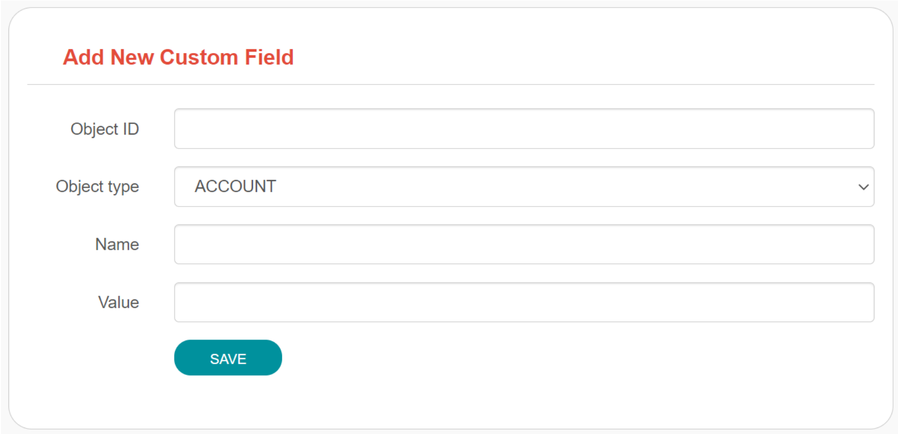
OBJECT ID	OBJECT TYPE	NAME	VALUE
1033706a-07de-4ed3-b0e0-0f1d09639b90	ACCOUNT	importance	high

Showing 1 to 1 of 1 entries

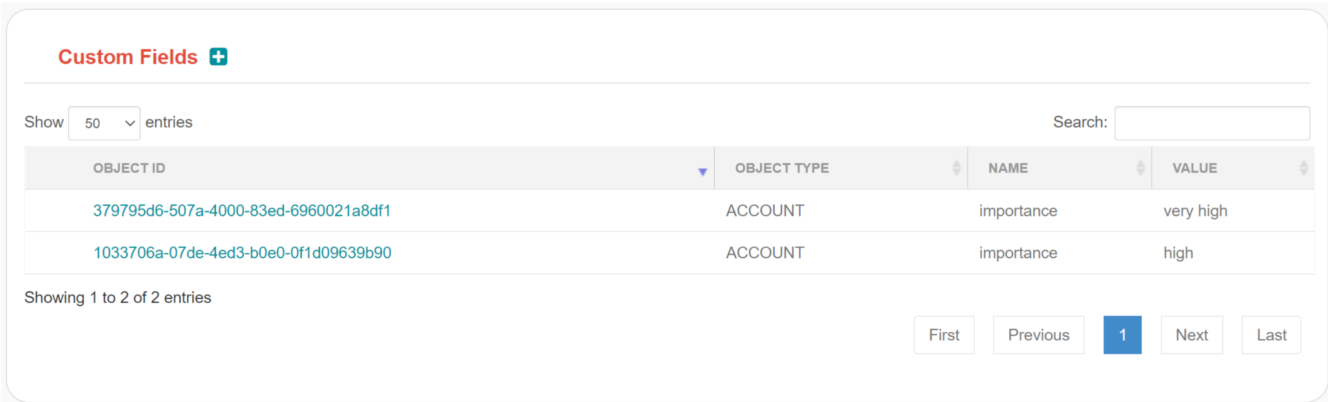
First Previous 1 Next Last

2. Click the plus sign ( ) next to **Custom Fields.**

   Kaui displays the Add New Custom Field screen:



3. Fill in the fields. For field descriptions, see "Custom Field Descriptions."
4. Click the **Save** button. Kaui displays the new custom field on the Custom Fields page.



Custom Field Descriptions

Field	Description
Object ID	The identifier of the object to which you want to attach a custom field. **Note:** To copy the identifier for the object, open a separate browser tab and copy the ID from the URL displayed on your browser's address line: *Example:* URL: `https://demo.killbill.io/accounts/1033706a-07de-4ed3-b0e0-0f1d09639b90/invoices/421d16de-6d19-41a0-b9e5-781ab3eedf1c` Invoice ID: `421d16de-6d19-41a0-b9e5-781ab3eedf1c`
Object type	The type of object that the custom field is being attached to, such as an account or payment.
Name	The name of the custom field (*Example:* Level).
Value	The value associated with this custom field (*Example:* Medium).