

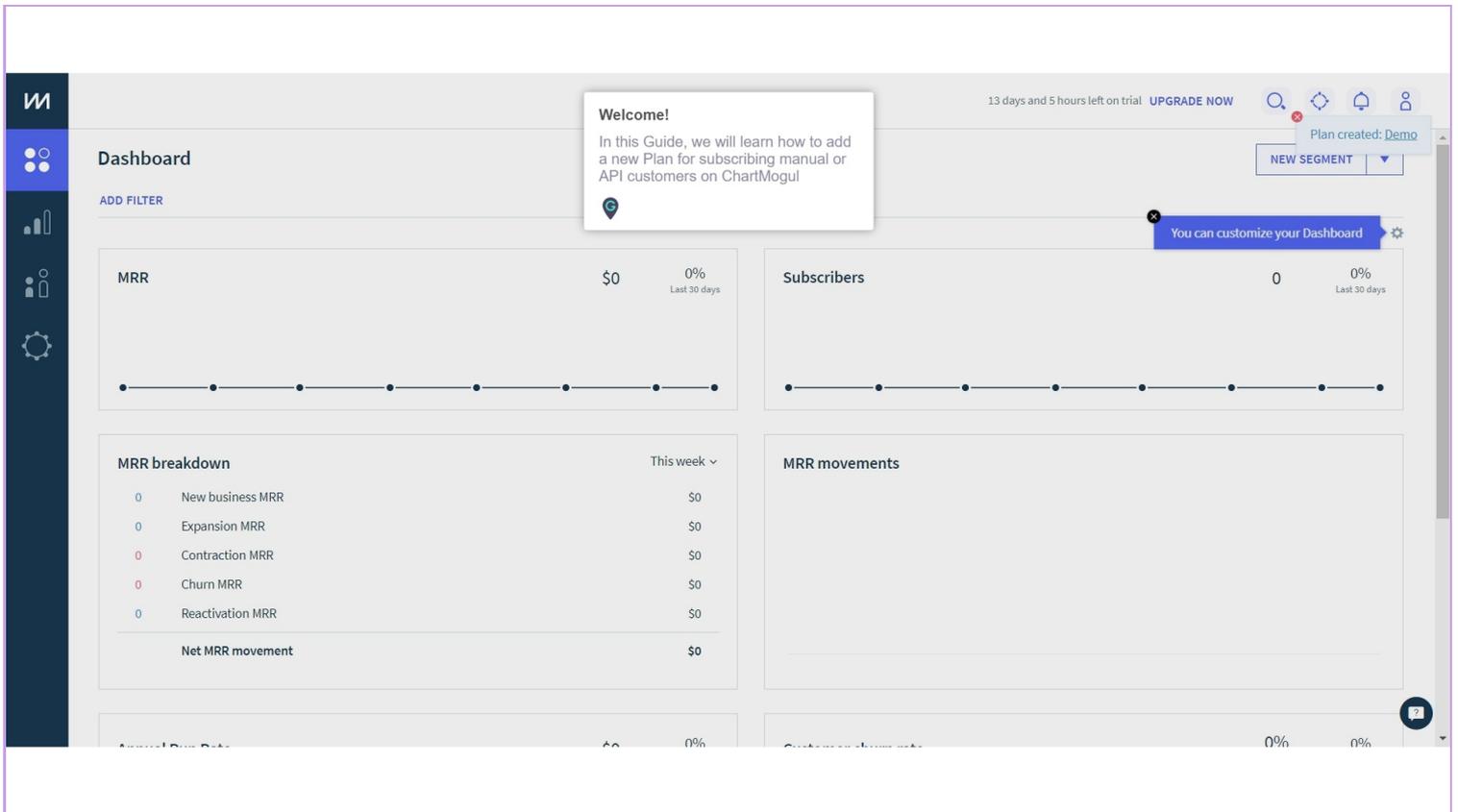


How to add a new Plan for subscribing manual or API customers on ChartMogul

# Step: 01

## Welcome!

In this Guide, we will learn how to add a new Plan for subscribing manual or API customers on ChartMogul



# Step: 02

Click on gear icon

The screenshot shows a dashboard with a dark blue sidebar on the left containing icons for home, dashboard, reports, users, and settings. The settings icon (a gear) is highlighted with a white box and a callout that says "Click on gear icon". The main dashboard area has a header with a trial notice, search, and user profile icons. Below the header, there are four main sections: "MRR" and "Subscribers" (both showing \$0 and 0% change), "MRR breakdown" (a table with categories like New business MRR, Expansion MRR, etc.), and "MRR movements". A blue notification bubble in the top right says "You can customize your Dashboard" with a gear icon.

13 days and 24 hours left on trial **UPGRADE NOW** 🔍 🔄 🔔 👤

Dashboard NEW SEGMENT ▾

ADD FILTER

**MRR** \$0 0% Last 30 days

**Subscribers** 0 0% Last 30 days

**MRR breakdown** This week ▾

0	New business MRR	\$0
0	Expansion MRR	\$0
0	Contraction MRR	\$0
0	Churn MRR	\$0
0	Reactivation MRR	\$0
<b>Net MRR movement</b>		<b>\$0</b>

**MRR movements**

You can customize your Dashboard ⚙️

# Step: 03

## Click on "Plans"

The screenshot shows the ChartMogul 'Users' management interface. At the top right, it indicates '13 days and 5 hours left on trial' and an 'UPGRADE NOW' button. The main navigation bar includes 'Users', 'Data sources', 'Data settings', 'Plans', and 'Billing'. The 'Plans' tab is highlighted with a blue border, and a callout box with a location pin icon and the text 'Click on "Plans"' points to it. Below the navigation, the 'Users' section is titled, followed by a sub-header '+ INVITE USERS' and a table of existing users.

Name	Email	Role	2FA		
Ashvini Rawal		Admin	Off		
Demo		Team member	Off	Pending activation	DELETE

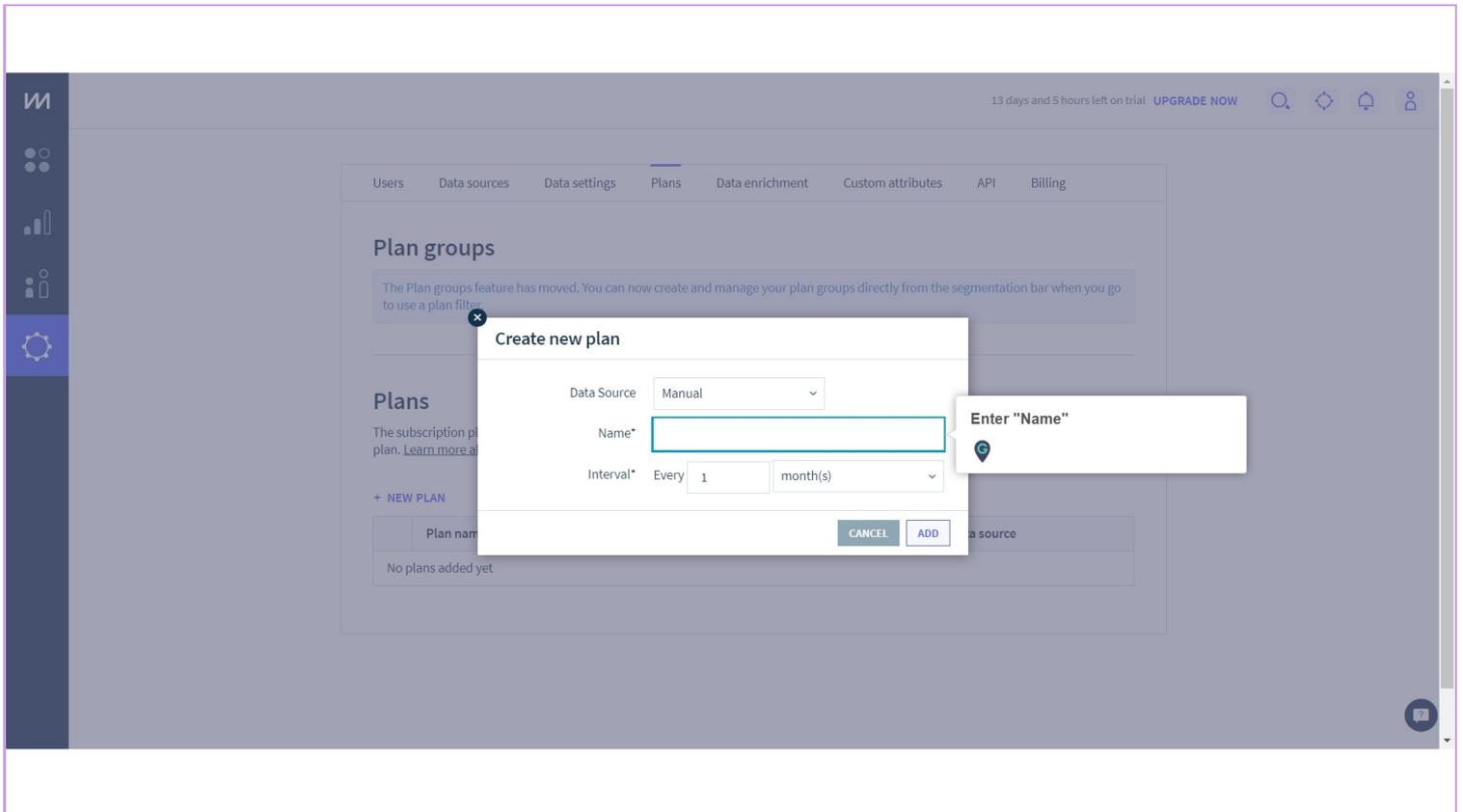
## Step: 04

### Click on "New Plan"

The screenshot displays the myGuide application interface. On the left is a dark blue sidebar with navigation icons. The top navigation bar includes a search icon, a refresh icon, a notification bell, and a user profile icon. A notification bubble on the right says "Plan created: Demo". The main content area has a navigation menu with "Plans" selected. Below this, there are two sections: "Plan groups" with a message about the feature moving, and "Plans" with a description and a "+ NEW PLAN" button. A callout box with a location pin icon points to the "+ NEW PLAN" button and contains the text "Click on 'New Plan'". Below the callout is a table with columns for "Plan", "External ID", and "Data source". The table currently shows "No plans added yet".

## Step: 05

Enter "Name"



The screenshot shows a software interface with a 'Create new plan' dialog box open. The dialog box has the following fields:

- Data Source:** A dropdown menu with 'Manual' selected.
- Name\*:** A text input field that is currently empty and highlighted with a red border.
- Interval\*:** A dropdown menu with 'Every' selected, followed by a text input field containing '1' and another dropdown menu with 'month(s)' selected.

At the bottom of the dialog box, there are two buttons: 'CANCEL' and 'ADD'. A callout box with a red location pin icon points to the 'Name\*' field, containing the text 'Enter "Name"'. The background interface shows a navigation menu on the left and a main content area with tabs for 'Users', 'Data sources', 'Data settings', 'Plans', 'Data enrichment', 'Custom attributes', 'API', and 'Billing'. The 'Plans' tab is active, and the 'Create new plan' dialog box is centered over it.

## Step: 06

### Select "Interval"

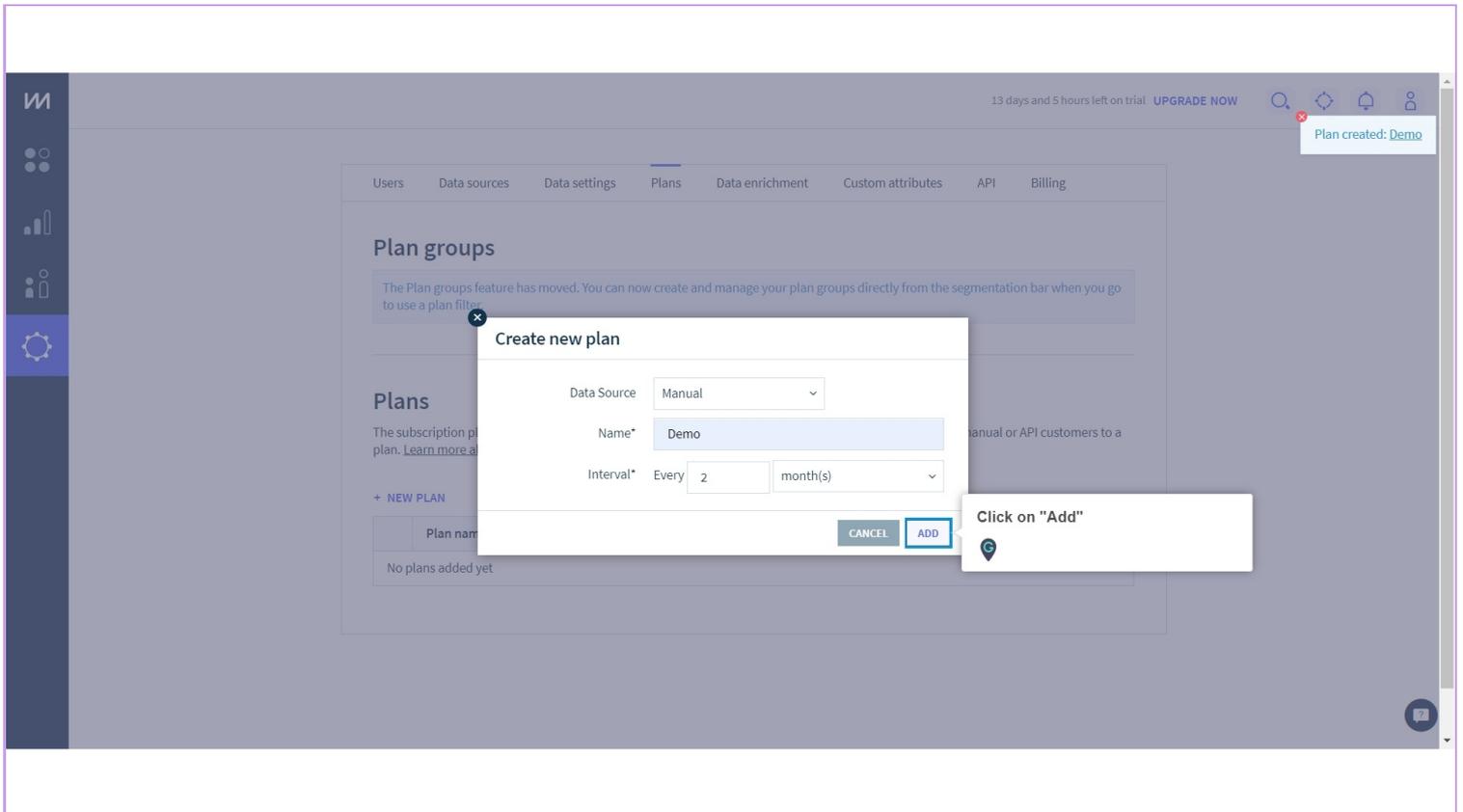
The screenshot shows a software interface with a 'Plans' tab selected. A 'Create new plan' dialog box is open, displaying the following fields:

- Data Source: Manual
- Name\*: Demo
- Interval\*: Every 1 month(s)

A callout box with a location pin icon and the text "Select 'Interval'" points to the 'Interval\*' field in the dialog. The background interface includes a navigation menu on the left and a top navigation bar with options like 'Users', 'Data sources', 'Data settings', 'Plans', 'Data enrichment', 'Custom attributes', 'API', and 'Billing'. A trial notice at the top right indicates '13 days and 5 hours left on trial' with an 'UPGRADE NOW' button.

## Step: 07

Click on "Add"



The screenshot displays a web application interface for managing plans. A modal window titled "Create new plan" is open, allowing the user to define a new plan. The form includes the following fields:

- Data Source:** A dropdown menu currently set to "Manual".
- Name\*:** A text input field containing the value "Demo".
- Interval\*:** A field with a dropdown set to "Every", a numeric input field containing "2", and another dropdown set to "month(s)".

At the bottom of the modal, there are two buttons: "CANCEL" and "ADD". A red box highlights the "ADD" button, and a callout bubble points to it with the text "Click on 'Add'".

In the background, the "Plans" section of the dashboard is visible, showing a message: "The Plan groups feature has moved. You can now create and manage your plan groups directly from the segmentation bar when you go to use a plan filter." Below this, there is a "+ NEW PLAN" button and a table with one header row "Plan name" and one data row "No plans added yet".

Other UI elements include a top navigation bar with "Users", "Data sources", "Data settings", "Plans", "Data enrichment", "Custom attributes", "API", and "Billing". A trial status indicator shows "13 days and 5 hours left on trial" with an "UPGRADE NOW" button. A notification in the top right corner states "Plan created: Demo".

# Step: 08

## Plan is created!

The screenshot shows a web application interface with a dark sidebar on the left containing navigation icons. The main content area has a top navigation bar with links: Users, Data sources, Data settings, Plans, Data enrichment, Custom attributes, API, and Billing. A notification box at the top center says "Plan is created!". In the top right corner, there is a trial status "13 days and 5 hours left on trial" with an "UPGRADE NOW" button, and a notification "Plan created: Demo".

The "Plans" section is active, displaying a message: "The Plan groups feature has moved. You can now create and manage your plan groups directly from the segmentation bar when you go to use a plan filter." Below this, a "Plans" section explains that subscription plans are listed here and provides a link to "Learn more about manual plans". A "+ NEW PLAN" button is visible above a table.

	Plan name	External ID	Data source	
👁	Demo	N/A	Manual/CSV	DELETE

# Thank You!

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