



Kaui Guide

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Introduction

What Is Kaui?

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

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

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



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

How to Use This Guide

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

- [Getting Started](#)
- [Basic search and Advanced search](#)
- [Accounts](#)
- [Payment methods](#)
- [Subscriptions](#)
- [Invoices](#)
- [Payments](#)
- [Timeline](#)

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

- [Tenants](#)
- [Users, roles, and permissions](#)
- [Catalog](#)
- [Overdue](#)
- [Translation files](#)
- [Tags](#)
- [Custom fields](#)



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

About Screenshots

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

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

Other Learning Resources

Videos

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

Glossary

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

Account (a.k.a. customer account)

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

Child

An account that is associated with a parent account.

External Key

An alternative unique ID for an object.

Parent

An account that contains one or more child accounts.

Payment Method

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

Permissions

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

Plan

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

Plugin

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

Phase (a.k.a plan phase)

Time periods within a subscription during which certain rules apply.

Subscription

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

Tag

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

Tenant

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

User

A person who logs on to use Kaui.

User Role

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

Getting Started

First-Time Login



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

To log in to Kauai:

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

The image shows a 'Login' form with two input fields: 'Username' and 'Password'. Below the fields is a blue 'SIGN IN' button.

Kauai displays the Add New Tenant screen:

The image shows an 'Add New Tenant' form with three input fields: 'Name' (t_demo), 'API Key' (t_demo), and 'API Secret' (*****). Below the fields is a blue 'SAVE' button.

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



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

3. Click the **Save** button.

Log In to Kauai

To log in to Kauai:

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

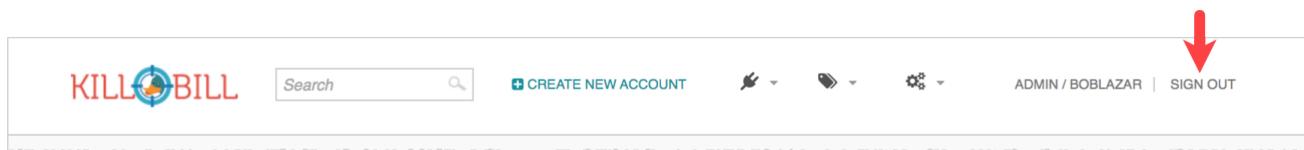
The image shows a login interface with a light gray background. At the top left, the word "Login" is written in red. Below it are two input fields: "Username" and "Password", each with a corresponding text input box. At the bottom center is a teal-colored button labeled "SIGN IN".

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

The image shows a "Choose Tenant" interface. At the top left, the text "Choose Tenant" is in red. Below it is a dropdown menu labeled "Tenant". At the bottom center is a teal-colored button labeled "SAVE".

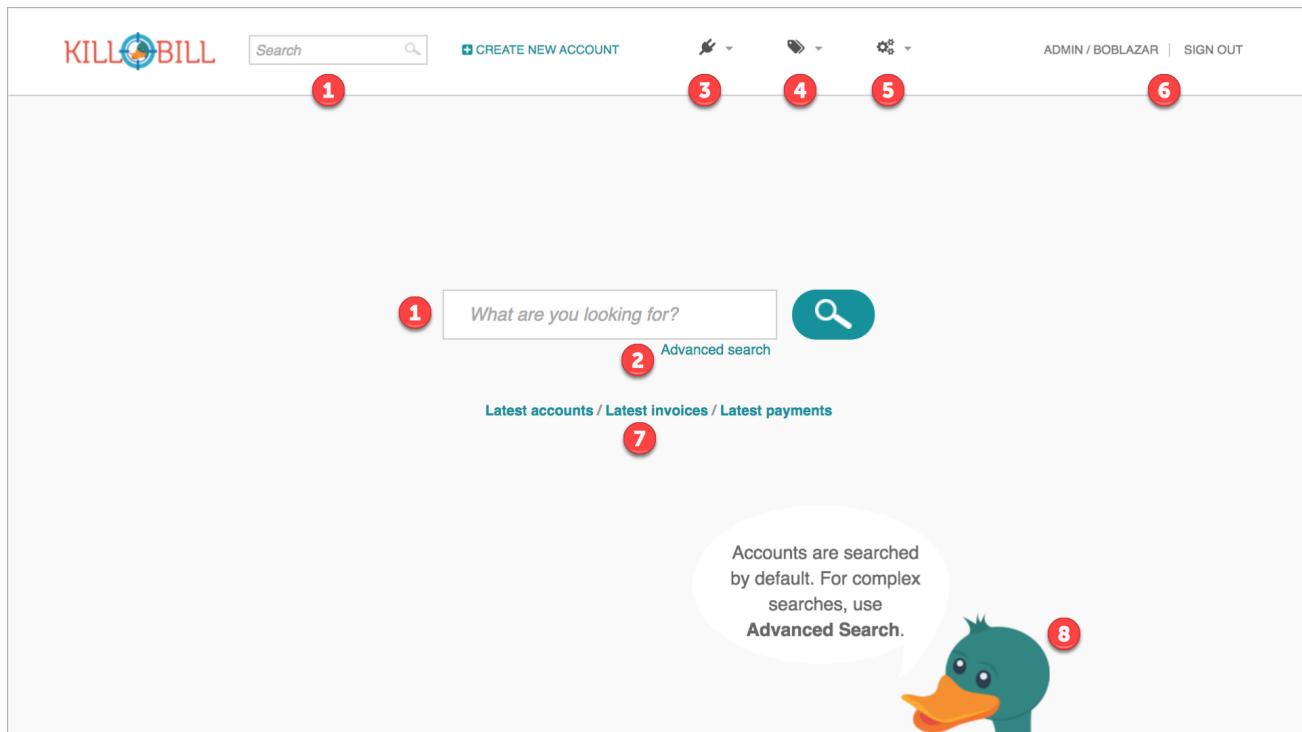
Log Out of Kaui

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



Homepage Layout

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



1. [Basic Search](#)
2. [Advanced Search](#)
3. [Plugin Manager and Analytics](#)
4. [Tags and Custom Fields](#)
5. [Users, Tenants, and Admin](#)
6. Username / Tenant name and [logout](#)
7. Latest invoices, accounts, and payments (latest records created for this tenant)
8. This is Killian, the Kill Bill mascot!

Return to Homepage

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



Icons

| Icon | Description |
|------|---|
| | Add—Indicates you can add an item, such as a payment method, credit, charge, etc. |

| Icon | Description |
|------|--|
| | Dry-run invoice—Appears on the Account page. Clicking it manually triggers a committed or dry-run invoice. |
| | Expand—Expand a section or dropdown menu. |
| | Collapse—Collapse a section. |
| | <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> |
| | Kaui Package Manager—Appears at the top of the screen and gives you access to plugin specific screens. (Also known as Kill Bill Plugin Manager.) |
| | Add-on—Appears on the Subscription screen and lets you add an add-on to the account's subscription. |
| | Make a payment—Appears on the Invoice screen and lets you make a payment against the invoice. |
| | Users, Tenants, & Admin—Admin level feature: Appears at the top of the screen and gives you access to Users, Tenants, and Admin. |
| | <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-4786-9788-8efe3af71676 | 68b2ba7f-0f6f-4786-9788-8efe3af71676 | \$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 | |
| ab84521-25fd-4007-bdea-c4fde5403cd8 | 2418455544 | €0 | |

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

First Previous **1** 2 3 4 ... 5 Next Last

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

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



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

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



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

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

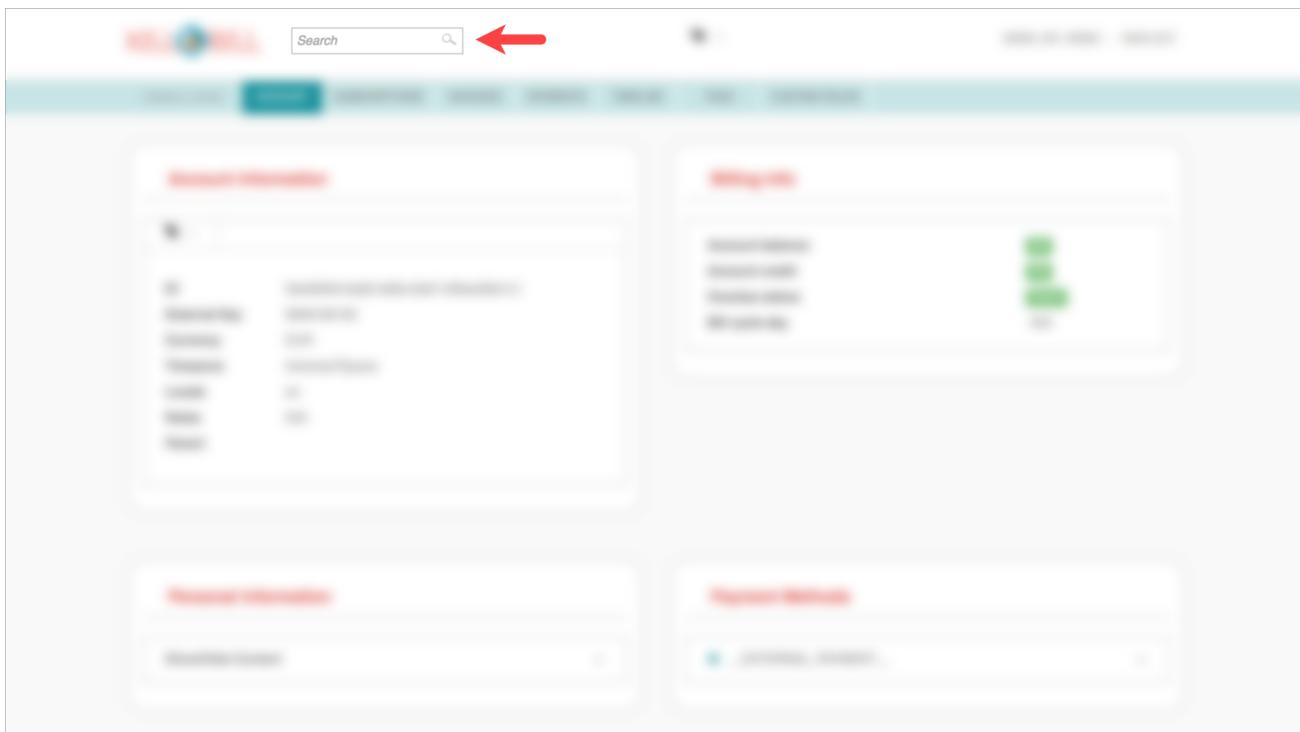
| Invoices | | | | |
|----------|------------|---------|---------|--|
| NUMBER | DATE | AMOUNT | BALANCE | |
| 18574 | 2021-06-23 | \$59.98 | \$59.98 | |
| 18573 | 2021-06-23 | \$59.98 | \$59.98 | |
| 18538 | 2021-06-22 | \$29.99 | \$29.99 | |
| 17587 | 2021-05-29 | \$29.99 | \$0 | |

Basic Search



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

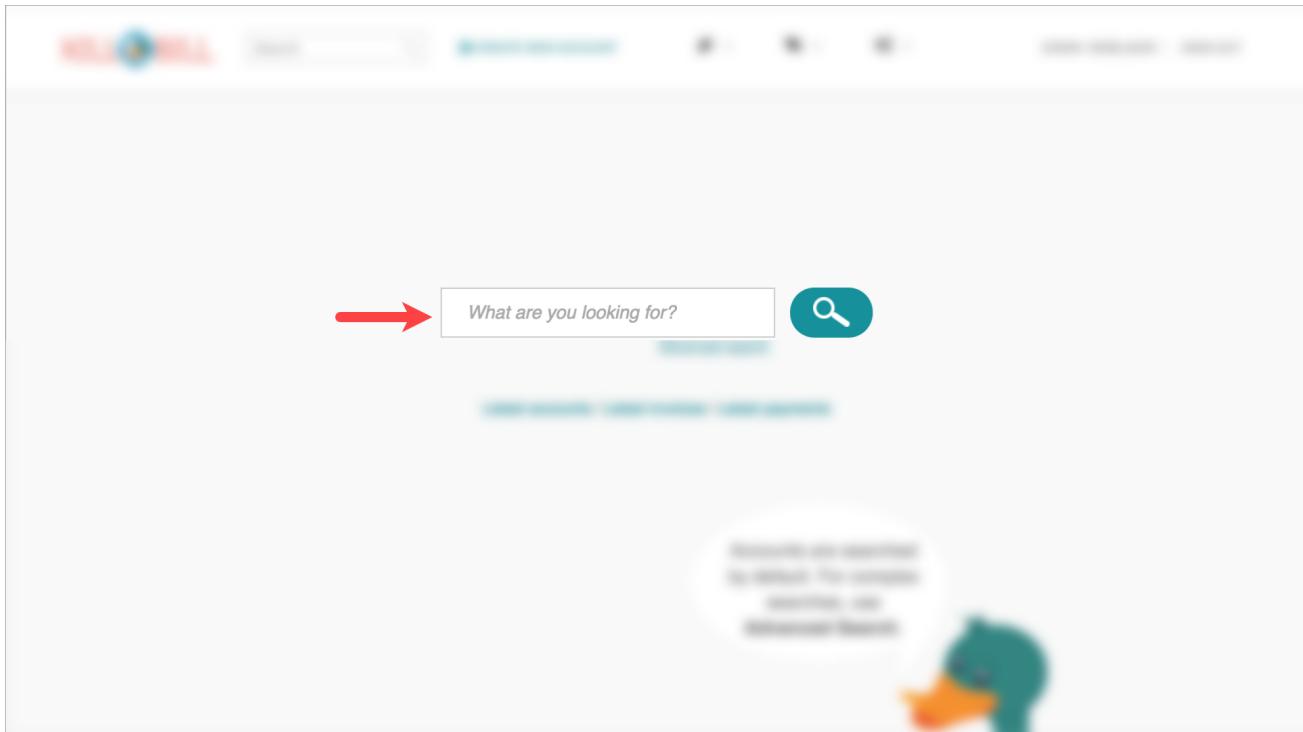
To search for customer accounts, use the basic search. Basic search is available at the top of the screen no matter where you are in Kaui.



You can search for an account using the following criteria:

- Account ID
- External key
- Name
- Email address

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



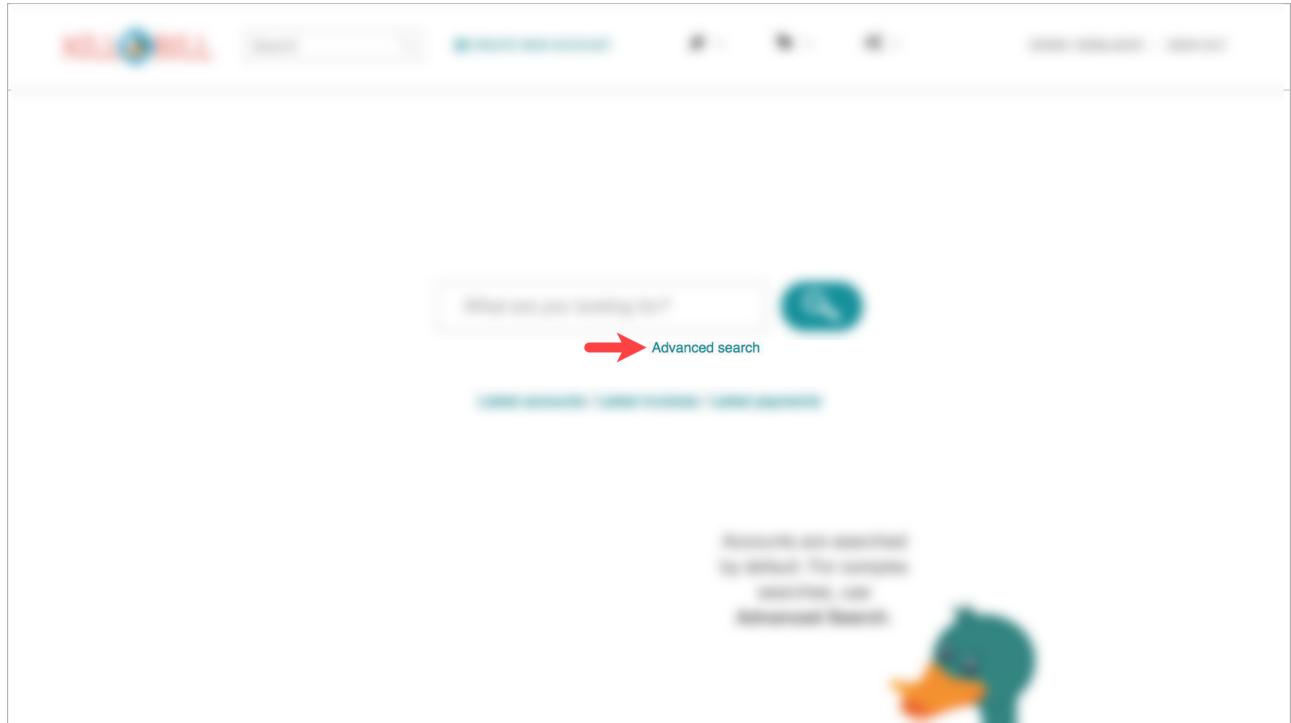
Advanced Search

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

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

To perform an advanced search:

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

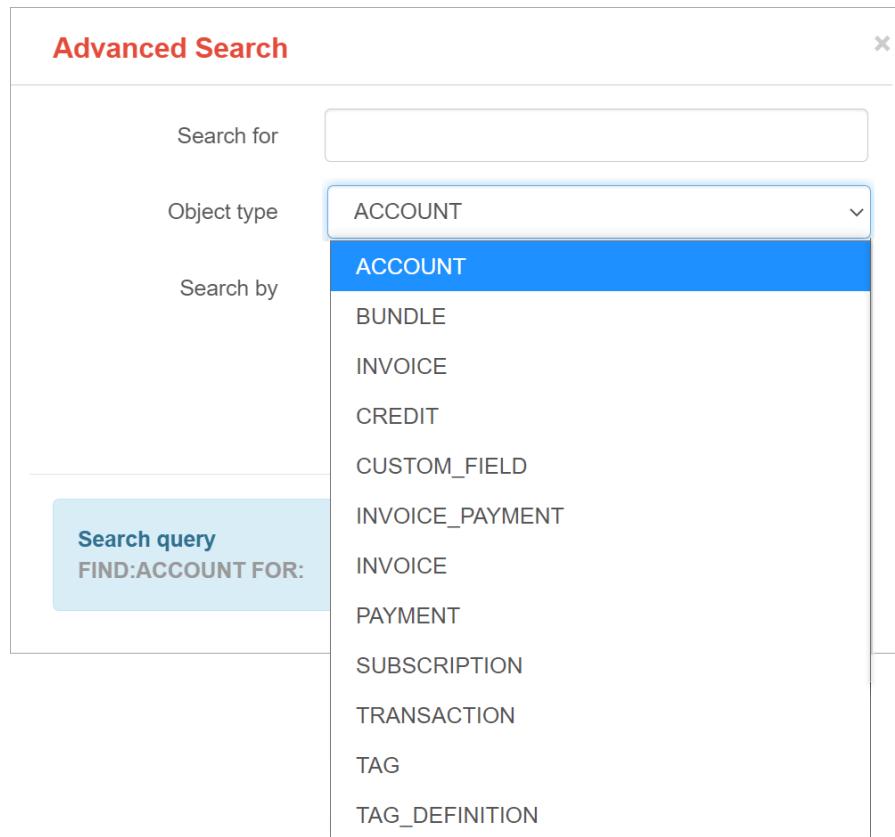


Kaui displays the Advanced Search pop-up:

The Advanced Search pop-up window has the following fields and features:

- Search for:** A text input field.
- Object type:** A dropdown menu currently set to "ACCOUNT".
- Search by:** A dropdown menu.
- Fast search (find first exact match):** A checkbox.
- SEARCH:** A teal-colored button.
- Search query:** A section containing the text "FIND:ACCOUNT FOR:".

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

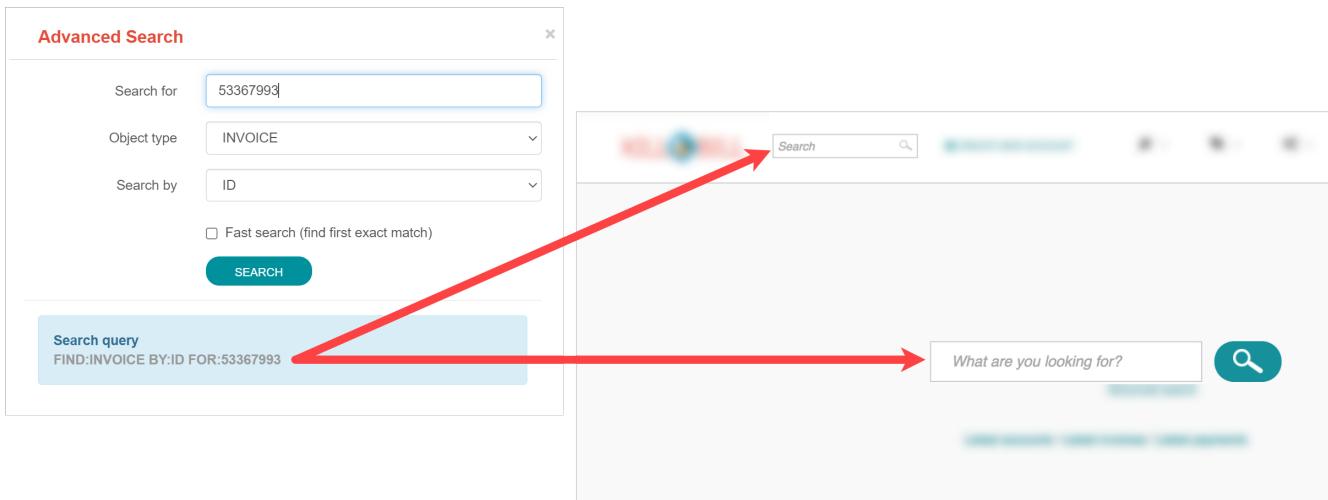


Note: For information on which fields are searched for each object type, see the table in the next section.

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



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



Searchable Fields by Object Type

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

Accounts

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

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

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

Account Page Layout

The Account page has the following sections:

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

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

- 1. Sub-menu:** The top navigation bar, which includes tabs for ACCOUNT, SUBSCRIPTIONS, INVOICES, PAYMENTS, TIMELINE, TAGS, and CUSTOM FIELDS. A red circle with the number 1 is positioned above the CUSTOM FIELDS tab.
- 2. Account Information:** A panel containing account details like ID, External Key, Currency, Timezone, Locale, Notes, and Parent. A red circle with the number 2 is positioned above the panel title.
- 3. Billing Info:** A panel with buttons for PAY ALL INVOICES, ADD CREDIT, and CREATE CHARGE. It also displays Account balance (\$10), Account credit (\$0), Overdue status (Good), Bill cycle day (N/A), and Next Invoice Date (N/A). A red circle with the number 3 is positioned above the panel title.
- 4. Personal Information:** A panel with a 'Show/Hide Content' button. A red circle with the number 4 is positioned above the panel title.
- 5. Payment Methods:** A panel showing a single method: EXTERNAL_PAYMENT. A red circle with the number 5 is positioned above the panel title.

1. Account Sub-Menu

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



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

2. Account Information

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

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

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

3. Personal Information

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

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

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

4. Billing Info

Here you can perform the following tasks for the customer:

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

You can also see a summary of billing information:

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

| 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 | <p>The date on which the system generates the customer's next invoice.</p> |

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

5. Payment Methods

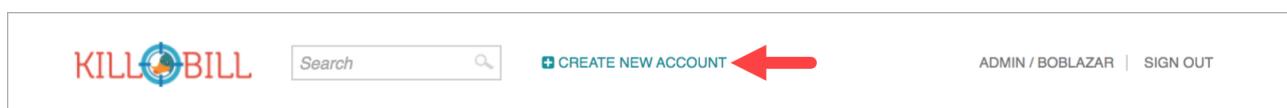
This section of the Account page lets you:

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

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

Create an Account

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



2. Kaui opens the Add New Account screen:

Add New Account

| | |
|-------------------------------------|---|
| Name | <input type="text"/> |
| First name length ⓘ | <input type="text"/> |
| External key | <input type="text"/> |
| Email | <input type="text"/> |
| Bill cycle day | <input type="text"/> |
| Currency | <input type="text" value="USD"/> <input type="button" value="▼"/> |
| Timezone | <input type="text" value="(GMT+00:00) UTC"/> <input type="button" value="▼"/> |
| Locale | <input type="text" value="English United States (en_US)"/> <input type="button" value="▼"/> |
| Address line 1 | <input type="text"/> |
| Address line 2 | <input type="text"/> |
| Zip code | <input type="text"/> |
| Company | <input type="text"/> |
| City | <input type="text"/> |
| State | <input type="text"/> <input type="button" value="▼"/> |
| Country | <input type="text" value="United States"/> <input type="button" value="▼"/> |
| Phone | <input type="text"/> |
| Notes | <input type="text"/> |
| <input type="checkbox"/> Migrated? | |
| <input type="button" value="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 | <p>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.</p> <p>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.</p> |
| External key | <p>An optional alternate ID for the account. Once this is saved for the customer, you cannot change it.</p> <p>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.</p> |
| Email | The main email address to use for communicating with the customer. |
| Bill cycle day (BCD) | <p>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.</p> <p>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.</p> |
| 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. |

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

Edit an Account

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



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

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

Kaui opens the Update Account screen:

Update Account

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

Kaui opens the Add New Email screen:

Add New Email

Email

SAVE

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

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.

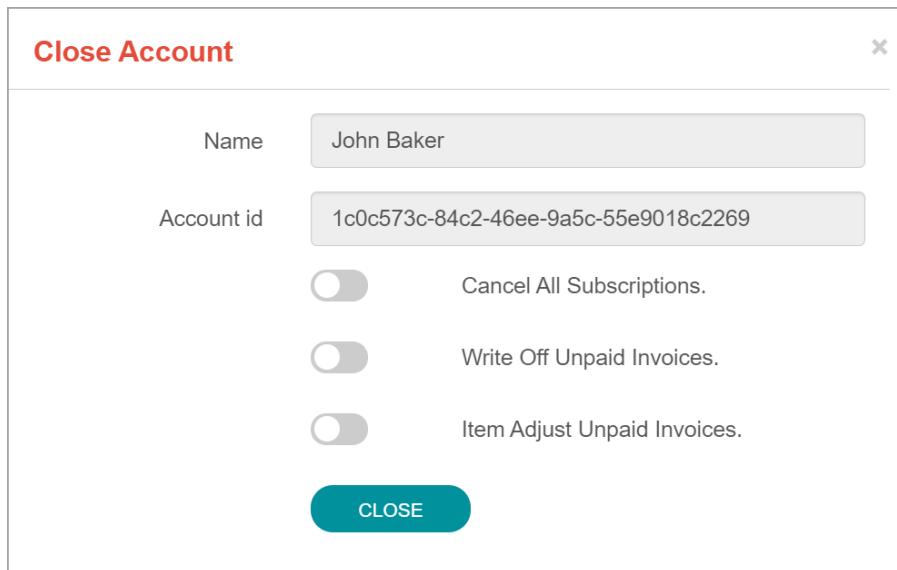


Note: Closing an account does not delete it. It only indicates the account is no longer a customer of yours. Once you close the account, its data becomes read-only, and you cannot make changes to it.

1. Open the account on the Account page.

2. Next to Account Information, click **Close**.

Kauai 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.

Kauai 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:

The screenshot shows the 'Account Information' section of a child account. The 'Parent' field contains a blue plus sign icon, which is highlighted with a red arrow. Other fields shown include ID, External Key, Currency, Timezone, Locale, and Notes (containing 'VIP').

Kaui opens a pop-up:

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

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

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 | 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.

Billing Info

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

| | |
|----------------------------|----------------------------------|
| Account balance | \$10 |
| Account credit | \$0 |
| Overdue status | Good |
| Bill cycle day | N/A |
| Next Invoice Date | N/A |
| Trigger invoice generation | <input type="checkbox"/> Dry-run |

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

The screenshot shows a modal window titled "Add New Credit". It contains four input fields: "Amount" (empty text input), "Currency" (dropdown menu set to "USD"), "Reason" (dropdown menu set to "100 - Courtesy"), and "Comment" (empty text area). Below the fields is a blue "SAVE" button.

2. Fill in the fields:

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

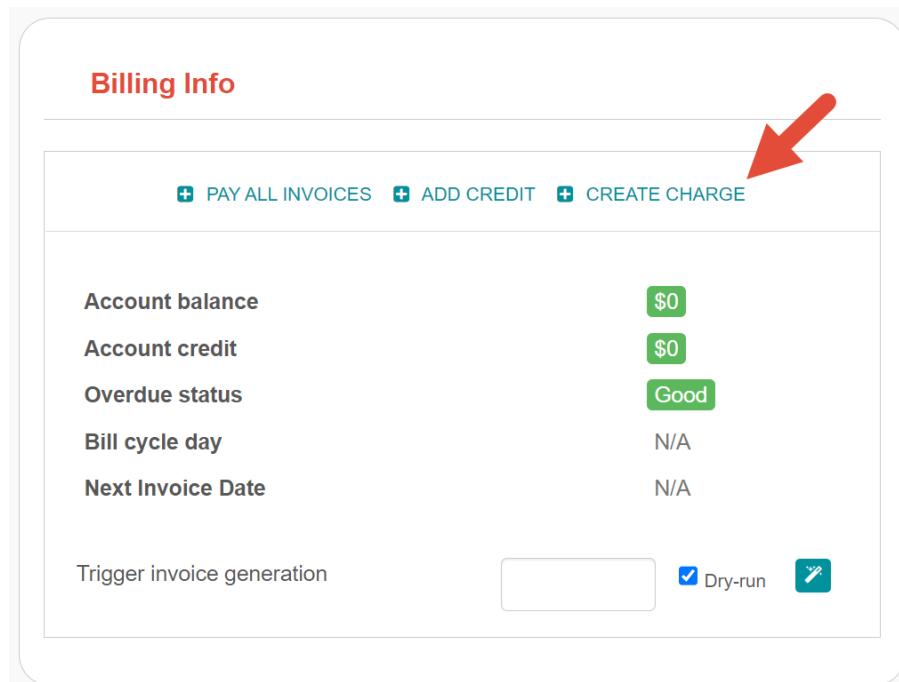
3. Click the **Save** button. To view the credit, select **Invoices** on the sub-menu.

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

Create a Charge on an Account

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

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



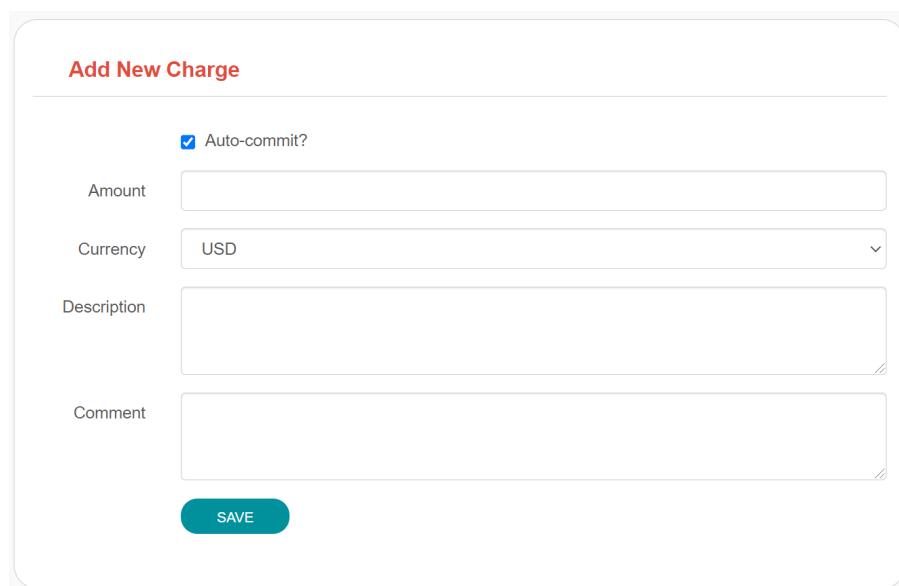
Billing Info

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

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

Trigger invoice generation

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



Add New Charge

Auto-commit?

Amount

Currency

Description

Comment

SAVE

2. To set the invoice as a draft instead of immediately committing it, uncheck the **Auto-commit** box.
3. Fill in the fields:
 - **Amount**—The amount of the charge.
 - **Currency**—The currency defaults from the customer account and should not need to be changed.
 - **Description** and **Comment**—What you type here displays on the customer’s invoice. Both fields are optional.
4. Click **Save** and 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

Overview

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 'Payment Methods' section with a red '+' icon. Below it is a card for an 'EXTERNAL_PAYMENT' method. The card displays the name '_EXTERNAL_PAYMENT_' and ID '0f700362-2669-4e33-98e3-5de85e840c04'. At the top of the card is a star icon followed by the text '_EXTERNAL_PAYMENT_'. To the right of the card are three buttons: '+ AUTHORIZE', '+ PURCHASE', and '+ CREDIT'.

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 screenshot shows the same 'Payment Methods' section as before. A red arrow points to the star icon next to the '_EXTERNAL_PAYMENT_' method in the list. The star icon is now filled blue, indicating it is the default 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:

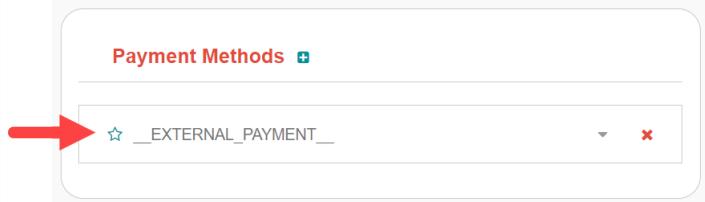
The screenshot shows the 'Payment Methods' section again. A red arrow points to the red '+' icon located to the right of the 'Payment Methods' label. This icon is used to add a new payment method.

Kaui displays the Add New Payment Method screen:

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

Payment Method Field Descriptions

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

| Field | Description |
|--|--|
| Plugin name | <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> . |
| Expiration year | <i>(Examples: 07 for the month of July and 23 for the year 2023.)</i> |
| 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.

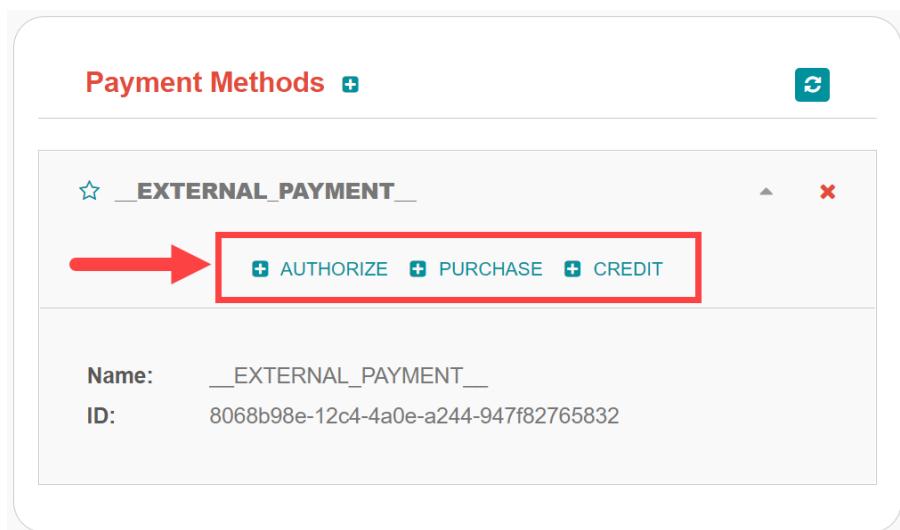
You can perform the following transactions from the Payment Methods section:

- 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.

Kaui displays the Process Transaction screen:

Process Transaction

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

[+ add control plugin names](#)

CONTROL PLUGIN NAME

| | |
|--|---|
| | x |
|--|---|

[+ add property](#)

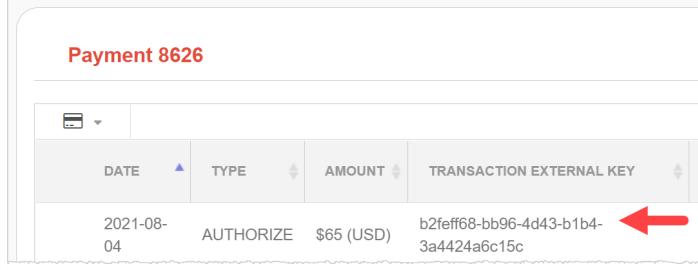
| NAME | VALUE |
|------|-------|
| | x |

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 | <p>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.</p>  |
| Reason | The reason is automatically selected based on Kaui configuration settings . However, you can make a different selection. |
| Comment | The text you enter here displays on the Timeline page after the transaction is complete. Adding comments is optional. |
| Add control plugin | For information on control plugins, see Plugin Manager . |
| Add property (Name/Value) | Use this area to assign custom fields and values to the transaction. For information on custom fields, see Custom Fields . |

Delete Payment Method



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

To delete a payment method:

1. Open the account on the Account page.

2. In the **Payment Methods** area, click the red X () next to the payment method. Kaui *immediately* removes the payment method.

Subscriptions

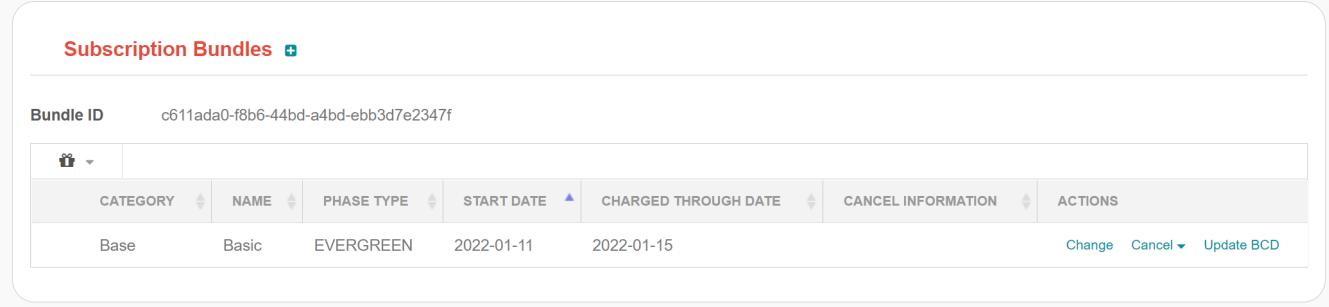
Overview

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

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

Open Subscriptions Page

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



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

| CATEGORY | NAME | PHASE TYPE | START DATE | CHARGED THROUGH DATE | CANCEL INFORMATION | ACTIONS |
|----------|-------|------------|------------|----------------------|--------------------|--|
| Base | Basic | EVERGREEN | 2022-01-11 | 2022-01-15 | | Change Cancel Update BCD |

On the Subscriptions page, you can:

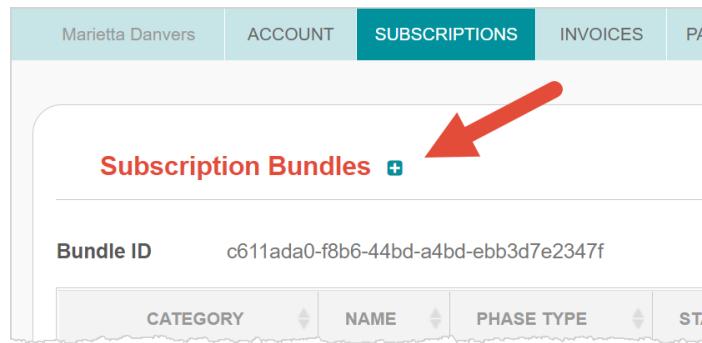
- [Add a subscription](#)
- [Add an add-on product to a subscription](#)
- [Pause and resume a subscription](#)
- [Change a subscription's plan and amount](#)
- [Cancel a subscription](#)
- [Update the billing cycle day \(BCD\) for the subscription](#)

Add a Subscription



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

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



Kauai displays the Add New Subscription screen:

The form has a title 'Add New Subscription'. It contains the following fields:
 - Bundle Key
 - Subscription Key
 - Plan: Basic (selected from a dropdown)
 - Price Override
 - Creation Type: Immediate Creation
 Specify a date
 A blue 'SAVE' button is at the bottom.

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

Add Subscription Field Descriptions

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

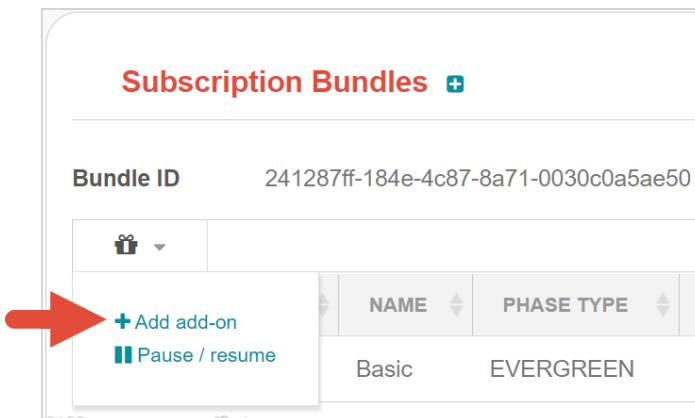
Add an Add-On Product to a Subscription

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



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

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



Kaui opens the Add New Add-On screen:

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

Add New Add-On Field Descriptions

| Field | Description |
|------------------|---|
| Subscription Key | Note that this subscription key applies to the add-on, not the original subscription. If you leave this field blank, Kill Bill generates a unique subscription key. If necessary, you can enter a different subscription key. |
| Plan | Select the add-on to add to the subscription. |

| Field | Description |
|--------------------|--|
| 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.



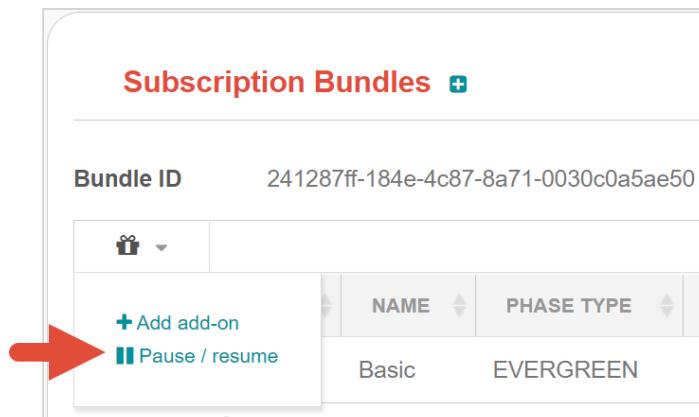
Note: While a customer's subscription bundle is paused, you cannot add any new subscriptions or add-ons to the account.

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 screenshot shows a 'Pause / Resume' form. It has three text input fields: 'Pause date', 'Resume date', and 'Comment'. Below these fields is a teal button labeled '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.

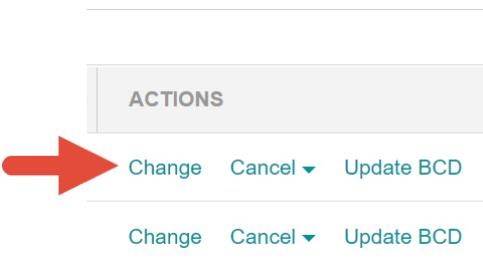
4. Click the **Pause / Resume** button. Kaui displays a success message at the top of the screen.

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:

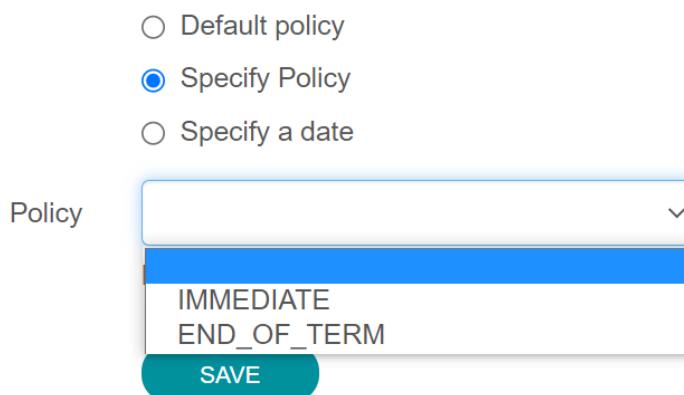
The screenshot shows a 'Change Subscription' dialog box. At the top, it says 'Change Subscription'. Below that, there's a 'New plan' dropdown set to 'Basic', a 'Price Override' input field which is empty, and a group of three radio buttons for selecting a policy: 'Default policy' (selected), 'Specify Policy', and 'Specify a date'. At the bottom is a teal '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*.



- **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

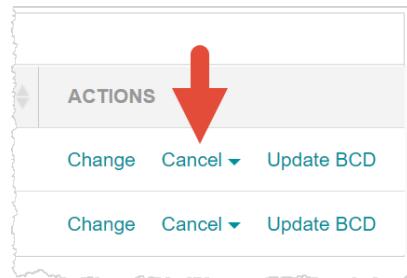
Change Date

SAVE

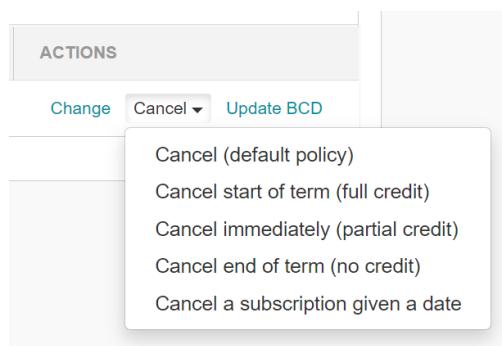
Cancel a Subscription

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**.

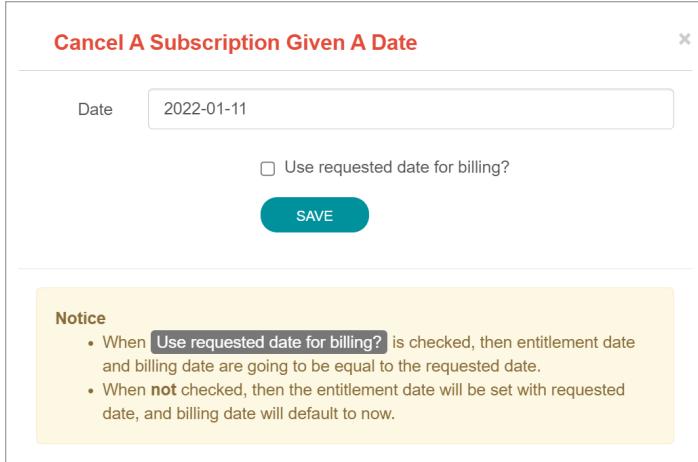


Kaui displays several options. The option you select defines how Kill Bill handles billing for the canceled subscription:



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. |

| Option | Description |
|------------------------------------|---|
| 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>Notice</p> <ul style="list-style-type: none"> When Use requested date for billing? is checked, then entitlement date and billing date are going to be equal to the requested date. When not checked, then the entitlement date will be set with requested date, and billing date will default to now. <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

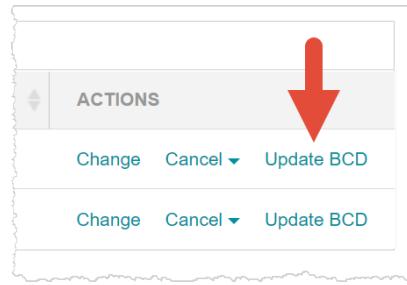
Follow the steps below to update the billing cycle day (BCD) defined for a subscription. These steps assume the subscription is billed on a monthly basis.

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.

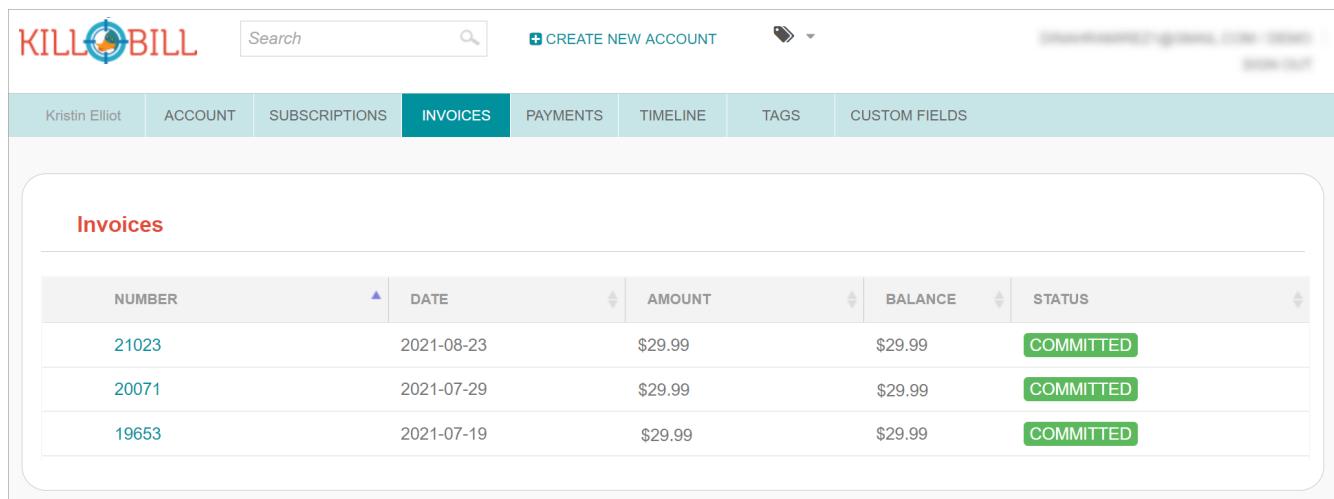
Invoices

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 links for "CREATE NEW ACCOUNT", "Logout", and "Logout (SSL)". Below the navigation bar is a menu bar with links for "Kristin Elliot", "ACCOUNT", "SUBSCRIPTIONS", "INVOICES" (which is highlighted in blue), "PAYMENTS", "TIMELINE", "TAGS", and "CUSTOM FIELDS". The main content area is titled "Invoices" and contains 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 'Invoice Details' page for invoice number 21023. At the top, there are buttons for 'View Customer Invoice Html'. Below this, the 'Invoice date' is listed as 2021-08-23 and the 'Target date' as 2021-08-23. A table displays a single item: 'External charge' on 2021-08-23 with an amount of \$29.99 (USD). An 'Adjust' button is next to the amount. At the bottom, a summary table shows the following details:

| | |
|----------------|---------------|
| 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 Kauai Guide Invoices interface. At the top, it displays "Invoice 21023" and a link to "View Customer Invoice Html". Below this, there are two date fields: "Invoice date" set to "2021-08-23" and "Target date" also set to "2021-08-23". A toolbar with icons for edit, delete, and other actions is visible. The main content area shows a table with one row: "External charge" on "2021-08-23" with an amount of "\$29.99 (USD)". An "Adjust" button is located at the end of this row. At the bottom, summary statistics are provided: 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 same Kauai Guide Invoices interface as above, but with a red arrow pointing to the "Make payment" button. This button is located in the toolbar below the invoice details, next to the edit, delete, and other action icons.



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

3. Kauai displays the Process Payment screen:

Process Payment

External?

Amount: 29.99
Currency: USD

Payment Method: Leave blank to use account's default

Reason: 600 - Alt payment method

Comment:

SAVE

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

Process Payment Field Descriptions

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

The screenshot shows the Kauai Invoices Details page for Invoice 19608. At the top, there is a link to 'View Customer Invoice Html'. Below that, the invoice number 'Invoice 19608' is displayed along with the date '2021-07-18'. There is also a 'Target date' field set to '2021-07-18'. A dropdown menu icon is present. The main content area shows a table of items with columns: DESCRIPTION, START DATE, END DATE, SUBSCRIPTION ID, AMOUNT, and COMMENTS. One row in the table is 'Add-on service' with a start date of '2021-07-18' and an amount of '\$4.99 (USD)'. To the right of the table is an 'Adjust' button. At the bottom of the page, there is a summary section with the following details:

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

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

Invoice 19608 View Customer Invoice Html

Invoice date 2021-07-18

Target date 2021-07-18

Tag As:

WRITTEN_OFF

Comment

UPDATE

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

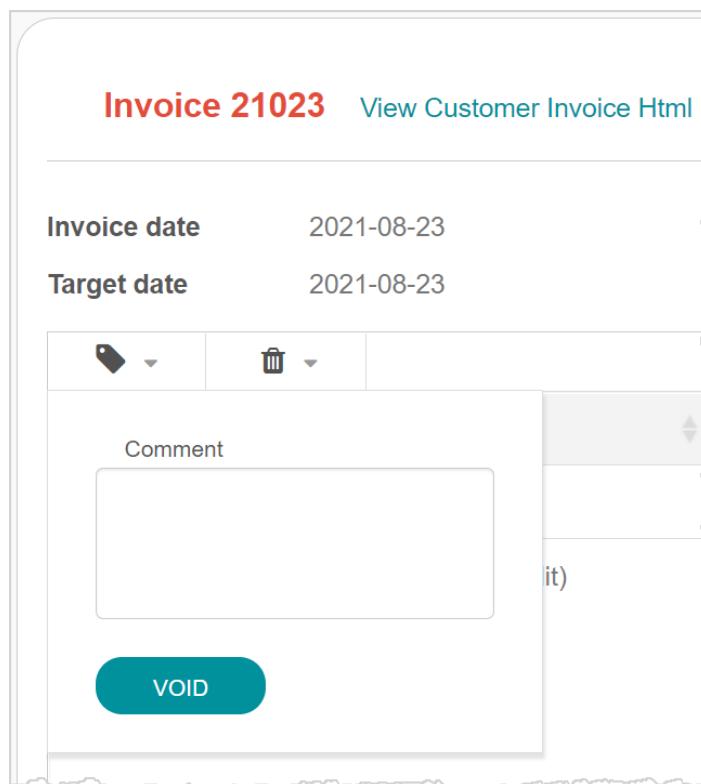
Invoice date 2021-08-23

Target date 2021-08-23

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

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

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



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

4. Click the **Void** button.

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

Pay All Unpaid Invoices

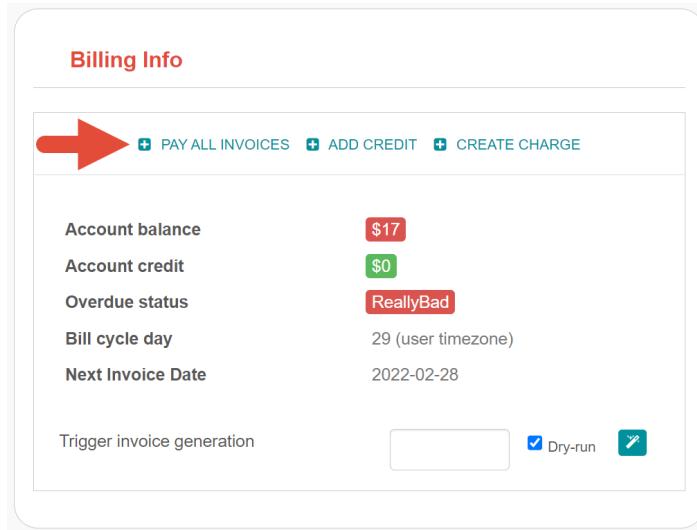
You can pay all unpaid invoices if a customer account has at least one outstanding invoice. Before you begin, make sure the customer has a valid payment method (see Note).



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

To pay all invoices:

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



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 Dry-run

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.

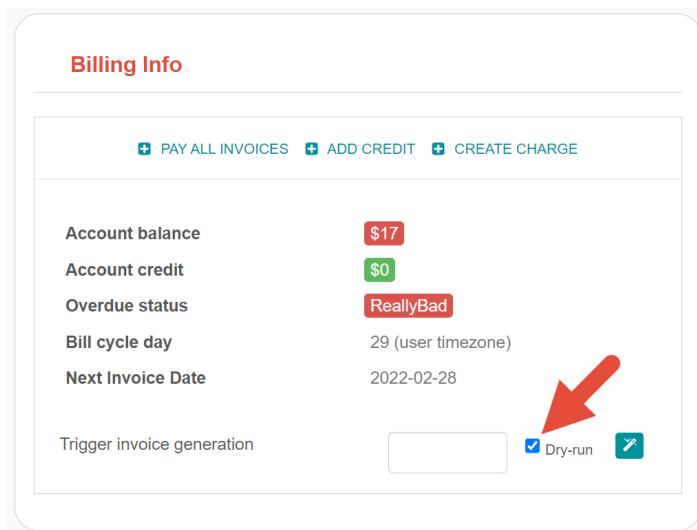
Generate a Dry-Run Invoice

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.



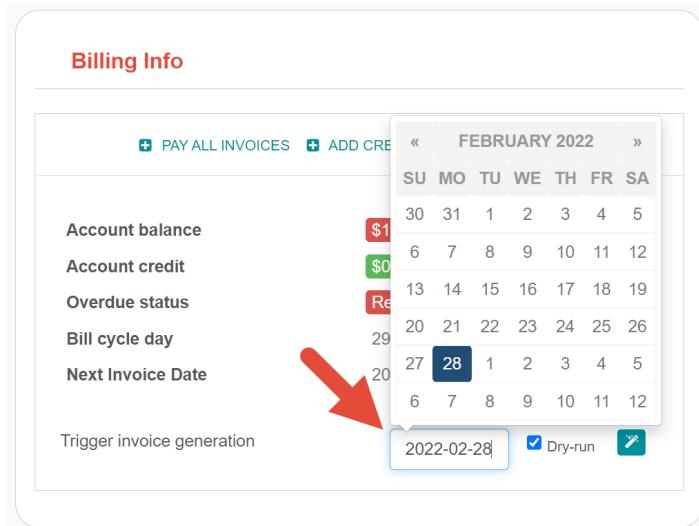
Billing Info

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 Dry-run

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



4. Click the magic wand button:



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



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

Payments

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

For more information on payments, see:

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

Payments Page

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

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



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

The screenshot shows the Kill Bill Payments page. At the top, there is a navigation bar with links for ACCOUNT, SUBSCRIPTIONS, INVOICES, PAYMENTS (which is highlighted in blue), TIMELINE, TAGS, and CUSTOM FIELDS. Below the navigation bar, there is a search bar and a 'CREATE NEW ACCOUNT' button. The main content area is titled 'Payments' and displays a table of payment transactions. The columns in the table are: NUMBER, DATE, AUTH AMOUNT, CAPTURE AMOUNT, REFUND AMOUNT, LAST TRANSACTION STATUS, and EXTERNAL KEY. The table contains four rows of data:

| 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.

| 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-aee44c65e2f83 | 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.

Refund
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

| 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 . |
| 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.

| 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**.

| DATE | TYPE | AMOUNT | TRANSACTION EXTERNAL KEY |
|------|----------|------------|--------------------------------------|
| 18 | PURCHASE | \$25 (USD) | cdf3d494-1c0e-424c-b60f-77276dd6dd03 |

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

| | |
|--|--------------------------------------|
| Amount | 25.0 |
| Currency: USD | |
| Reason | 400 - Canceled Recurring Transaction |
| <input type="checkbox"/> Cancel account subscriptions? | |
| Comment | |
| SAVE | |

3. If necessary, select a different **Reason**. (The chargeback reason is automatically selected based on [Kaui configuration settings](#). However, you can make a different selection.)
4. If the subscription associated with the payment needs to be canceled, check the **Cancel account subscriptions** box.
5. Fill in the **Comment** field (optional). The text you enter here displays on the [Timeline](#) page.
6. Click the **Save** button. Kaui saves the chargeback and displays it as a separate row on the Payments Details page:

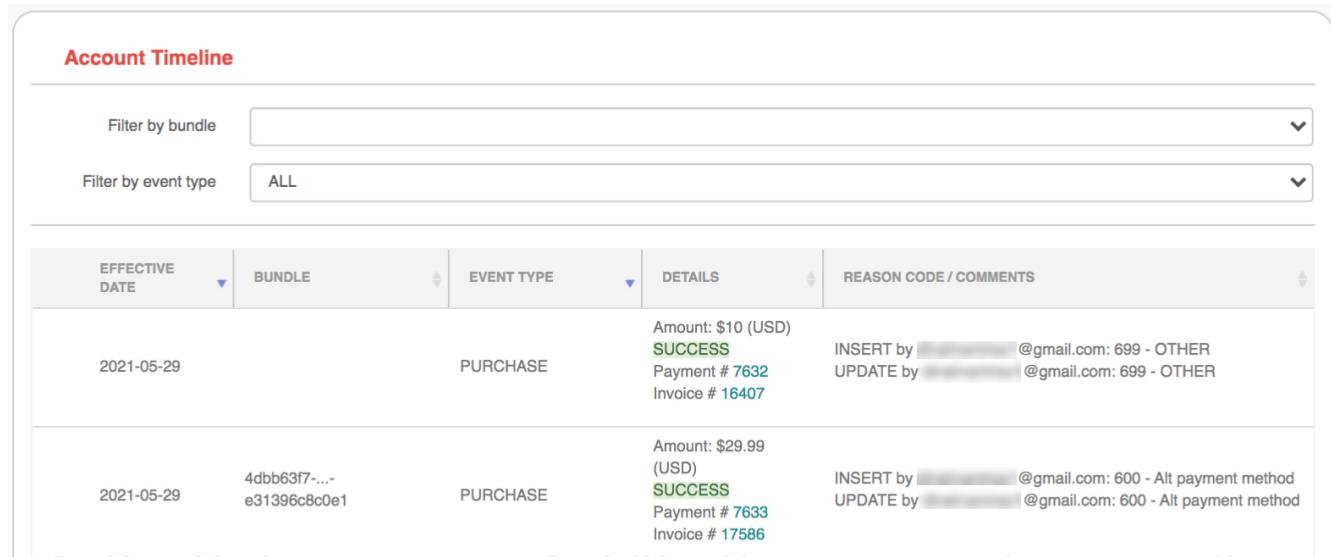
| Payment 9782 | | | | | | | |
|--------------|------------|------------|--------------------------------------|----------|-----------|--------------|-----------------|
| DATE | TYPE | AMOUNT | TRANSACTION EXTERNAL KEY | FIRST ID | SECOND ID | GATEWAY CODE | GATEWAY MESSAGE |
| 2021-10-18 | PURCHASE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

Timeline

Overview

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

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

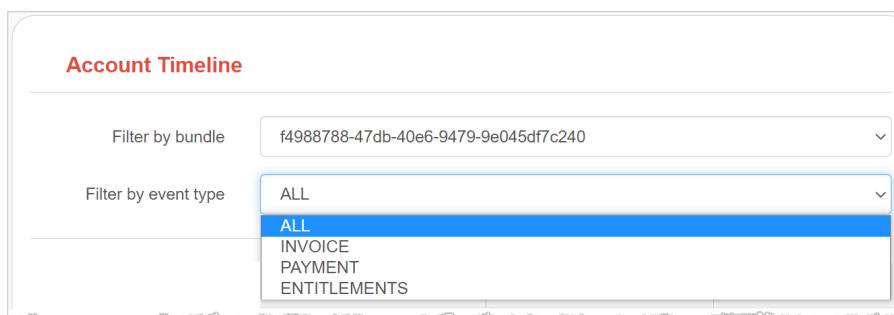


The screenshot shows the 'Account Timeline' page with the following details:

- Filter by bundle:** A dropdown menu containing a single entry: f4988788-47db-40e6-9479-9e045df7c240.
- Filter by event type:** A dropdown menu with options: ALL (selected), INVOICE, PAYMENT, and ENTITLEMENTS.
- Table Headers:** EFFECTIVE DATE, BUNDLE, EVENT TYPE, DETAILS, and REASON CODE / COMMENTS.
- Table Data:**
 - Row 1: EFFECTIVE DATE: 2021-05-29, BUNDLE: f4988788-47db-40e6-9479-9e045df7c240, EVENT TYPE: PURCHASE, DETAILS: Amount: \$10 (USD)
SUCCESS
Payment # 7632
Invoice # 16407, REASON CODE / COMMENTS: INSERT by [redacted] @gmail.com: 699 - OTHER
UPDATE by [redacted] @gmail.com: 699 - OTHER
 - Row 2: EFFECTIVE DATE: 2021-05-29, BUNDLE: 4dbb63f7-...-e31396c8c0e1, EVENT TYPE: PURCHASE, DETAILS: Amount: \$29.99 (USD)
SUCCESS
Payment # 7633
Invoice # 17586, REASON CODE / COMMENTS: INSERT by [redacted] @gmail.com: 600 - Alt payment method
UPDATE by [redacted] @gmail.com: 600 - Alt payment method

On the Timeline page, you can:

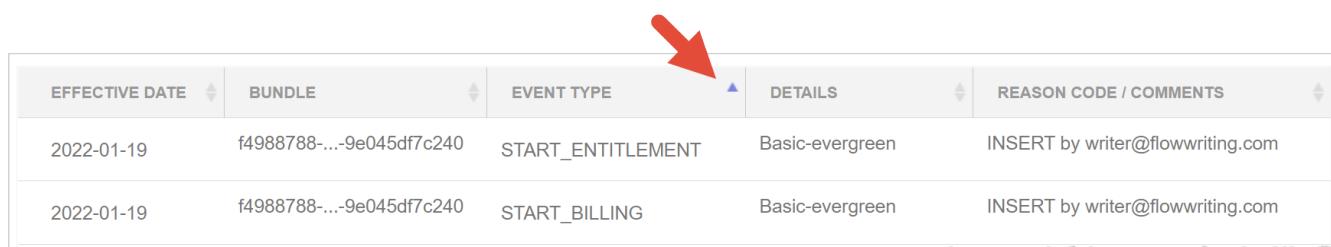
- **Filter events:** Make selections in the **Filter by event type** or **Filter by bundle** fields to display only specific events (e.g., PURCHASE, INVOICE) and/or by a specific subscription bundle.



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

- Filter by bundle:** A dropdown menu containing a single entry: f4988788-47db-40e6-9479-9e045df7c240.
- Filter by event type:** A dropdown menu with options: ALL (selected), 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.



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

- Table Headers:** EFFECTIVE DATE, BUNDLE, EVENT TYPE, DETAILS, and REASON CODE / COMMENTS.
- Table Data:**
 - Row 1: EFFECTIVE DATE: 2022-01-19, BUNDLE: f4988788-...-9e045df7c240, EVENT TYPE: START_ENTITLEMENT, DETAILS: Basic-evergreen, REASON CODE / COMMENTS: INSERT by writer@flowwriting.com
 - Row 2: EFFECTIVE DATE: 2022-01-19, BUNDLE: f4988788-...-9e045df7c240, EVENT TYPE: START_BILLING, DETAILS: Basic-evergreen, REASON CODE / COMMENTS: INSERT by writer@flowwriting.com

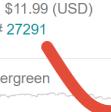
- **Open linked documents:** Click the document link in the **Details** column.

| 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 by SubscriptionBaseTransition |

[Invoice 27291](#) [View Customer Invoice Html](#)

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

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



Tenants

Overview

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

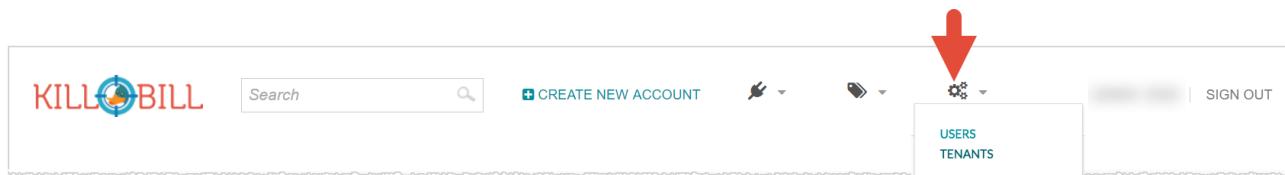
Additional Tenant Resources

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

Create a Tenant

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

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



Kaui displays a list of tenants on the Tenants screen:

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

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

Kaui displays the Add New Tenant screen:

Add New Tenant

| | |
|------------|--------|
| Name | t_demo |
| API Key | t_demo |
| API Secret | ***** |

SAVE

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



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

4. Click the **Save** button.

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

Tenant was successfully configured

Tenant Details

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

Allowed Users

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

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

Existing Plans + Enable XML View

Tenant Configuration Page

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

The screenshot shows the Kill Bill Tenant Configuration interface. At the top, there's a navigation bar with the Kill Bill logo, a search bar, account creation options, and user authentication. Below the header, four main sections are highlighted with red arrows and numbers:

- 1 Tenant Details**: A box containing basic tenant information: Name: t_demo, Tenant ID: 2a381717-704d-48bf-ae7d-32a1fc58b823, and API Key: t_demo.
- 2 Useful Links**: A box listing useful links such as Parked accounts, AUTO_INVOICING_OFF accounts, AUTO_PAY_OFF accounts, PENDING payments, UNKNOWN and PLUGIN_FAILURE payments, and Queues.
- 3 Allowed Users**: A table showing one user named admin.
- 4 Tenant Configuration Tabs**: A row of tabs: Catalog Show, Overdue Show, Invoice Template, Invoice Translation, Catalog Translation, and Plugin Config. The Catalog Show tab is currently selected.

1 Tenant Details

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

2 Useful Links

Click on a link to go to the associated list.

3 Allowed Users

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

By default, the admin user has access to the tenant.

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

4 Tenant Configuration Tabs

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

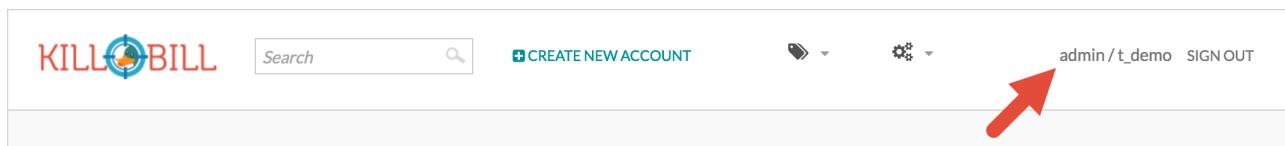
- [Catalog Show](#)—Create and manage catalog XML files.
- [Overdue Show](#)—Create and manage the XML configuration file that helps to control Kill Bill's overdue (dunning) functionality.
- [Invoice Template](#)—Upload invoice template files.
- [Invoice Translation](#)—Upload translated invoice files.

- **Catalog Translation**—Upload translated catalog strings files.
- **Plugin Config**—Upload plugin configuration files. *Currently undocumented.*

Add an Allowed User to the Tenant

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

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



Kauai displays the Tenant Configuration page.

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

A screenshot of the Tenant Configuration page. It has two main sections: 'Tenant Details' on the left and 'Useful Links' on the right. The 'Tenant Details' section shows the tenant name 'bob', tenant ID, and API key. The 'Useful Links' section lists various account statuses. Below these, there's a table titled 'Allowed Users' with columns 'NAME' and 'DESCRIPTION'. A single row shows 'admin'. To the left of the table, the text 'Allowed Users' is followed by a blue plus icon with a white plus sign. A red arrow points to this plus icon.

Kauai displays the Add Allowed User pop-up.

A screenshot of the 'Add Allowed User' pop-up window. It has a title bar 'Add Allowed User' and an 'X' button. Inside, there's a 'User name' input field and a large green 'ADD' button.

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

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

Remove a User from the Tenant

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



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

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

The screenshot shows the Kill Bill tenant configuration interface. At the top right, there is a user session indicator showing "admin / t_demo". A red arrow points to this text. To the right of the arrow are the "SIGN OUT" link and other user-related icons.

Kaui displays the Tenant Configuration page.

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

The screenshot shows the "Tenant Configuration" page. On the left, under "Tenant Details", the tenant is identified as "Name: bob" and "Tenant ID: b6f05279-3fa3-4354-be65-677571853169". On the right, under "Useful Links", there is a list of links including "Parked accounts", "AUTO_INVOICING_OFF accounts", "AUTO_PAY_OFF accounts", "PENDING payments", "UNKNOWN and PLUGIN_FAILURE payments", and "Queues". Below these sections is the "Allowed Users" table. The table has two columns: "NAME" and "DESCRIPTION". It lists one user, "mary", with the description "Managed User". To the right of the "NAME" column, there is a small table with a "x" icon, which is the delete button. A red arrow points to this "x" icon.

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

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

Users, Roles, and Permissions

Overview

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

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

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

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

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

Before You Begin

Before you begin working with users, make sure that:

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

In addition, you should already have at least one [tenant](#) set up in Kaui.

Additional Resources

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

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

Managing Users with a Third-Party System

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

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

Managing Users with Kill Bill

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

Create a User Role

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

To create a user role:

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

Add New Role Definition

Role name

Permissions

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

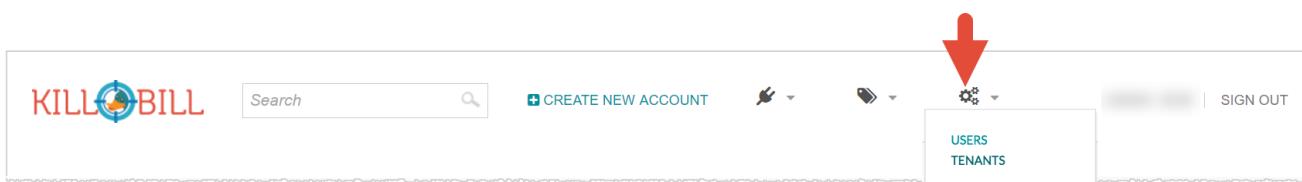
SAVE

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.

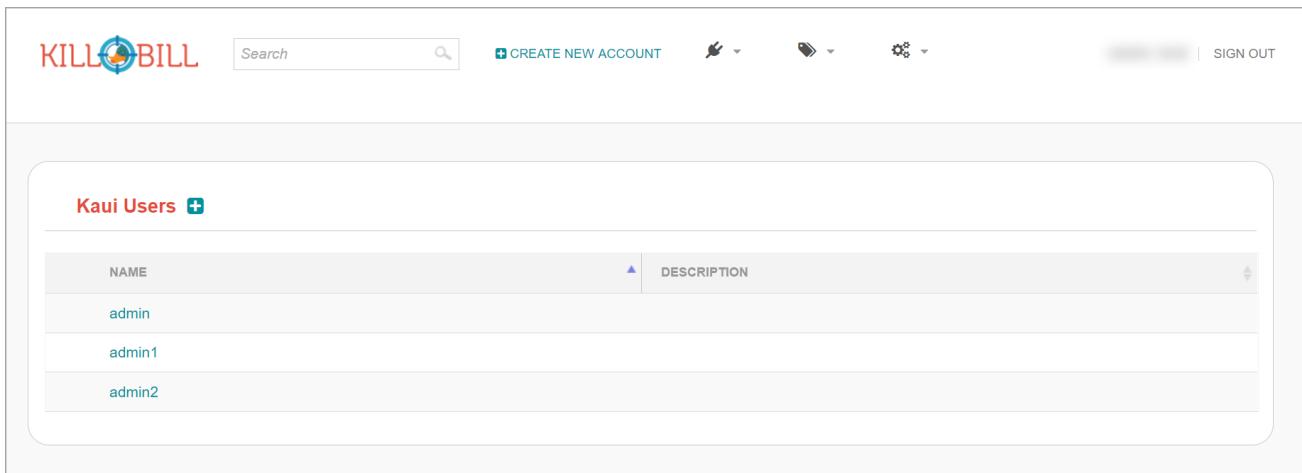
Open the User List

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:



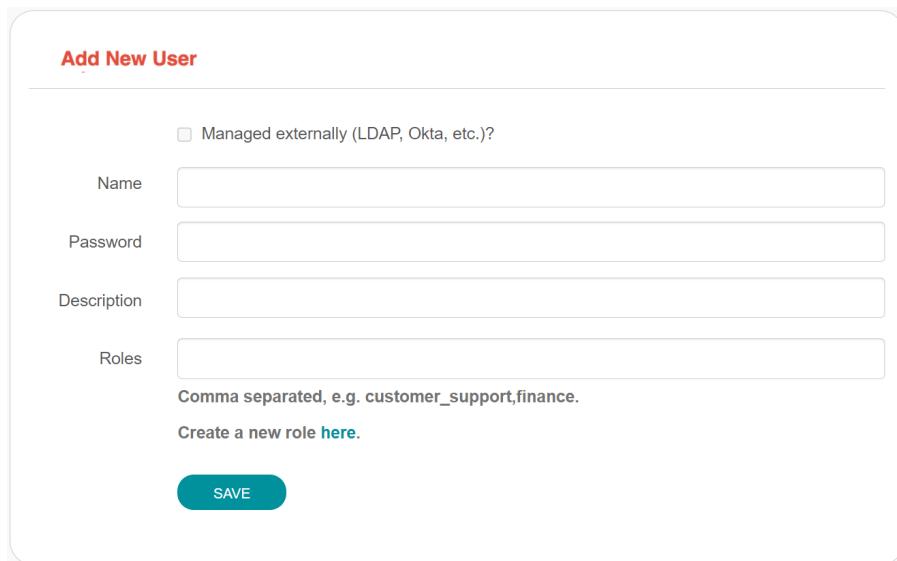
The screenshot shows the Kill Bill application's user management interface. At the top, there is a navigation bar with the Kill Bill logo, a search bar, and links for 'CREATE NEW ACCOUNT', 'SIGN OUT', and other system settings. Below the navigation, a section titled 'Kauai Users' contains a table with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

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

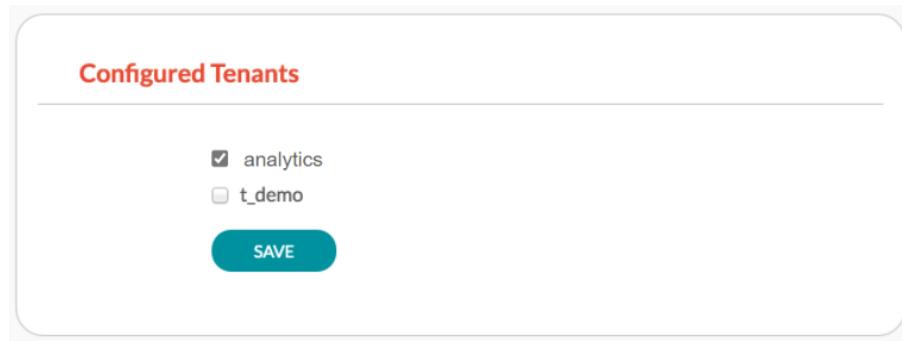
1. [Open the users list.](#)
2. Select the plus icon () next to **Kauai Users**.

Kauai displays the Add New User pop-up:



The 'Add New User' pop-up window has a title bar 'Add New User'. It contains several input fields and a checkbox. The fields are labeled 'Name', 'Password', 'Description', and 'Roles'. Below the 'Roles' field, there is a note: 'Comma separated, e.g. customer_support,finance.' and a link 'Create a new role [here](#)'. At the bottom right is a blue 'SAVE' button.

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



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

Edit a User

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

1. Open the user list.

A screenshot of the Kill Bill user list interface. The top navigation bar includes the Kill Bill logo, a search bar, a "CREATE NEW ACCOUNT" button, and user profile icons. Below the header is a table titled "Kaui Users" with a plus sign icon. The table has columns for "NAME" and "DESCRIPTION". The data shows four users: admin, admin1, and admin2. The "admin" row is currently selected, indicated by a blue border.

2. Select the user you want to edit.

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

The screenshot shows two overlapping interface components. The top component is titled "User Details" and contains fields for "Name: admin1", "Description:", and "Roles:". The bottom component is titled "Configured Tenants" and lists several tenant names with checkboxes: bob (checked), tenant, tenant2, greylogin, multi3, and analytics. A "SAVE" button is located at the bottom right of the tenants section.

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

Kaui displays the Update User screen:

The "Update User" screen includes the following fields:

- A checkbox for "Managed externally (LDAP, Okta, etc.)?" which is unchecked.
- A "Name" field containing a blurred value.
- A "Password" field.
- A "Description" field with the value "Managed User".
- A "Roles" field with the value "consumer-role". Below it is a note: "Comma separated, e.g. customer_support,finance." and a link: "Create a new role [here](#)".

 A "SAVE" button is located at the bottom right.

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. |

| Field | Description |
|-------------|--|
| 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

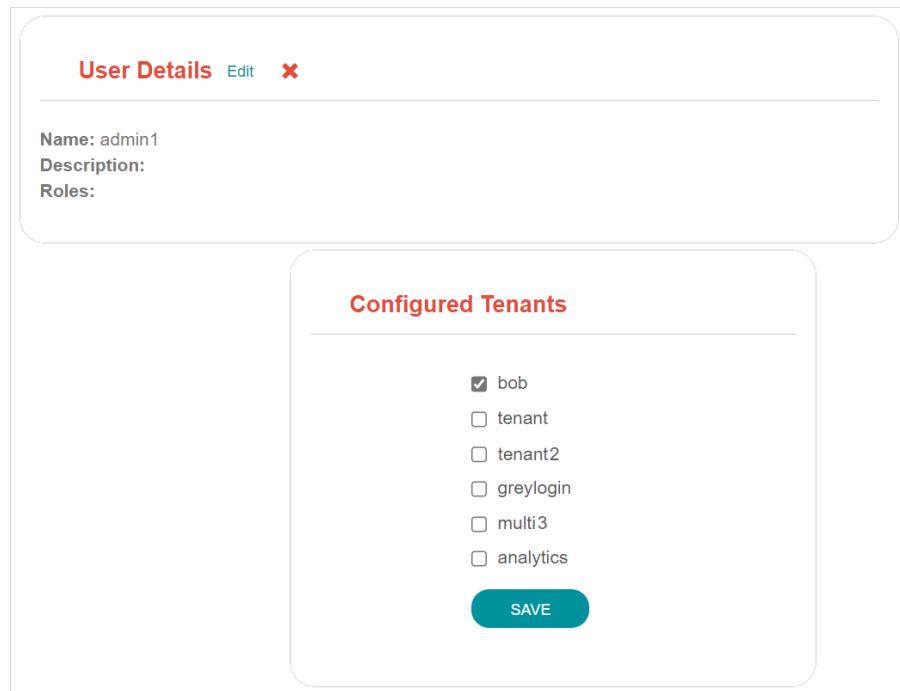
The following steps explain how to delete a user from the system (i.e., for both Kaui and Kill Bill). Deleting a user also removes the user's access to any assigned tenants.

1. Open the user list.

| 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).



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

After you successfully log in, Kaui deletes the user.

Catalog

Overview

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

- [View catalog products and plans](#)
- [Create a simple catalog](#)
- [Upload an XML catalog](#)
- [View the catalog as XML](#)
- [Delete a catalog](#)
- [Download the catalog](#)

On this tab, you can also [add a currency to a plan](#).

Additional Catalog Resources

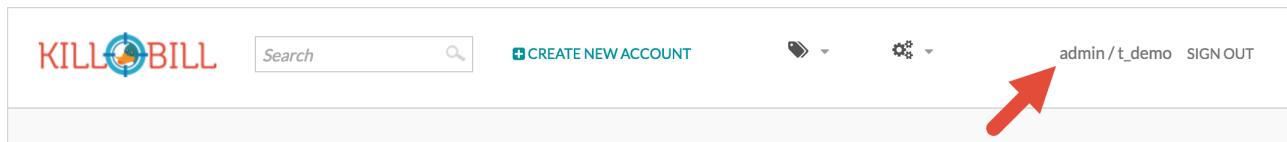
- [Catalog API](#)
- "Catalog" section in *Subscription Guide*

View Catalog Products and Plans

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

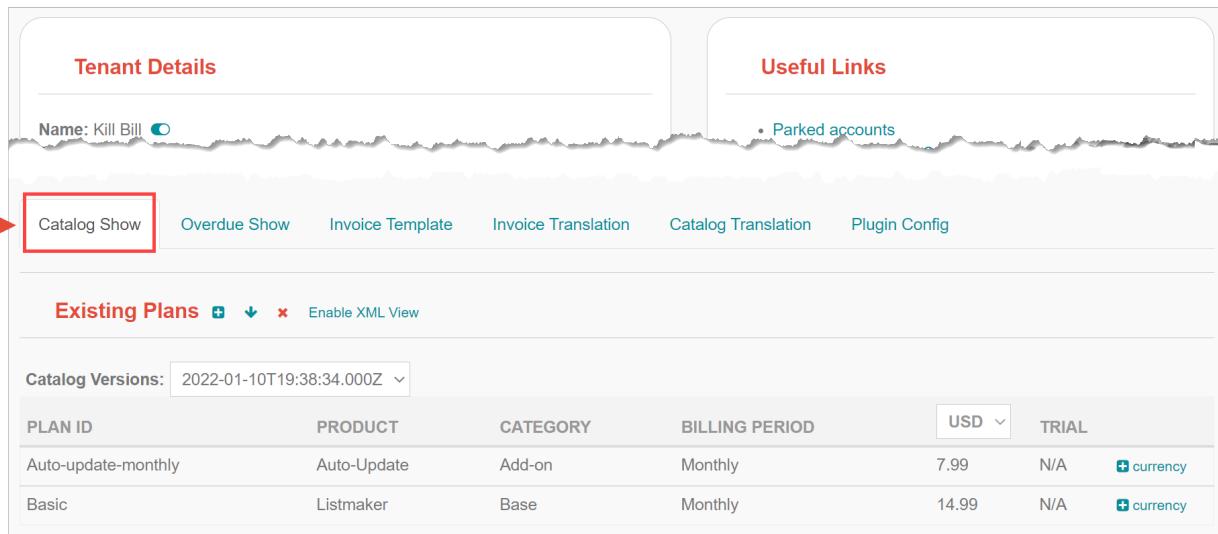
To get there:

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



Kaui displays the Tenant Configuration page.

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

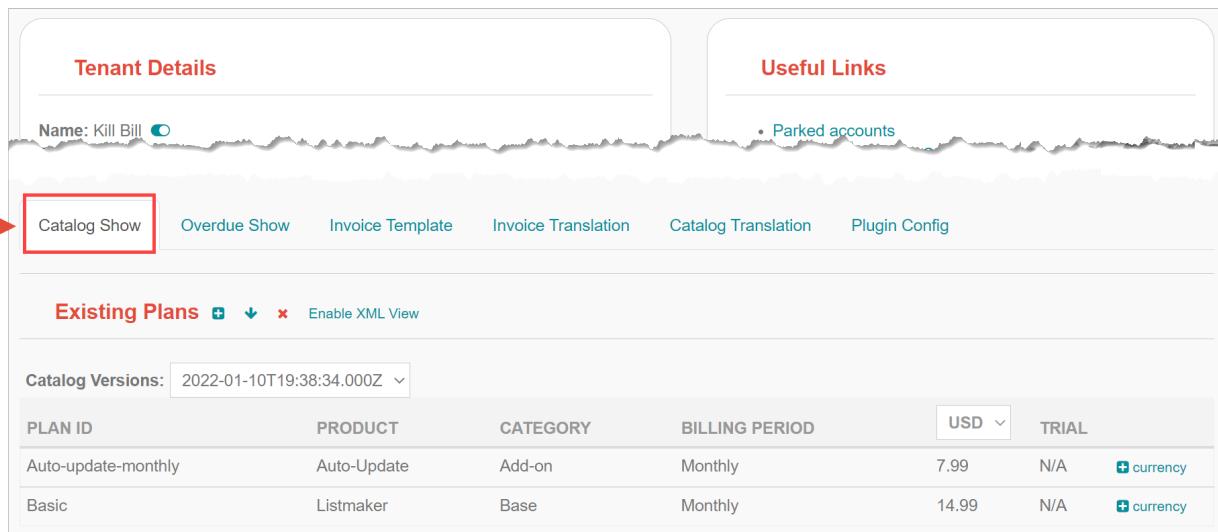


The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Catalog Show" tab is highlighted with a red box and a red arrow pointing to it. Other tabs visible include "Overdue Show", "Invoice Template", "Invoice Translation", "Catalog Translation", and "Plugin Config". A "Useful Links" section on the right includes a link to "Parked accounts". Below the tabs is a section titled "Existing Plans" with a "Catalog Versions" dropdown set to "2022-01-10T19:38:34.000Z". A table lists two plans: "Auto-update-monthly" (Auto-Update, Add-on, Monthly, \$7.99, N/A) and "Basic" (Listmaker, Base, Monthly, \$14.99, N/A). The table has columns for PLAN ID, PRODUCT, CATEGORY, BILLING PERIOD, USD, and TRIAL.

| 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.



The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Catalog Show" tab is highlighted with a red box and a red arrow pointing to it. Other tabs visible include "Overdue Show", "Invoice Template", "Invoice Translation", "Catalog Translation", and "Plugin Config". A "Useful Links" section on the right includes a link to "Parked accounts". Below the tabs is a section titled "Existing Plans" with a "Catalog Versions" dropdown set to "2022-01-10T19:38:34.000Z". A table lists two plans: "Auto-update-monthly" (Auto-Update, Add-on, Monthly, \$7.99, N/A) and "Basic" (Listmaker, Base, Monthly, \$14.99, N/A). The table has columns for PLAN ID, PRODUCT, CATEGORY, BILLING PERIOD, USD, and TRIAL.

| 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**.

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

Add a Currency to a Plan

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

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 lists two plans: "Auto-update-monthly" and "Basic". The "Currency" column for both plans shows "USD" and a "currency" icon. A "Catalog Versions" dropdown is set to "2022-01-10T19:38:34.000Z".

| 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)" form. It has fields for "Plan ID" (set to "Auto-update-monthly"), "Amount" (empty), and "Currency" (set to "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.

Upload an XML Catalog

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



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

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



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

To upload an XML catalog in Kaui:

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

The screenshot shows the Tenant Configuration page. At the top left is the "Tenant Details" section with a "Name: Kill Bill" field. To the right is the "Useful Links" section with a "Parked accounts" link. Below these are several tabs: "Catalog Show" (which has a red arrow pointing to it), "Overdue Show", "Invoice Template", "Invoice Translation", "Catalog Translation", and "Plugin Config". Underneath the tabs is a section titled "Existing Plans" with a "Enable XML View" link. A dropdown menu for "Catalog Versions" shows "2022-01-10T19:38:34.000Z". Below this is a table of catalog 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**.

Kaui opens the Catalog Configuration screen:

The screenshot shows the "Catalog Configuration" screen. At the top is a header with "Catalog Configuration" and "Enable Advanced Configuration (Upload XML)". Below are several input fields:

- Product Category: Base
- Product Name: (empty)
- Plan Name: (empty)
- Amount: 0
- Currency: USD
- Billing Period: Monthly
- Trial Length: 0
- Trial Time Unit: Unlimited

A "SAVE" button is at the bottom right.

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

Kaui displays an upload screen:

Advanced Configuration [Enable Simple Configuration](#)

No file chosen

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](#)

catalog_2022-01-10T19_38_34.000Z.xml

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: [2022-01-10T19:38:34.000Z](#)

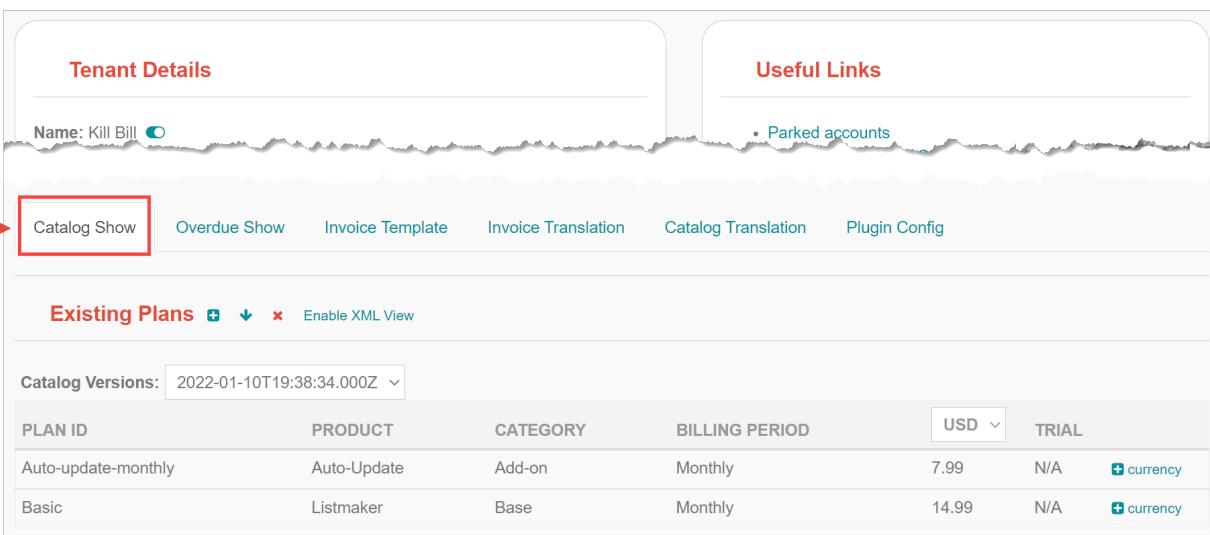
| PLAN ID | PRODUCT | CATEGORY | BILLING PERIOD | USD | TRIAL |
|-----------------------|---------------|----------|----------------|-----|--------------------------------|
| remotecontrol-monthly | RemoteControl | Add-on | Monthly | 15 | N/A + currency |
| standard-monthly | Standard | Base | Monthly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



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

View the Catalog as XML

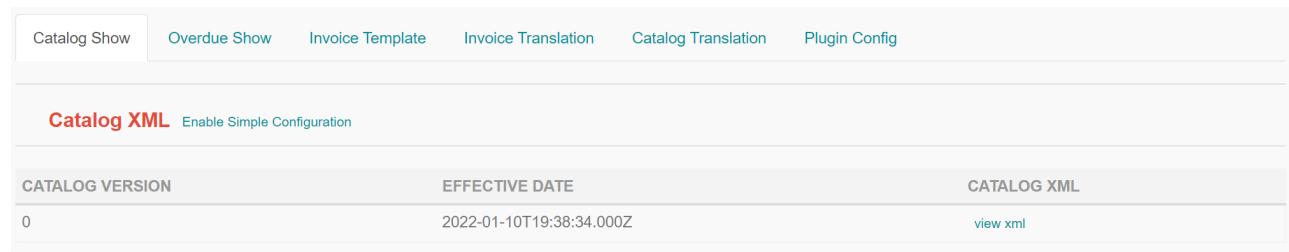
1. Go to the [Catalog Show tab](#) on the Tenant Configuration page.



The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Catalog Show" tab is highlighted with a red arrow. Other tabs visible include Overdue Show, Invoice Template, Invoice Translation, Catalog Translation, and Plugin Config. A "Useful Links" section on the right includes a link to "Parked accounts". Below the tabs is a section titled "Existing Plans" with a dropdown for "Catalog Versions" set to "2022-01-10T19:38:34.000Z". A table lists two plans: "Auto-update-monthly" (Auto-Update, Add-on, Monthly, USD, N/A) and "Basic" (Listmaker, Base, Monthly, 14.99, N/A).

2. Click **Enable XML View**.

Kaui displays the a list of catalog versions:



The screenshot shows the "Catalog XML" view. It displays a single catalog version (version 0) effective from 2022-01-10T19:38:34.000Z. There is a "view xml" link available.

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>
</catalog>
```

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

Delete a Catalog

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

The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Catalog Show" tab is highlighted with a red arrow and a red box. Other tabs include "Overdue Show", "Invoice Template", "Invoice Translation", "Catalog Translation", and "Plugin Config". A "Useful Links" section on the right includes a link to "Parked accounts". Below the tabs is a section titled "Existing Plans" with a "Catalog Versions" dropdown set to "2022-01-10T19:38:34.000Z". A table lists two plans: "Auto-update-monthly" (Auto-Update, Add-on, Monthly, \$7.99, N/A) and "Basic" (Listmaker, Base, Monthly, \$14.99, N/A). The table has columns for PLAN ID, PRODUCT, CATEGORY, BILLING PERIOD, USD, and TRIAL.

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

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

Download the Catalog

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

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

The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Catalog Show" tab is highlighted with a red arrow and a red box. Other tabs include "Overdue Show", "Invoice Template", "Invoice Translation", "Catalog Translation", and "Plugin Config". A "Useful Links" section on the right includes a link to "Parked accounts". Below the tabs is a section titled "Existing Plans" with a "Catalog Versions" dropdown set to "2022-01-10T19:38:34.000Z". A table lists two plans: "Auto-update-monthly" (Auto-Update, Add-on, Monthly, \$7.99, N/A) and "Basic" (Listmaker, Base, Monthly, \$14.99, N/A). The table has columns for PLAN ID, PRODUCT, CATEGORY, BILLING PERIOD, USD, and TRIAL.

| 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 Tenant Configuration page for a tenant named "Kill Bill". The "Catalog Show" tab is selected. A red arrow points to the down arrow icon in the "Existing Plans" section. The "Existing Plans" section also includes a plus sign (+), a red X, and the text "Enable XML View". Below this is a "Catalog Versions" dropdown set to "2022-01-10T19:38:34.000Z".

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

Overdue

Overview

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

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

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

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

In Kaui, overdue configuration is a subset of the full overdue configuration settings. For more information on the full configuration settings and global settings, see the [Overdue System Guide](#).

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

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

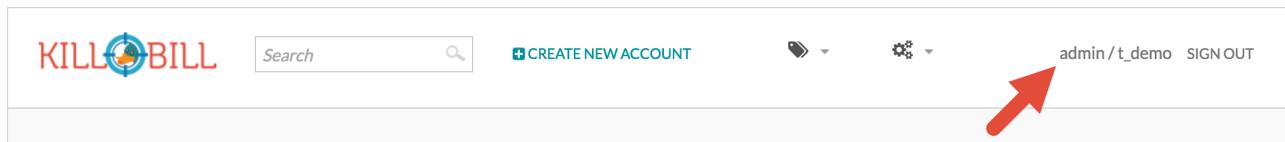
Additional Overdue Resources

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

View Overdue Configuration

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

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



Kaui displays the Tenant Configuration page.

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

The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Overdue Show" tab is highlighted with a red box and an arrow pointing to it. Other tabs visible include Catalog Show, Invoice Template, Invoice Translation, Catalog Translation, and Plugin Config. A section titled "Existing Overdue Config" contains a "View Overdue Xml" link. Below this, a message states "No overdue configuration defined for tenant".

Create Overdue Flows

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

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

This screenshot is identical to the one above, showing the Tenant Configuration page for the "Kill Bill" tenant. The "Overdue Show" tab is again highlighted with a red box and arrow. The same sections and messages are present: "Existing Overdue Config" with a "View Overdue Xml" link, and a message about no overdue configuration defined.

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

Kaui opens the Overdue Configuration screen:

The screenshot shows the "Overdue Configuration" screen. At the top, there is a link to "Enable Advanced Configuration (Upload XML)". Below this is a table titled "New Overdue States" with the following columns: EXTERNAL NAME, MESSAGE, BLOCK SUBSCRIPTION CHANGES, SUBSCRIPTION CANCELLATION, DAYS SINCE EARLIEST UNPAID INVOICE, TAG INCLUSION, TAG EXCLUSION, NUMBER OF UNPAID INVOICES, and TOTAL UNPAID INVOICE BALANCE. A "SAVE" button is located at the bottom of the table.

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

Overdue Configuration Enable Advanced Configuration (Upload XML)

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

SAVE

4. Fill in the fields for the current row. For field information, see the [Overdue Configuration Field Descriptions](#) table.
5. To add another overdue configuration row, click **+ new overdue states**.

Overdue Configuration Enable Advanced Configuration (Upload XML)

+ new overdue states 

| NAME | EXTERNAL MESSAGE | BLOCK SUBSCRIPTION CHANGES | SUBSCRIPTION CANCELLATION |
|-------|------------------------------|----------------------------------|------------------------------|
| Clear | Alert regarding your subscri | true | none |

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

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

Existing Overdue Config  [View Overdue Xml](#)

| NAME | EXTERNAL MESSAGE | ACTIONS | CONDITIONS |
|--------------|--------------------|--|--|
| WARNING | Warning State | | <ul style="list-style-type: none"> Time Since earliest unpaid invoice >= 5DAYS Number of unpaid invoices >= 0 Total unpaid invoice balance >= 0 |
| CANCELLATION | Cancellation state | <ul style="list-style-type: none"> Block changes:true Cancel subscriptions:true (policy:END_OF_TERM) | <ul style="list-style-type: none"> Time Since earliest unpaid invoice >= 10DAYS Number of unpaid invoices >= 0 Total unpaid invoice balance >= 0 |



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

Overdue Configuration Field Descriptions

| Field | Description |
|------------------|---|
| Name | The name assigned to the overdue state. |
| External Message | Message text that other plugins, when listening for overdue events, can retrieve and display to the user. <i>(Optional)</i> |

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

Upload an XML Overdue Configuration File

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



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

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

The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The top navigation bar includes tabs for Catalog Show, Overdue Show (which is highlighted with a red box and has a red arrow pointing to it), Invoice Template, Invoice Translation, Catalog Translation, and Plugin Config. Below the tabs, there's a section titled "Existing Overdue Config" with a plus sign icon and a "View Overdue Xml" link. A message states "No overdue configuration defined for tenant". To the right, there's a "Useful Links" section with a link to "Parked accounts".

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

Kaui opens the Overdue Configuration screen:

The screenshot shows the Overdue Configuration screen. At the top, it says "Overdue Configuration" and "Enable Advanced Configuration (Upload XML)". Below that is a table with columns: EXTERNAL NAME, MESSAGE, BLOCK SUBSCRIPTION CHANGES, SUBSCRIPTION CANCELLATION, DAYS SINCE EARLIEST UNPAID INVOICE, TAG INCLUSION, TAG EXCLUSION, NUMBER OF UNPAID INVOICES, and TOTAL UNPAID INVOICE BALANCE. There is a "new overdue states" button above the table. At the bottom is a "SAVE" button.

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

The screenshot shows the "Upload Overdue XML Config" screen. It has a "Choose File" button with "No file chosen" next to it, and a large "UPLOAD" button below it.

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

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

Upload Overdue XML Config [Enable Simple View](#)

Choose File

UPLOAD

- Click the **Upload** button.

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

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

View Overdue Configuration as XML

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

Tenant Details

Name: Kill Bill

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

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

No overdue configuration defined for tenant

Useful Links

- Parked accounts

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

Delete Overdue Flows

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

Tenant Details

Name: Kill Bill

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

Existing Overdue Config View Overdue XML

No overdue configuration defined for tenant

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

Kaui opens the Overdue Configuration screen.

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

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

SAVE

4. Click the **Save** button.

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

Translation Files

Overview

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

- Invoice Template
- Invoice Translation
- Catalog Translation

The screenshot shows a horizontal navigation bar with five tabs: Catalog Show, Overdue Show, Invoice Template (which is highlighted with a red border), Invoice Translation, Catalog Translation, and Plugin Config. Below the tabs is a form area. It contains a 'Choose File' button with the placeholder 'No file chosen', a checkbox labeled 'Manual Pay', and a prominent blue 'UPLOAD' button.

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

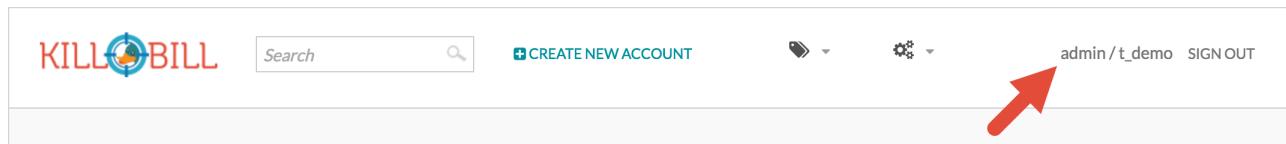
Additional Translation Resources

- [Invoice Templates](#)
- [Email Notification Plugin](#)
- [Internationalization](#)

View Translation Tabs

To get there:

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



Kaui displays the Tenant Configuration page.

2. Scroll down to see the translation tabs:

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

No file chosen

Manual Pay

UPLOAD

Upload a Translation File

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

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

Catalog Show Overdue Show **Invoice Template** Inv

HtmlInvoiceTemplate.mustache

Manual Pay

UPLOAD

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

Catalog Show Overdue Show **Invoice Template** Inv

HtmlInvoiceTemplate.mustache

Manual Pay

UPLOAD

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

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

InvoiceTranslation_en_US.properties

Locale en_US

UPLOAD

6. Click the **Upload** button.

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

Tags

Overview

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

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



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

Types of Tags

Kill Bill has two types of tags:

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



Note: Kill Bill does not include default user tags.

You can view all available tags on the [Tag Definitions page](#).

About Tag Definitions

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

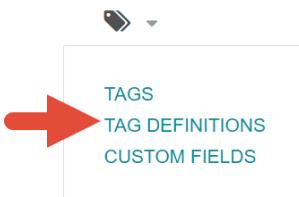
Additional Tag Resources

API Reference:

- [Tag](#)
- [Tag Definition](#)

View All Tags

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



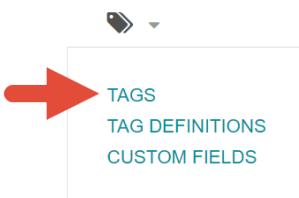
Kaui displays the Tag Definitions page.

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

View Objects with Attached Tags

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

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



Kaui displays the Tags page.

| Tags | | | |
|--------------------------------------|--------------------------------------|-------------|---------------------|
| Show | 50 | entries | Search: |
| TAG ID | OBJECT ID | OBJECT TYPE | TAG DEFINITION NAME |
| 3e5b5002-5719-47a8-ae86-552d5cf8b4d3 | 1033706a-07de-4ed3-b0e0-0f1d09639b90 | ACCOUNT | red |
| 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](#)".

Tag definition successfully created

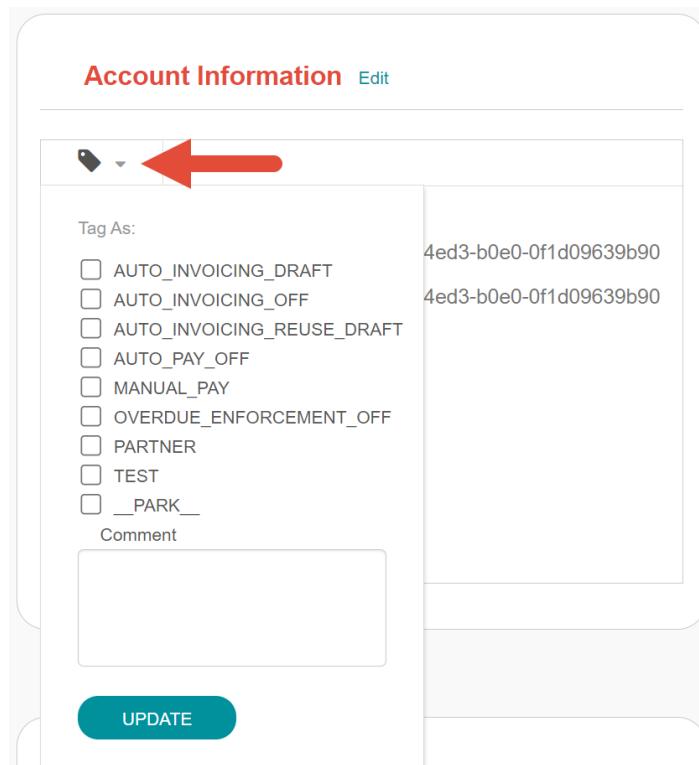
| ID | NAME | DESCRIPTION | SYSTEM TAG? | APPLICABLE TYPES | |
|---------------------------|--------------|---------------------------------------|-------------|------------------|-------------------------|
| a7c8c525-...-f9e0e043e2c2 | yellow | yellow tag | false | ACCOUNT | Destroy |
| 5135a1b0-...-4de5679e5833 | 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 | |

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

Attach or Remove a Tag

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

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



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

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

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

Custom Fields

Overview

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

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



Note: Kill Bill does not include default custom fields.

Additional Custom Tag Resources

- API Reference for [Custom Field](#)
- "Custom Fields" section for object types in the [API Reference](#).

View All Custom Fields

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

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



Kaui displays the Custom Fields page:

| OBJECT ID | OBJECT TYPE | NAME | VALUE |
|--------------------------------------|-------------|------------|-----------|
| 379795d6-507a-4000-83ed-6960021a8df1 | ACCOUNT | importance | very high |
| 1033706a-07de-4ed3-b0e0-0f1d09639b90 | ACCOUNT | importance | high |



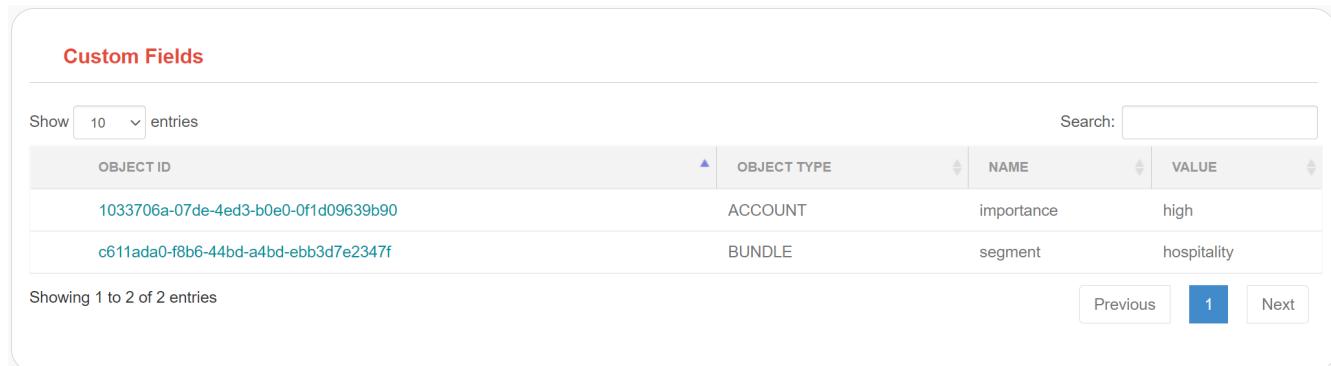
Tip: On the Custom Fields page, you can open the object (account, invoice, etc.) by clicking the link in the Object ID column.

View Custom Fields for an Account

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

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

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



The screenshot shows a table titled "Custom Fields" with two entries. The columns are labeled: OBJECT ID, OBJECT TYPE, NAME, and VALUE. The first entry is for an ACCOUNT object named "importance" with value "high". The second entry is for a BUNDLE object named "segment" with value "hospitality".

| Custom Fields | | | |
|--------------------------------------|-------------|------------|-------------|
| Show 10 entries | Search: | | |
| OBJECT ID | OBJECT TYPE | NAME | VALUE |
| 1033706a-07de-4ed3-b0e0-0f1d09639b90 | ACCOUNT | importance | high |
| c611ada0-f8b6-44bd-a4bd-ebb3d7e2347f | BUNDLE | segment | hospitality |

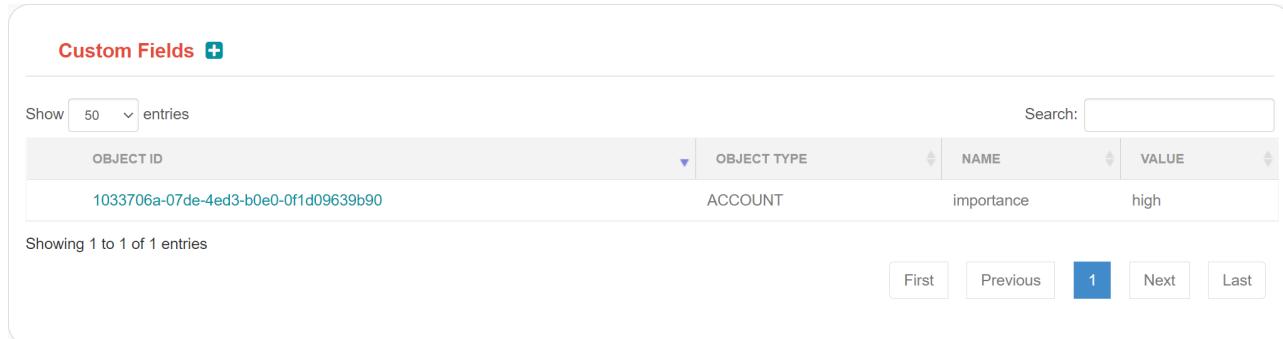
Showing 1 to 2 of 2 entries

Previous 1 Next

Create and Attach a Custom Field

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

1. Open the Custom Fields page as explain in "[View All Custom Fields](#)".



The screenshot shows a table titled "Custom Fields" with one entry. The columns are labeled: OBJECT ID, OBJECT TYPE, NAME, and VALUE. The entry is for an ACCOUNT object named "importance" with value "high".

| Custom Fields + | | | |
|--|-------------|------------|-------|
| Show 50 entries | Search: | | |
| OBJECT ID | OBJECT TYPE | NAME | VALUE |
| 1033706a-07de-4ed3-b0e0-0f1d09639b90 | ACCOUNT | importance | high |

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

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

Kaui displays the Add New Custom Field screen:

Add New Custom Field

Object ID:

Object type: ACCOUNT

Name:

Value:

SAVE

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

Custom Fields

Show 50 entries Search:

| OBJECT ID | OBJECT TYPE | NAME | VALUE |
|--------------------------------------|-------------|------------|-----------|
| 379795d6-507a-4000-83ed-6960021a8df1 | ACCOUNT | importance | very high |
| 1033706a-07de-4ed3-b0e0-0f1d09639b90 | ACCOUNT | importance | high |

Showing 1 to 2 of 2 entries

First Previous **1** Next Last

Custom Field Descriptions

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

Plugin Manager

Overview

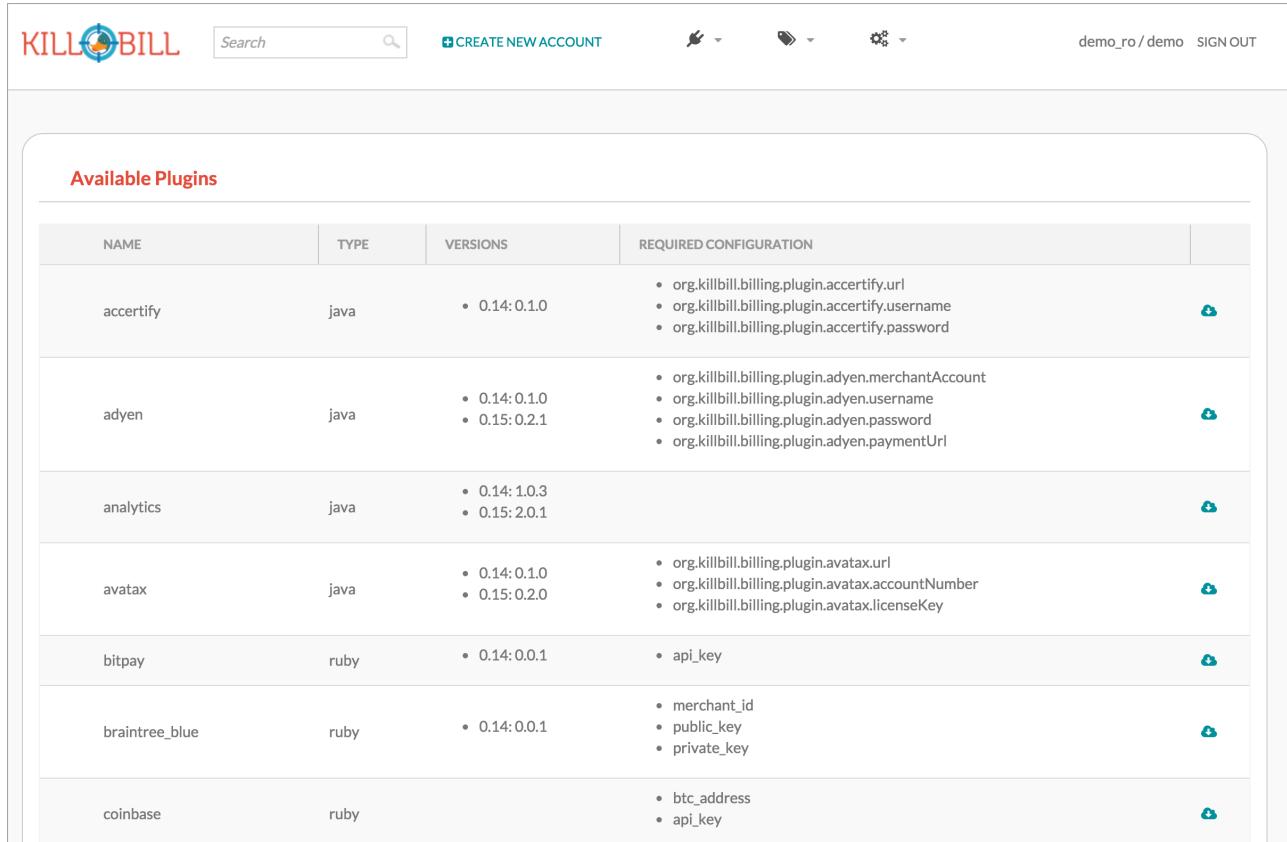
The KPM page is only available when the KPM plugin has been deployed.

It lets you install and uninstall plugins, as well as start, stop, and restart them at runtime:

Install a Plugin

In order to deploy a plugin via Kaui, you need to do the following:

1. Click on the plugin icon at the top and select **kpm**.



The screenshot shows the Kill Bill web interface with the "Available Plugins" section highlighted. The table lists various plugins with their names, types, versions, required configuration, and download icons.

| NAME | TYPE | VERSIONS | REQUIRED CONFIGURATION |
|----------------|------|--------------------------------|---|
| accertify | java | • 0.14: 0.1.0 | <ul style="list-style-type: none"> org.killbill.billing.plugin.accertify.url org.killbill.billing.plugin.accertify.username org.killbill.billing.plugin.accertify.password |
| adyen | java | • 0.14: 0.1.0 • 0.15: 0.2.1 | <ul style="list-style-type: none"> org.killbill.billing.plugin.adyen.merchantAccount org.killbill.billing.plugin.adyen.username org.killbill.billing.plugin.adyen.password org.killbill.billing.plugin.adyen.paymentUrl |
| analytics | java | • 0.14: 1.0.3 • 0.15: 2.0.1 | |
| avatax | java | • 0.14: 0.1.0 • 0.15: 0.2.0 | <ul style="list-style-type: none"> org.killbill.billing.plugin.avatax.url org.killbill.billing.plugin.avatax.accountNumber org.killbill.billing.plugin.avatax.licenseKey |
| bitpay | ruby | • 0.14: 0.0.1 | <ul style="list-style-type: none"> api_key |
| braintree_blue | ruby | • 0.14: 0.0.1 | <ul style="list-style-type: none"> merchant_id public_key private_key |
| coinbase | ruby | | <ul style="list-style-type: none"> btc_address api_key |

2. Click on **Install New Plugin**.
3. Click on the download icon next to the plugin that you wish to install.
4. Wait a few minutes, then refresh the web page.

Once the plugin download is complete, it will appear in Stopped status. To start the plugin, click on the **Start** button.

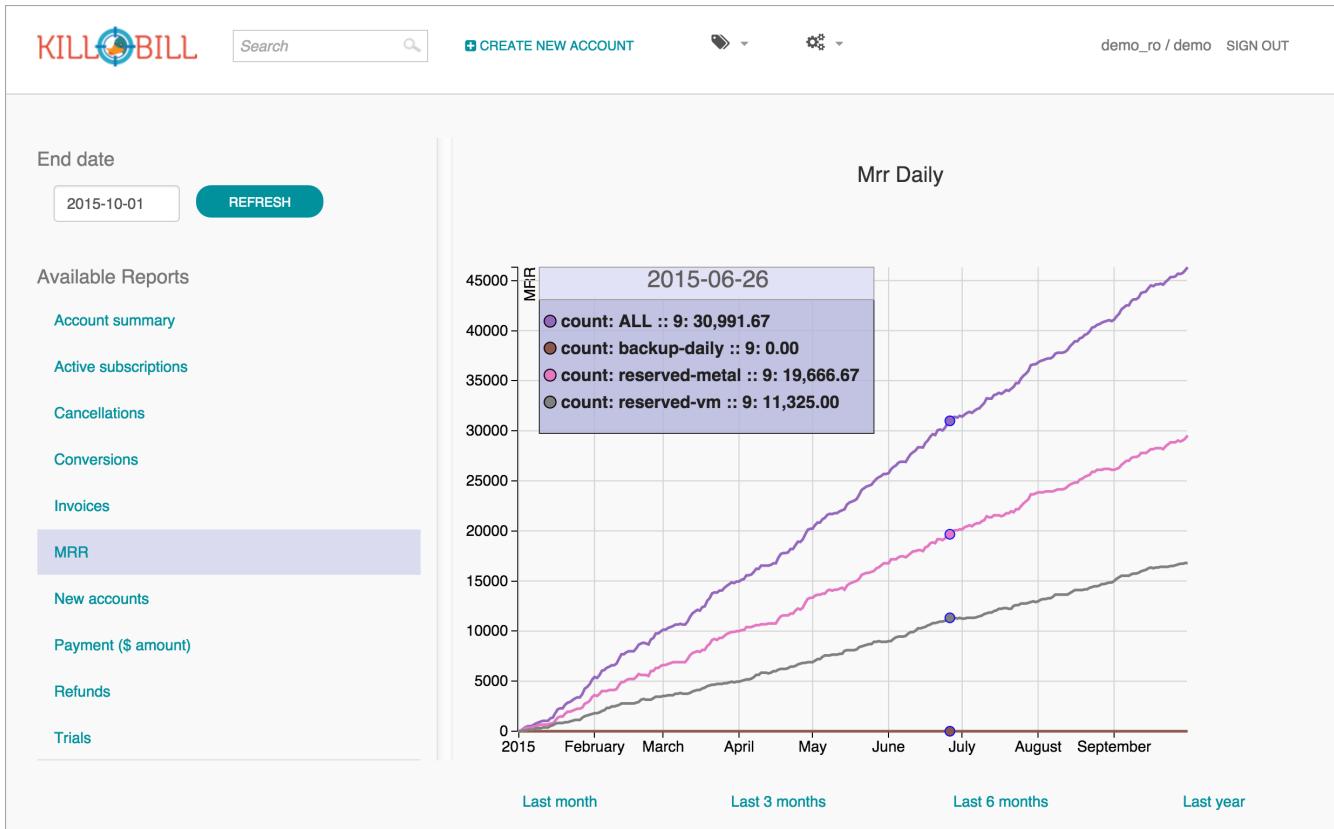
Analytics

Overview

The Analytics page is only available when the analytics plugin has been deployed.

It lets you display custom metrics with filtering capabilities. We provide a few by default, but the analytics framework lets you add any desired metric.

Here we show the MRR by plan over time:



For more information, see the [Analytics Guide](#).