

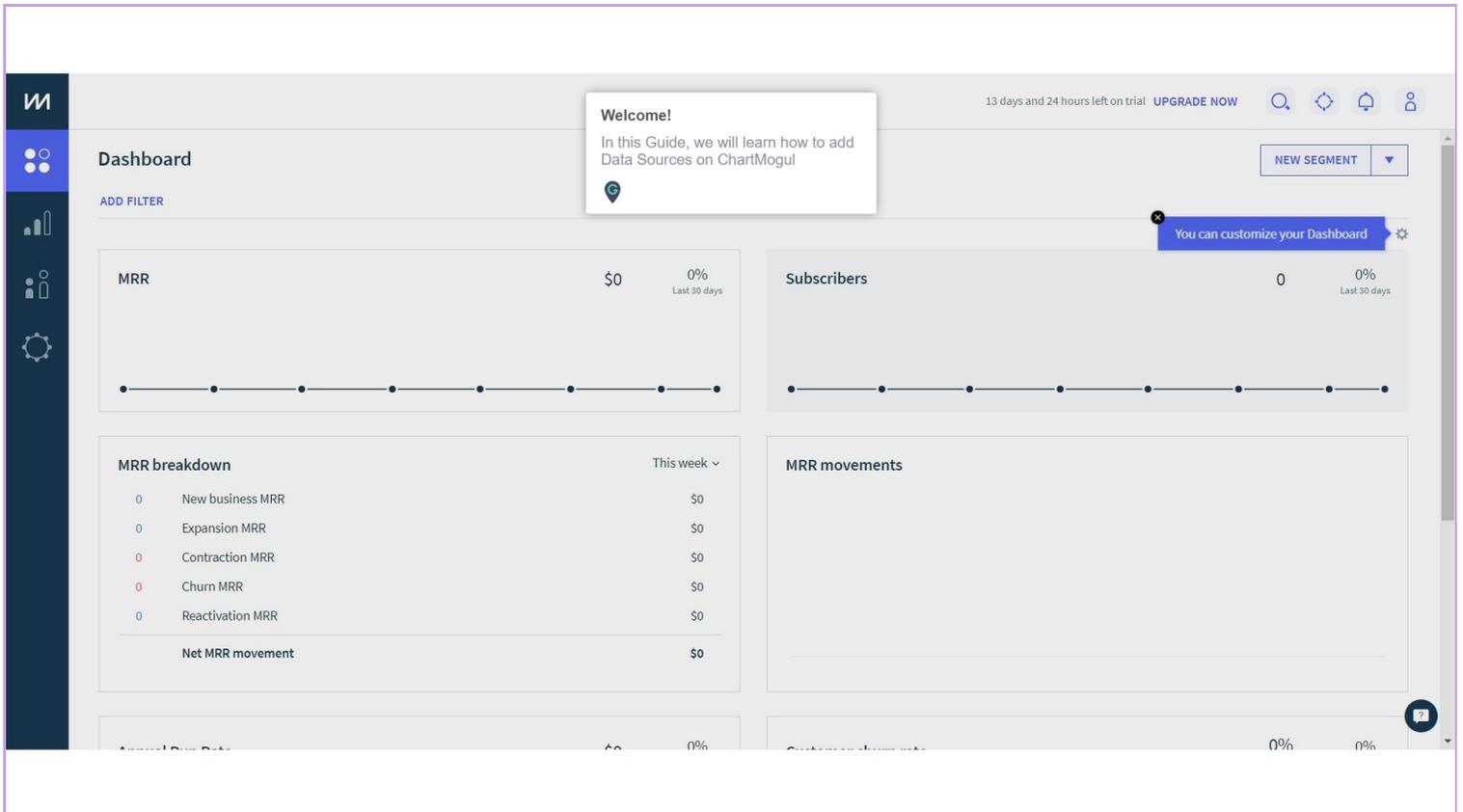


How to add Data Sources on ChartMogul

Step: 01

Welcome!

In this Guide, we will learn how to add Data Sources on ChartMogul



Step: 02

Click on gear icon

The screenshot shows a dashboard interface with a dark blue sidebar on the left. The sidebar contains several icons, with the gear icon (representing settings) highlighted by a white box and a tooltip that says "Click on gear icon". The main dashboard area is titled "Dashboard" and includes a "NEW SEGMENT" button. Below the title, there is an "ADD FILTER" section. The dashboard features four main widgets: "MRR" (Monthly Recurring Revenue) showing \$0 and 0% change; "Subscribers" showing 0 and 0% change; "MRR breakdown" showing a table of revenue components; and "MRR movements" showing a line chart area. A notification banner at the top right says "You can customize your Dashboard" with a gear icon. The top right corner of the dashboard includes a trial notice: "13 days and 24 hours left on trial UPGRADE NOW" and several utility icons (search, refresh, notifications, user profile).

	This week
0 New business MRR	\$0
0 Expansion MRR	\$0
0 Contraction MRR	\$0
0 Churn MRR	\$0
0 Reactivation MRR	\$0
Net MRR movement	\$0

Step: 03

Click on "Data sources"

13 days and 24 hours left on trial [UPGRADE NOW](#)

Users **Data sources** Custom attributes API Billing

Click on "Data sources"

Step 1: Review your data settings.

Users

Additional users are free, so you can add your whole team to ChartMogul if needed. [Learn more about users and roles.](#)

+ INVITE USERS

Name	Email	Role	2FA		
Aishwarya Karanjkar		Admin	Off		

Step: 04

Click on "New data source"

13 days and 24 hours left on trial [UPGRADE NOW](#)

Users **Data sources** Data settings Plans Data enrichment Custom attributes API Billing

Data sources

Add and manage your customer data sources here. If you bill your customers using different systems, you should create a data source for each system.

[+ NEW DATA SOURCE](#) Click on "New data source"

Name	System	Status	
Please add a data source			

Import API

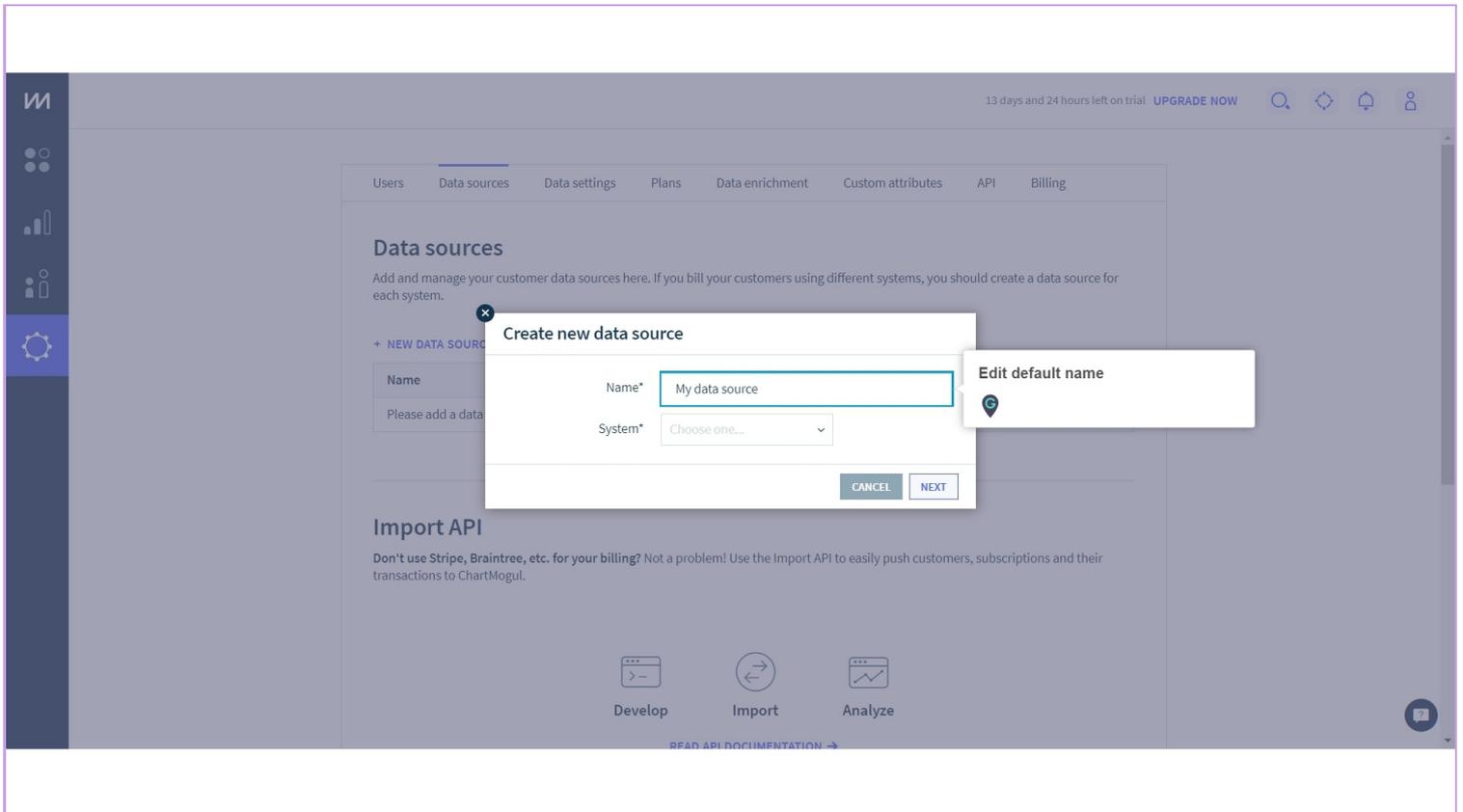
Don't use Stripe, Braintree, etc. for your billing? Not a problem! Use the Import API to easily push customers, subscriptions and their transactions to ChartMogul.

Develop Import Analyze

[READ API DOCUMENTATION →](#)

Step: 05

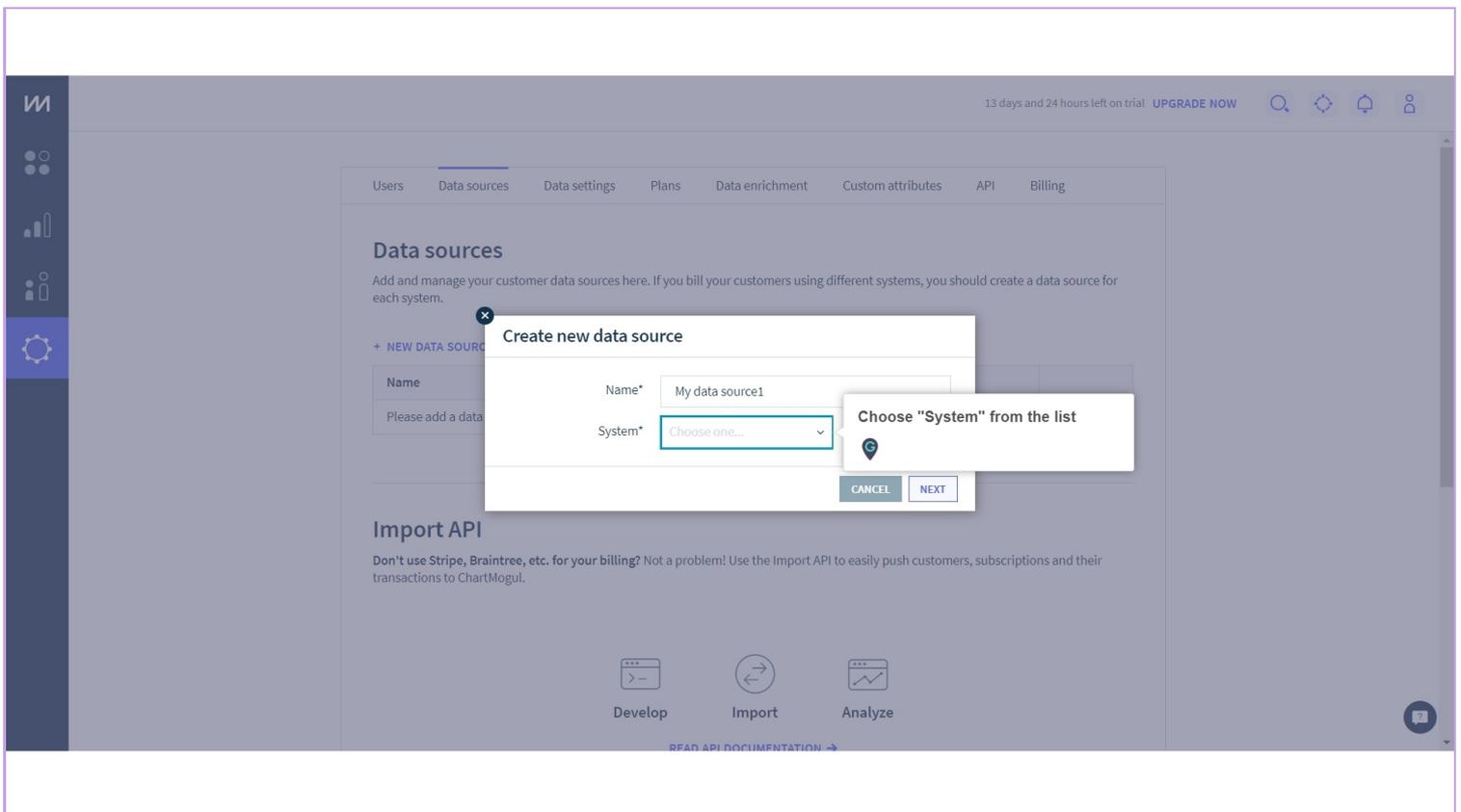
Edit default name



The screenshot displays a web application interface with a sidebar on the left and a main content area. The main content area is titled "Data sources" and includes a sub-header "Data sources" and a description: "Add and manage your customer data sources here. If you bill your customers using different systems, you should create a data source for each system." Below this, there is a "+ NEW DATA SOURCE" button and a form with fields for "Name" and "System". The "Name" field contains the text "My data source". A tooltip with the text "Edit default name" is positioned over the "Name" input field. The "System" field is a dropdown menu with the text "Choose one...". At the bottom of the dialog, there are "CANCEL" and "NEXT" buttons. The background interface shows a navigation menu with items like "Users", "Data sources", "Data settings", "Plans", "Data enrichment", "Custom attributes", "API", and "Billing". There is also a "13 days and 24 hours left on trial UPGRADE NOW" notification in the top right corner. At the bottom of the page, there are icons for "Develop", "Import", and "Analyze", and a link to "READ API DOCUMENTATION".

Step: 06

Choose "System" from the list

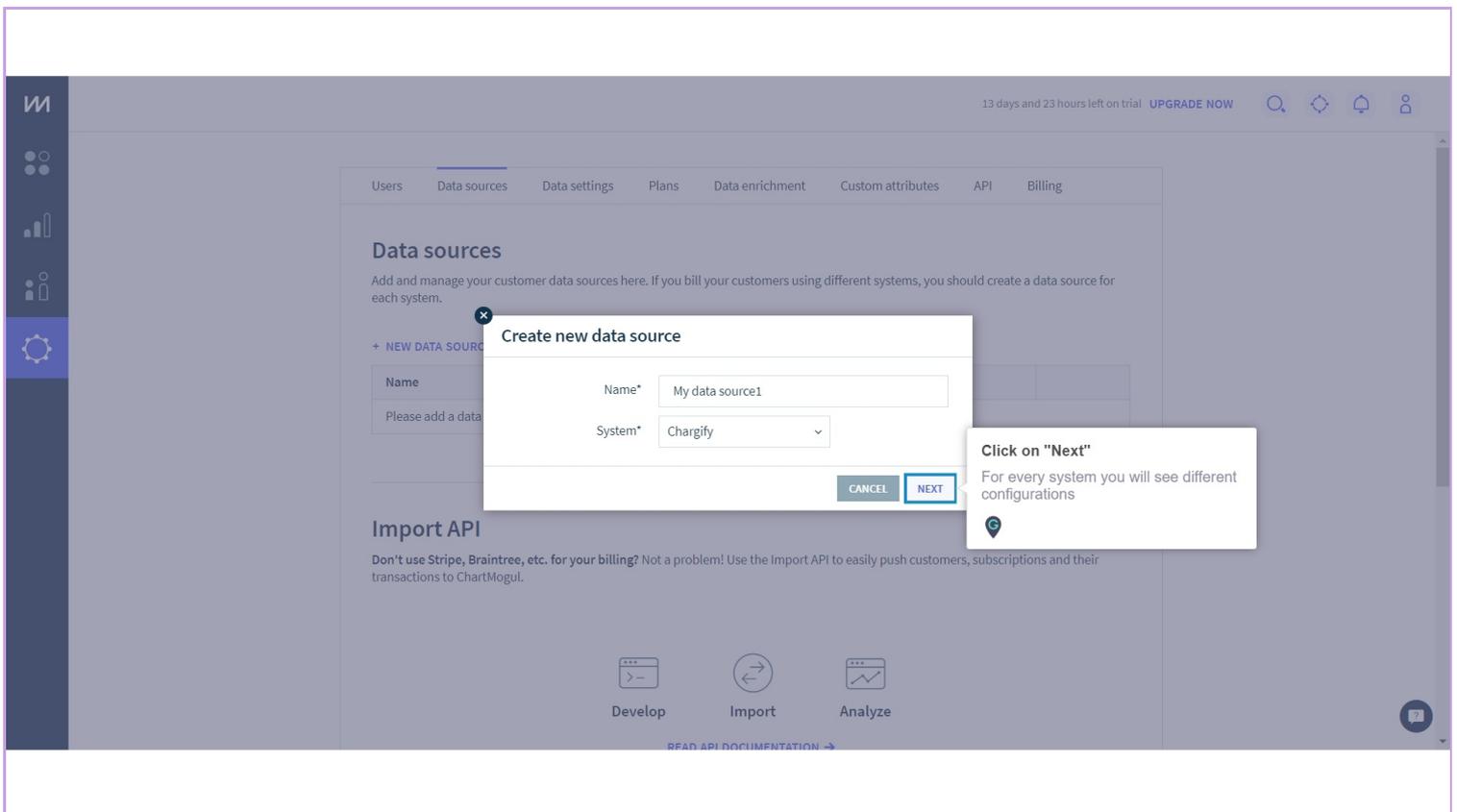


The screenshot shows the 'Data sources' section of the ChartMogul dashboard. A modal titled 'Create new data source' is open, featuring a text input for 'Name' with the value 'My data source1' and a dropdown menu for 'System' with the placeholder 'Choose one...'. A callout box points to the dropdown menu with the text 'Choose "System" from the list'. The background page includes a navigation bar with 'Users', 'Data sources', 'Data settings', 'Plans', 'Data enrichment', 'Custom attributes', 'API', and 'Billing'. Below the modal, there is an 'Import API' section with instructions and icons for 'Develop', 'Import', and 'Analyze'.

Step: 07

Click on "Next"

For every system you will see different configurations



The screenshot shows the 'Data sources' section of the ChartMogul dashboard. A modal window titled 'Create new data source' is open, allowing the user to add a new data source. The modal contains two input fields: 'Name*' with the value 'My data source1' and 'System*' with a dropdown menu set to 'Chargify'. At the bottom of the modal are 'CANCEL' and 'NEXT' buttons. A callout box points to the 'NEXT' button with the text: 'Click on "Next" For every system you will see different configurations'. The background shows the 'Data sources' page with a '+ NEW DATA SOURCE' button and a table with columns for Name and System. Below the table is the 'Import API' section with a brief description and icons for 'Develop', 'Import', and 'Analyze'.

Step: 08

Connect your selected data source account through webhook URL

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Users Data sources Data settings Plans Data enrichment Custom attributes API Billing

Chargify data source

Connect your Chargify account to import your customer billing data for subscription analytics.
[How to connect Chargify to ChartMogul](#)

Generate a webhook to keep your data in sync

Data source UUID

Webhook URL [REGENERATE](#)
[Show instructions](#)

Add your Chargify API information

Private API key

Chargify subdomain .chargify.com

Currency

Metered components Include metered components in subscription revenue

[SAVE](#)

Connect your selected data source account through webhook URL

Step: 09

Add API information of your data source

Add Private API key, Subdomain of the data source, Currency and include/exclude metered components in subscription revenue

13 days and 23 hours left on trial [UPGRADE NOW](#)

Add API information of your data source
Add Private API key, Subdomain of the data source, Currency and include/exclude metered components in subscription revenue

Data source UUID

Webhook URL [REGENERATE](#)
[Show instructions](#)

Add your Chargify API information

Private API key

Chargify subdomain .chargify.com

Currency

Metered components Include metered components in subscription revenue

[SAVE](#)

Then import your historic data

[IMPORT DATA](#)

Name

[UPDATE](#)

Step: 10

Click on "Save"

13 days and 23 hours left on trial [UPGRADE NOW](#) [Q](#) [+](#) [🔔](#) [👤](#)

Data source UUID

Webhook URL [REGENERATE](#)
[Show instructions](#)

Add your Chargify API information

Private API key

Chargify subdomain .chargify.com

Currency

Include metered components in subscription revenue

[SAVE](#)

Then import your historic data

[IMPORT DATA](#)

Name

[UPDATE](#)

Step: 11

Import your historic data

The screenshot shows a web interface with a dark sidebar on the left containing icons for home, dashboard, users, and settings. The main content area is titled "Add your Chargify API information" and includes the following fields:

- Private API key: [Redacted]
- Chargify subdomain: [Redacted] .chargify.com
- Currency: Select Currency... (dropdown)
- Metered components: Include metered components in subscription revenue

A "SAVE" button is located below the "Metered components" section.

Below this, the section "Then import your historic data" features an "IMPORT DATA" button. A tooltip with a location pin icon and the text "Import your historic data" is positioned over the button.

Underneath, there is a "Name" field containing "My data source1" and an "UPDATE" button.

At the bottom, a "Delete" link is provided with the text: "If you want to remove this data source and all the data associated with it, click the link below."

The top right of the interface shows a trial status: "13 days and 23 hours left on trial" and an "UPGRADE NOW" button, along with search, refresh, and user profile icons.

Step: 12

Edit the data source name if you want

13 days and 24 hours left on trial [UPGRADE NOW](#)

Currency

Metered components Include metered components in subscription revenue

[SAVE](#)

Then import your historic data

[IMPORT DATA](#)

Name

[UPDATE](#)

Delete [If you want to remove this data source and all the data associated with it, click the link below.](#)

[DELETE THIS DATA SOURCE](#)

[← MANAGE DATA SOURCES](#)

Edit the data source name if you want

Step: 13

Click on "Update" and you're done!

The screenshot displays a web application interface for managing data sources. On the left is a dark sidebar with icons for home, dashboard, users, and settings. The top right corner shows a trial timer: "13 days and 24 hours left on trial" and an "UPGRADE NOW" button. The main content area is titled "Then import your historic data" and contains the following elements:

- A "Meted components" section with a checked checkbox "Include meteted components in subscription revenue" and a "SAVE" button.
- An "IMPORT DATA" button.
- A data source entry with the name "My data source1" and an "UPDATE" button. A callout box with a location pin icon points to the "UPDATE" button, containing the text "Click on 'Update' and you're done!".
- A "Delete" section with the text "If you want to remove this data source and all the data associated with it, click the link below." and a red link "DELETE THIS DATA SOURCE".
- A link at the bottom: "← MANAGE DATA SOURCES".

Thank You!

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