



## Kaui Guide

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# Table of Contents

|   |    |
|---|----|
| Introduction .....                              | 1  |
| What Is Kauï? .....                             | 1  |
| How to Use This Guide .....                     | 1  |
| About Screenshots .....                         | 2  |
| Other Learning Resources .....                  | 2  |
| Getting Started .....                           | 4  |
| First-Time Login .....                          | 4  |
| Log In to Kauï .....                            | 4  |
| Log Out of Kauï .....                           | 5  |
| Homepage Layout .....                           | 5  |
| Icons .....                                     | 6  |
| Grids/Tables .....                              | 7  |
| Basic Search .....                              | 8  |
| Advanced Search .....                           | 10 |
| Accounts .....                                  | 13 |
| Account Page Layout .....                       | 13 |
| Create an Account .....                         | 15 |
| Account Field Descriptions .....                | 17 |
| Edit an Account .....                           | 18 |
| Add Additional Contact Emails .....             | 19 |
| Delete Additional Contact Emails .....          | 21 |
| Close an Account .....                          | 21 |
| Link to Parent Account .....                    | 22 |
| Add Credit to an Account .....                  | 24 |
| Create a Charge on an Account .....             | 25 |
| Payment Methods .....                           | 28 |
| About Payment Plugin Names .....                | 28 |
| View Payment Method Details .....               | 28 |
| Set a Payment Method as the Default .....       | 29 |
| Add Payment Method .....                        | 29 |
| Applying Transactions to a Payment Method ..... | 31 |
| Process Transaction Field Descriptions .....    | 33 |
| Delete Payment Method .....                     | 34 |
| Subscriptions .....                             | 36 |
| Overview .....                                  | 36 |
| Open Subscriptions Page .....                   | 36 |
| Add a Subscription .....                        | 36 |
| Add Subscription Field Descriptions .....       | 37 |

|   |    |
|---|----|
| Add an Add-On Product to a Subscription ..... | 38 |
| Add New Add-On Field Descriptions .....       | 38 |
| Pause/Resume Subscriptions .....              | 39 |
| Change a Subscription .....                   | 40 |
| Cancel a Subscription .....                   | 42 |
| Update the Billing Cycle Day .....            | 43 |
| Invoices .....                                | 45 |
| Invoices Page .....                           | 45 |
| Invoice Details Page .....                    | 45 |
| Open Invoice Details .....                    | 46 |
| Make a Payment on an Invoice .....            | 46 |
| Process Payment Field Descriptions .....      | 47 |
| Write Off or Void an Invoice .....            | 48 |
| Pay All Unpaid Invoices .....                 | 50 |
| Generate a Dry-Run Invoice .....              | 51 |
| Payments .....                                | 53 |
| Payments Page .....                           | 53 |
| About Automatic Invoice Payments .....        | 53 |
| Payment Details Page .....                    | 54 |
| Open Payment Details .....                    | 54 |
| Refund a Payment .....                        | 55 |
| Process Refund Field Descriptions .....       | 56 |
| Perform a Chargeback .....                    | 57 |
| Timeline .....                                | 59 |
| Tenants .....                                 | 61 |
| Overview .....                                | 61 |
| Additional Tenant Resources .....             | 61 |
| Create a Tenant .....                         | 61 |
| Tenant Configuration Page .....               | 62 |
| Add an Allowed User to the Tenant .....       | 64 |
| Remove a User from the Tenant .....           | 64 |
| Users, Roles, and Permissions .....           | 66 |
| Overview .....                                | 66 |
| Before You Begin .....                        | 66 |
| Additional Resources .....                    | 66 |
| Create a User Role .....                      | 67 |
| Open the User List .....                      | 67 |
| Add a User .....                              | 68 |
| Edit a User .....                             | 69 |
| Add New User Field Descriptions .....         | 70 |
| Delete a User .....                           | 70 |

|  |    |
|--|----|
| Catalog .....                                  | 72 |
| Overview .....                                 | 72 |
| Additional Catalog Resources .....             | 72 |
| View Catalog Products and Plans .....          | 72 |
| Create a Simple Catalog .....                  | 73 |
| Catalog Configuration Field Descriptions ..... | 74 |
| Add a Currency to a Plan .....                 | 75 |
| Upload an XML Catalog .....                    | 75 |
| View the Catalog as XML .....                  | 77 |
| Delete a Catalog .....                         | 78 |
| Download the Catalog .....                     | 79 |
| Overdue .....                                  | 80 |
| Overview .....                                 | 80 |
| Additional Overdue Resources .....             | 80 |
| View Overdue Configuration .....               | 80 |
| Create Overdue Flows .....                     | 81 |
| Overdue Configuration Field Descriptions ..... | 82 |
| Upload an XML Overdue Configuration File ..... | 83 |
| View Overdue Configuration as XML .....        | 85 |
| Delete Overdue Flows .....                     | 85 |
| Translation Files .....                        | 87 |
| Overview .....                                 | 87 |
| Additional Translation Resources .....         | 87 |
| View Translation Tabs .....                    | 87 |
| Upload a Translation File .....                | 88 |
| Tags .....                                     | 90 |
| Overview .....                                 | 90 |
| Additional Tag Resources .....                 | 90 |
| View All Tags .....                            | 91 |
| View Objects with Attached Tags .....          | 91 |
| Add a Tag Definition .....                     | 92 |
| Delete a Tag Definition .....                  | 94 |
| Attach or Remove a Tag .....                   | 94 |
| Custom Fields .....                            | 96 |
| Overview .....                                 | 96 |
| Additional Custom Tag Resources .....          | 96 |
| View All Custom Fields .....                   | 96 |
| View Custom Fields for an Account .....        | 97 |
| Create and Attach a Custom Field .....         | 97 |
| Custom Field Descriptions .....                | 98 |

# 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 Kauí:

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

The image shows a 'Login' screen with a light gray background. At the top center is the word 'Login' in red. Below it are two input fields: 'Username' and 'Password', each with a placeholder text ('Username' has 'kauí' and 'Password' has 'password'). At the bottom is a blue rounded rectangular button labeled 'SIGN IN' in white.

Kauí displays the Add New Tenant screen:

The image shows an 'Add New Tenant' screen with a light gray background. At the top center is the title 'Add New Tenant' in red. Below it are three input fields: 'Name' (with value 't\_demo'), 'API Key' (with value 't\_demo'), and 'API Secret' (with value '\*\*\*\*\*'). At the bottom is a blue rounded rectangular button labeled 'SAVE' in white.

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 Kauí

To log in to Kauí:

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

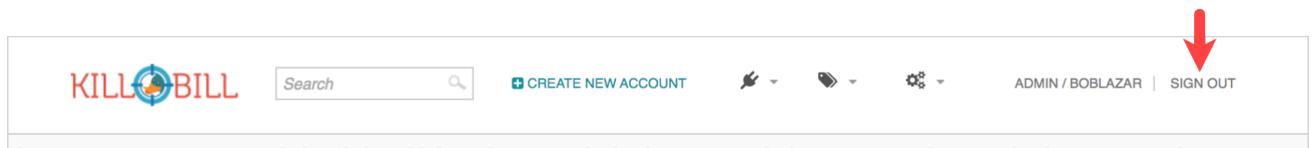
The image shows the Kill Bill login interface. It features a header with the word "Login" in red. Below it are two input fields: "Username" and "Password", each with a corresponding text input box. A teal-colored "SIGN IN" button is positioned below the password field.

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" dialog box. It has a header with the same red "Choose Tenant" text. Below it is a "Tenant" dropdown menu and a teal "SAVE" button.

## Log Out of Kaui

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



## Homepage Layout

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

The image shows the Kill Bill homepage layout with various numbered callouts:

- 1**: Search bar placeholder "What are you looking for?"
- 2**: Advanced search link below the search bar.
- 3**: User profile icon.
- 4**: Logout link.
- 5**: Settings gear icon.
- 6**: Admin/Bob Lazar link.
- 7**: Navigation links for "Latest accounts / Latest invoices / Latest payments".
- 8**: A teal duck icon with a speech bubble containing the text: "Accounts are searched by default. For complex searches, use Advanced Search."

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

## Return to Homepage

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



## Icons

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

| Icon | Description  |
|------|--|
|      | Make a payment—Appears on the Invoice screen and lets you make a payment against the invoice.  |
|      | Users, Tenants, & Admin—_Admin level feature:_ Appears at the top of the screen and gives you access to Users, Tenants, and Admin.   |
|      | <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><b>Note:</b> This icon does not display if the only payment method listed is <b>EXTERNAL_PAYMENT</b>.</p> |

## Grids/Tables

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

| Showing All Accounts                  |                                      |         |
|---------------------------------------|--------------------------------------|---------|
| ID                                    | EXTERNAL KEY                         | BALANCE |
| 68b2ba7f-0f6f-4786-9788-8bef3af71676  | 68b2ba7f-0f6f-4786-9788-8bef3af71676 | \$0     |
| ec4d7a66-5eed-4a1d-a290-208c3aaafda24 | 0585529786                           | €0      |
| a95d6483-3df1-4d3d-bf6a-1c9a82a229d5  | 7411156749                           | \$0     |
| 7e050655-f160-428e-8e64-68718a1da147  | 8473547085                           | £0      |
| eb8b02dc-42f0-44c3-84ea-5b7b5f91343b  | 6235981780                           | €0      |
| ab9f521-25fd-4007-bdca-c4fde5403cqjh  | 2418455544                           | €0      |

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

First    Previous    **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     |  |

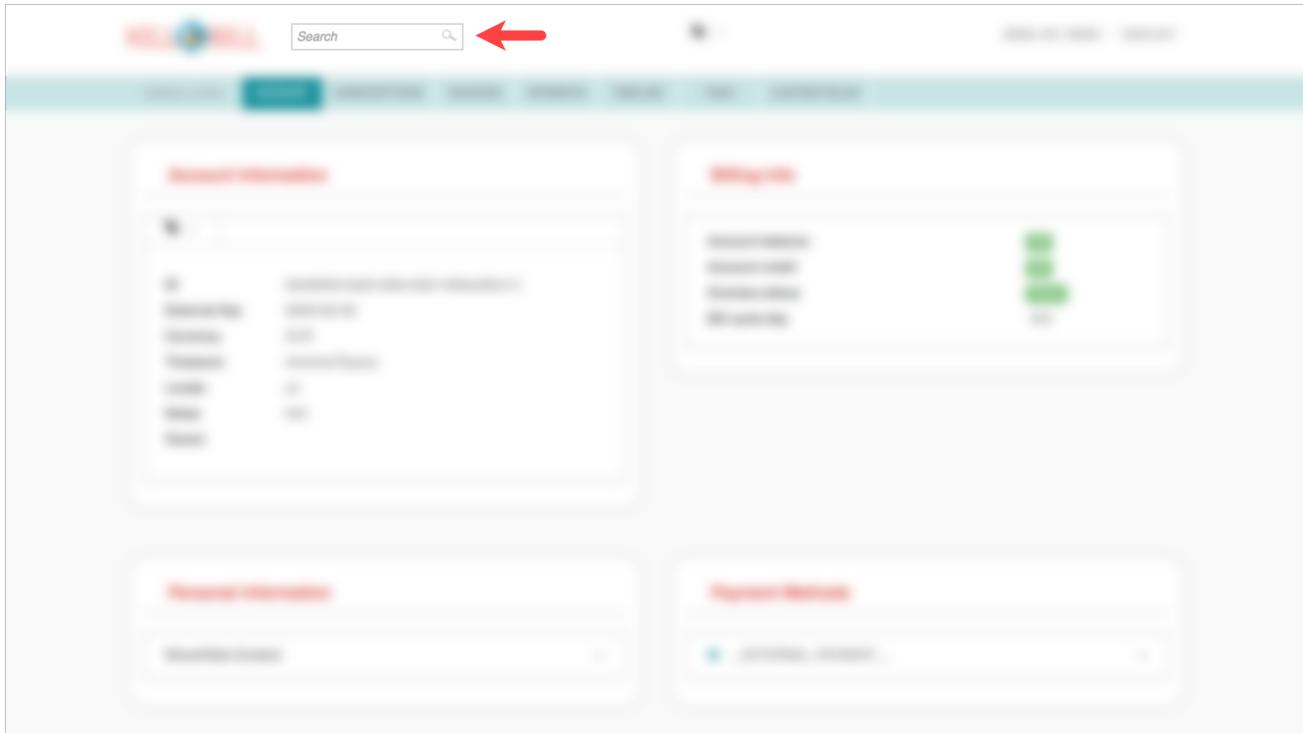


## Basic Search



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

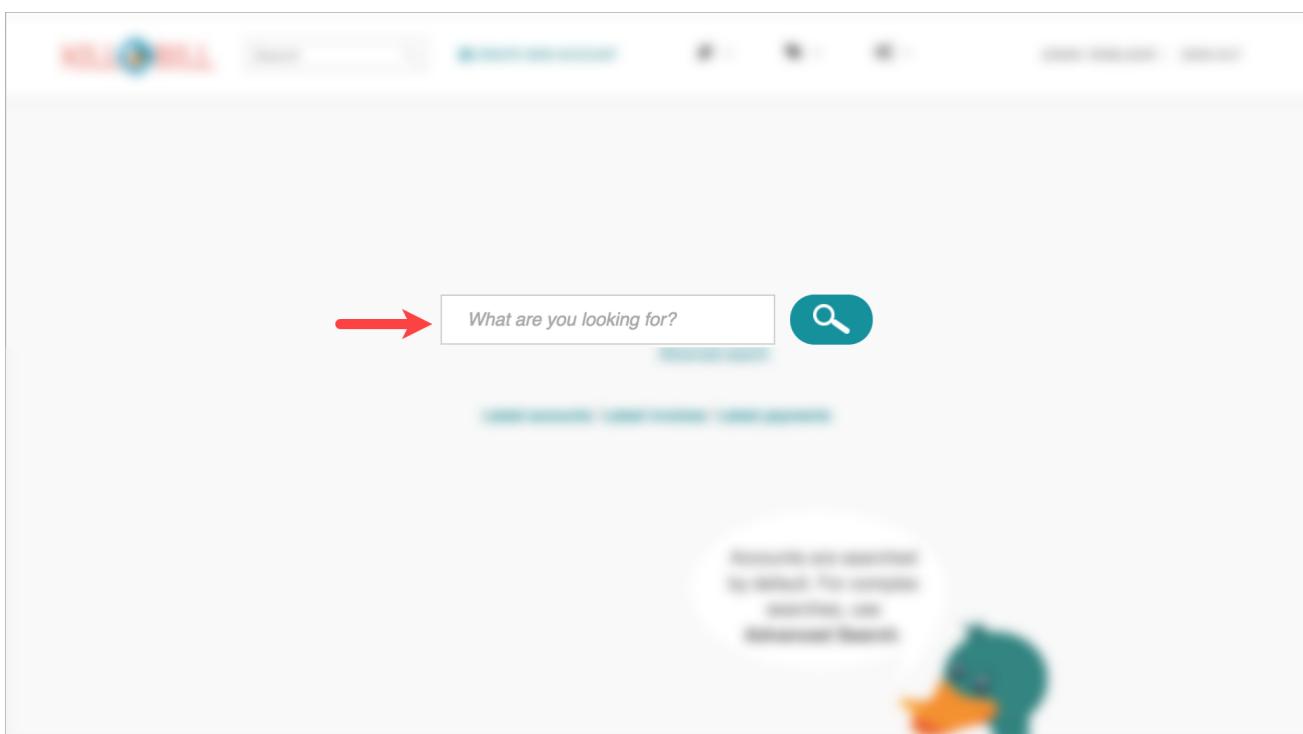
To search for customer accounts, use the basic search. Basic search is available at the top of the screen no matter where you are in Kaui.



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**:



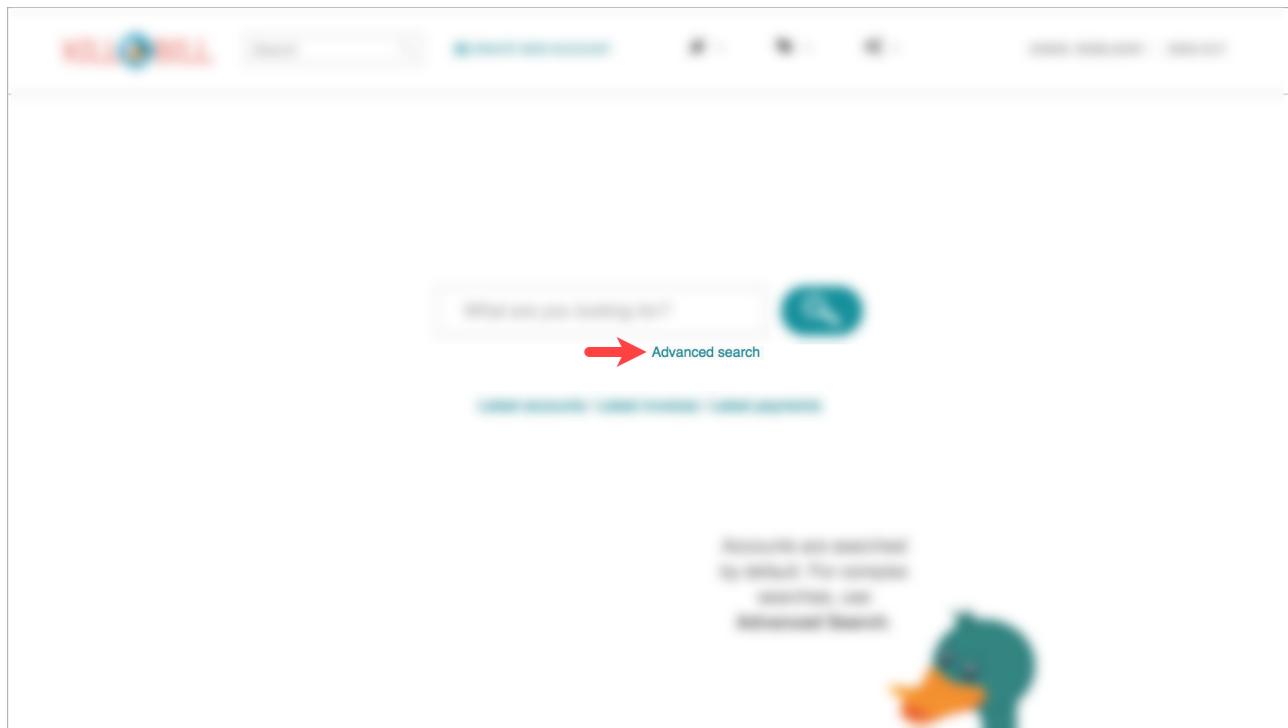
# Advanced Search

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:

**Advanced Search**

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

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

**Advanced Search**

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

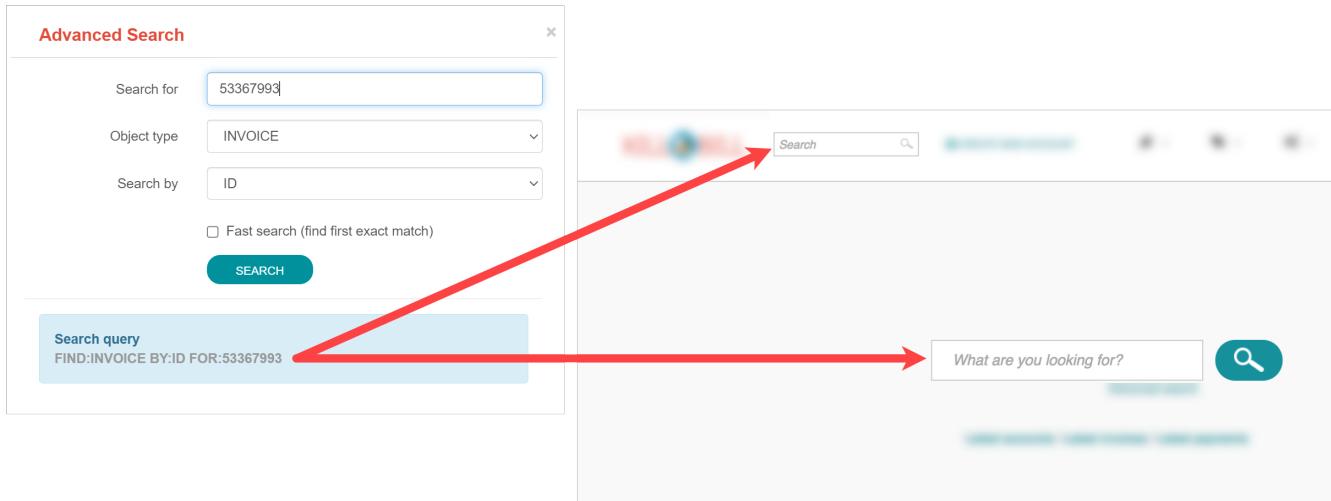


**Note:** For information on which fields are searched for each object type, see the table in the next section.

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 page interface. At the top, there is a navigation bar with tabs: Katelynn Lemke, ACCOUNT (highlighted in teal), SUBSCRIPTIONS, INVOICES, PAYMENTS, TIMELINE, TAGS, and CUSTOM FIELDS. A red circle with the number '1' is positioned over the CUSTOM FIELDS tab. Below the navigation bar are four main content sections, each with a red circle containing a number corresponding to the list above:

- Account Information (2):** This section displays account details like ID, External Key, Currency, Timezone, Locale, Notes, and Parent. It includes a dropdown menu icon and a 'Show/Hide Content' button.
- Billing Info (3):** This section shows the account balance (\$10), account credit (\$0), and overdue status (Good). It also lists bill cycle day (N/A) and next invoice date (N/A). There is a 'Trigger invoice generation' button with a dry-run checkbox.
- Personal Information (4):** This section contains a 'Show/Hide Content' button.
- Payment Methods (5):** This section lists payment methods, with one method shown as '★ \_EXTERNAL\_PAYMENT\_'. There is a refresh icon next to the list.

### 1. Account Sub-Menu

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

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

## 2. Account Information

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

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

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

## 3. Personal Information

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

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

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

## 4. Billing Info

Here you can perform the following tasks for the customer:

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

You can also see a summary of billing information:

| Field           | Description   |
|-----------------|---|
| Account balance | Amount of money due on the account, including any account credits.  |
| Account credit  | Amount of any money owed to the customer.   |
| Overdue status  | The status of the customer's account that indicates if they are overdue or up-to-date on their invoice payments.<br><br><b>Note:</b> The account can have a negative account balance, but not be overdue. That's because overdue status depends on invoice due dates and how late payments are defined based on a company's business policy. For example, an invoice may not be overdue if a company allows a 15-day grace period (a.k.a. NET terms) to make a payment. |

| Field                | Description  |
|----------------------|--|
| Bill cycle day (BCD) | The day of the month on which the system generates an invoice for this account. This field applies to accounts that are subscribed to monthly subscriptions (or a multiple of monthly, such as quarterly, annually, etc.). For more information, see the <a href="#">Account Field Descriptions</a> table. |
| Next invoice date    | The date on which the system generates the customer's next invoice.  |

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

## 5. Payment Methods

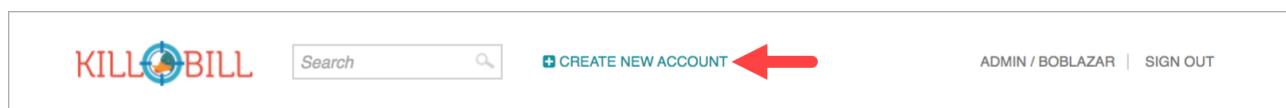
This section of the Account page lets you:

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

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

## Create an Account

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



2. Kauí opens the Add New Account screen:

### Add New Account

Name

First name length (?)

External key

Email

Bill cycle day

Currency  ▼

Timezone  ▼

Locale  ▼

Address line 1

Address line 2

Zip code

Company

City

State  ▼

Country  ▼

Phone

Notes

Migrated?

**SAVE**

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

4. Click the **Save** button.

# Account Field Descriptions

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

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

## Edit an Account

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



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

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

Kauí opens the Update Account screen:

**Update Account**

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

**SAVE**

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

## Add Additional Contact Emails

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

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

**Personal Information**

Show/Hide Content ▾

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

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

Kauai opens the Add New Email screen:

**Add New Email**

Email

**SAVE**

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

**Personal Information**

Show/Hide Content ▾

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

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

## Delete Additional Contact Emails



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

To remove additional contact emails:

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

## Close an Account

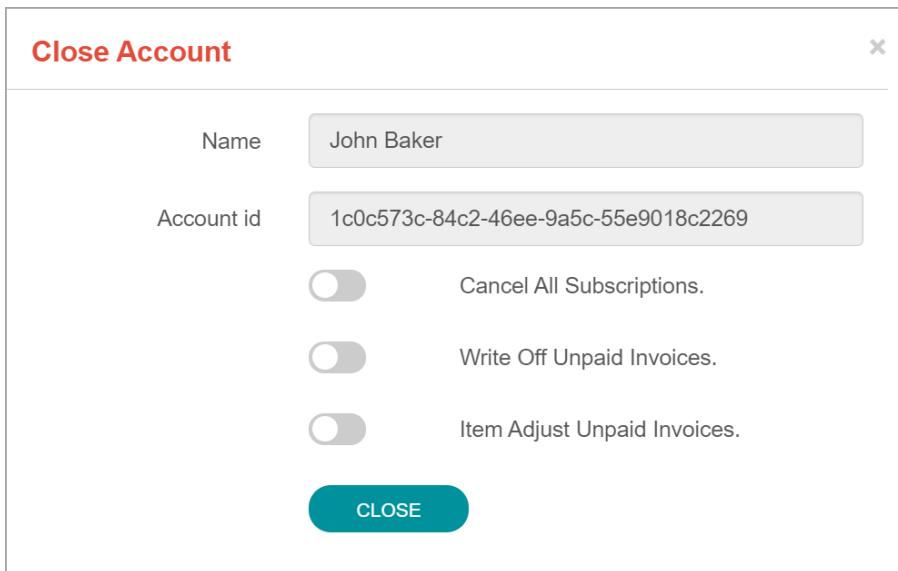
Use the steps in this section to indicate you will no longer be doing business with a customer. If the customer has unpaid invoices, using the steps below, you can choose to either write off or item-adjust them.



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

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

Kaui displays the Close Account pop-up:



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



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

5. Click the **Close** button.

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



## Link to Parent Account

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

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

**Account Information** [Edit](#)

|              |   |
|--------------|---|
| ID           | 6d468048-a1dc-45ea-87b5-72cf9ec14771  |
| External Key | 6d468048-a1dc-45ea-87b5-72cf9ec14771  |
| Currency     | USD   |
| Timezone     | Etc/UTC   |
| Locale       | en_US   |
| Notes        | VIP   |
| Parent       | <a href="#">+</a>  |

Kaui opens a pop-up:

**Link To Parent**

|  |                      |
|--|----------------------|
| Parent account id  | <input type="text"/> |
| <input type="checkbox"/> Is payment delegated to parent? |                      |
| <a href="#">SAVE</a>                                     |                      |

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

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

| ID           | 6d468048-a1dc-45ea-87b5-72cf9ec14771                 |
|--------------|--|
| External Key | 6d468048-a1dc-45ea-87b5-72cf9ec14771                 |
| Currency     | USD  |
| Timezone     | Etc/UTC  |
| Locale       | en_US  |
| Notes        | VIP  |
| Parent       | <a href="#">cb736a4f-9b56-4074-ae07-1d37b37cb69f</a> |

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

## Add Credit to an Account

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

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

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

- Billing Info** header
- PAY ALL INVOICES**, **ADD CREDIT**, and **CREATE CHARGE** buttons (the **ADD CREDIT** button is highlighted with a red arrow)
- Account balance**: \$10
- Account credit**: \$0
- Overdue status**: Good
- Bill cycle day**: N/A
- Next Invoice Date**: N/A
- Trigger invoice generation** button
- 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 showing "USD"), "Reason" (dropdown menu showing "100 - Courtesy"), and "Comment" (empty text area). At the bottom 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 [Kauui 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), Kauui adjusts the account balance and account credit accordingly.

## Create a Charge on an Account

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

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

**Billing Info**

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

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

Trigger invoice generation   Dry-run

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

**Add New Charge**

Auto-commit?

Amount

Currency

Description

Comment

**SAVE**

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

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

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

# Payment Methods

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

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

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



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



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

## About Payment Plugin Names

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

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

## View Payment Method Details

To view a payment method after it's created:

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

Kaui expands the details for the payment method:

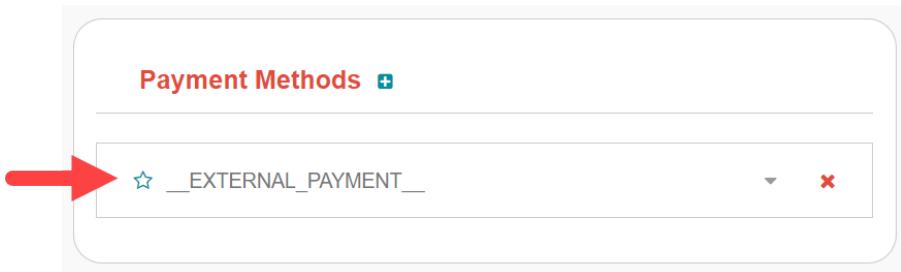
The screenshot shows a modal window titled "Payment Methods" with a red plus sign icon. Inside, a section for "EXTERNAL\_PAYMENT" is expanded, showing three buttons: "AUTHORIZE", "PURCHASE", and "CREDIT". Below these buttons, the "Name:" field contains the value "EXTERNAL\_PAYMENT\_" and the "ID:" field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

# Set a Payment Method as the Default

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

To set a payment method as the default:

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

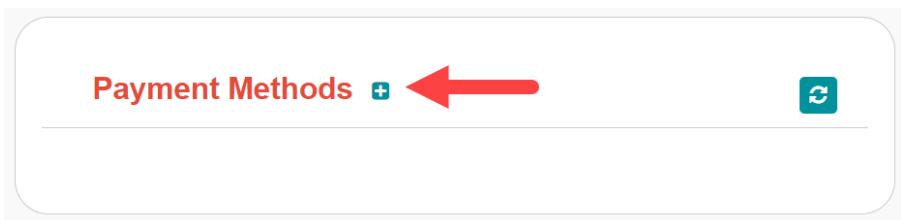


The filled star (  ) indicates it's now the default payment method.

# Add Payment Method

To add a payment method:

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



Kaui displays the Add New Payment Method screen:

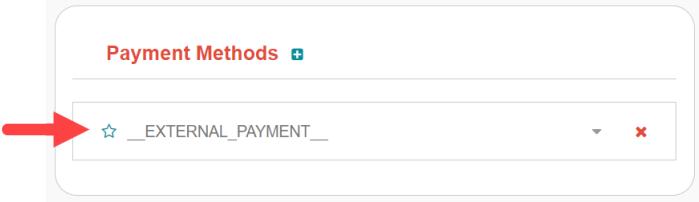
**Add New Payment Method**

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

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

## Payment Method Field Descriptions

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

| Field  | Description   |
|--|---|
| Plugin name  | <p>Type in the name of the plugin that is associated with this type of payment method.</p> <p>Each payment method is associated with a payment plugin that does the backend processing related to the payment method. The <b>Plugin name</b> 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 <a href="#">readme</a> file. For example, in the <a href="#">Stripe plugin readme file</a>, 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> .<br>( <i>Examples: 07</i> for the month of July and <i>23</i> for the year 2023.)  |
| Expiration year                                      |   |
| Credit card number                                   | The credit card number, typed without dashes.   |
| Address 1, Address 2, City, ZIP code, State, Country | The billing address associated with this card.  |
| Add property (Name/Value)                            | <p>Use the <b>Name/Value</b> fields to assign custom fields and values to the payment method.</p> <p><b>Note:</b> Custom fields are an advanced feature. For more information, see <a href="#">Custom Fields</a>.</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><b>Note:</b> If you forget to select this box, you can set the payment method as the default by clicking the star icon next to the payment method on the Account page:</p>   |

## Applying Transactions to a Payment Method

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

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

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

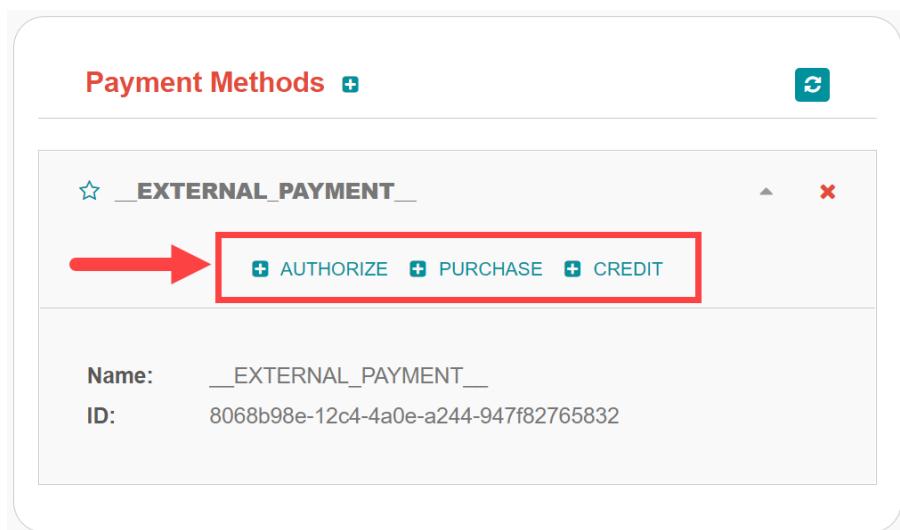
You can perform the following transactions from the Payment Methods section:

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



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

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



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

Kauai displays the Process Transaction screen:

**Process Transaction**

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

**CONTROL PLUGIN NAME**

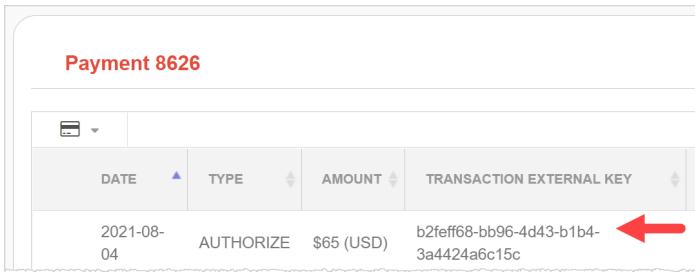
**NAME** **VALUE**

**SAVE**

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

## Process Transaction Field Descriptions

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

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

## 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

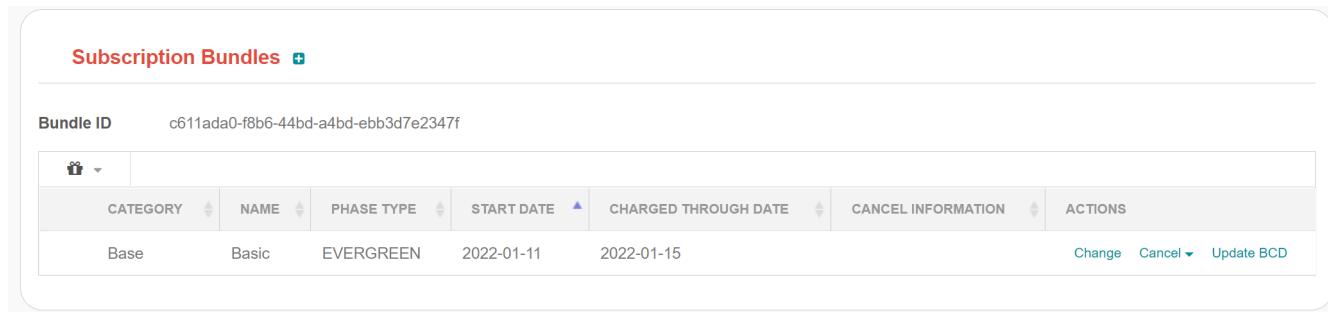
## Overview

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 columns are labeled: CATEGORY, NAME, PHASE TYPE, START DATE, CHARGED THROUGH DATE, CANCEL INFORMATION, and ACTIONS. The data in the table is:

| CATEGORY | NAME  | PHASE TYPE | START DATE | CHARGED THROUGH DATE | CANCEL INFORMATION | ACTIONS  |
|----------|-------|------------|------------|----------------------|--------------------|--|
| Base     | Basic | EVERGREEN  | 2022-01-11 | 2022-01-15           |                    | <a href="#">Change</a> <a href="#">Cancel</a> <a href="#">Update BCD</a> |

On the Subscriptions page, you can:

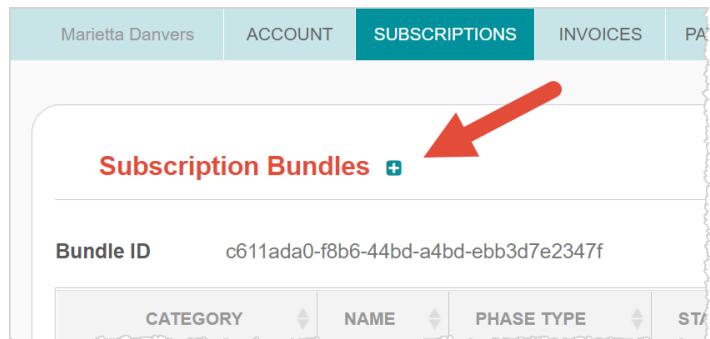
- [Add a subscription](#)
- [Add an add-on product to a subscription](#)
- [Pause and resume a subscription](#)
- [Change a subscription's plan and amount](#)
- [Cancel a subscription](#)
- [Update the billing cycle day \(BCD\) for the subscription](#)

## Add a Subscription



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

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



Kaui displays the Add New Subscription screen:

**Add New Subscription**

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

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 <b>Date</b> field that appears. |

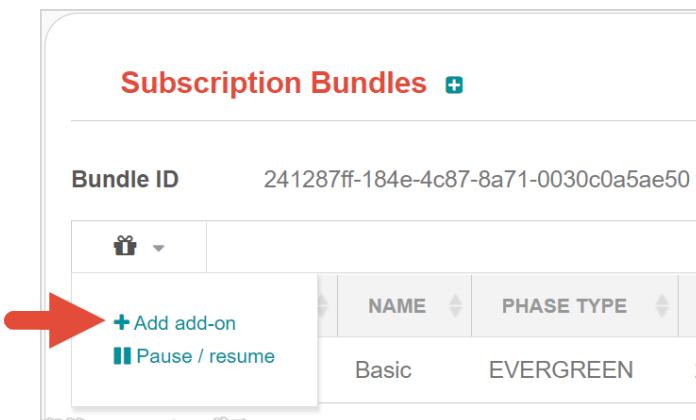
# Add an Add-On Product to a Subscription

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



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

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



Kaui opens the Add New Add-On screen:

The screenshot shows the 'Add New Add-On' interface. It includes fields for 'Subscription Key' (with a placeholder '241287ff-184e-4c87-8a71-0030c0a5ae50'), 'Plan' (set to 'Auto-update-monthly'), and 'Price Override'. Below these are two radio buttons: 'Immediate Creation' (selected) and 'Specify a date'. At the bottom is a blue 'SAVE' button.

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

## Add New Add-On Field Descriptions

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

| Field              | Description  |
|--------------------|--|
| Immediate Creation | Select this option to start the subscription immediately.  |
| Specify a date     | To define a specific date on which the subscription begins, select this option, and choose a date from the <b>Date</b> 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.



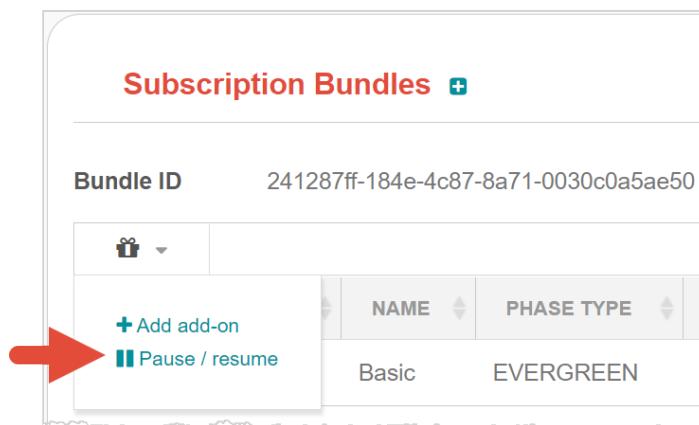
**Note:** While a customer's subscription bundle is paused, you cannot add any new subscriptions or add-ons to the account.

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:

**Pause / Resume**

Pause date

Resume date

Comment

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.

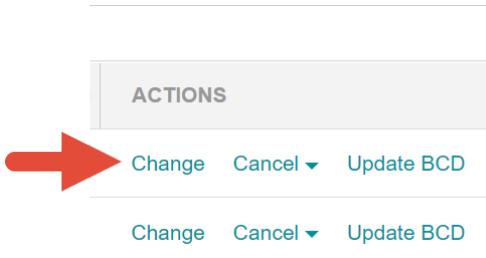
4. Click the **Pause / Resume** button. Kaui displays a success message at the top of the screen.

## 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:

**Change Subscription**

|   |       |
|---|-------|
| New plan  | Basic |
| Price Override  |       |
| <input checked="" type="radio"/> Default policy<br><input type="radio"/> Specify Policy<br><input type="radio"/> Specify a date |       |
| <b>SAVE</b>   |       |

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*.

|        |   |
|--------|---|
| Policy | <input type="radio"/> Default policy<br><input checked="" type="radio"/> Specify Policy<br><input type="radio"/> Specify a date |
|        | <b>IMMEDIATE</b><br><b>END_OF_TERM</b>  |
|        | <b>SAVE</b>   |

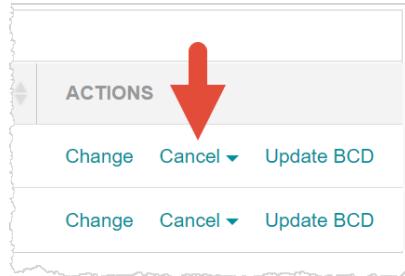
- **Specify a date:** Click on this and choose a date from the **Change Date** calendar that appears. Make sure to choose an effective date that is in the future.

|             |            |
|-------------|------------|
| Change Date | 2022-01-11 |
| <b>SAVE</b> |            |

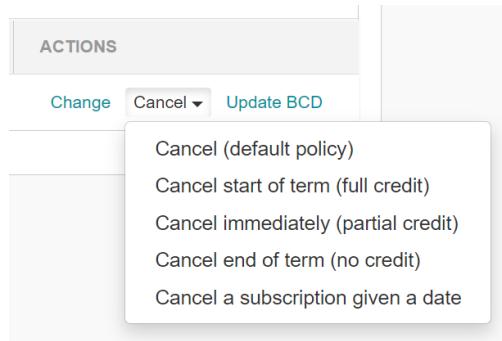
# Cancel a Subscription

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**.



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



## Cancellation Options

| Option                              | Description   |
|-------------------------------------|---|
| Cancel (default policy)             | Uses the default policy specified for the plan in the catalog.  |
| Cancel start of term (full credit)  | Cancels the subscription immediately and refunds whatever amounts have been paid toward the subscription.   |
| Cancel immediately (partial credit) | Cancels the subscription immediately and applies a partial credit to the account based on how much of the service has been consumed.  |
| Cancel end of term (no credit)      | Cancels the subscription at the end of the billing period with no refund to the customer. Note that after using this option to cancel, you can still reinstate the customer (i.e., reverse the cancellation). |

| Option                             | Description   |
|------------------------------------|---|
| Cancel a subscription given a date | <p>If you select this option, Kaui displays a pop-up from which to choose a date:</p> <p style="text-align: center;">image::CancelSubGivenDate.png[width=350,align="center"]</p> <p><b>Use requested date for billing:</b> 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

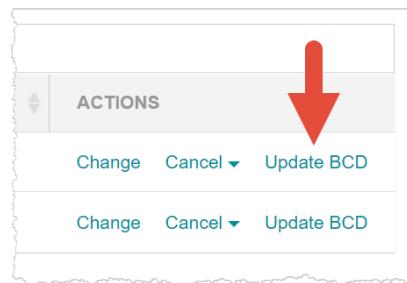
Follow the steps below to update the billing cycle day (BCD) defined for a subscription. These steps assume the subscription is billed on a monthly basis.

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 |
| <b>SAVE</b>             |            |

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

Otherwise, you can define a later date for this change to occur.



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

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

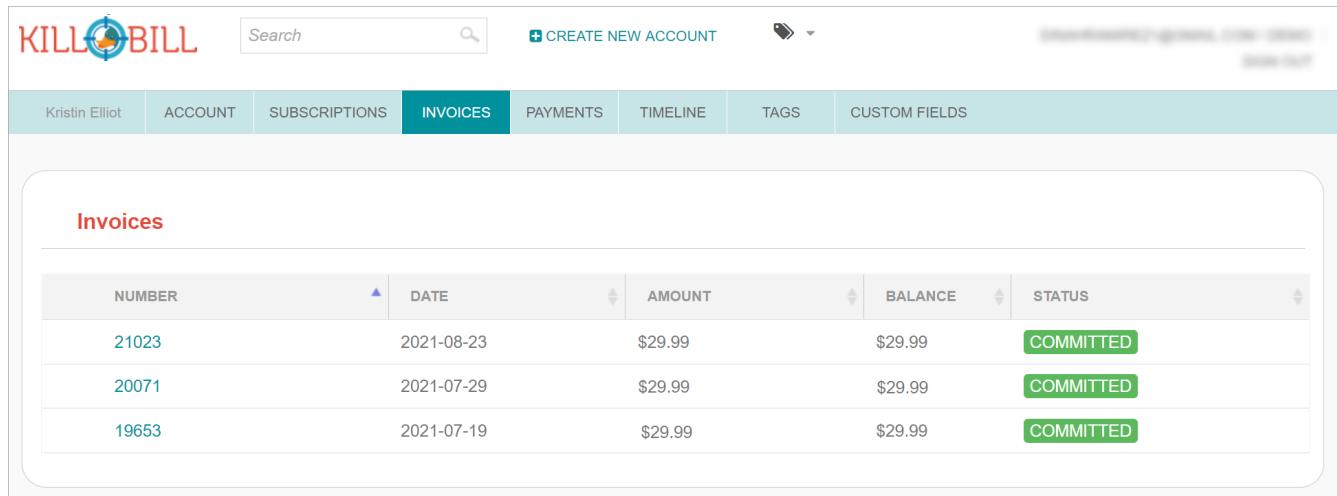
# Invoices

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

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

## Invoices Page

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



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

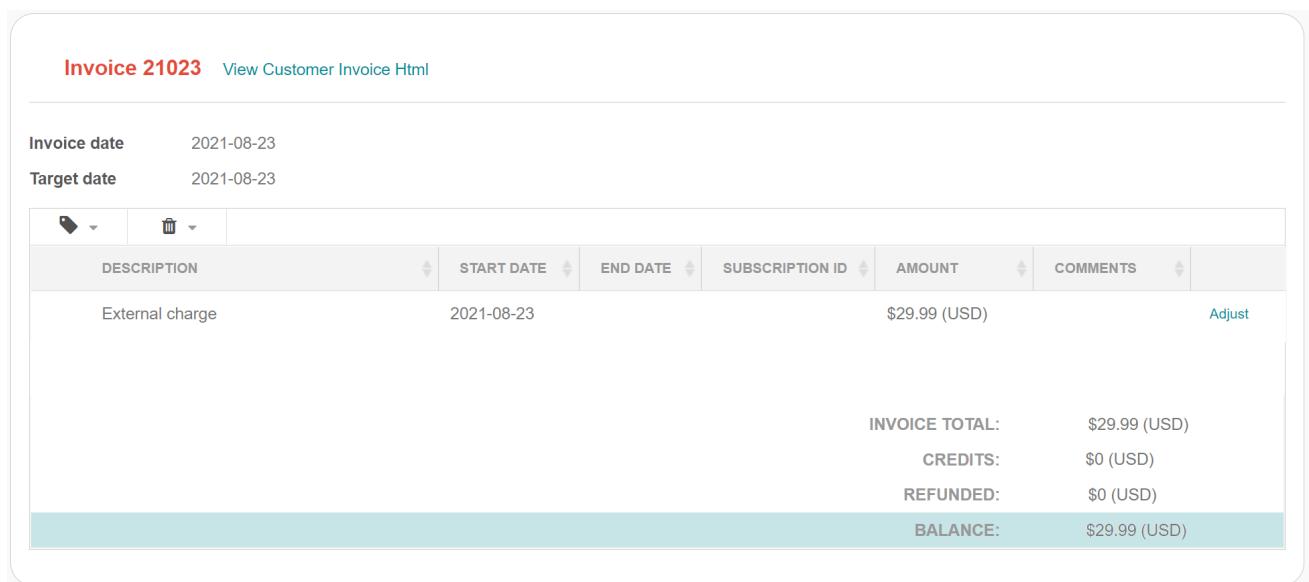
| NUMBER | DATE       | AMOUNT  | BALANCE | STATUS    |
|--------|------------|---------|---------|-----------|
| 21023  | 2021-08-23 | \$29.99 | \$29.99 | COMMITTED |
| 20071  | 2021-07-29 | \$29.99 | \$29.99 | COMMITTED |
| 19653  | 2021-07-19 | \$29.99 | \$29.99 | COMMITTED |

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

Click the invoice number to open the Invoice Details page.

## Invoice Details Page

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



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

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

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

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

On the Invoice Details page, you can:

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



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

## Open Invoice Details

To get to the Invoice Details page:

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



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

## Make a Payment on an Invoice

To make a manual payment against an invoice:

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

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

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

**Invoice 21023** [View Customer Invoice Html](#)

**Invoice date** 2021-08-23

**Target date** 2021-08-23

**Balance Due**

2021-08-23



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

- Kaui displays the Process Payment screen:

**Process Payment**

External?

Amount: 29.99

Currency: USD

Payment Method:

Leave blank to use account's default

Reason: 600 - Alt payment method

Comment:

**SAVE**

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

## Process Payment Field Descriptions

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

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

## Write Off or Void an Invoice

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

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

### Write Off an Invoice

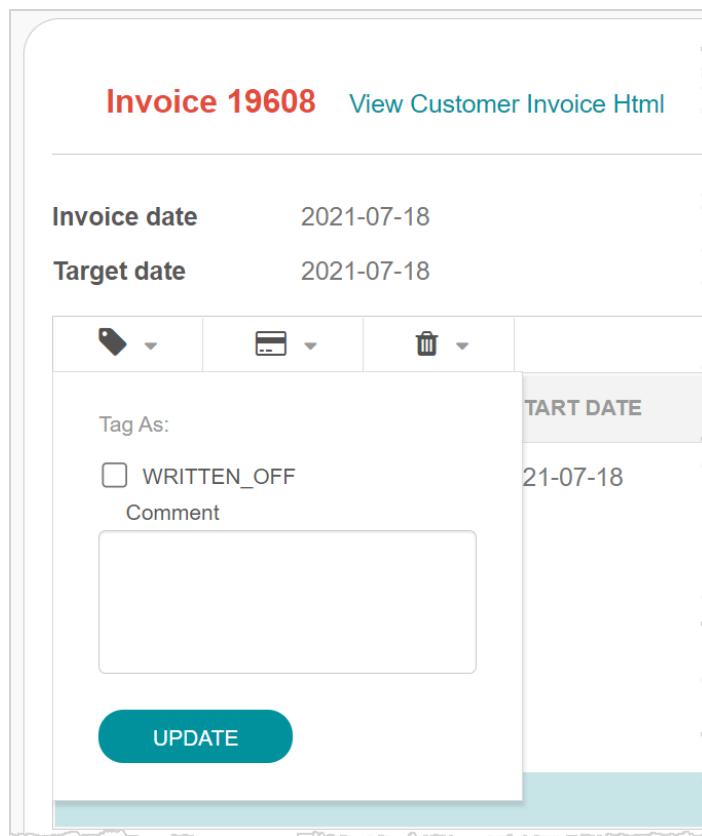
To write off an invoice:

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

**Invoice 19608** [View Customer Invoice Html](#)

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

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



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

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

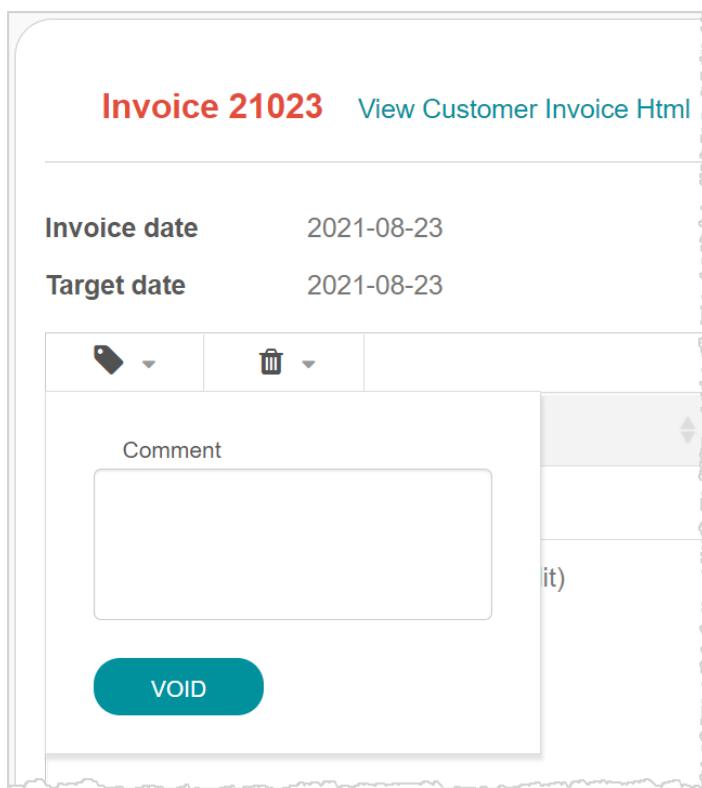
## Void an Invoice

To void an invoice:

1. Open the Invoices Details page for the invoice.

| Invoice 21023 View Customer Invoice Html  |            |             |               |                |                 |
|---|------------|-------------|---------------|----------------|-----------------|
| Invoice date                              | 2021-08-23 | Target date | 2021-08-23    |                |                 |
| <a href="#">🏷️</a> <a href="#">Delete</a> |            | DESCRIPTION | START DATE    | END DATE       | SUBSCRIPTION ID |
| External charge                           | 2021-08-23 |             | \$29.99 (USD) |                | Adjust          |
|   |            |             |               | INVOICE TOTAL: | \$29.99 (USD)   |
|   |            |             |               | CREDITS:       | \$0 (USD)       |
|   |            |             |               | REFUNDED:      | \$0 (USD)       |
|   |            |             |               | BALANCE:       | \$29.99 (USD)   |

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



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

4. Click the **Void** button.

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

## Pay All Unpaid Invoices

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



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

To pay all invoices:

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

The screenshot shows the 'Billing Info' section of a software interface. At the top, there are three buttons: '+ PAY ALL INVOICES', '+ ADD CREDIT', and '+ CREATE CHARGE'. Below these are several account details:

- Account balance**: \$17
- Account credit**: \$0
- Overdue status**: ReallyBad
- Bill cycle day**: 29 (user timezone)
- Next Invoice Date**: 2022-02-28

At the bottom, there is a 'Trigger invoice generation' button, a checked 'Dry-run' checkbox, and a pencil icon.

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.)

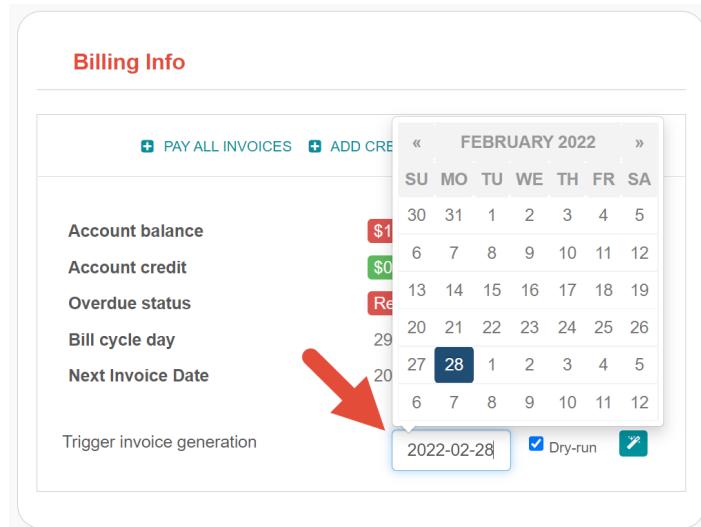
After you generate the invoice, which is in **DRAFT** mode, you have the choice to commit it. If you do not commit the **DRAFT** invoice, it remains in the system as a draft.

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.

The screenshot shows the same 'Billing Info' section as before, but with a red arrow pointing to the 'Dry-run' checkbox. The checkbox is checked, indicating that a dry-run invoice is being generated.

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:



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



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

# Payments

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

For more information on payments, see:

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

## Payments Page

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

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



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

The screenshot shows the Kill Bill interface with the 'Payments' tab selected. The page displays a table of payment records with columns for Number, Date, Auth Amount, Capture Amount, Refund Amount, Last Transaction Status, and External Key. The data is as follows:

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

## About Automatic Invoice Payments

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

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

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

- No default payment method exists for the account
- The default payment method is invalid (e.g., expired credit card)
- The **AUTO\_PAY\_OFF** or **MANUAL\_PAY** system tags are defined for the account



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

## Payment Details Page

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

**Payment 8960**

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

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

**Payment Method Details**

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

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

## Open Payment Details

To get to the Payment Details page:

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



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

# Refund a Payment

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

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



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

To refund a payment:

1. Open the Payment Detail page for the payment.

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

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

Payment 9734

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

Refund  
 Chargeback

| TYPE | AMOUNT | TRANSACTION EXTERNAL KEY |
|------|--------|--------------------------|
|      |        |                          |

Kaui opens the Process Refund screen.

**Process Refund**

No Invoice Adjustment  
 Invoice Item Adjustment

Amount: 10.0  
 Currency: USD

Reason: 500 - Courtesy

Comment:

**SAVE**

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

**Payment 9734**

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

## Process Refund Field Descriptions

| Field                   | Description   |
|-------------------------|---|
| No Invoice Adjustment   | If you are refunding the entire balance of the invoice, select <b>No Invoice Adjustment</b> . However, if you are providing a partial refund, select <b>Invoice Item Adjustment</b> . |
| 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 <a href="#">Kaui configuration settings</a> . However, you can make a different selection.                                       |
| Comment                 | The text you enter here displays on the <a href="#">Timeline</a> page after the payment is complete. Adding comments is optional.   |

# Perform a Chargeback

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

1. Open the Payment Detail page for the payment.

Payment 9782

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

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

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

Payment 9782

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

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

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

Process Chargeback

Amount: 25.0  
Currency: USD

Reason: 400 - Canceled Recurring Transaction

Cancel account subscriptions?

Comment:

SAVE

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

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

**Payment 9782**

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

# Timeline

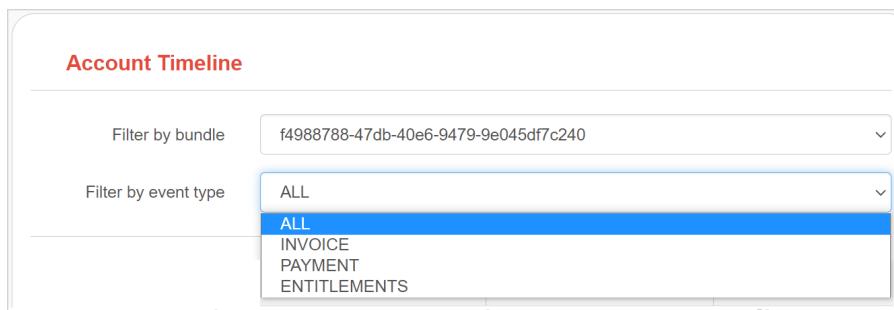
The Timeline displays a chronological list of events (that is, an audit log) that occurred for a specific customer account. You cannot make changes to the timeline.

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

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

On the Timeline page, you can:

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



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

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

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

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

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

Invoice 27291 [View Customer Invoice Html](#)

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

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

# Tenants

## Overview

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

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



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

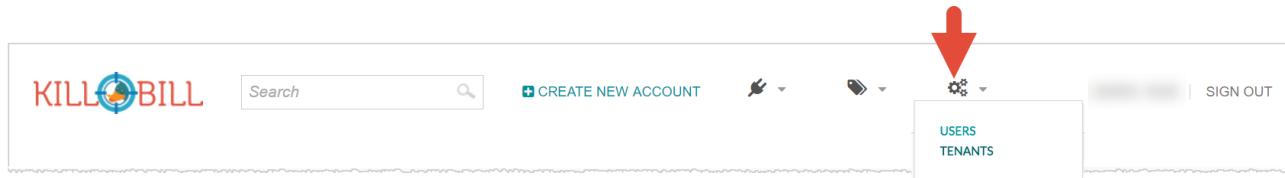
## Additional Tenant Resources

- [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:

The screenshot shows the 'Kaui Tenants' screen. At the top, it says 'Kaui Tenants' with a plus sign button. Below is a table with three rows of tenant data:

| 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**

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



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

- Click the **Save** button.

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

The screenshot shows the Kaui Tenant Configuration page. At the top, there is a navigation bar with the KILL BILL logo, a search bar, a 'CREATE NEW ACCOUNT' button, and user account information ('admin / t\_demo' with a 'SIGN OUT' link). A red arrow points to the user account information. Below the navigation bar, a success message 'Tenant was successfully configured' is displayed. The main content area is divided into sections: 'Tenant Details' (listing Name: t\_demo, Tenant ID: 2a381717-704d-48bf-ae7d-32a1fc58b823, API Key: t\_demo), 'Allowed Users' (listing 'admin'), and tabs for Catalog Show, Overdue Show, Invoice Template, Invoice Translation, Catalog Translation, and Plugin Config. At the bottom, there is a link for Existing Plans and an 'Enable XML View' option.

## Tenant Configuration Page

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

The screenshot shows the Kill Bill Tenant Configuration page. At the top, there is a navigation bar with the Kill Bill logo, a search bar, and account creation links. On the right, it shows the current user (admin/t\_demo) and sign-out options. The main content area is divided into several sections:

- Tenant Details** (Section 1): Displays basic tenant information: Name: t\_demo, Tenant ID: 2a381717-704d-48bf-ae7d-32a1fc58b823, and API Key: t\_demo.
- Useful Links** (Section 2): A list of useful links including Parked accounts, AUTO\_INVOICING\_OFF accounts, AUTO\_PAY\_OFF accounts, PENDING payments, UNKNOWN and PLUGIN\_FAILURE payments, and Queues.
- Allowed Users** (Section 3): A table showing allowed users. It has columns for NAME and DESCRIPTION. One row is shown: admin.
- Tabs at the bottom** (Section 4): 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:

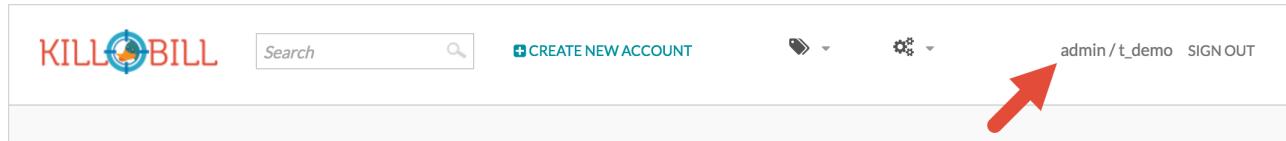
- [Catalog Show](#)—Create and manage catalog XML files.
- [Overdue Show](#)—Create and manage the XML configuration file that helps to control Kill Bill's overdue (dunning) functionality.
- [Invoice Template](#)—Upload invoice template files.
- [Invoice Translation](#)—Upload translated invoice files.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



Kaui displays the Tenant Configuration page.

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

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

Kaui displays the Add Allowed User pop-up.

The pop-up window has a title bar "Add Allowed User". It contains a "User name" input field and a blue "ADD" button at the bottom.

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

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

## Remove a User from the Tenant

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

the user from the Kill Bill system.



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

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

The screenshot shows the Kill Bill Kauai interface. At the top right, there is a user session indicator showing 'admin / t\_demo' and a 'SIGN OUT' link. A large red arrow points to this area.

Kauai 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 with the 'Allowed Users' section highlighted. A table lists users with columns 'NAME' and 'DESCRIPTION'. The user 'mary' is listed with the description 'Managed User'. To the right of the 'NAME' column, there is a delete button represented by a black 'X'. A large red arrow points to this 'X' button.

| 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](https://<your_host>/kaui/role_definitions/new).

Add New Role Definition

Role name

Permissions   
Comma separated, e.g. account:create,entitlement:change\_plan,invoice:credit

SAVE

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

## Open the User List

To open a list of Kaui users:

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



Kaui displays the Users screen:

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

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

## Add a User

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

Kaui displays the Add New User pop-up:

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

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

A 'SAVE' button is at the bottom.

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

The 'Configured Tenants' pop-up form contains the following list:

- analytics
- t\_demo

A 'SAVE' button is at the bottom.

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

## Edit a User

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

1. Open the user list.

The screenshot shows the Kill Bill 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 'Kaui Users' contains a table with two columns: 'NAME' and 'DESCRIPTION'. The table lists four users: 'admin', 'admin1', 'admin2', and another unnamed entry. The 'NAME' column is sorted in ascending order.

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 modal windows. The top window is titled 'User Details' and contains fields for 'Name: admin1', 'Description:', and 'Roles:'. The bottom window 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 'Configured Tenants' window.

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:

**Update User**

Managed externally (LDAP, Okta, etc.)?

Name: [Redacted]

Password: [Redacted]

Description: Managed User

Roles: consumer-role  
 Comma separated, e.g. customer\_support,finance.  
[Create a new role here.](#)

**SAVE**

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

6. Click the **Save** button.

## Add New User Field Descriptions

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

## Delete a User

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

1. [Open the user list](#).

The screenshot shows the Kill Bill user interface. At the top, there is a navigation bar with the Kill Bill logo, a search bar, and links for 'CREATE NEW ACCOUNT', 'SIGN OUT', and other account management options. Below the navigation is a list titled 'Kauai Users' with a '+' button. The list displays three users: 'admin', 'admin1', and 'admin2'. Each user entry has a small edit icon next to it.

2. Select the user you want to delete.

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

The screenshot shows two overlapping windows. The top window is titled 'User Details' and contains fields for 'Name: admin1', 'Description:', and 'Roles:'. The bottom window is titled 'Configured Tenants' and lists several tenant names with checkboxes: 'bob' (checked), 'tenant', 'tenant2', 'greylogin', 'multi3', and 'analytics'. A 'SAVE' button is at the bottom of this window.

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

After you successfully log in, Kauai 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

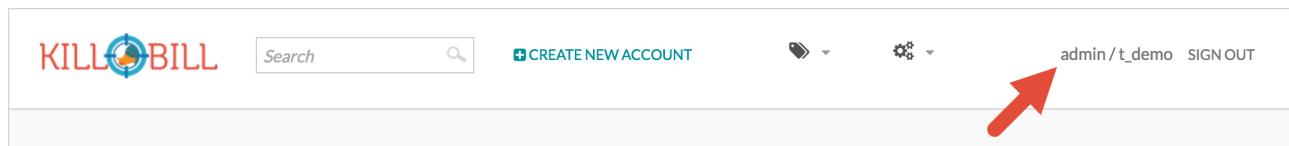
- [Catalog API](#)
- "Catalog" section in *Subscription Guide*

## 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:



Kauai 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 arrow and a red box. Other tabs include "Overdue Show", "Invoice Template", "Invoice Translation", "Catalog Translation", and "Plugin Config". A "Useful Links" sidebar on the right includes a link to "Parked accounts". Below the tabs is a section for "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) and "Basic" (Listmaker, Base, Monthly, \$14.99). 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 + currency |
| Basic               | Listmaker   | Base     | Monthly        | 14.99 | N/A + currency |

## Create a Simple Catalog

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

This screenshot is identical to the one above, showing the Tenant Configuration page for "Kill Bill". The "Catalog Show" tab is again highlighted with a red arrow and a red box. The "Existing Plans" section and the catalog table are also present.

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

Kauai opens the Catalog Configuration screen:

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

|                  |           |
|------------------|-----------|
| Product Category | Base      |
| Product Name     |           |
| Plan Name        |           |
| Amount           | 0         |
| Currency         | USD       |
| Billing Period   | Monthly   |
| Trial Length     | 0         |
| Trial Time Unit  | Unlimited |
| <b>SAVE</b>      |           |

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

4. Click the **Save** button.

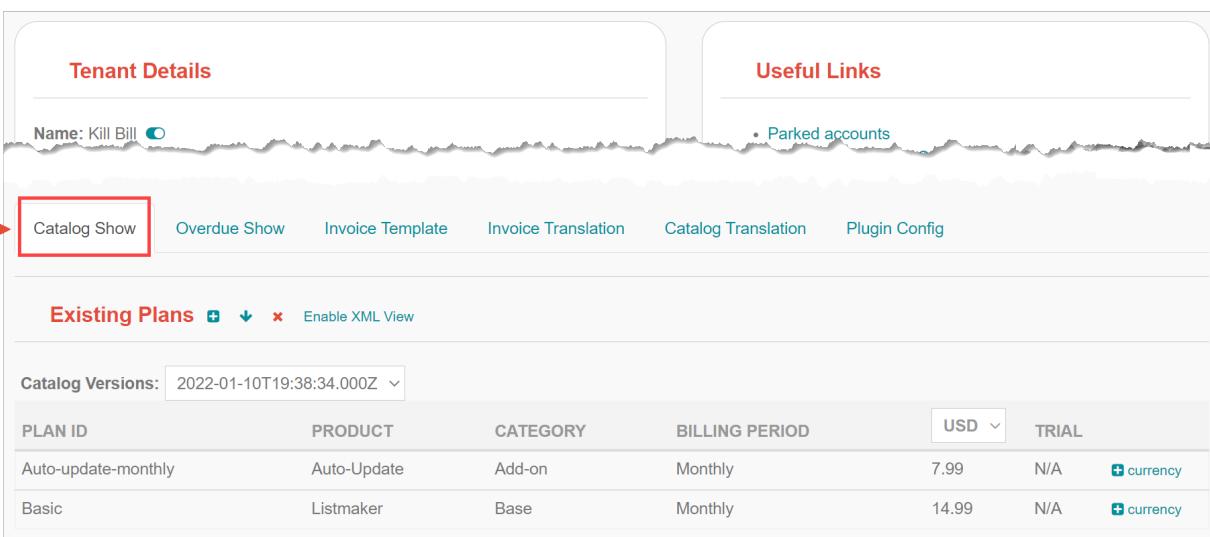
## Catalog Configuration Field Descriptions

For additional field information, see the [Catalog API](#).

| Field            | Description   |
|------------------|---|
| Product Category | Define whether this product is of the <b>BASE</b> , <b>ADDON</b> , or <b>STANDALONE</b> category: <ul style="list-style-type: none"> <li>• Base products can have one or more addons.</li> <li>• Add-on products can be bundled with a base product.</li> <li>• Standalone products cannot have any add-ons.</li> </ul> |
| 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 <a href="#">adding a currency to a plan</a> .   |
| Billing Period   | The period for which the customer is billed.  |
| Trial Length     | Along with a unit of time ( <b>Trial Time Unit</b> below), defines the length of the trial.   |
| Trial Time Unit  | Along with the <b>Trial Length</b> 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.

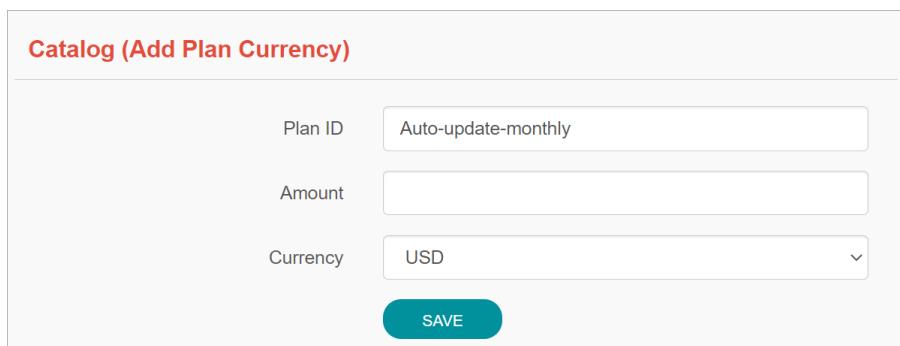


The screenshot shows the Tenant Configuration page with the Catalog Show tab highlighted by a red arrow. The page includes sections for Tenant Details (Name: Kill Bill), Useful Links (Parked accounts), Existing Plans (Auto-update-monthly, Basic), and Catalog Versions (2022-01-10T19:38:34.000Z). A table lists PLAN ID, PRODUCT, CATEGORY, BILLING PERIOD, and TRIAL for each plan, with USD selected as the currency.

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

2. 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 (Auto-update-monthly), Amount (empty), and Currency (USD). A SAVE button is at the bottom.

3. Fill in the fields:

- **Plan ID**—By default, Kaui fills in this field based on the plan you selected, but you can change it to a different plan ID.
- **Amount**—The cost of the plan in the new currency you’re adding.
- **Currency**—The currency you are adding.

4. Click the **Save** button. Kaui displays the new currency on the Catalog Show tab.

## 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 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 sidebar titled "Useful Links" contains a link to "Parked accounts". Below the tabs is a section for "Existing Plans" with a "Catalog Versions" dropdown set to "2022-01-10T19:38:34.000Z". A table lists two plans: "Auto-update-monthly" and "Basic".

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

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

Kaui opens the Catalog Configuration screen:

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

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

Kaui displays an upload screen:

**Advanced Configuration** Enable Simple Configuration

No file chosen

- 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

- 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**

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 <span style="border: 1px solid #ccc; padding: 2px;">▼</span> | TRIAL  |
|-----------------------|---------------|----------|----------------|--|--|
| remotecontrol-monthly | RemoteControl | Add-on   | Monthly        | 15   | N/A <span style="color: blue;">+ currency</span> |
| standard-monthly      | Standard      | Base     | Monthly        | 25   | N/A <span style="color: blue;">+ currency</span> |

**Useful Links**



**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

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

The screenshot shows the Tenant Configuration page with the 'Catalog Show' tab highlighted by a red arrow. The 'Catalog Versions' section displays two entries:

| 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 Enable XML View.

Kaui displays the a list of catalog versions:

The screenshot shows the Catalog XML view with one entry:

| CATALOG VERSION | EFFECTIVE DATE           | CATALOG XML              |
|-----------------|--------------------------|--------------------------|
| 0               | 2022-01-10T19:38:34.000Z | <a href="#">view xml</a> |

## 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. The "Existing Plans" section shows two plans: "Auto-update-monthly" and "Basic". The "Catalog Versions" dropdown is set to "2022-01-10T19:38:34.000Z". The table below lists the plans with 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   |

- 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.

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

The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Catalog Show" tab is highlighted with a red arrow. The "Existing Plans" section shows two plans: "Auto-update-monthly" and "Basic". The "Catalog Versions" dropdown is set to "2022-01-10T19:38:34.000Z". The table below lists the plans with 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   |

- Click the down arrow (⬇).

The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Catalog Show" tab is selected. The "Existing Plans" section has a red arrow pointing to the down arrow (⬇) next to the "Enable XML View" button. The "Catalog Versions" dropdown is set to "2022-01-10T19:38:34.000Z".

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

# Overdue

## Overview

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

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

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

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

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

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

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

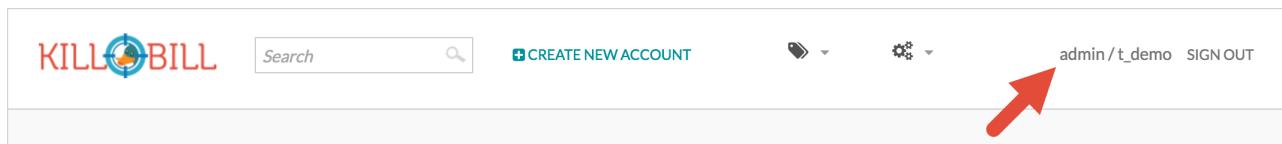
## Additional Overdue Resources

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

## View Overdue Configuration

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

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



Kaui displays the Tenant Configuration page.

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

The screenshot shows the Tenant Configuration page for a tenant named "Kill Bill". The "Overdue Show" tab is highlighted with a red box and arrow. Other tabs include Catalog Show, Invoice Template, Invoice Translation, Catalog Translation, and Plugin Config. A section titled "Existing Overdue Config" contains a "View Overdue XML" link and a note stating "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 "Kill Bill" with the "Overdue Show" tab selected. The "Existing Overdue Config" section is empty.

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

Kaui opens the Overdue Configuration screen:

The Overdue Configuration screen displays a table for defining new overdue states. The columns are labeled: 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 at the bottom.

| EXTERNAL NAME | MESSAGE | BLOCK SUBSCRIPTION CHANGES | SUBSCRIPTION CANCELLATION | DAYS SINCE EARLIEST UNPAID INVOICE | TAG INCLUSION | TAG EXCLUSION | NUMBER OF UNPAID INVOICES | TOTAL UNPAID INVOICE BALANCE |
|---------------|---------|----------------------------|---------------------------|------------------------------------|---------------|---------------|---------------------------|------------------------------|
|               |         |                            |                           |                                    |               |               |                           |                              |

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

The Overdue Configuration screen shows a row for a new overdue state. The "NAME" field is "Clear", and the "EXTERNAL MESSAGE" field is empty. The "BLOCK SUBSCRIPTION CHANGES" and "SUBSCRIPTION CANCELLATION" dropdowns are both set to "false". The "DAYS SINCE EARLIEST UNPAID INVOICE" dropdown is set to "NONE". The "TAG INCLUSION" and "TAG EXCLUSION" dropdowns are both set to "NONE". The "NUMBER OF UNPAID INVOICES" and "TOTAL UNPAID INVOICE BALANCE" fields are both set to "0". A red box highlights the entire row. A "SAVE" button is at the bottom.

| 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 |
|-------|------------------|----------------------------|---------------------------|------------------------------------|---------------|---------------|---------------------------|------------------------------|
| Clear |                  | false                      | false                     | NONE                               | NONE          | NONE          | 0                         | 0                            |

4. Fill in the fields for the current row. For field information, see the [Overdue Configuration Field](#)

## Descriptions table.

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

The screenshot shows the 'Overdue Configuration' screen. At the top, there's a link to 'Enable Advanced Configuration (Upload XML)'. Below that is a table with columns: NAME, EXTERNAL MESSAGE, BLOCK, SUBSCRIPTION CHANGES, and SUBSCRIPTION CANCELLATION. A row is currently selected, showing 'Clear' in the NAME column, 'Alert regarding your subscri' in the EXTERNAL MESSAGE column, 'true' in the BLOCK dropdown, and 'NONE' in the SUBSCRIPTION CANCELLATION dropdown. A red arrow points to the '+ new overdue states' button at the top left of the table area.

| Overdue Configuration |                              |       |                      | Enable Advanced Configuration (Upload XML) |
|-----------------------|------------------------------|-------|----------------------|--|
|                       |                              |       |                      |  |
|                       |                              |       |                      |  |
| + new overdue states  |                              | BLOCK | SUBSCRIPTION CHANGES | SUBSCRIPTION CANCELLATION                  |
| <b>NAME</b>           | <b>EXTERNAL MESSAGE</b>      |       |                      |  |
| Clear                 | Alert regarding your subscri | true  | ✓                    | NONE                                       |

- 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.

The screenshot shows the 'Existing Overdue Config' screen. At the top, there are tabs: Catalog Show, Overdue Show (which is selected), Invoice Template, Invoice Translation, Catalog Translation, and Plugin Config. Below the tabs, there's a link to 'View Overdue Xml'. The main area displays two rows of configuration:

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



**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>  |
| Block Subscription Changes | If set to <b>true</b> , the customer <i>cannot</i> make plan changes to the subscription in this overdue flow. If set to <b>false</b> , the customer is allowed to make changes. |

| Field                              | Description   |
|------------------------------------|---|
| 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"> <li>• <b>NONE</b>: Kill Bill ignores this field, and the subscription is not cancelled.</li> <li>• <b>POLICY_NONE</b>: Same as <b>NONE</b> above.</li> <li>• <b>POLICY_IMMEDIATE_POLICY</b>: Cancels the subscription immediately and applies a partial credit to the account based on how much of the service has been consumed.</li> <li>• <b>POLICY_END_OF_TERM</b>: Cancels the subscription at the end of the billing period with no refund to the customer (i.e., no proration).</li> </ul> |
| 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 <b>NONE</b> setting.</p> <ul style="list-style-type: none"> <li>• <b>AUTO_PAY_OFF</b></li> <li>• <b>AUTO_INVOICING_OFF</b></li> <li>• <b>OVERDUE_ENFORCEMENT_OFF</b></li> <li>• <b>MANUAL_PAY</b></li> <li>• <b>TEST</b></li> <li>• <b>PARTNER</b></li> </ul> <p>For a description of system tags, see the "<a href="#">Tags</a>" 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 <b>NONE</b> 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 "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. A note states "No overdue configuration defined for tenant".

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

Kaui opens the Overdue Configuration screen:

The screenshot shows the Overdue Configuration screen with a table for defining new overdue states. The columns are: 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 at the bottom.

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

The screenshot shows the "Upload Overdue XML Config" screen. It includes a "Choose File" input field showing "No file chosen" and a teal "UPLOAD" button.

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.

The screenshot shows the "Upload Overdue XML Config" screen again, but now the "Choose File" input field shows the selected file name "overdue\_V2.xml".

5. Click the Upload button.

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

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

**Existing Overdue Config** [View Overdue Xml](#)

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

## View Overdue Configuration as XML

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

## Delete Overdue Flows

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

Tenant Details

Name: Kill Bill

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

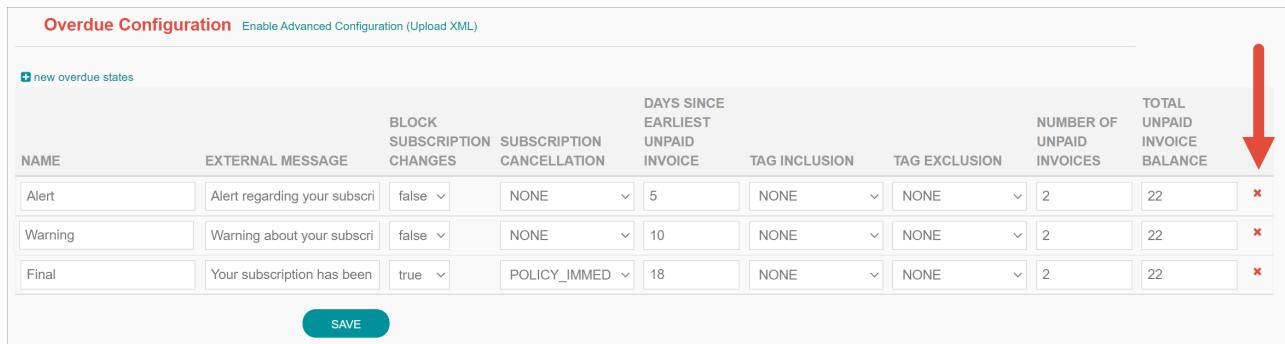
**Existing Overdue Config** [View Overdue Xml](#)

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.



The screenshot shows the 'Overdue Configuration' page. At the top, there's a link to 'Enable Advanced Configuration (Upload XML)'. Below that, a button for 'new overdue states' is visible. The main area contains a table with the following columns: NAME, EXTERNAL 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 are three rows of data:

| 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                           |

A red arrow points to the delete icon (red X) in the last column of the third row. At the bottom of the table is a 'SAVE' button.

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 file upload form. It includes 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.

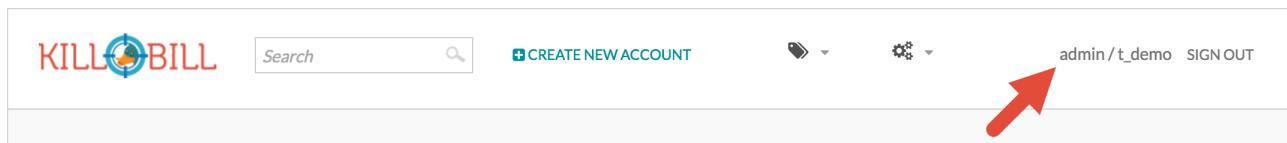
## Additional Translation Resources

- [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:



Kauai displays the Tenant Configuration page.

2. Scroll down to see the translation tabs:

## Upload a Translation File

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

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

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

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

6. Click the **Upload** button.

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

# Tags

## Overview

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

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



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

## Types of Tags

Kill Bill has two types of tags:

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



**Note:** Kill Bill does not include default user tags.

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

## About Tag Definitions

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

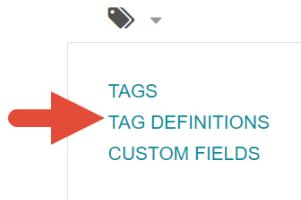
## Additional Tag Resources

API Reference:

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

# View All Tags

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



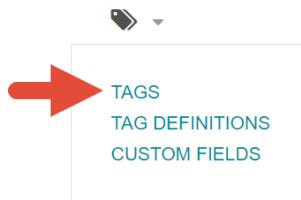
Kaui displays the Tag Definitions page.

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

# View Objects with Attached Tags

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

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



Kaui displays the Tags page.

| Tags                                 |                                      |             |                     |
|--------------------------------------|--------------------------------------|-------------|---------------------|
| Show                                 | 50                                   | entries     | Search:             |
| TAG ID                               | OBJECT ID                            | OBJECT TYPE | TAG DEFINITION NAME |
| 3e5b5002-5719-47a8-ae86-552d5cf8b4d3 | 1033706a-07de-4ed3-b0e0-0f1d09639b90 | ACCOUNT     | red                 |
| 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          | <a href="#">Destroy</a> |
| 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 |
| <b>SAVE</b>   |          |

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          | <a href="#">Destroy</a> |
| 5135a1b0-...-4de5679e5833 | blue         | blue tag                              | false       | ACCOUNT          | <a href="#">Destroy</a> |
| 00000000-...-000000000001 | __PARK__     | Accounts with invalid invoicing state | true        | ACCOUNT          |                         |
| 00000000-...-000000000001 | AUTO_PAY_OFF | Suspends payments until removed.      | true        | ACCOUNT          |                         |

# Delete a Tag Definition



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

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

To delete a tag definition:

1. Open the Tag Definitions page as explain in "[View All Tags](#)".

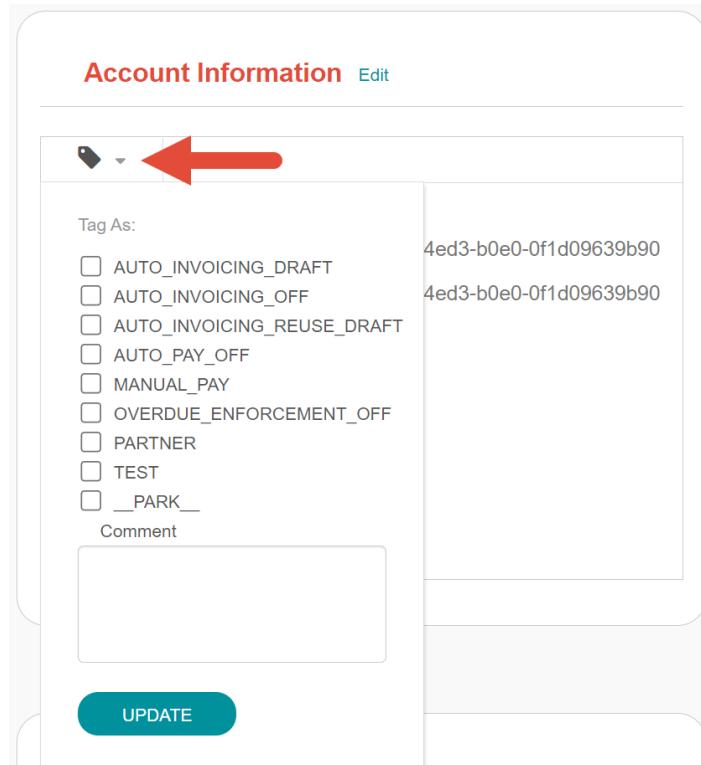
| ID                        | NAME         | DESCRIPTION                           | SYSTEM TAG? | APPLICABLE TYPES |                         |
|---------------------------|--------------|---------------------------------------|-------------|------------------|-------------------------|
| a7c8c525-...-f9e0e043e2c2 | yellow       | yellow tag                            | false       | ACCOUNT          | <a href="#">Destroy</a> |
| 5135a1b0-...-4de5679e5833 | blue         | blue tag                              | false       | ACCOUNT          | <a href="#">Destroy</a> |
| 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     |
|--------------------------------------|-------------|------------|-----------|
| 39795d6-507a-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".

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

# 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".

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

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

Kaui displays the Add New Custom Field screen:

Add New Custom Field

|             |                      |
|-------------|----------------------|
| Object ID   | <input type="text"/> |
| Object type | ACCOUNT              |
| Name        | <input type="text"/> |
| Value       | <input type="text"/> |
| <b>SAVE</b> |                      |

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 <a href="#">+</a>      |             |            |           |
|--------------------------------------|-------------|------------|-----------|
| 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><b>Note:</b> 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: <a href="https://demo.killbill.io/accounts/1033706a-07de-4ed3-b0e0-0f1d09639b90/invoices/421d16de-6d19-41a0-b9e5-781ab3eedf1c">https://demo.killbill.io/accounts/1033706a-07de-4ed3-b0e0-0f1d09639b90/invoices/421d16de-6d19-41a0-b9e5-781ab3eedf1c</a></p> <p>Invoice ID: <a href="#">421d16de-6d19-41a0-b9e5-781ab3eedf1c</a></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).   |