

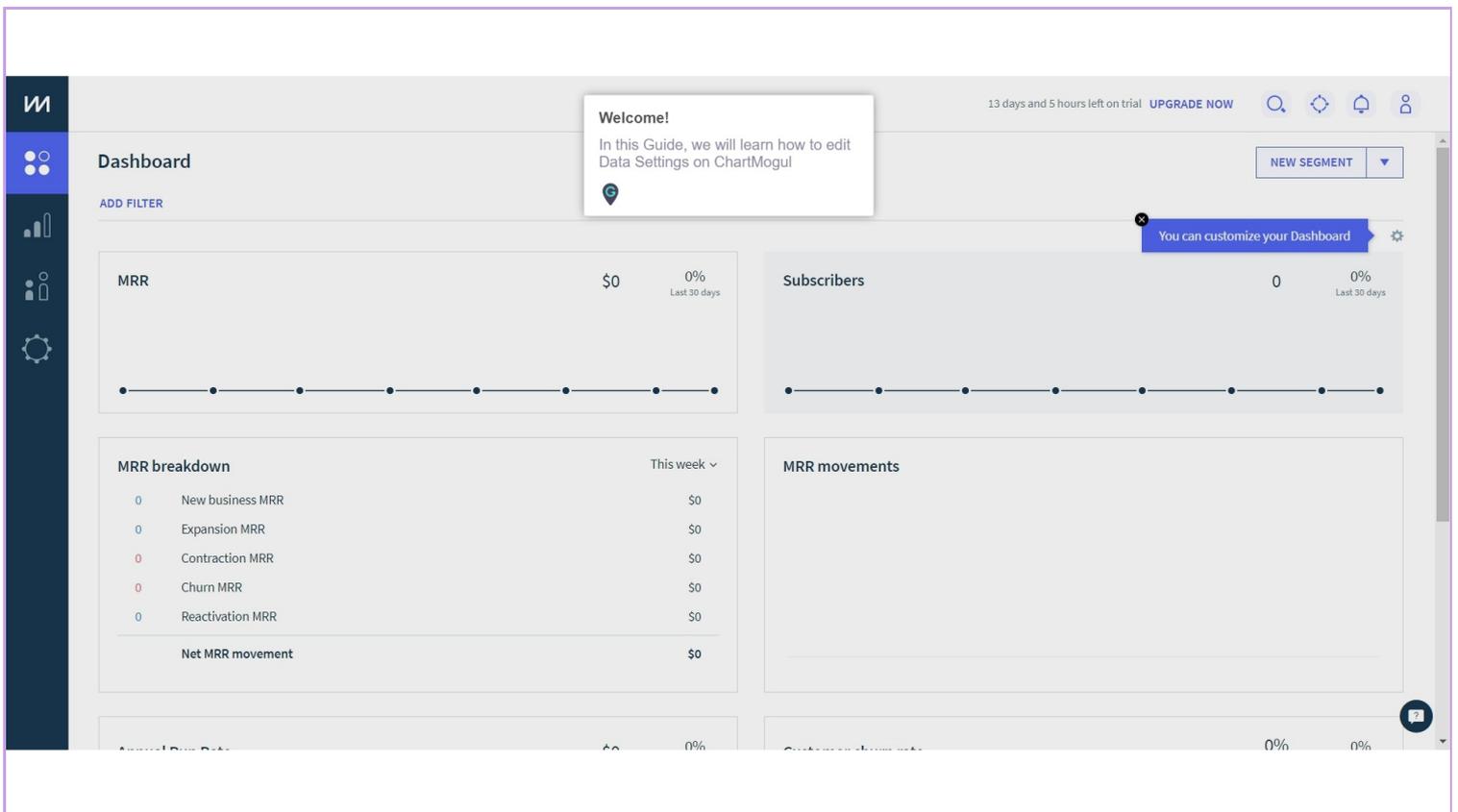


How to edit Data Settings on ChartMogul

Step: 01

Welcome!

In this Guide, we will learn how to edit Data Settings on ChartMogul



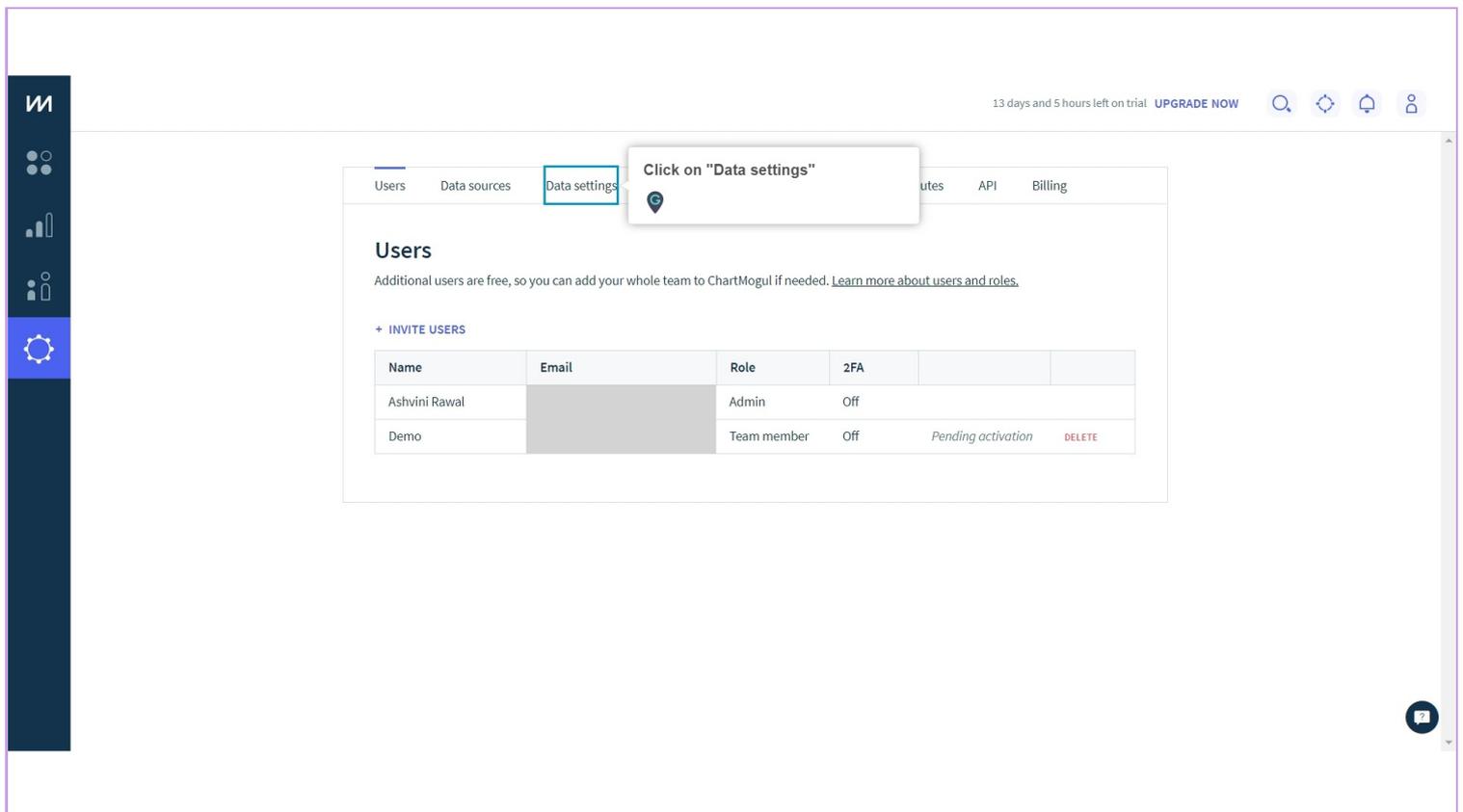
Step: 02

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 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" which is a table with categories like New business MRR, Expansion MRR, Contraction MRR, Churn MRR, and Reactivation MRR, all showing \$0; and "MRR movements". A blue notification bubble in the top right corner says "You can customize your Dashboard" with a gear icon. The top right of the dashboard also shows a trial status: "13 days and 24 hours left on trial UPGRADE NOW" along with search, refresh, and user profile icons.

Step: 03

Click on "Data settings"



The screenshot shows the 'Users' management page in ChartMogul. The 'Data settings' tab is highlighted with a blue box, and a callout box with a location pin icon points to it with the text 'Click on "Data settings"'. The page includes a sidebar with navigation icons, a top navigation bar with 'Users', 'Data sources', 'Data settings', 'Integrations', 'API', and 'Billing', and a main content area with a 'Users' table.

13 days and 5 hours left on trial [UPGRADE NOW](#)    

Users | Data sources | **Data settings** | Integrations | API | Billing

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		
Ashvini Rawal		Admin	Off		
Demo		Team member	Off	Pending activation	DELETE



Step: 04

Select "Timezone" from here

The screenshot displays the 'Data settings' page in the ChartMogul interface. The page is divided into several sections: 'Users', 'Data sources', 'Data settings' (active), 'Plans', 'Data enrichment', 'Custom attributes', 'API', and 'Billing'. The 'Data settings' section is further divided into 'General', 'Subscription Analytics', and 'Revenue Recognition'. The 'General' tab is selected, showing the following settings:

- Timezone:** GMT/BST - London (selected). A callout box points to this dropdown with the text "Select 'Timezone' from here".
- Week starts on:** Sunday
- Primary currency:** USD \$ (with a link to "Learn about how we handle multiple currencies.")
- Default customer name:** Company name

A "SAVE CHANGES" button is located at the bottom of the settings panel. The top right of the page shows a trial status: "13 days and 23 hours left on trial" and an "UPGRADE NOW" button. The left sidebar contains navigation icons for home, data, users, and settings (highlighted).

Step: 05

Choose, when do you want your week to start

The screenshot shows the 'Data settings' page in ChartMogul. The page has a dark sidebar on the left with icons for home, settings, analytics, and users. The main content area has a navigation bar with 'Users', 'Data sources', 'Data settings' (active), 'Plans', 'Data enrichment', 'Custom attributes', 'API', and 'Billing'. Below the navigation bar, there's a 'Data settings' section with a sub-header and a link to 'Learn more about data settings'. There are three tabs: 'General' (active), 'Subscription Analytics', and 'Revenue Recognition'. The 'General' tab contains four settings: 'Timezone' (HMT/IST - Kolkata), 'Week starts on' (Sunday), 'Primary currency' (USD \$), and 'Default customer name' (Company name). A 'SAVE CHANGES' button is located at the bottom. A tooltip is positioned over the 'Week starts on' dropdown, containing the text 'Choose, when do you want your week to start' and a location pin icon. The top right corner of the page shows '13 days and 5 hours left on trial' and an 'UPGRADE NOW' button, along with search, refresh, and user profile icons.

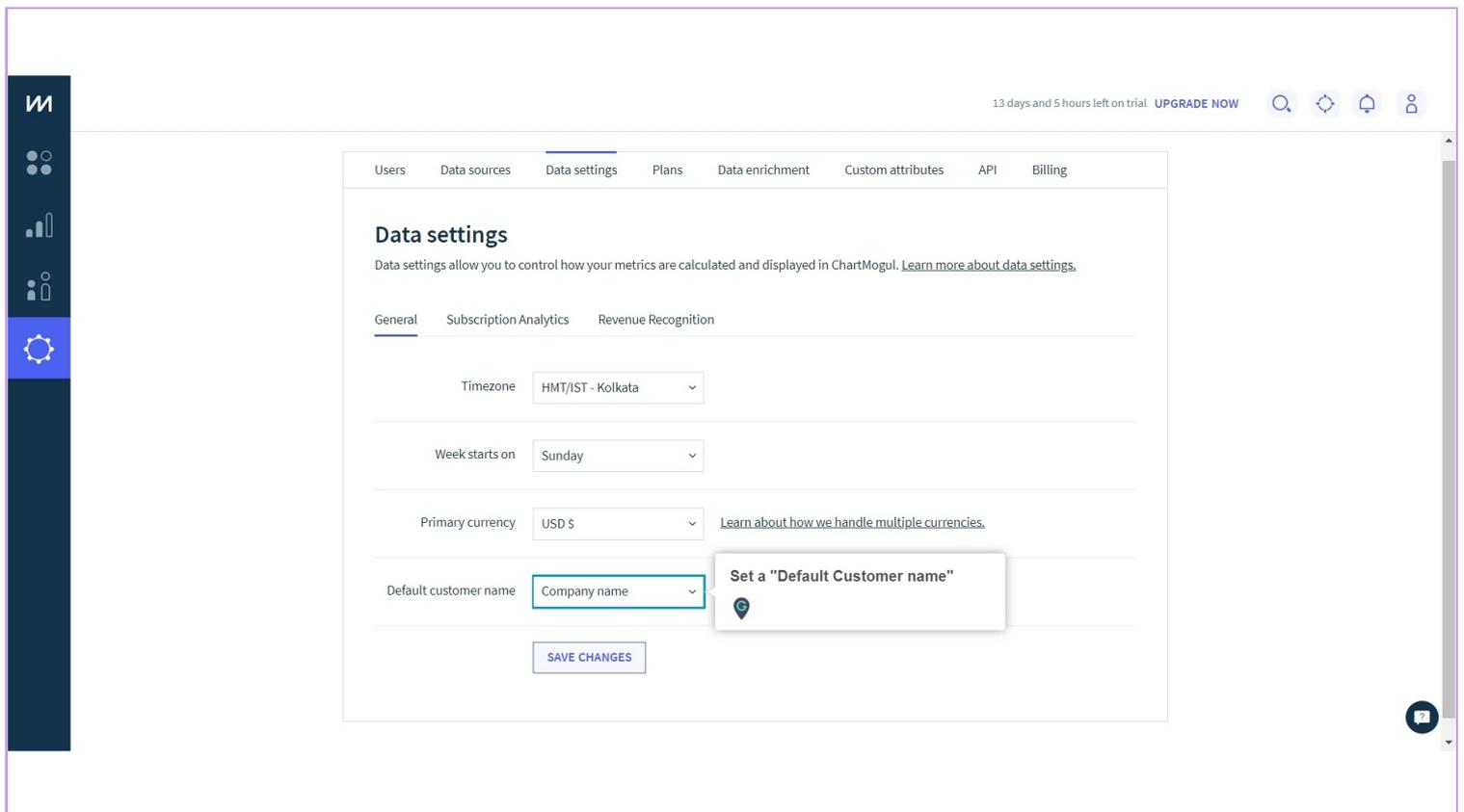
Step: 06

Select "Currency"

The screenshot shows the 'Data settings' page in ChartMogul. The page has a top navigation bar with 'Users', 'Data sources', 'Data settings' (active), 'Plans', 'Data enrichment', 'Custom attributes', 'API', and 'Billing'. A trial timer shows '13 days and 5 hours left on trial' with an 'UPGRADE NOW' button. A search, refresh, and user profile icons are in the top right. The 'Data settings' section has tabs for 'General', 'Subscription Analytics', and 'Revenue Recognition'. Under 'General', there are settings for 'Timezone' (HMT/IST - Kolkata), 'Weeks' (with a tooltip 'Select "Currency"'), 'Primary currency' (USD \$), and 'Default customer name' (Company name). A 'SAVE CHANGES' button is at the bottom.

Step: 07

Set a "Default Customer name"



The screenshot displays the 'Data settings' page in the ChartMogul interface. The page is titled 'Data settings' and includes a navigation menu with options: Users, Data sources, Data settings (selected), Plans, Data enrichment, Custom attributes, API, and Billing. Below the title, there is a sub-menu with 'General', 'Subscription Analytics', and 'Revenue Recognition'. The 'General' tab is active, showing settings for Timezone (HMT/IST - Kolkata), Week starts on (Sunday), Primary currency (USD \$), and Default customer name (Company name). A tooltip is visible over the 'Default customer name' dropdown, containing the text 'Set a "Default Customer name"' and a location pin icon. A 'SAVE CHANGES' button is located at the bottom of the settings panel. The top right corner of the interface shows a trial status: '13 days and 5 hours left on trial' and an 'UPGRADE NOW' button, along with search, refresh, and user profile icons.

Step: 08

Click on "Save changes"

The screenshot shows the 'Data settings' page in the ChartMogul dashboard. The page has a dark blue sidebar on the left with icons for home, settings, analytics, and users. The main content area is titled 'Data settings' and includes a navigation menu with options: Users, Data sources, Data settings (selected), Plans, Data enrichment, Custom attributes, API, and Billing. Below the title, there is a sub-menu with 'General', 'Subscription Analytics', and 'Revenue Recognition'. The 'General' tab is active, showing four settings: 'Timezone' (HMT/IST - Kolkata), 'Week starts on' (Sunday), 'Primary currency' (USD \$), and 'Default customer name' (First + last name). A blue 'SAVE CHANGES' button is located at the bottom of the settings form. A callout box with a pointer icon highlights the button and contains the text 'Click on "Save changes"'. The top right of the dashboard shows a trial status: '13 days and 5 hours left on trial' and an 'UPGRADE NOW' button, along with search, refresh, and user profile icons.

Step: 09

Click on "Subscription Analytics"

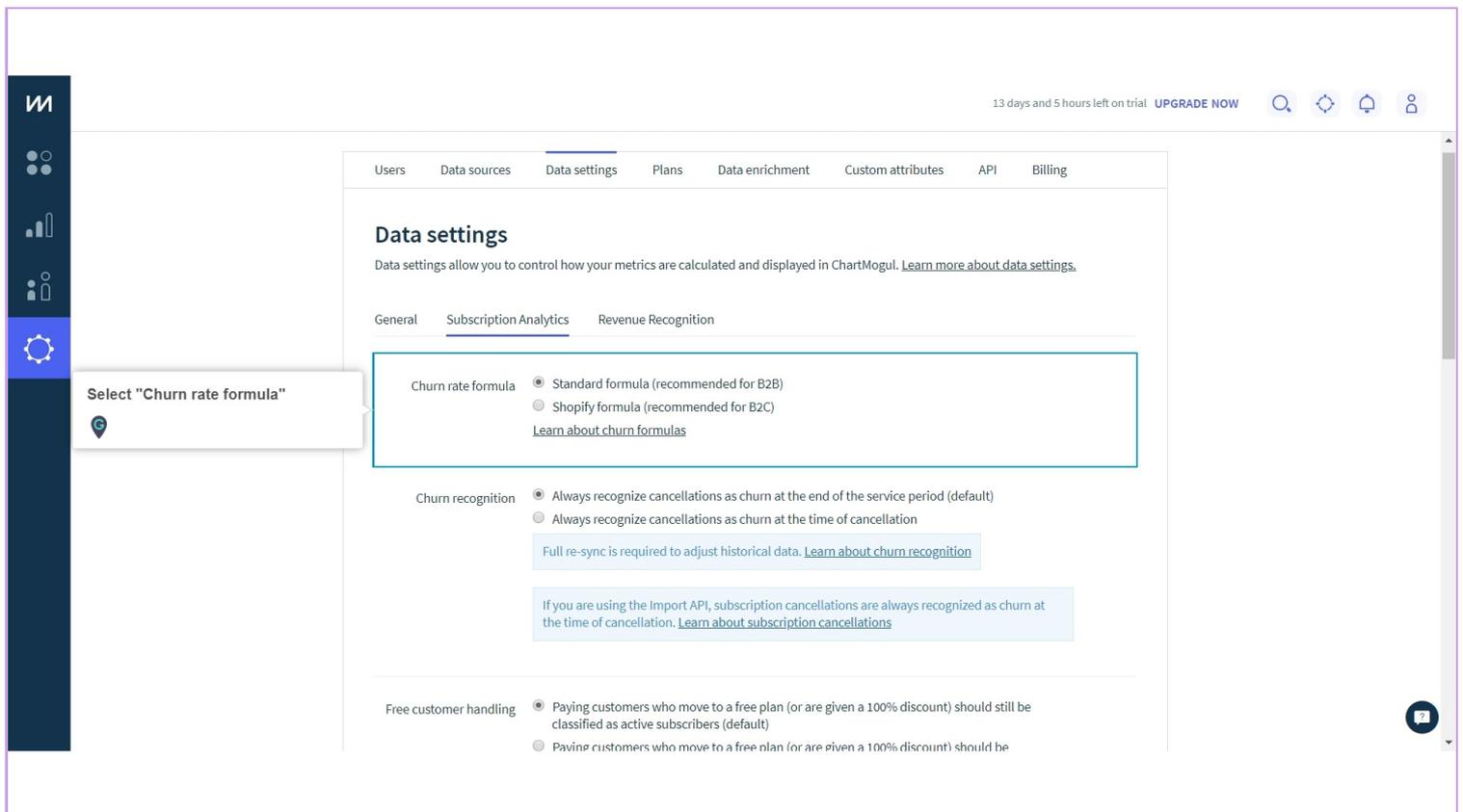
The screenshot displays the 'Data settings' page in ChartMogul. The 'Subscription Analytics' tab is selected and highlighted with a callout box that says "Click on 'Subscription Analytics'". The page shows the following settings:

- Timezone: GMT/BST - London
- Week starts on: Sunday
- Primary currency: USD \$ (with a link to [Learn about how we handle multiple currencies.](#))
- Default customer name: First + last name

A "SAVE CHANGES" button is located at the bottom of the settings form.

Step: 10

Select "Churn rate formula"



The screenshot displays the ChartMogul interface. On the left is a dark sidebar with navigation icons. The main content area is titled "Data settings" and includes a navigation menu with "Users", "Data sources", "Data settings", "Plans", "Data enrichment", "Custom attributes", "API", and "Billing". The "Data settings" section has three tabs: "General", "Subscription Analytics", and "Revenue Recognition". The "Subscription Analytics" tab is active. A callout box on the left points to the "Churn rate formula" section, which contains two radio button options: "Standard formula (recommended for B2B)" (selected) and "Shopify formula (recommended for B2C)". Below this, there are sections for "Churn recognition" and "Free customer handling", each with radio button options and informational text boxes.

13 days and 5 hours left on trial [UPGRADE NOW](#)    

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

Data settings

Data settings allow you to control how your metrics are calculated and displayed in ChartMogul. [Learn more about data settings.](#)

General **Subscription Analytics** Revenue Recognition

Churn rate formula Standard formula (recommended for B2B)
 Shopify formula (recommended for B2C)
[Learn about churn formulas](#)

Churn recognition Always recognize cancellations as churn at the end of the service period (default)
 Always recognize cancellations as churn at the time of cancellation
Full re-sync is required to adjust historical data. [Learn about churn recognition](#)

If you are using the Import API, subscription cancellations are always recognized as churn at the time of cancellation. [Learn about subscription cancellations](#)

Free customer handling Paying customers who move to a free plan (or are given a 100% discount) should still be classified as active subscribers (default)
 Paying customers who move to a free plan (or are given a 100% discount) should be

Step: 11

Select "Churn recognition"

The screenshot shows the ChartMogul 'Data settings' interface. The navigation menu includes 'Users', 'Data sources', 'Data settings', 'Plans', 'Data enrichment', 'Custom attributes', 'API', and 'Billing'. The 'Data settings' page has three tabs: 'General', 'Subscription Analytics', and 'Revenue Recognition'. Under 'Subscription Analytics', there are three sections: 'Churn rate formula', 'Churn recognition', and 'Free customer handling'. The 'Churn recognition' section is highlighted with a red box and contains two radio button options: 'Always recognize cancellations as churn at the end of the service period (default)' and 'Always recognize cancellations as churn at the time of cancellation'. Below these options are two informational text boxes: 'Full re-sync is required to adjust historical data. [Learn about churn recognition](#)' and 'If you are using the Import API, subscription cancellations are always recognized as churn at the time of cancellation. [Learn about subscription cancellations](#)'. A callout box on the right side of the page points to the 'Churn recognition' section with the text 'Select "Churn recognition"'. The top right of the interface shows '13 days and 5 hours left on trial' and an 'UPGRADE NOW' button, along with search, refresh, and user profile icons.

Step: 12

Select customer handling strategy for customers who have been paying so far, and now moving to a free plan

The screenshot shows the ChartMogul settings interface. On the left is a dark sidebar with navigation icons. The main content area is titled 'Free customer handling' and contains two radio button options. The first option is selected. Below the options is a light blue informational box. The second section, 'Handling of delinquent subscriptions', contains explanatory text, two radio button options, a dropdown menu set to '14 days past due', and two more light blue informational boxes. On the right side, a white tooltip box with a location pin icon contains the text: 'Select customer handling strategy for customers who have been paying so far, and now moving to a free plan'. The top right of the interface shows a trial timer and several utility icons.

13 days and 5 hours left on trial **UPGRADE NOW** 🔍 ⚙️ 🔔 👤

Free customer handling

- Paying customers who move to a free plan (or are given a 100% discount) should still be classified as active subscribers (default)
- Paying customers who move to a free plan (or are given a 100% discount) should be classified as cancelled/churned subscribers

With either option MRR will reduce to \$0. Full re-sync is required to adjust historical data.

Handling of delinquent subscriptions

With some billing systems, it's possible for subscriptions to remain active indefinitely, even after all payment attempts have failed. These delinquent subscriptions will continue to contribute to your MRR and active customer count until they're explicitly cancelled.

To avoid over-reporting the number of paid subscriptions, you can choose to automatically cancel these subscriptions in ChartMogul after they have been delinquent for some time.

- Leave past due subscriptions as-is until they are explicitly cancelled.
- Treat subscriptions as cancelled when they are

14 days past due ▾

This feature only impacts subscriptions in your ChartMogul account, and does not make changes to the status of subscriptions in your billing system.

Cancellations generated by this feature will not be 'undone' if the unpaid invoice(s) from the past eventually do get paid. However, if an invoice for a subscription that has been 'churned' by this feature gets paid in the future (the invoice has a subscription period beginning after the churn date), then the subscription will automatically be reactivated and appear as Reactivation MRR in your ChartMogul reports.

Select customer handling strategy for customers who have been paying so far, and now moving to a free plan

Step: 13

Select a strategy for handling delinquent subscriptions

The screenshot shows the ChartMogul settings interface. On the left is a dark sidebar with icons for home, settings, reports, and users. The main content area is titled 'Handling of delinquent subscriptions'. It contains a text box explaining that delinquent subscriptions can remain active indefinitely and that users can choose to automatically cancel them after a certain period. Two radio button options are available: 'Leave past due subscriptions as-is until they are explicitly cancelled.' (selected) and 'Treat subscriptions as cancelled when they are'. A dropdown menu is set to '14 days past due'. Below this are two informational boxes: one stating the feature only impacts ChartMogul account subscriptions and another explaining that cancellations are not 'undone' if unpaid invoices are later paid. A link 'Learn more about delinquent subscription handling' is provided. The 'Refund handling' section below has two radio button options: 'Refunds are tracked but do not, by themselves, impact MRR (default)' (selected) and 'When an invoice is refunded (in full) reduce the historic MRR as if the invoice was never paid (Stripe only)'. A note states 'Full re-sync is required to adjust historical data.' A callout box on the right says 'Select a strategy for handling delinquent subscriptions' with a location pin icon. The top right of the interface shows '13 days and 5 hours left on trial' and an 'UPGRADE NOW' button.

13 days and 5 hours left on trial [UPGRADE NOW](#)

Handling of delinquent subscriptions

With some billing systems, it's possible for subscriptions to remain active indefinitely, even after all payment attempts have failed. These delinquent subscriptions will continue to contribute to your MRR and active customer count until they're explicitly cancelled.

To avoid over-reporting the number of paid subscriptions, you can choose to automatically cancel these subscriptions in ChartMogul after they have been delinquent for some time.

- Leave past due subscriptions as-is until they are explicitly cancelled.
- Treat subscriptions as cancelled when they are

14 days past due

This feature only impacts subscriptions in your ChartMogul account, and does not make changes to the status of subscriptions in your billing system.

Cancellations generated by this feature will not be 'undone' if the unpaid invoice(s) from the past eventually do get paid. However, if an invoice for a subscription that has been 'churned' by this feature gets paid in the future (the invoice has a subscription period beginning after the churn date), then the subscription will automatically be reactivated and appear as Reactivation MRR in your ChartMogul reports.

[Learn more about delinquent subscription handling](#)

Refund handling

- Refunds are tracked but do not, by themselves, impact MRR (default)
- When an invoice is refunded (in full) reduce the historic MRR as if the invoice was never paid (Stripe only)

Full re-sync is required to adjust historical data.

Select a strategy for handling delinquent subscriptions

Step: 14

Choose how you want to handle refunds

The screenshot shows a settings interface with a dark sidebar on the left containing icons for home, settings, analytics, and user profile. The main content area is titled "Choose how you want to handle refunds" and includes a "SAVE CHANGES" button at the bottom. The settings are organized into two sections:

- Refund handling:** This section is highlighted with a red box. It contains two radio button options:
 - Refunds are tracked but do not, by themselves, impact MRR (default)
 - When an invoice is refunded (in full) reduce the historic MRR as if the invoice was never paid (Stripe only)A light blue callout box below these options states: "Full re-sync is required to adjust historical data."
- Smart grouping:** This section contains two radio button options:
 - Off
 - Group activities that happen withinA dropdown menu below the second option is set to "60 minutes". A light blue callout box below the dropdown explains: "When enabled, some MRR movements that happen within the selected time frame will be grouped together. For example, when smart grouping is off, a new subscription that consists of two plans will generate one newbiz MRR movement and one expansion MRR movement. With smart grouping turned on, ChartMogul will classify these two plans as part of the same newbiz event. We recommend leaving smart grouping turned on. [Learn more about smart grouping](#)"

Step: 15

Enable/Disable Smart grouping

The screenshot shows the 'Smart grouping' settings in the ChartMogul interface. The settings are as follows:

- Refund handling:**
 - Refunds are tracked but do not, by themselves, impact MRR (default)
 - When an invoice is refunded (in full) reduce the historic MRR as if the invoice was never paid (Stripe only)

Full re-sync is required to adjust historical data.
- Smart grouping:**
 - Off
 - Group activities that happen within
 - 60 minutes

When enabled, some MRR movements that happen within the selected time frame will be grouped together. For example, when smart grouping is off, a new subscription that consists of two plans will generate one newbiz MRR movement and one expansion MRR movement. With smart grouping turned on, ChartMogul will classify these two plans as part of the same newbiz event. We recommend leaving smart grouping turned on. [Learn more about smart grouping](#)

SAVE CHANGES

The interface includes a sidebar with navigation icons, a top navigation bar with a trial timer (13 days and 5 hours left on trial) and an 'UPGRADE NOW' button, and a right-hand panel with a search icon, a refresh icon, a notification bell, and a user profile icon. A tooltip on the right side of the settings panel reads 'Enable/Disable Smart grouping'.

Step: 16

Click on "Save changes"

The screenshot shows a settings interface with a dark sidebar on the left containing icons for home, settings, analytics, and user profile. The main content area is titled "13 days and 5 hours left on trial UPGRADE NOW" and includes a search, refresh, and notification icon. The settings are organized into sections: "Learn more about delinquent subscription handling", "Refund handling" (with radio buttons for "Refunds are tracked but do not, by themselves, impact MRR (default)" and "When an invoice is refunded (in full) reduce the historic MRR as if the invoice was never paid (Stripe only)", and a note "Full re-sync is required to adjust historical data."), and "Smart grouping" (with radio buttons for "Off" and "Group activities that happen within", a dropdown menu set to "60 minutes", and a detailed explanatory note). At the bottom left, a blue "SAVE CHANGES" button is highlighted by a callout box with the text "Click on 'Save changes'" and a pointer icon.

Step: 17

Click on "Revenue Recognition"

The screenshot shows the ChartMogul interface. At the top right, it indicates "13 days and 5 hours left on trial" and an "UPGRADE NOW" button. The navigation menu includes "Users", "Data sources", "Data settings", "Plans", "Data enrichment", "Custom attributes", "API", and "Billing". The "Data settings" page is active, with sub-tabs for "General", "Subscription Analytics", and "Revenue Recognition". A callout box with a location pin icon points to the "Revenue Recognition" tab, containing the text "Click on 'Revenue Recognition'".

Data settings
Data settings allow you to control how your metrics are calculated and displayed in ChartMogul. [Learn more about data settings.](#)

General Subscription Analytics **Revenue Recognition**

Churn rate formula

- Standard formula (recommended for B2B)
- Shopify formula (recommended for B2C)

[Learn about churn formulas](#)

Churn recognition

- Always recognize cancellations as churn at the end of the service period (default)
- Always recognize cancellations as churn at the time of cancellation

Full re-sync is required to adjust historical data. [Learn about churn recognition](#)

If you are using the Import API, subscription cancellations are always recognized as churn at the time of cancellation. [Learn about subscription cancellations](#)

Free customer handling

- Paying customers who move to a free plan (or are given a 100% discount) should still be classified as active subscribers (default)

Step: 18

Choose "Revenue recognition strategy"

13 days and 5 hours left on trial [UPGRADE NOW](#)

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

Data settings

Data settings allow you to control how your metrics are calculated and displayed in ChartMogul. [Learn more about data settings.](#)

General Subscription Analytics **Revenue Recognition**

Revenue recognition strategy

- Spread revenue evenly throughout service periods
- Recognize all revenues at the start of service periods
- Recognize all revenues at the end of service periods
- Slice billing periods by month, and recognize revenues at the start of each month
- Slice billing periods by month, and recognize revenues at the end of each month

Changing your revenue recognition strategy will update your entire account, including historical reports. [Learn more about revenue recognition strategies.](#)

Revenue recognition timing

- Recognize revenues when invoices are paid
- Recognize revenues when invoices are issued

Changing your revenue recognition timing will update your entire account, including historical reports. [Learn more about revenue recognition strategies.](#)

Choose "Revenue recognition strategy"

Step: 19

Choose "Revenue recognition timing"

13 days and 23 hours left on trial **UPGRADE NOW** 🔍 ⚙️ 🔔 👤

General Subscription Analytics **Revenue Recognition**

Revenue recognition strategy

- Spread revenue evenly throughout service periods
- Recognize all revenues at the start of service periods
- Recognize all revenues at the end of service periods
- Slice billing periods by month, and recognize revenues at the start of each month
- Slice billing periods by month, and recognize revenues at the end of each month

Changing your revenue recognition strategy will update your entire account, including historical reports. [Learn more about revenue recognition strategies.](#)

Revenue recognition timing

- Recognize revenues when invoices are paid
- Recognize revenues when invoices are issued

Changing your revenue recognition timing will update your entire account, including historical reports. [Learn more about revenue recognition timing.](#)

Choose "Revenue recognition timing"

SAVE CHANGES

Step: 20

Click on "Save changes"

The screenshot displays a software interface for configuring revenue recognition. The top navigation bar includes a search icon, a refresh icon, a notification bell, and a user profile icon. The main content area is divided into three tabs: "General", "Subscription Analytics", and "Revenue Recognition". The "Revenue Recognition" tab is active, showing two sections: "Revenue recognition strategy" and "Revenue recognition timing".

Revenue recognition strategy

- Spread revenue evenly throughout service periods
- Recognize all revenues at the start of service periods
- Recognize all revenues at the end of service periods
- Slice billing periods by month, and recognize revenues at the start of each month
- Slice billing periods by month, and recognize revenues at the end of each month

Changing your revenue recognition strategy will update your entire account, including historical reports. [Learn more about revenue recognition strategies.](#)

Revenue recognition timing

- Recognize revenues when invoices are paid
- Recognize revenues when invoices are issued

Changing your revenue recognition timing will update your entire account, including historical reports. [Learn more about revenue recognition timing.](#)

At the bottom of the settings area, there is a blue button labeled "SAVE CHANGES". A callout box with a pointer to this button contains the text "Click on 'Save changes'".

Thank You!

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