



Kaui User Guide - DRAFT

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Introduction

How to Use This Guide

The first chapter, [Navigation and Interface](#), explains how to **navigate** in Kaui and its **basic interface features**.

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

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

Advanced and administrative features are covered later in the guide:

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

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

About Screenshots

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

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

Other Learning Resources

Videos

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

Glossary

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

Account (a.k.a. customer account)

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

Child

An account that is associated with a parent account.

External Key

An alternative unique ID for an object.

Parent

An account that contains one or more child accounts.

Payment Method

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

Permissions

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

Plan

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

Plugin

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

Phase (a.k.a plan phase)

Time periods within a subscription during which certain rules apply.

Subscription

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

Tag

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

Tenant

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

User

A person who logs on to use Kaui.

User Role

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

Navigation and Interface

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, deploying plugins, 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).

What You Can Do in Kaui

In Kaui, users can perform basic tasks, such as:

- Create a customer account
- Generate a customer invoice
- Cancel a subscription

However, Kaui can also help advanced users perform tasks, for example:

- Adding a plugin to Kill Bill
- Managing Kill Bill users
- Creating tags or custom fields

These are just a handful of the tasks you can accomplish with Kaui. For a full list, see the *Table of Contents* at the beginning of this guide.

Sign In and Sign Out



Note: If you are logging in to Kaui for the first time after installing Kill Bill and Kaui, see the "[First Time Login](#)" section in the Tenants chapter.

To sign in to Kaui, type in your username and password, then select the **Sign In** button.

Login

Username

Password

SIGN IN

If your organization uses more than one Kill Bill tenant, select the tenant from the dropdown and select the **Save** button:

Choose Tenant

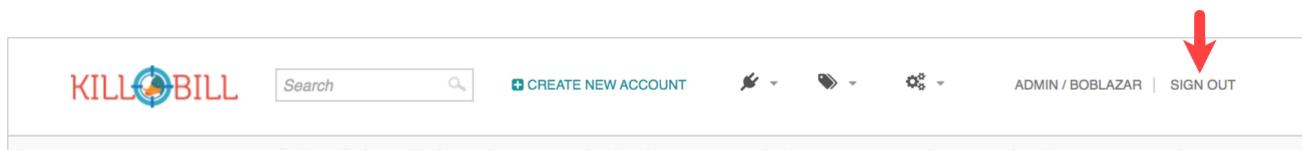
Tenant

SAVE



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



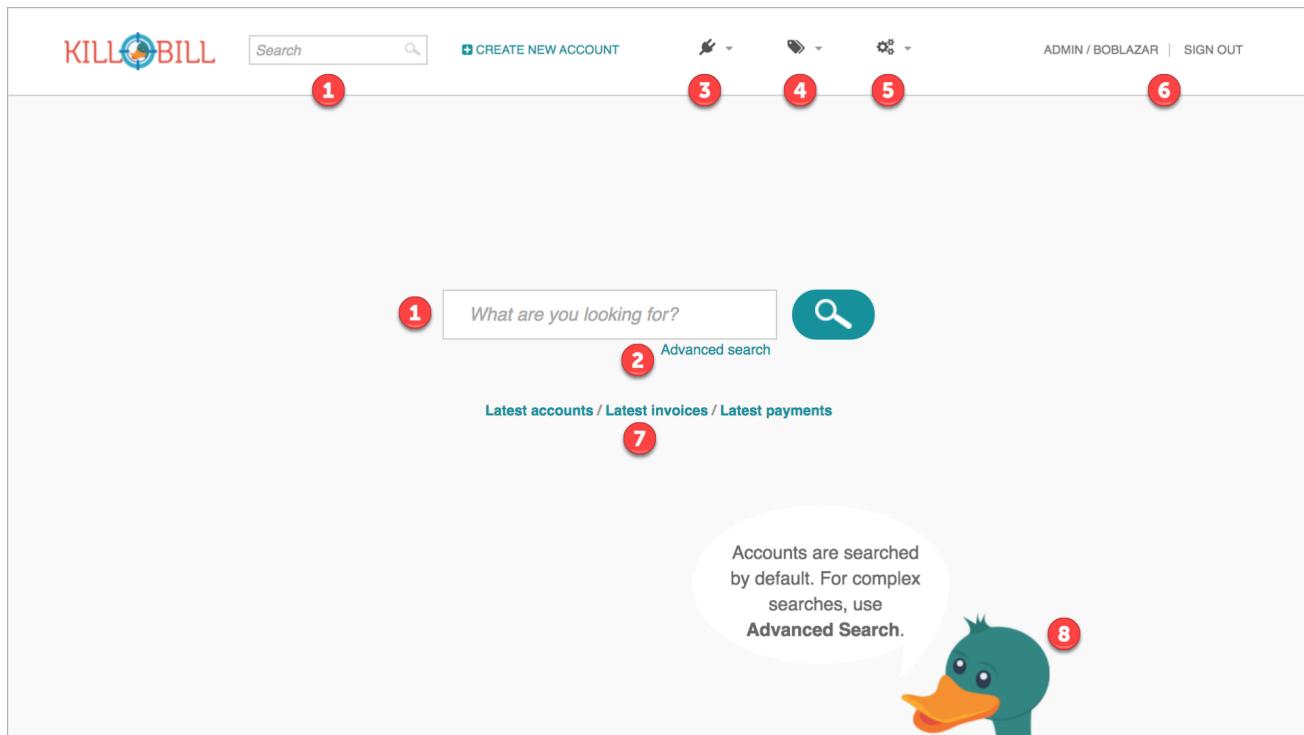
Navigate

This section gets you familiar with the standard features of Kauai's user interface, such as:

- [Homepage Layout](#)
- [Icons](#)
- [Grids/Tables](#)
- [Basic Search](#)
- [Advanced Search](#)

Homepage Layout

The homepage is the screen that Kauai 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
image::../assets/img/kau_i/PlusGreen.png[]	Add—Indicates you can add an item, such as a payment method, credit, charge, etc.
image::../assets/img/kau_i/InvoiceGen.png[]	Dry-run invoice—Appears on the Account page. Clicking it manually triggers a committed or dry-run invoice.

Icon	Description
image::../assets/img/kau_i/DownArrow.png[]	Expand—Expand a section or dropdown menu.
image::../assets/img/kau_i/UpArrow.png[]	Collapse—Collapse a section.
image::../assets/img/kau_i/Tag.png[]	<p>Tags—_Admin-level feature:_ On the home page, click to access Tags, Tag Definitions, and Custom Fields.</p> <p><i>All users:</i> In other locations in Kaui, click to select a tag to apply to the current object (for example, an account).</p>
image::../assets/img/kau_i/Plug.png[]	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.)
image::../assets/img/kau_i/Addon.png[]	Add-on—Appears on the Subscription screen and lets you add an add-on to the account's subscription.
image::../assets/img/kau_i/CreditCard.png[]	Make a payment—Appears on the Invoice screen and lets you make a payment against the invoice.
image::../assets/img/kau_i/Gears.png[]	Users, Tenants, & Admin—_Admin level feature:_ Appears at the top of the screen and gives you access to Users, Tenants, and Admin.
image::../assets/img/kau_i/Refresh.png[]	<p>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).</p> <p>Note: This icon does not display if the only payment method listed is EXTERNAL_PAYMENT.</p>

Grids/Tables

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

Showing All Accounts		
ID	EXTERNAL KEY	BALANCE
68b2ba7f-0f6f-4786-9788-8bef3af71676	68b2ba7f-0f6f-4786-9788-8bef3af71676	\$0
ec4d7a66-5eed-4a1d-a290-208c3aaafda24	0585529786	€0
a95d6483-3df1-4d3d-bf6a-1c9a82a229d5	7411156749	\$0
7e050655-f160-428e-8e64-68718a1da147	8473547085	£0
eb8b02dc-42f0-44c3-84ea-5b7bf91343b	6235981780	€0
ab9f521-25fd-4007-bd0a-c4fde5403cdh	2418455544	€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:

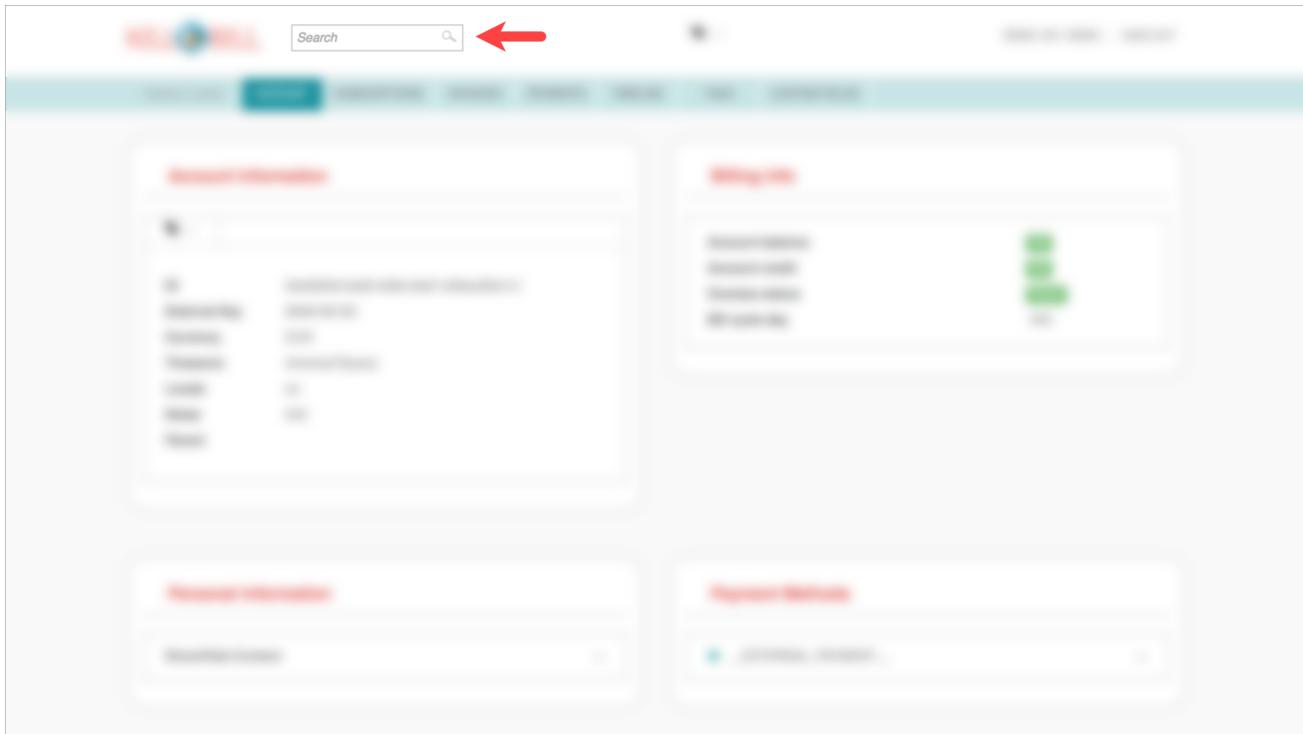
Invoices				
NUMBER	DATE	AMOUNT	BALANCE	
18574	2021-06-23	\$59.98	\$59.98	
18573	2021-06-23	\$59.98	\$59.98	
18538	2021-06-22	\$29.99	\$29.99	
17587	2021-05-29	\$29.99	\$0	

Basic Search



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

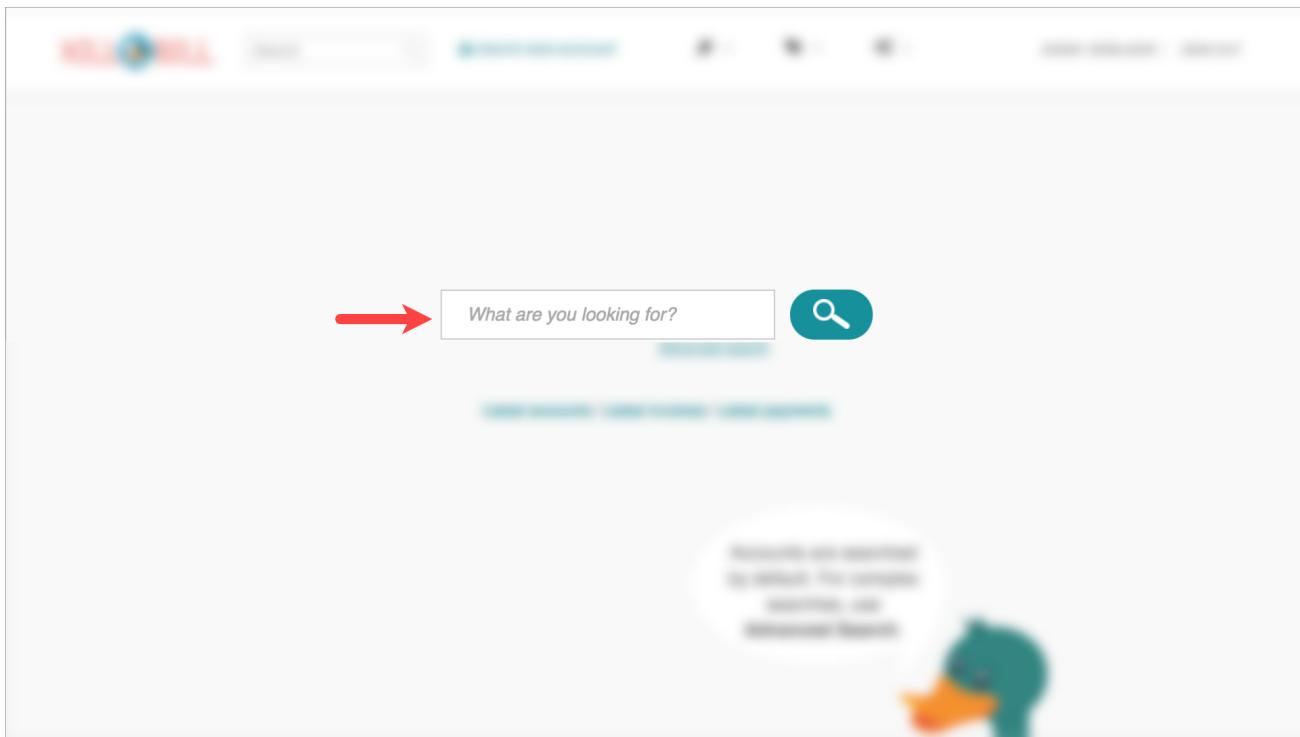
To search for customer accounts, use the basic search. Basic search is available at the top of the screen no matter where you are in Kaui.



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**:



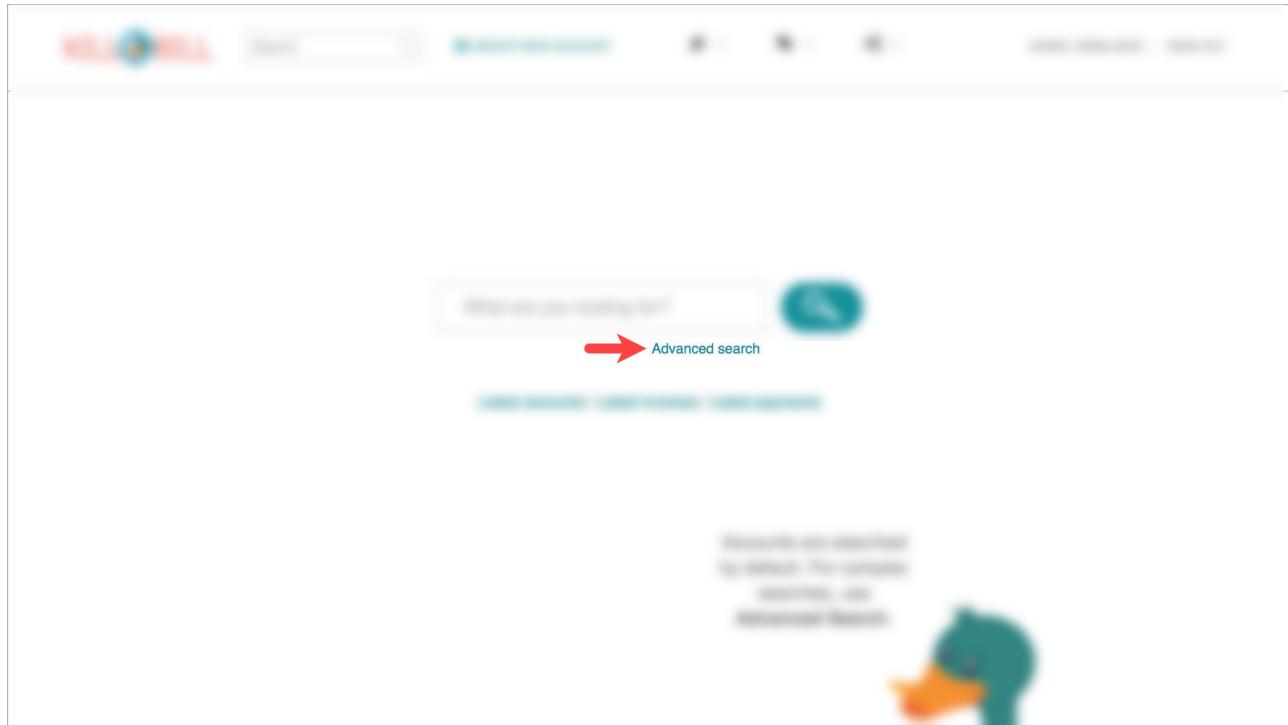
Advanced Search

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**:



Kauai displays the Advanced Search pop-up:

The Advanced Search pop-up window has a title bar "Advanced Search" with a close button "x". It contains three input fields: "Search for" (text input), "Object type" (dropdown menu set to "ACCOUNT"), and "Search by" (dropdown menu). Below these fields is a checkbox "Fast search (find first exact match)". A large blue button labeled "SEARCH" is centered below the input fields. At the bottom of the window, there is a light blue box containing the text "Search query" and "FIND:ACCOUNT FOR:".

Advanced Search	
Search for	<input type="text"/>
Object type	ACCOUNT
Search by	<input type="text"/>
<input type="checkbox"/> Fast search (find first exact match)	
SEARCH	
Search query	
FIND:ACCOUNT FOR:	

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

Advanced Search

Search for	<input type="text"/>
Object type	ACCOUNT ACCOUNT BUNDLE INVOICE CREDIT CUSTOM_FIELD INVOICE_PAYMENT INVOICE PAYMENT SUBSCRIPTION TRANSACTION TAG TAG_DEFINITION
Search by	
Search query FIND:ACCOUNT 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:

Advanced Search

Search for	<input type="text" value="53367993"/>
Object type	INVOICE INVOICE
Search by	ID ID
<input type="checkbox"/> Fast search (find first exact match)	
<input type="button" value="SEARCH"/>	
Search query FIND:INVOICE BY:ID FOR:53367993	

What are you looking for?

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.

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

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

The screenshot shows the 'ACCOUNT' tab selected in the top navigation bar. The page is divided into five main sections, each with a red circle containing a number:

- 1. Sub-menu:** The top navigation bar, which includes tabs for ACCOUNT, SUBSCRIPTIONS, INVOICES, PAYMENTS, TIMELINE, TAGS, and CUSTOM FIELDS. The ACCOUNT tab is highlighted.
- 2. Account Information:** A card displaying account details:

ID	0dcb634d-2ad5-4d0e-b3a7-c0feec20e1c1
External Key	9946162130
Currency	EUR
Timezone	America/Tijuana
Locale	en
Notes	N/A
Parent	
- 3. Billing Info:** A card displaying billing information:

PAY ALL INVOICES	ADD CREDIT	CREATE CHARGE
Account balance	\$10	
Account credit	\$0	
Overdue status	Good	
Bill cycle day	N/A	
Next Invoice Date	N/A	
- 4. Personal Information:** A card with a 'Show/Hide Content' button.
- 5. Payment Methods:** A card showing one method: ★ _EXTERNAL_PAYMENT_

1. Account Sub-Menu

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

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

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

2. Account Information

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

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

- [Edit an Account](#)
- [Link to Parent Account](#)
- [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.

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

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

5. Payment Methods

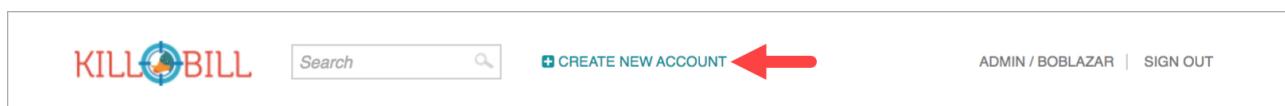
This section of the Account page lets you:

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

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

Create an Account

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



2. Kauí opens the Add New Account screen:

Add New Account

Name

First name length (?)

External key

Email

Bill cycle day

Currency ▼

Timezone ▼

Locale ▼

Address line 1

Address line 2

Zip code

Company

City

State ▼

Country ▼

Phone

Notes

Migrated?

SAVE

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

4. Click the **Save** button.

Account Field Descriptions

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

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

Edit an Account

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



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

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

Kauí opens the Update Account screen:

Update Account

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

SAVE

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

Add Additional Contact Emails

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

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

Personal Information

Show/Hide Content ▾

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

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

Kauai opens the Add New Email screen:

Add New Email

Email

SAVE

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

Personal Information

Show/Hide Content

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

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

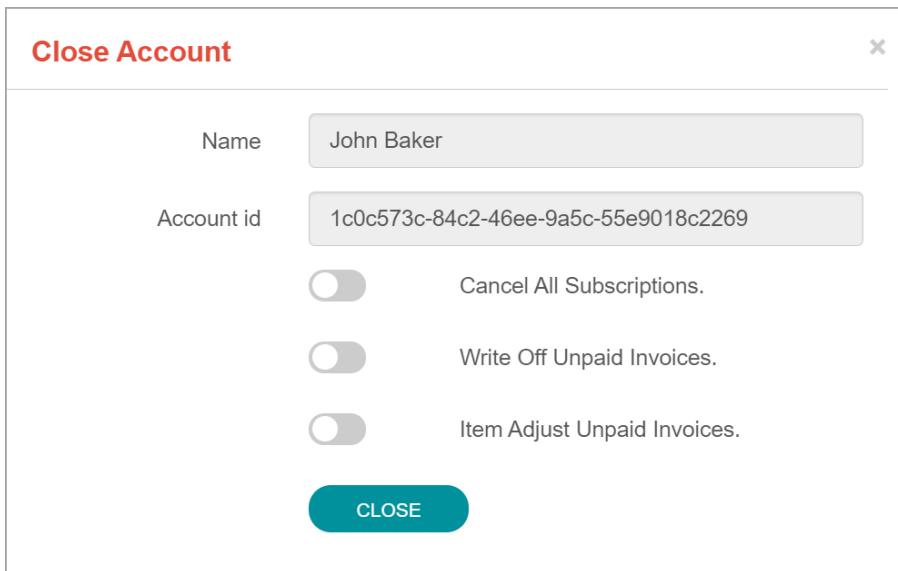
Use the steps in this section to indicate you will no longer be doing business with a customer. If the customer has unpaid invoices, using the steps below, you can choose to either write off or item-adjust them.



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:

Account Information [Edit](#)

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

Kaui opens a pop-up:

Link To Parent

Parent account id	<input type="text"/>
<input type="checkbox"/> Is payment delegated to parent?	
SAVE	

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

The screenshot shows the 'Account Information' page with the following details:

ID	6d468048-a1dc-45ea-87b5-72cf9ec14771
External Key	6d468048-a1dc-45ea-87b5-72cf9ec14771
Currency	USD
Timezone	Etc/UTC
Locale	en_US
Notes	VIP
Parent	cb736a4f-9b56-4074-ae07-1d37b37cb69f

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

Add Credit to an Account

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

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

The screenshot shows the 'Billing Info' page with the following sections:

- Billing Info** header
- PAY ALL INVOICES**, **ADD CREDIT**, and **CREATE CHARGE** buttons (the **ADD CREDIT** button is highlighted with a red arrow)
- Account balance**: \$10
- Account credit**: \$0
- Overdue status**: Good
- Bill cycle day**: N/A
- Next Invoice Date**: N/A
- Trigger invoice generation** input field
- Dry-run** checkbox
- Edit** icon

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

Add New Credit

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

SAVE

2. Fill in the fields:

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

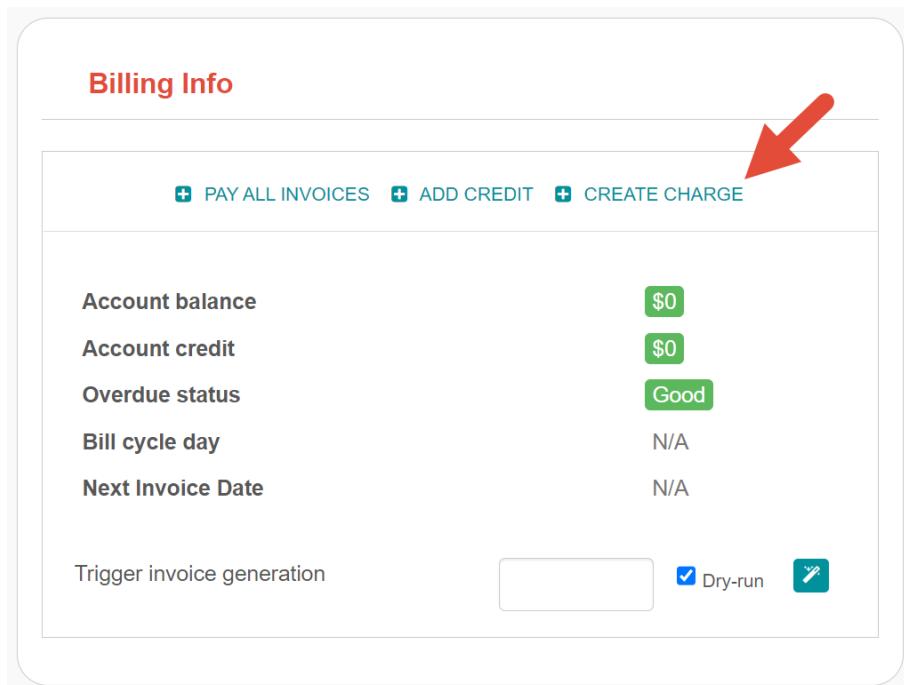
3. Click the **Save** button. To view the credit, select **Invoices** on the sub-menu.

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

Create a Charge on an Account

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

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



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

The image shows the 'Add New Charge' screen. It features four input fields: 'Amount' (with a checked 'Auto-commit?' checkbox above it), 'Currency' (set to 'USD'), 'Description', and 'Comment'. Below these fields is a 'SAVE' button.

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 Kauai generates an invoice.
5. If you unchecked the **Auto-commit** box and have changed your mind, you can click the text **Commit** at the top of the page.

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

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

Payment Methods

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

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

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



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



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

About Payment Plugin Names

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

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

View Payment Method Details

To view a payment method after it's created:

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

Kaui expands the details for the payment method:

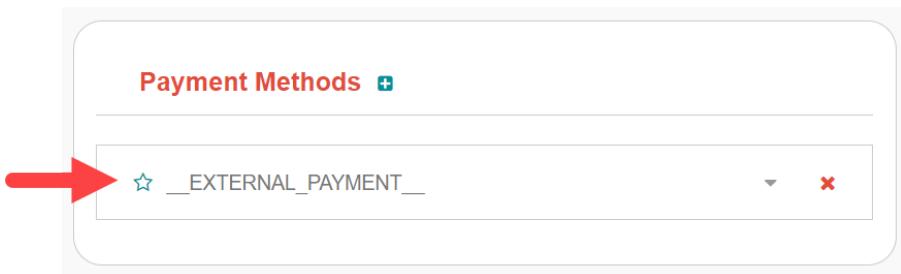
The screenshot shows a modal window titled "Payment Methods" with a plus sign icon. Inside, a card for a payment method named "_EXTERNAL_PAYMENT_" is displayed. The card has a star icon and a close (X) button. Below the name, there are three action buttons: "+ AUTHORIZE", "+ PURCHASE", and "+ CREDIT". At the bottom of the card, the "Name:" and "ID:" are listed. The "Name:" is followed by the value "_EXTERNAL_PAYMENT_". The "ID:" is followed by the value "0f700362-2669-4e33-98e3-5de85e840c04".

Set a Payment Method as the Default

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

To set a payment method as the default:

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

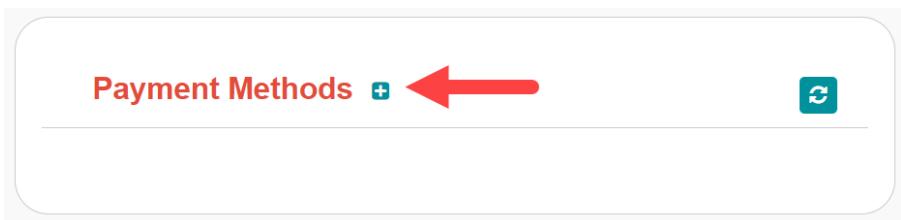


The filled star () indicates it's now the default payment method.

Add Payment Method

To add a payment method:

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



Kaui displays the Add New Payment Method screen:

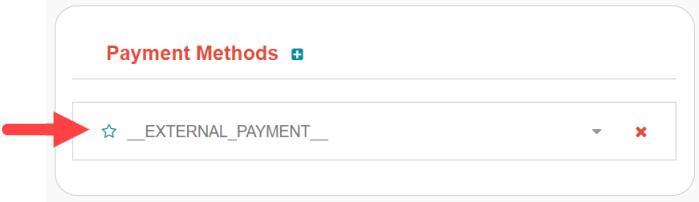
Add New Payment Method

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

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

Payment Method Field Descriptions

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

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

Applying Transactions to a Payment Method

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

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

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

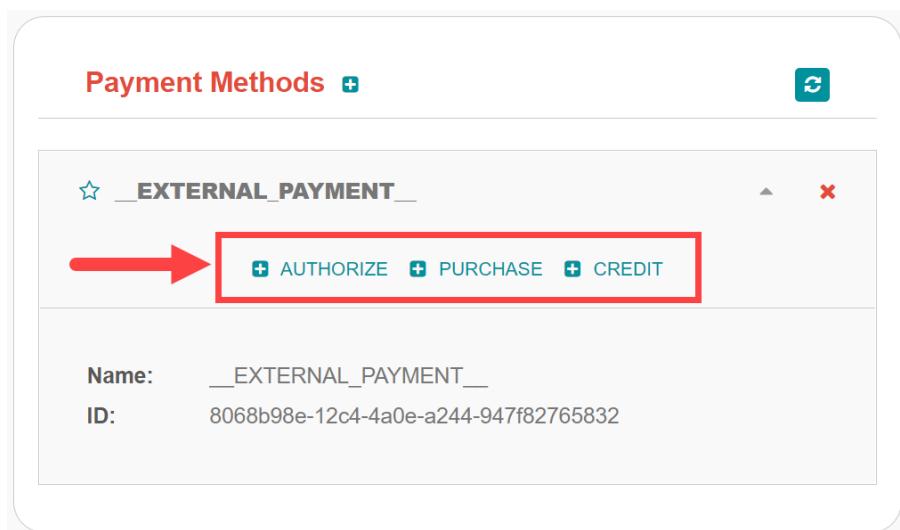
You can perform the following transactions from the Payment Methods section:

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



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

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



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

Kauai displays the Process Transaction screen:

Process Transaction

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

CONTROL PLUGIN NAME

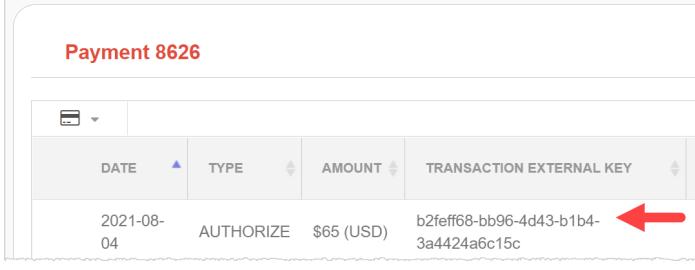
NAME **VALUE**

SAVE

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

Process Transaction Field Descriptions

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

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

Delete Payment Method



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

To delete a payment method:

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

immediately removes the payment method.

Subscriptions

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

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

Open Subscriptions Page

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

The screenshot shows the 'Subscription Bundles' section of the Subscriptions page. At the top, it displays the 'Subscription Bundles' heading and a 'Bundle ID' of 'c611ada0-f8b6-44bd-a4bd-ebb3d7e2347f'. Below this is a table with columns: CATEGORY, NAME, PHASE TYPE, START DATE, CHARGED THROUGH DATE, CANCEL INFORMATION, and ACTIONS. A single row is shown: Category 'Base', Name 'Basic', Phase Type 'EVERGREEN', Start Date '2022-01-11', Charged Through Date '2022-01-15', and Actions buttons for 'Change', 'Cancel', and 'Update BCD'.

On the Subscriptions page, you can:

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

Add a Subscription



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

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

The screenshot shows the 'Add New Subscription' screen. At the top, there is a navigation bar with tabs: ACCOUNT, SUBSCRIPTIONS (which is selected and highlighted in teal), INVOICES, and PAYMENTS. Below the navigation bar, the 'Subscription Bundles' heading is displayed with a red arrow pointing to the plus sign. Underneath, a table shows a single row with a 'Bundle ID' of 'c611ada0-f8b6-44bd-a4bd-ebb3d7e2347f' and columns for CATEGORY, NAME, PHASE TYPE, and START DATE.

Kaui displays the Add New Subscription screen:

Add New Subscription

Bundle Key	<input type="text"/>
Subscription Key	<input type="text"/>
Plan	<input type="text" value="Basic"/> ▼
Price Override	<input type="text"/>
<input checked="" type="radio"/> Immediate Creation <input type="radio"/> Specify a date	
SAVE	

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

Add Subscription Field Descriptions

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

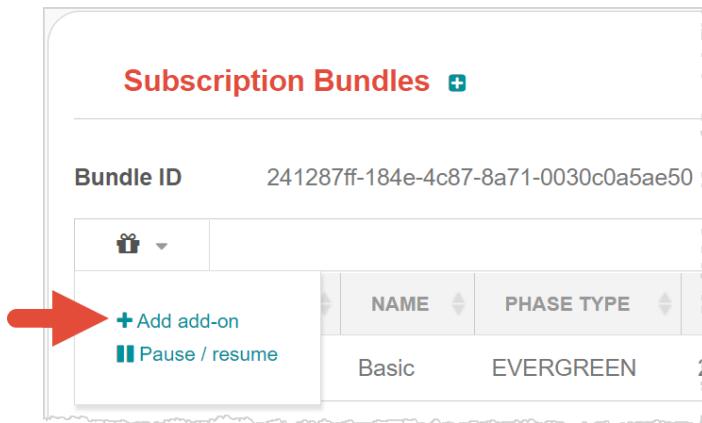
Add an Add-On Product to a Subscription

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



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

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



Kaui opens the Add New Add-On screen:

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

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

Add New Add-On Field Descriptions

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

Pause/Resume Subscriptions

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



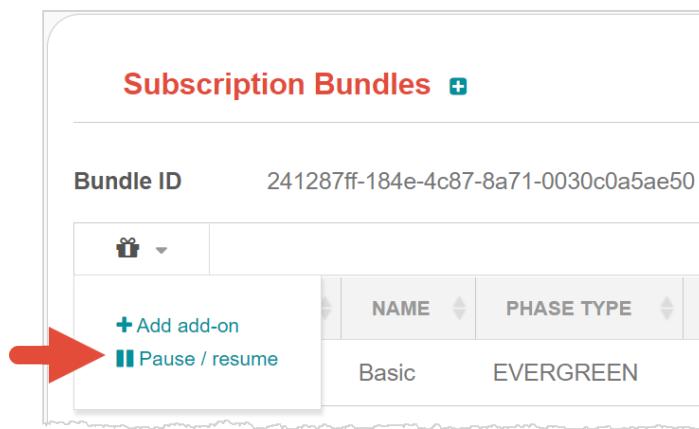
Note: While a customer's subscription bundle is paused, you cannot add any new subscriptions or add-ons to the account.

You can use the pause/resume feature to:

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

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**:



Kauai opens the Pause/Resume screen:

The dialog box has a title 'Pause / Resume'. It contains three input fields: 'Pause date', 'Resume date', and 'Comment'. Below the fields is a teal button labeled 'PAUSE / RESUME'.

Pause / Resume	
Pause date	<input type="text"/>
Resume date	<input type="text"/>
Comment	<input type="text"/>

PAUSE / RESUME

3. Fill in the following fields:

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

pause/resume. Adding comments is optional.

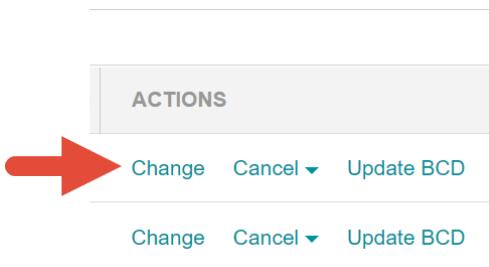
4. Click the **Pause / Resume** button. Kaui displays a success message at the top of the screen.

Change a Subscription

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

To change an account's subscription:

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



Kaui opens the Change Subscription screen:

A screenshot of a 'Change Subscription' dialog box. It has fields for 'New plan' (set to 'Basic') and 'Price Override' (empty). Below these are three radio buttons: 'Default policy' (selected), 'Specify Policy', and 'Specify a date'. At the bottom is a 'SAVE' button.

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

OR

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

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

Default policy

Specify Policy

Specify a date

Policy

IMMEDIATE
END_OF_TERM
SAVE

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

Default policy

Specify Policy

Specify a date

Change Date

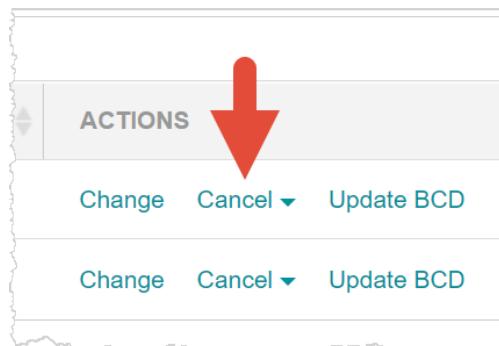
2022-01-11

SAVE

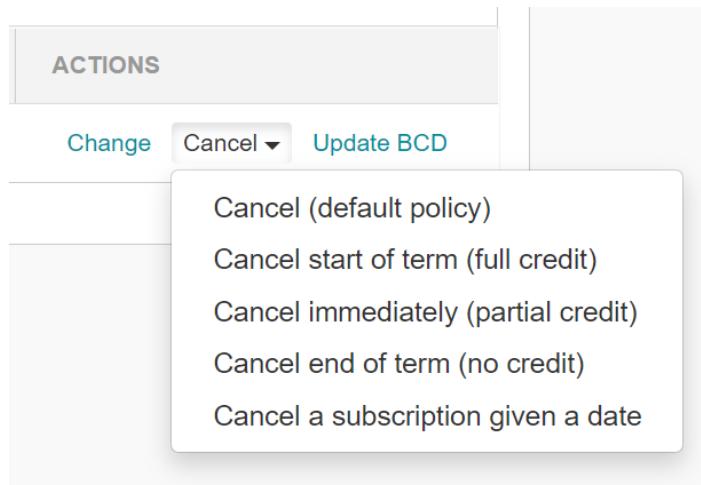
Cancel a Subscription

To cancel an account's subscription:

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



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



Cancellation Options

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

Update the Billing Cycle Day

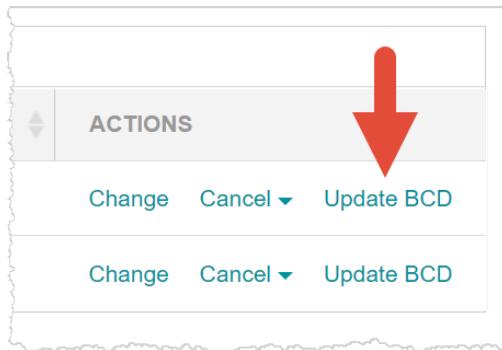
Follow the steps below to update the billing cycle day (BCD) defined for a subscription. These steps assume the subscription is billed on a monthly basis.

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



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

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



Kaui opens the Update Subscription BCD screen:

Update Subscription BCD	
Bill Cycle Day	12
Effective Date	2022-01-12
SAVE	

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



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

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

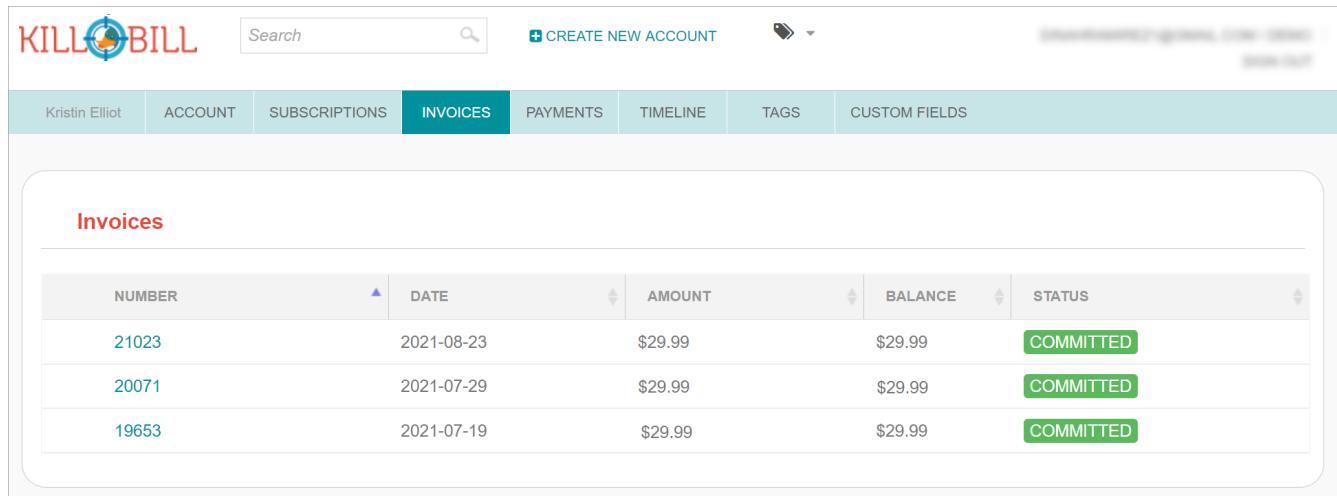
Invoices

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

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

Invoices Page

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



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

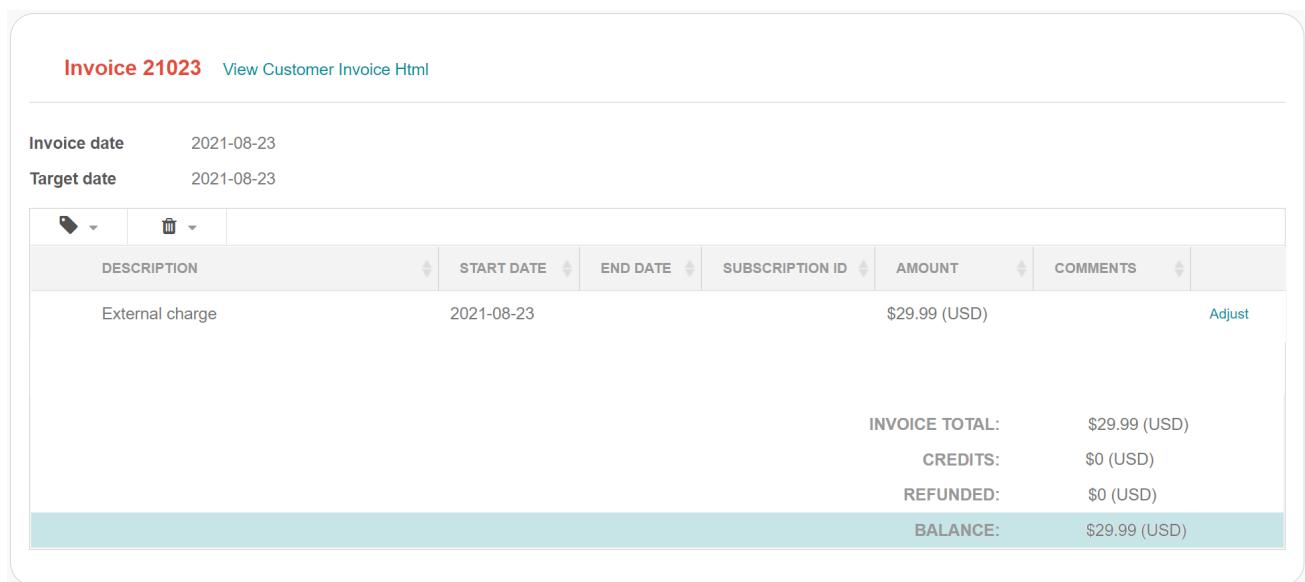
NUMBER	DATE	AMOUNT	BALANCE	STATUS
21023	2021-08-23	\$29.99	\$29.99	COMMITTED
20071	2021-07-29	\$29.99	\$29.99	COMMITTED
19653	2021-07-19	\$29.99	\$29.99	COMMITTED

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

Click the invoice number to open the Invoice Details page.

Invoice Details Page

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



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

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

At the bottom of the page, there is a summary table with the following data:

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

On the Invoice Details page, you can:

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



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

Open Invoice Details

To get to the Invoice Details page:

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



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

Make a Payment on an Invoice

To make a manual payment against an invoice:

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

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

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

The screenshot shows the 'Invoice 21023' detail page. At the top, there's a 'View Customer Invoice Html' link. Below that, the 'Invoice date' is listed as '2021-08-23'. Underneath it, the 'Target date' is also '2021-08-23'. A toolbar with several icons follows. Below the toolbar, a button labeled '+ Make payment' is highlighted with a red arrow pointing to it. To the right of the button, the text 'START DATE' is visible, followed by the date '2021-08-23'.



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

- Kaui displays the Process Payment screen:

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

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

Process Payment Field Descriptions

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

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

Write Off or Void an Invoice

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

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

Write Off an Invoice

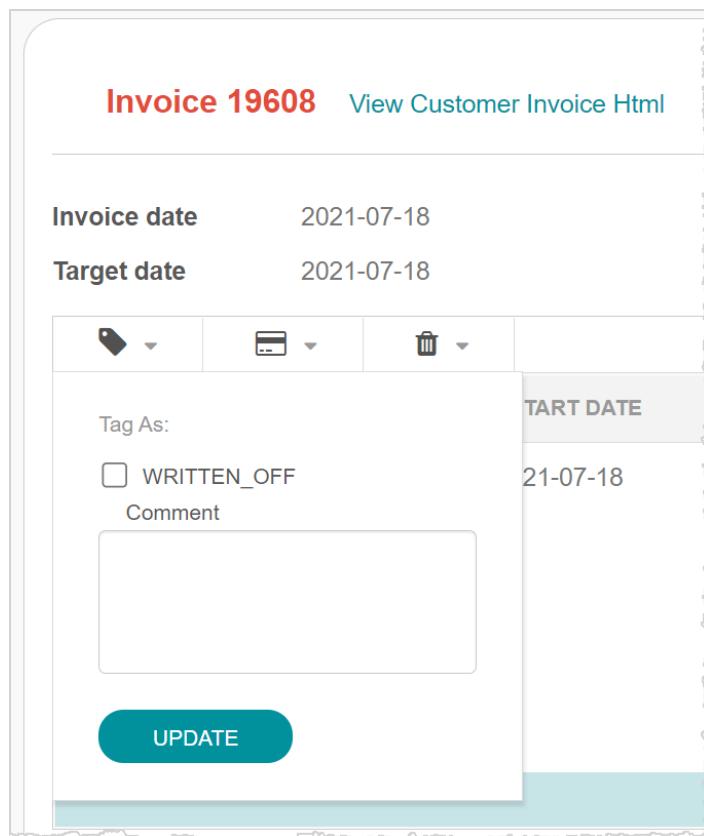
To write off an invoice:

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

Invoice 19608 [View Customer Invoice Html](#)

Invoice date	2021-07-18														
Target date	2021-07-18														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">DESCRIPTION</th> <th style="width: 10%;">START DATE</th> <th style="width: 10%;">END DATE</th> <th style="width: 10%;">SUBSCRIPTION ID</th> <th style="width: 10%;">AMOUNT</th> <th style="width: 10%;">COMMENTS</th> <th style="width: 10%;"> </th> </tr> </thead> <tbody> <tr> <td>Add-on service</td> <td>2021-07-18</td> <td></td> <td></td> <td>\$4.99 (USD)</td> <td></td> <td>Adjust</td> </tr> </tbody> </table>		DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	COMMENTS		Add-on service	2021-07-18			\$4.99 (USD)		Adjust
DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID	AMOUNT	COMMENTS										
Add-on service	2021-07-18			\$4.99 (USD)		Adjust									
INVOICE TOTAL: \$4.99 (USD) CREDITS: \$0 (USD) REFUNDED: \$0 (USD) BALANCE: \$4.99 (USD)															

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



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

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

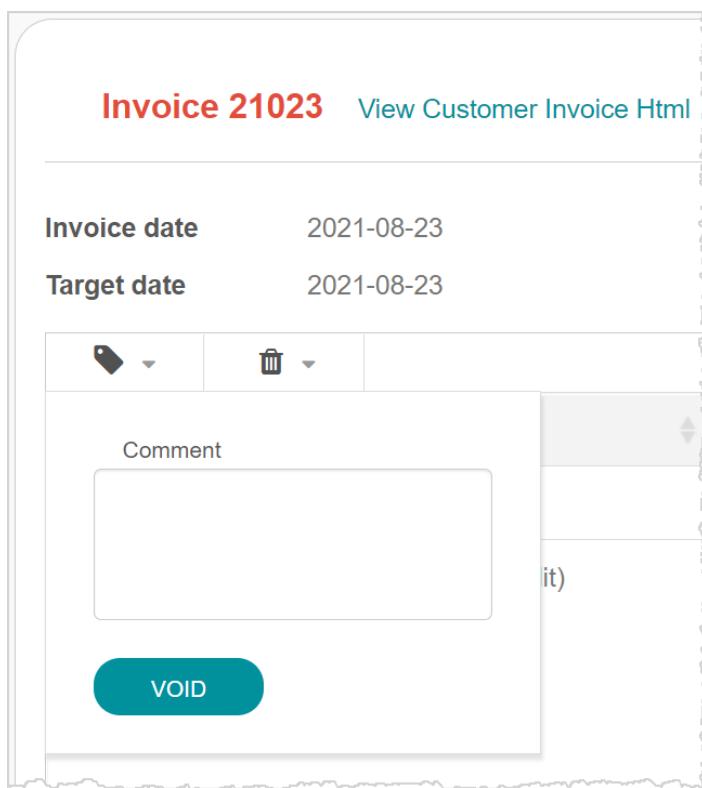
Void an Invoice

To void an invoice:

1. Open the Invoices Details page for the invoice.

Invoice 21023 View Customer Invoice Html					
Invoice date	2021-08-23	Target date	2021-08-23		
Tag Delete		DESCRIPTION	START DATE	END DATE	SUBSCRIPTION ID
External charge	2021-08-23		\$29.99 (USD)		Adjust
				INVOICE TOTAL:	\$29.99 (USD)
				CREDITS:	\$0 (USD)
				REFUNDED:	\$0 (USD)
				BALANCE:	\$29.99 (USD)

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



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

4. Click the **Void** button.

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

Pay All Unpaid Invoices

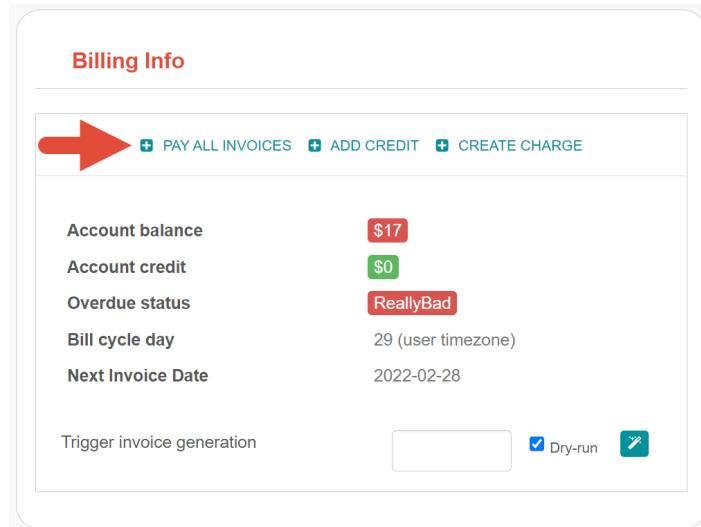
You can pay all unpaid invoices if a customer account has at least one outstanding invoice. Before you begin, make sure the customer has a valid payment method (see Note).



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

To pay all invoices:

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



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

Generate a Dry-Run Invoice

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

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

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

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

Billing Info

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

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

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

Billing Info

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

Account balance	\$1
Account credit	\$0
Overdue status	Re
Bill cycle day	29
Next Invoice Date	2022-02-28
Trigger invoice generation	<input type="button" value="Trigger"/>
<input checked="" type="checkbox"/> Dry-run 	

« FEBRUARY 2022 »

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

2022-02-28

4. Click the magic wand button:



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



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

Payments

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

For more information on payments, see:

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

Payments Page

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

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



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

The screenshot shows the Kill Bill interface with the 'ACCOUNT' tab selected. The 'PAYMENTS' tab is highlighted in blue. The main content area displays a table of recent payments. The columns are: NUMBER, DATE, AUTH AMOUNT, CAPTURE AMOUNT, REFUND AMOUNT, LAST TRANSACTION STATUS, and EXTERNAL KEY. The data in the table is as follows:

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

About Automatic Invoice Payments

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

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

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

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



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

Payment Details Page

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

Payment 8960

Invoice ID [a1e0c754-c8cf-4418-b01f-259ea5f3feaf](#)
External key 4a3f80aa-5ca1-4abe-a698-61edcd0b6a26

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

Payment Method Details

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

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

Open Payment Details

To get to the Payment Details page:

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



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

Refund a Payment

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

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



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

To refund a payment:

1. Open the Payment Detail page for the payment.

Payment 9734

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

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

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

Payment 9734

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

<input checked="" type="radio"/> Refund	<input type="radio"/> Chargeback
---	----------------------------------

Kaui opens the Process Refund screen.

Process Refund

No Invoice Adjustment
 Invoice Item Adjustment

Amount: 10.0
 Currency: USD

Reason: 500 - Courtesy

Comment:

SAVE

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

Payment 9734

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

Process Refund Field Descriptions

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

Perform a Chargeback

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

1. Open the Payment Detail page for the payment.

Payment 9782

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

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

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

Payment 9782

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

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

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

Process Chargeback

Amount: 25.0
Currency: USD

Reason: 400 - Canceled Recurring Transaction

Cancel account subscriptions?

Comment:

SAVE

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

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

Payment 9782

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

Timeline

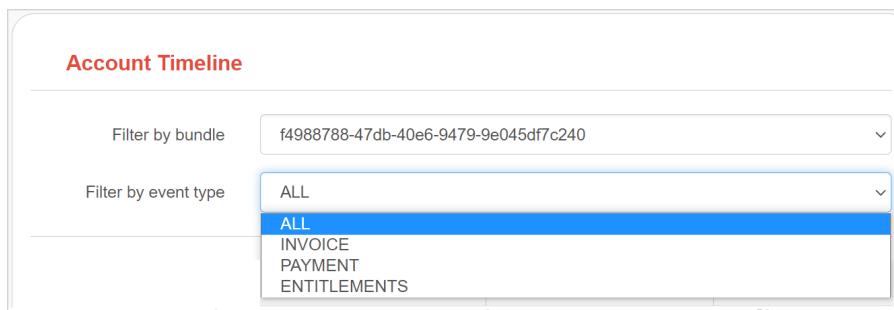
The Timeline displays a chronological list of events (that is, an audit log) that occurred for a specific customer account. You cannot make changes to the timeline.

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

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

On the Timeline page, you can:

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



The screenshot shows the 'Account Timeline' page with two filter dropdowns. The 'Filter by bundle' dropdown contains the value 'f4988788-47db-40e6-9479-9e045df7c240'. The 'Filter by event type' dropdown is open, showing a list of options: ALL (which is selected and highlighted in blue), INVOICE, PAYMENT, and ENTITLEMENTS.

- **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.

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

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

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

Invoice 27291 [View Customer Invoice Html](#)

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

DESCRIPTION	START DATE	END DATE	SUB
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 include:

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



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

Additional Resources

- [Tenant API](#)
- [Multi-Tenancy and Authorization](#)
- [Per Tenant Properties](#)

Create a Tenant

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

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

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



Kaui displays a list of tenants on the Tenants screen:

--> I NEED A SCREENSHOT HERE (don't have permissions) <--

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

Kaui displays the Add New Tenant screen:

Add New Tenant

Name	t_demo
API Key	t_demo
API Secret	*****

SAVE

- 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.

- Click the **Save** button.

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

The screenshot shows the Kaui Tenant Configuration page. At the top right, it displays "admin / t_demo" with a red arrow pointing to it. Below the header, there's a success message: "Tenant was successfully configured". The main section is titled "Tenant Details" and lists the tenant's name, ID, and API key. Under "Allowed Users", there's a table with one entry: "admin". At the bottom, there are navigation links for Catalog Show, Overdue Show, Invoice Template, Invoice Translation, Catalog Translation, and Plugin Config. A "Existing Plans" link is also present.

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

Tenant Configuration Page

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

Tenant Details 1

Name: t_demo
Tenant ID: 2a381717-704d-48bf-ae7d-32a1fc58b823
API Key: t_demo

Useful Links 2

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

Allowed Users 3

NAME	DESCRIPTION
admin	

Catalog Show **Overdue Show** **Invoice Template** **Invoice Translation** **Catalog Translation** **Plugin Config** 4

Existing Plans + **Enable XML View**

1 Tenant Details

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

2 Useful Links

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

3 Allowed Users

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

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

4 Tenant Configuration Tabs

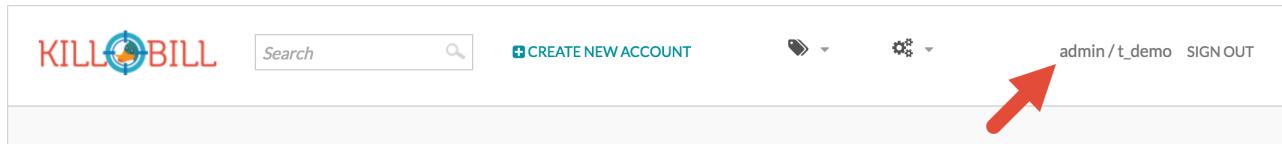
The tabs at the bottom of the Tenant Configuration page allow you upload various files that are specific to the current tenant:

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

Add an Allowed User to the Tenant

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

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



Kaui displays the Tenant Configuration page.

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

Tenant Details

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

Useful Links

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

Allowed Users **+**

NAME	DESCRIPTION
admin	

Kaui displays the Add Allowed User pop-up.

Add Allowed User

User name

ADD

3. Type the user name into the **User name** field.

4. Click the **Add** button.

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

Remove a User from the Tenant

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



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

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

The screenshot shows the Kill Bill web application's header. It includes the Kill Bill logo, a search bar, a 'CREATE NEW ACCOUNT' button, and user management icons. On the far right, it displays the current user 'admin / t_demo' and a 'SIGN OUT' link. A large red arrow points to the user information 'admin / t_demo'.

Kaui displays the Tenant Configuration page.

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

The screenshot shows the 'Tenant Configuration' page in Kaui. It has two main sections: 'Tenant Details' on the left and 'Useful Links' on the right. In the 'Tenant Details' section, there are fields for Name (bob), Tenant ID (b6f05279-3fa3-4354-be65-677571853169), and API Key (bob). Below these is a 'Allowed Users' table. The table has columns for NAME and DESCRIPTION. It contains one row for 'mary' (Managed User). To the right of the 'NAME' column for 'mary' is a small 'x' button, which is highlighted with a red arrow. The 'Useful Links' section lists various account-related links.

NAME	DESCRIPTION
mary	Managed User

3. Click OK.

Catalog Show Tab

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

- [Create a Simple Catalog](#)
- [Upload an XML Catalog](#)
- [View the Raw XML Catalog](#)
- [Delete a Catalog](#)



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

Catalog Resources

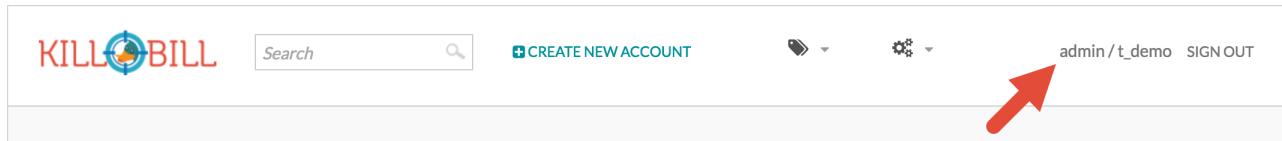
- [Catalog API](#)
- "Catalog" section in *Subscription Guide*

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:



Kauai displays the Tenant Configuration page.

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

A screenshot of the Tenant Configuration page. At the top, there are tabs: "Catalog Show" (which is highlighted with a red box and has a red arrow pointing to it), "Overdue Show", "Invoice Template", "Invoice Translation", "Catalog Translation", and "Plugin Config". Below these tabs, there is a section titled "Existing Plans" with a "Catalog Versions" dropdown set to "2022-01-10T19:38:34.000Z". A table lists existing plans:

PLAN ID	PRODUCT	CATEGORY	BILLING PERIOD	USD	TRIAL
Auto-update-monthly	Auto-Update	Add-on	Monthly	7.99	N/A
Basic	Listmaker	Base	Monthly	14.99	N/A

Create a Simple Catalog

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

A screenshot of the Tenant Configuration page, identical to the previous one but with a red arrow pointing to the "Catalog Show" tab, which is highlighted with a red box.

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

Kaui opens the Catalog Configuration screen:

The screenshot shows a form titled "Catalog Configuration". It includes fields for Product Category (set to "Base"), Product Name, Plan Name, Amount (0), Currency (USD), Billing Period (Monthly), Trial Length (0), and Trial Time Unit (Unlimited). A "SAVE" button is at the bottom.

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: <ul style="list-style-type: none">• Base Products—Products that can have one or more addons.• Add-On Products—Products that can be bundled with a base product.• Standalone Products—Products that 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.

Upload an XML Catalog

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



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

To upload an XML catalog in Kauai:

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

The screenshot shows the 'Tenant Details' section with the name 'Kill Bill'. Below it is a navigation bar with tabs: 'Catalog Show' (highlighted with a red arrow), 'Overdue Show', 'Invoice Template', 'Invoice Translation', 'Catalog Translation', and 'Plugin Config'. To the right is a 'Useful Links' section with a link to 'Parked accounts'. Below the navigation is a 'Existing Plans' section with a plus sign icon, a dropdown menu, and an 'Enable XML View' button. A catalog version dropdown shows '2022-01-10T19:38:34.000Z'. At the bottom is a table of plans:

PLAN ID	PRODUCT	CATEGORY	BILLING PERIOD	USD	TRIAL
Auto-update-monthly	Auto-Update	Add-on	Monthly	7.99	N/A
Basic	Listmaker	Base	Monthly	14.99	N/A

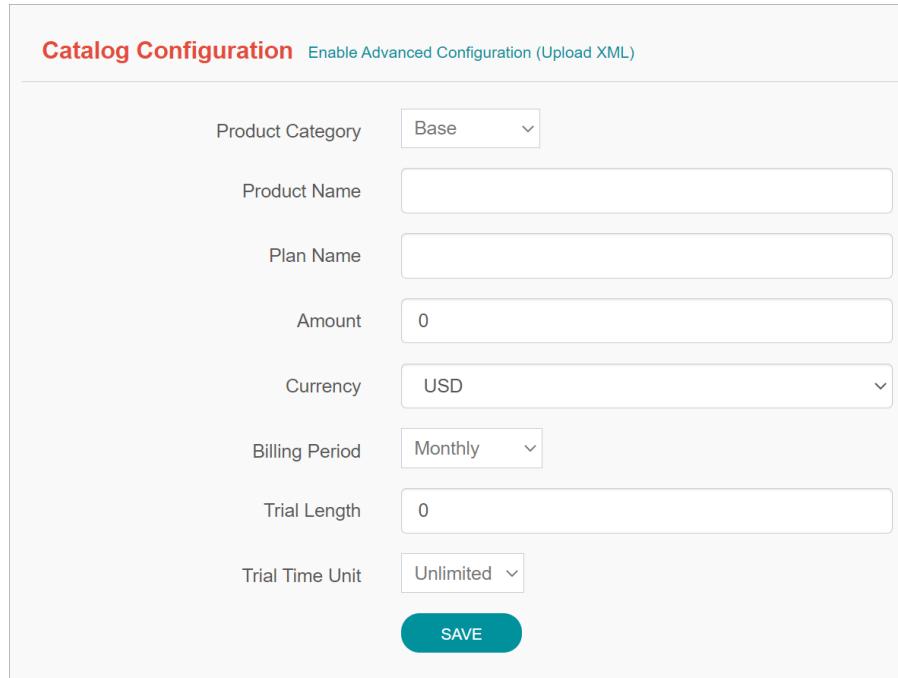
2. Click the plus sign () next to **Existing Plans**.

Kauai opens the Catalog Configuration screen:

Catalog Configuration [Enable Advanced Configuration \(Upload XML\)](#)

Product Category	Base
Product Name	
Plan Name	
Amount	0
Currency	USD
Billing Period	Monthly
Trial Length	0
Trial Time Unit	Unlimited

SAVE



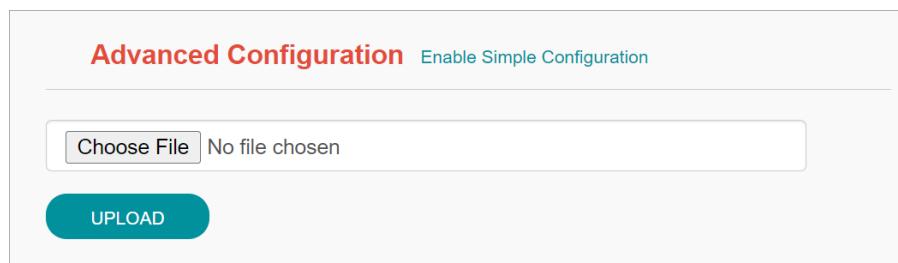
3. Click on **Enable Advanced Configuration (Upload XML)**.

Kaui displays an upload screen:

Advanced Configuration [Enable Simple Configuration](#)

Choose File No file chosen

UPLOAD



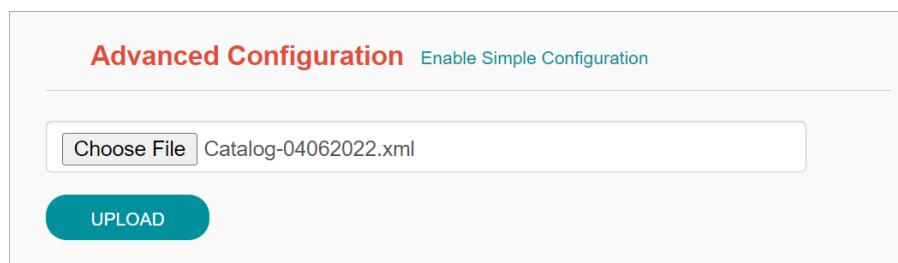
4. Click the **Choose File** button, locate the XML file, and select it.

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

Advanced Configuration [Enable Simple Configuration](#)

Choose File Catalog-04062022.xml

UPLOAD



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:

Catalog was successfully uploaded

Tenant Details

Useful Links

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

Existing Plans + - Enable XML View

Catalog Versions: 2019-01-02T00:00:00.000Z

PLAN ID	PRODUCT	CATEGORY	BILLING PERIOD	USD	TRIAL
remotecontrol-monthly	RemoteControl	Add-on	Monthly	15	N/A + currency
standard-monthly	Standard	Base	Monthly	25	N/A + currency

View the Catalog as XML

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

Tenant Details

Useful Links

Name: Kill Bill (edit)

→ Catalog Show Overdue Show Invoice Template Invoice Translation Catalog Translation Plugin Config

Existing Plans + - Enable XML View

Catalog Versions: 2022-01-10T19:38:34.000Z

PLAN ID	PRODUCT	CATEGORY	BILLING PERIOD	USD	TRIAL
Auto-update-monthly	Auto-Update	Add-on	Monthly	7.99	N/A + currency
Basic	Listmaker	Base	Monthly	14.99	N/A + currency

2. Click **Enable XML View**.

Kaui displays the a list of catalog versions:

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

Catalog XML Enable Simple Configuration

CATALOG VERSION	EFFECTIVE DATE	CATALOG XML
0	2022-01-10T19:38:34.000Z	view xml

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

```

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

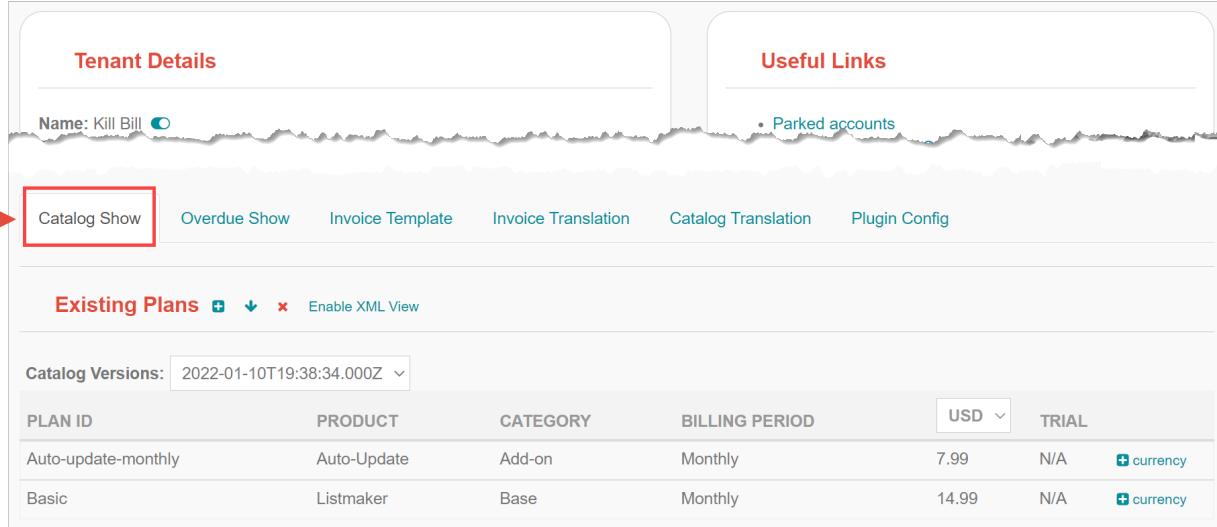
```

- To return to Kauai, click the Back arrow button of your browser.

Delete a Catalog

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

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



The screenshot shows the Tenant Configuration page with the following sections:

- Tenant Details:** Name: Kill Bill
- Useful Links:** Parked accounts
- Catalog Show Tab:** This tab is highlighted with a red box and a red arrow points to it.
- Overdue Show**
- Invoice Template**
- Invoice Translation**
- Catalog Translation**
- Plugin Config**
- Existing Plans:** Buttons for +, -, X, and Enable XML View.
- Catalog Versions:** A dropdown menu set to 2022-01-10T19:38:34.000Z.
- Plans Table:**

PLAN ID	PRODUCT	CATEGORY	BILLING PERIOD	USD	TRIAL
Auto-update-monthly	Auto-Update	Add-on	Monthly	7.99	N/A
Basic	Listmaker	Base	Monthly	14.99	N/A

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

What is supposed to happen here?

Add a Currency to a Plan

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

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

The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Catalog Show" tab is highlighted with a red arrow. The "Existing Plans" section shows two plans: "Auto-update-monthly" and "Basic". The "Auto-update-monthly" plan is set to Auto-Update, Add-on category, Monthly billing period, and USD currency at \$7.99. The "Basic" plan is set to Listmaker, Base category, Monthly billing period, and USD currency at \$14.99.

PLAN ID	PRODUCT	CATEGORY	BILLING PERIOD	CURRENCY	TRIAL
Auto-update-monthly	Auto-Update	Add-on	Monthly	USD	N/A
Basic	Listmaker	Base	Monthly	USD	N/A

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:

The screenshot shows the "Catalog (Add Plan Currency)" screen. It has three input fields: "Plan ID" (Auto-update-monthly), "Amount" (empty), and "Currency" (USD). A "SAVE" button is at the bottom.

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.

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.

The screenshot shows the Kill Bill Tenant Details interface. At the top, there are two sections: "Tenant Details" and "Useful Links". In the "Tenant Details" section, the name is listed as "Kill Bill". Below the name, there is a navigation bar with several tabs: "Catalog Show" (which is highlighted with a red arrow and a red border), "Overdue Show", "Invoice Template", "Invoice Translation", "Catalog Translation", and "Plugin Config". Under the "Catalog Show" tab, there is a section titled "Existing Plans" with a "Download" icon, a "Down Arrow" icon, a "Delete" icon, and a "Enable XML View" link. Below this, there is a "Catalog Versions" dropdown set to "2022-01-10T19:38:34.000Z". A table follows, showing catalog versions with columns for PLAN ID, PRODUCT, CATEGORY, BILLING PERIOD, USD, and TRIAL. Two rows are visible: "Auto-update-monthly" (Auto-Update, Add-on, Monthly, 7.99, N/A) and "Basic" (Listmaker, Base, Monthly, 14.99, N/A).

PLAN ID	PRODUCT	CATEGORY	BILLING PERIOD	USD	TRIAL
Auto-update-monthly	Auto-Update	Add-on	Monthly	7.99	N/A
Basic	Listmaker	Base	Monthly	14.99	N/A

2. Click the down arrow ().

The screenshot shows the Kill Bill Overdue Show page. At the top, there are three tabs: "Catalog Show", "Overdue Show" (which is highlighted with a red arrow and a red border), and "Invoice Template". Below the tabs, there is a section titled "Existing Plans" with a "Download" icon, a "Down Arrow" icon (highlighted with a red arrow), a "Delete" icon, and a "Enable XML View" link. Below this, there is a "Catalog Versions" dropdown set to "2022-01-10T19:38:34.000Z". A table follows, showing catalog versions with columns for PLAN ID and PRODUCT.

PLAN ID	PRODUCT
---------	---------

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

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.

Add New Role Definition

Role name

Permissions
Comma separated, e.g. account:create,entitlement:change_plan,invoice:credit

SAVE

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:

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

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

Add a User

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

Kauai displays the Add New User pop-up:

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

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

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

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

Configured Tenants

<input checked="" type="checkbox"/> analytics
<input type="checkbox"/> t_demo

SAVE

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.

The screenshot shows the Kill Bill Kauai Users list. At the top, there is a navigation bar with the Kill Bill logo, a search bar, and links for 'CREATE NEW ACCOUNT', 'SIGN OUT', and other system settings. Below the navigation is a header labeled 'Kauai Users' with a plus sign icon. A table lists users with columns for 'NAME' and 'DESCRIPTION'. The table contains four rows: 'admin', 'admin1', 'admin2', and 'admin3'. The 'admin' row is currently selected.

NAME	DESCRIPTION
admin	
admin1	
admin2	
admin3	

2. Select the user you want to edit.

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

User Details [Edit](#) [X](#)

Name: admin1

Description:

Roles:

Configured Tenants

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

[SAVE](#)

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

Kauai displays the Update User screen:

Update User

Managed externally (LDAP, Okta, etc.)?

Name

[REDACTED]

Password

[REDACTED]

Description

Managed User

Roles

consumer-role

Comma separated, e.g. customer_support,finance.

Create a new role [here](#).

[SAVE](#)

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

Add New User Field Descriptions

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

Delete a User

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

1. Open the user list.

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

NAME	DESCRIPTION
admin	
admin1	
admin2	

2. Select the user you want to delete.

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

User Details [Edit](#)

Name: admin1

Description:

Roles:

Configured Tenants

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

[SAVE](#)

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.

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.

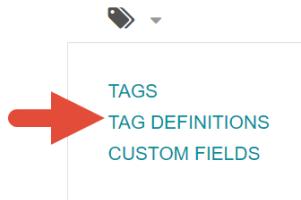
Additional Resources

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**:



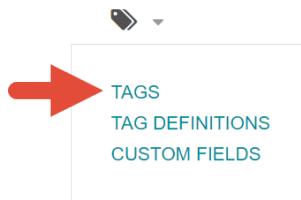
Kaui displays the Tag Definitions page.

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
5b3fce3-395e-4d4a-8856-8aa7ebcc5560	c2c35fa0-8225-49c5-ace0-8d971df05161	INVOICE	WRITTEN_OFF
70ee7475-a38c-4837-aacc-08299b2a0ff7	b60d4bee-137e-41b8-bbb1-0adccb6366ff	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-bbb1-0adccb6366ff	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](#)".

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	

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

Kaui displays the Add New Tag Definition screen:

Add New Tag Definition

Object type 	ACCOUNT
Name	blue
Description	blue tag
SAVE	

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.

Tag definition successfully created

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	

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](#)".

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:

Account Information [Edit](#)

Tag As:

AUTO_INVOICING_DRAFT
 AUTO_INVOICING_OFF
 AUTO_INVOICING_REUSE_DRAFT
 AUTO_PAY_OFF
 MANUAL_PAY
 OVERDUE_ENFORCEMENT_OFF
 PARTNER
 TEST
 __PARK__

Comment

UPDATE



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

Plugin Manager

Analytics

Admin

FAQs