Overview

In Kaui, you can apply one or more tags to accounts and invoices, a tag being a single value. This section covers the tasks for viewing, managing, and attaching 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 the system; 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 user tags on the Tag Definition page.

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

Additional Resources

API Reference:

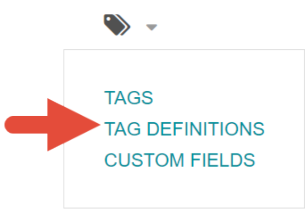
- Tag
- Tag Definition

Add Tag Definition

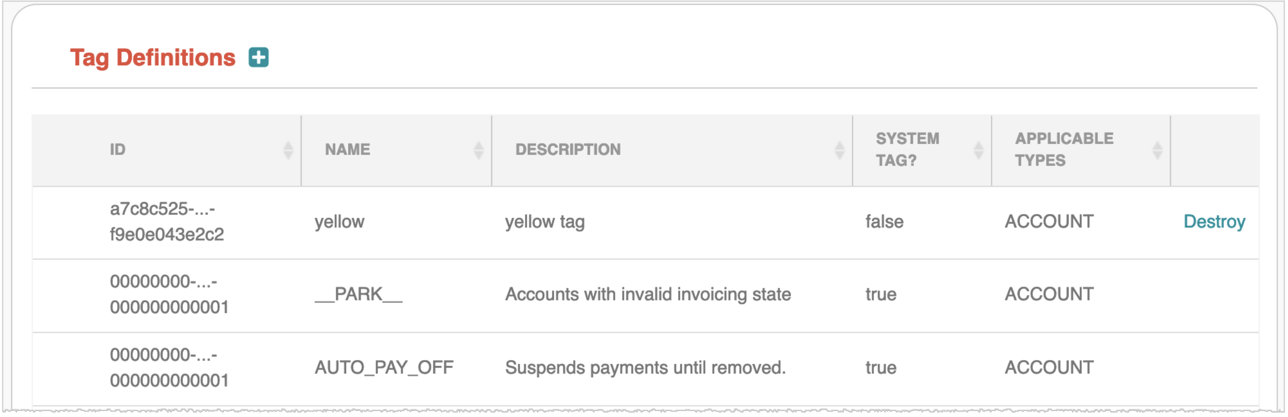
As its name implies, a *tag definition* defines information about a specific tag. In Kaui, you must create a tag definition for each user tag you want to use in the current tenant.

To create a new tag definition:

1. At the top of the screen, click the tag icon and select **Tag Definitions**.

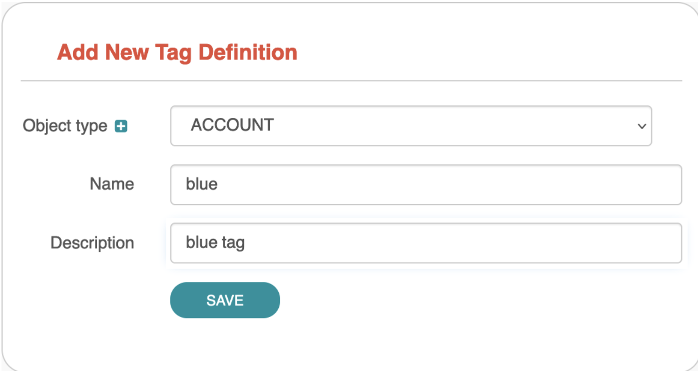


Kaui displays the Tag Definitions page.

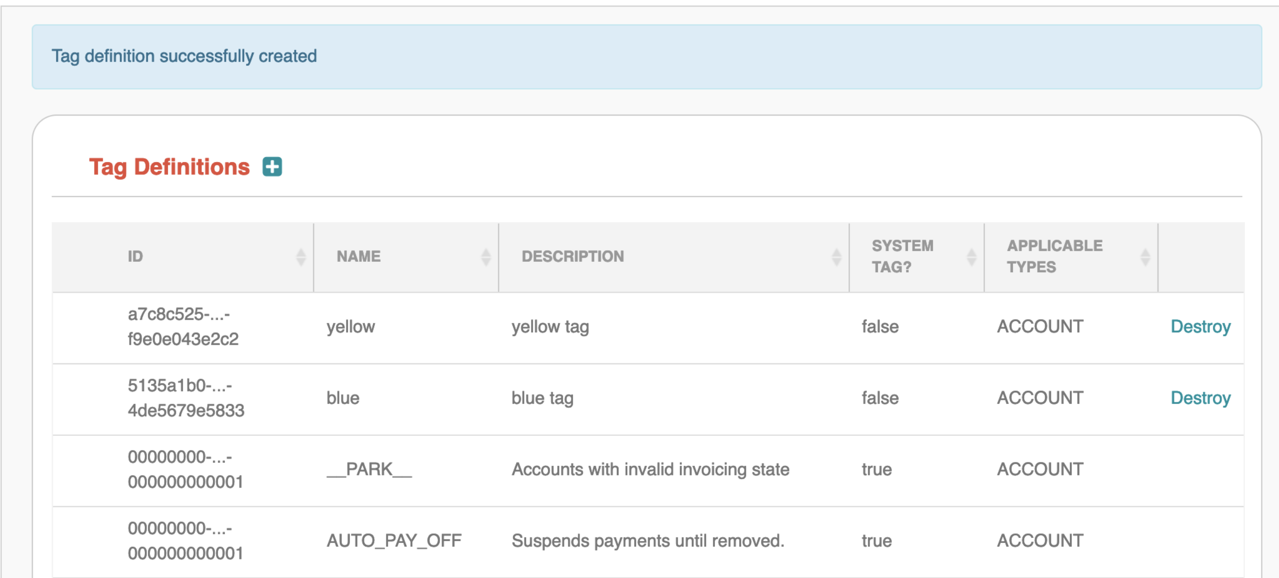


2. Click the plus sign ( ) next to **Tag Definition.**

   Kaui displays the Add New Tag Definition screen:



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



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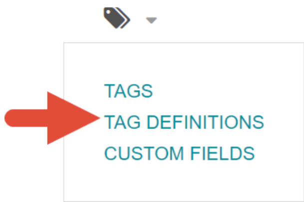
Delete a Tag Definition

If necessary, you can delete a tag definition from the current tenant.

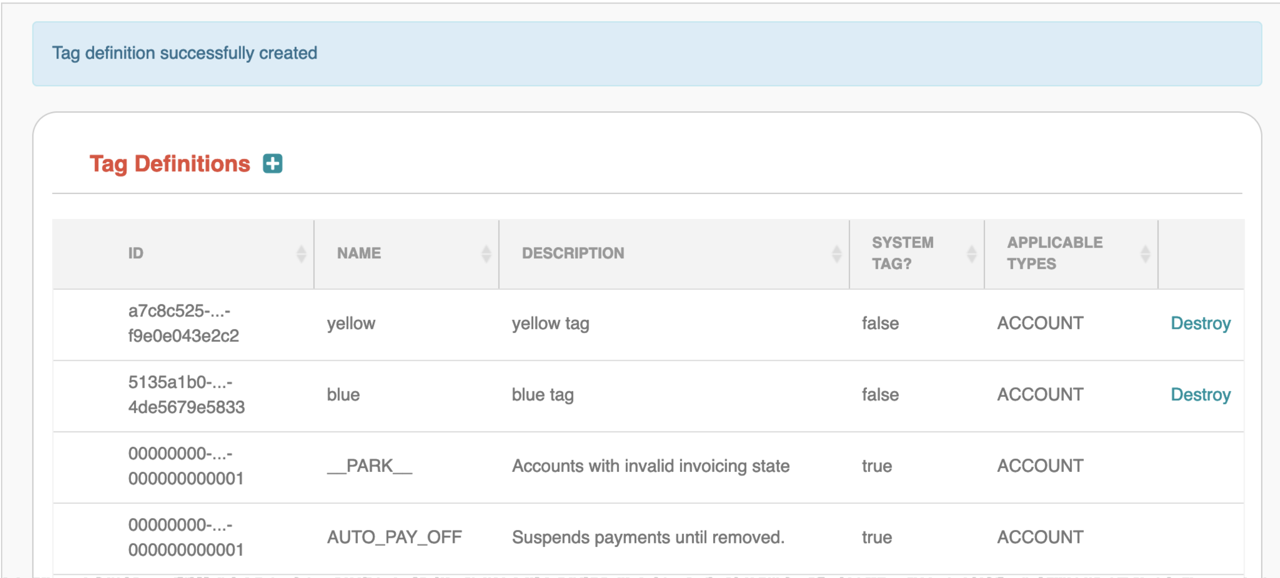
If the associated tag has been applied to an object, then … ???

To delete a tag definition:

1. At the top of the screen, click the tag icon and select **Tag Definitions**.



Kaui displays the Tag Definitions page.



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

Do you get a message to confirm here?

Attach or Remove a Tag

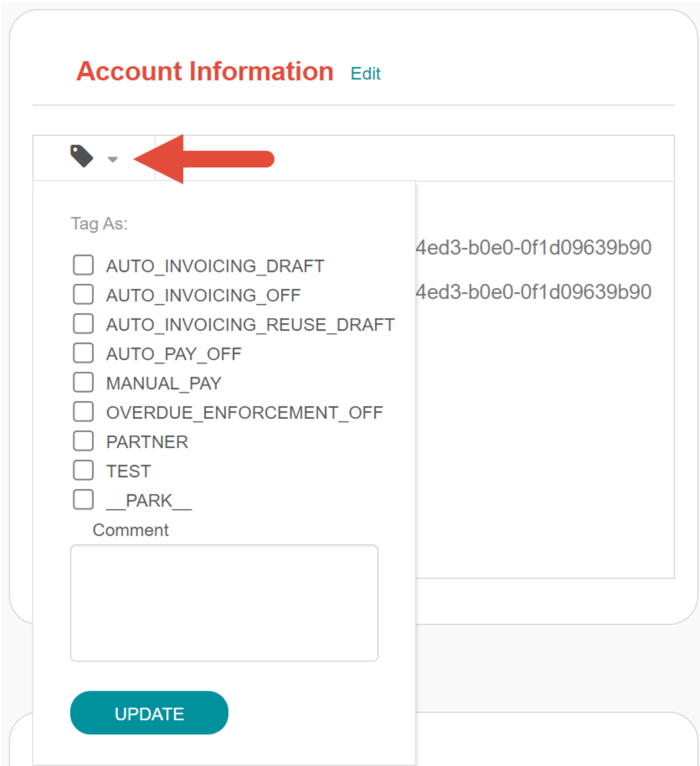
In Kaui, you can attach both control tags and user tags to accounts and invoices.

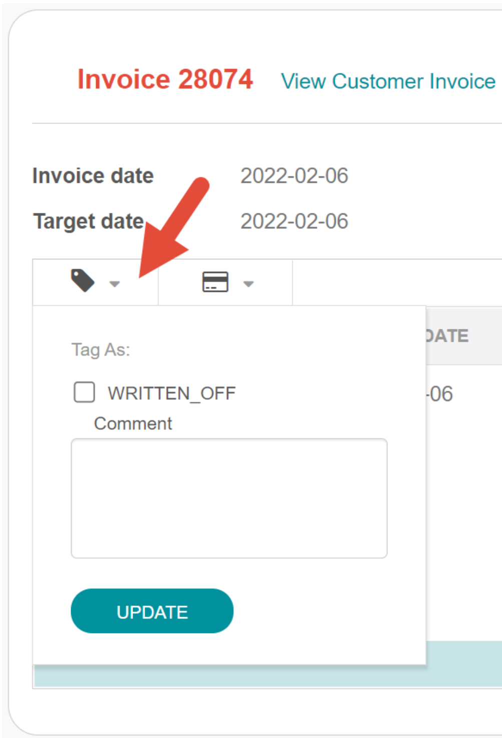
NOTE	**Note:** You can use the API to attach tags to more object types, such as payments and subscriptions. For more information, see the "Tags" section of the relevant object type (for example, Payments) in the REST API Reference.

To attach (or remove) a tag from an account or invoice:

1. Open the account on the Accounts page.
2. If necessary, click **Invoices** on the sub-menu and click the link to open the relevant invoice.

3. Click the tag icon:





4. 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 the checkbox.

5. Add text in the **Comment** field (optional). Kill Bill stores the Comment text in the tags audit log (accessible via API).

6. Click the **Update** button.

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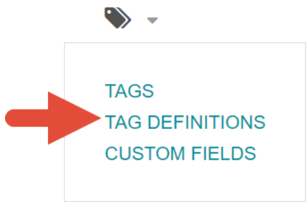
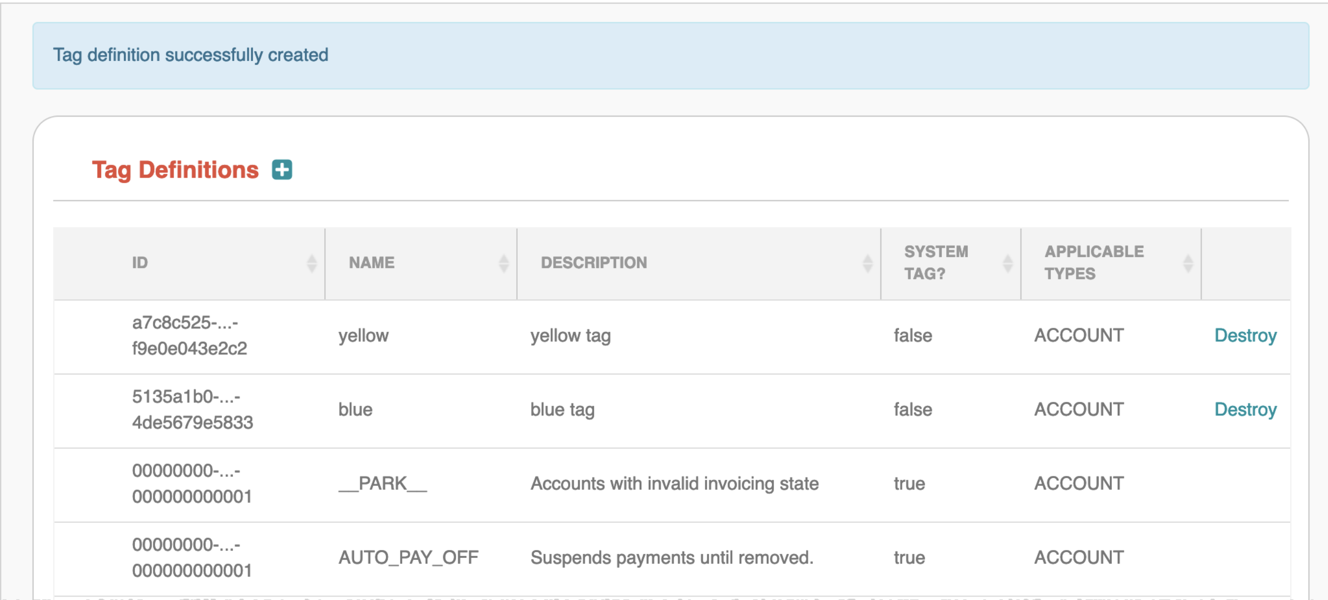
View Available Tags

To see a list of all available tags (control and user), select the tag icon at the top of the screen, then select **Tag Definitions**:

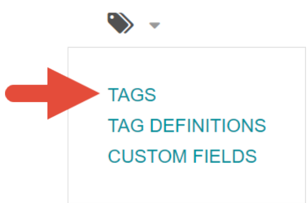


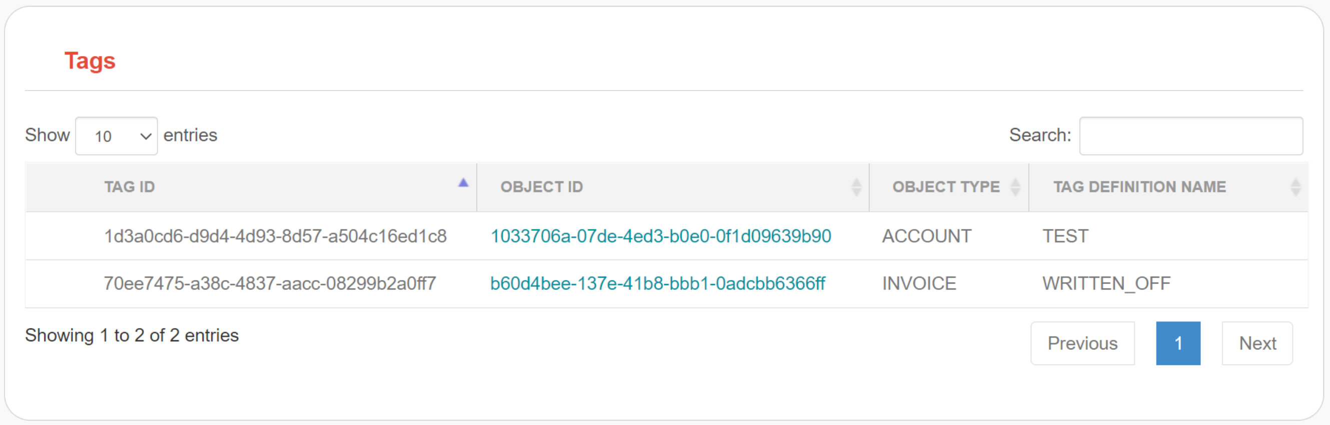


View Object Types That Have Attached Tags

This section explains how to view the object types 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 that have a tag attached, select the tag icon at the top of the screen, then select **Tags**:




Tags

Show 10 entries

Search:

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

Showing 1 to 2 of 2 entries

Previous 1 Next

TIP

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 an account (or invoice), open the account and click **Tags** on the sub-menu. The Tags page displays only the tags assigned to that account or its related invoice.

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