

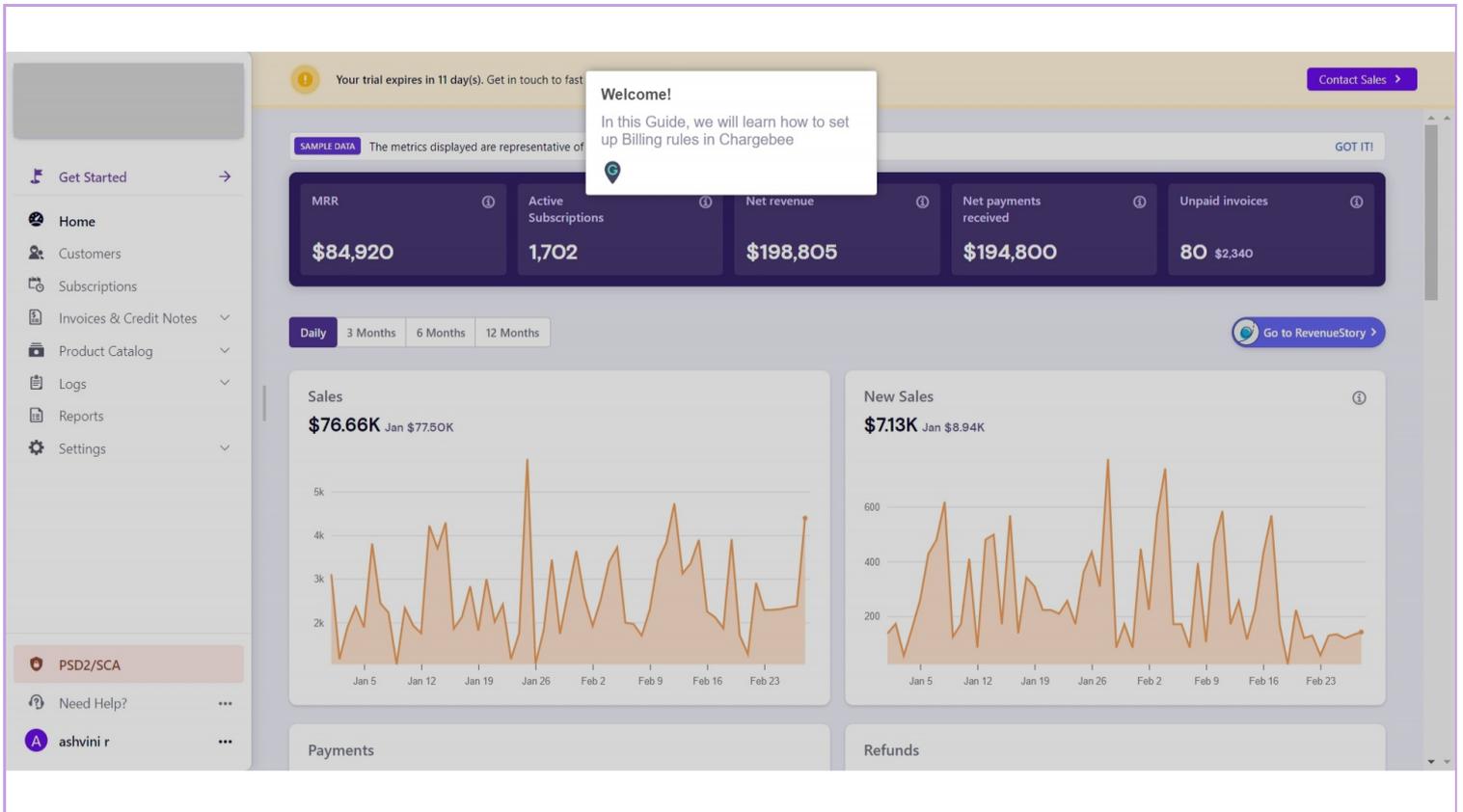


How to set up Billing rules in Chargebee

Step: 01

Welcome!

In this Guide, we will learn how to set up Billing rules in Chargebee



Step: 02

Click on "Settings"

The screenshot shows a dashboard interface for a subscription business. On the left is a navigation sidebar with the following items: Get Started, Home, Customers, Subscriptions, Invoices & Credit Notes, Product Catalog, Logs, Reports, and Settings (highlighted with a blue border). Below the sidebar are user profile information: PSD2/SCA, Need Help?, and the user name ashvini r.

The main dashboard area features a yellow notification bar at the top: "Your trial expires in 11 day(s). Get in touch to fast track your onboarding." with a "Contact Sales" button. Below this is a "SAMPLE DATA" section with the text "The metrics displayed are representative of a subscription business." and a "GOT IT!" button.

The dashboard contains several key metrics cards:

- MRR: \$84,920
- Active Subscriptions: 1,702
- Net revenue: \$198,805
- Net payments received: \$194,800
- Unpaid invoices: 80 \$2,340

Below the metrics are two line charts:

- Sales:** A line chart showing sales over time from Jan 5 to Feb 23. A tooltip points to the "Settings" menu item in the sidebar with the text "Click on 'Settings'".
- New Sales:** A line chart showing new sales over time from Jan 5 to Feb 23. The current value is \$7.13K, with a note "Jan \$8.94K".

At the bottom of the dashboard, there are sections for "Payments" and "Refunds".

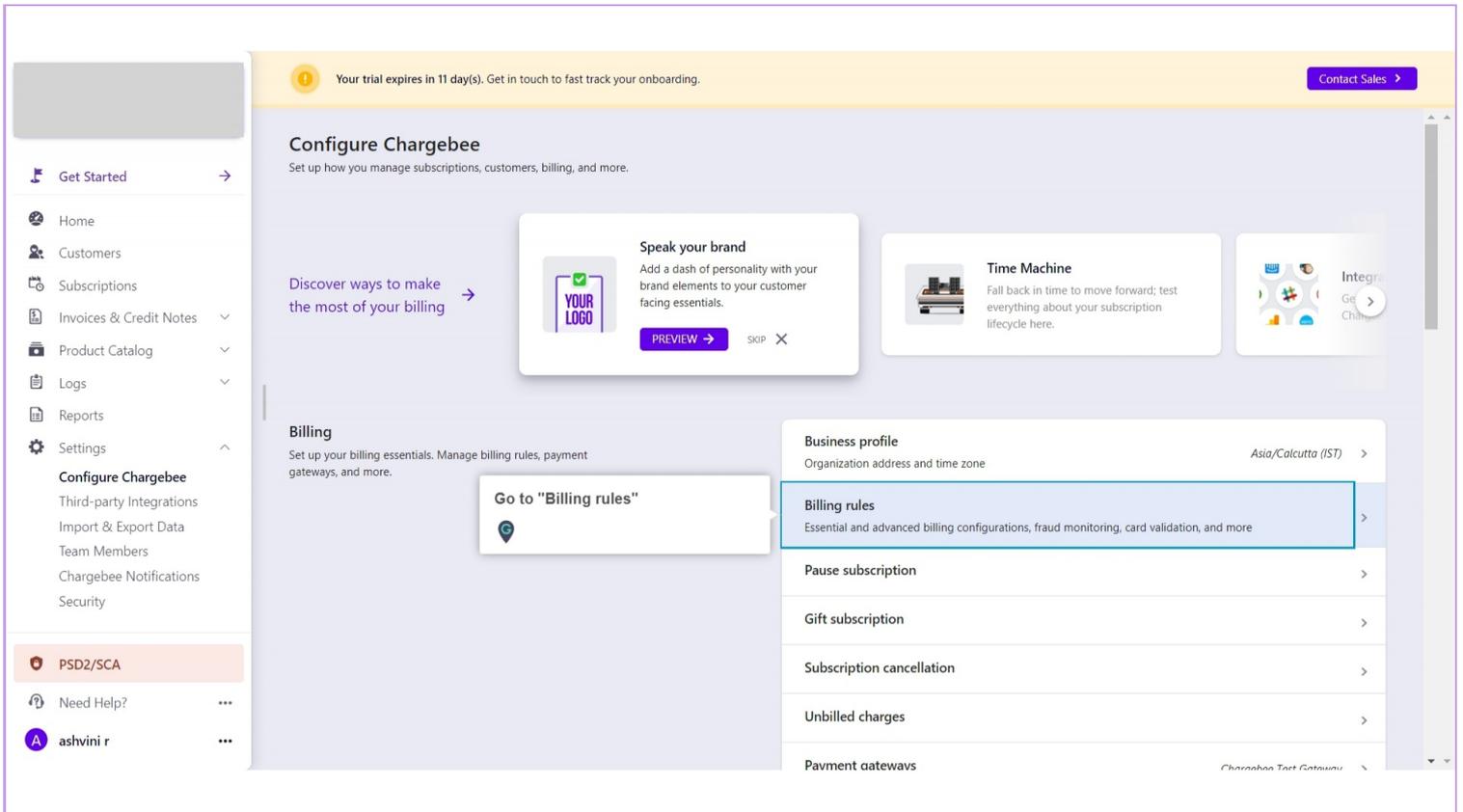
Step: 03

Click on "Configure Chargebee"

The screenshot shows a dashboard interface with a sidebar on the left and a main content area. The sidebar contains a menu with items like 'Get Started', 'Home', 'Customers', 'Subscriptions', 'Invoices & Credit Notes', 'Product Catalog', 'Logs', 'Reports', 'Settings', 'Configure Chargebee', 'Third-party Integrations', 'Import & Export Data', 'Team Members', 'Chargebee Notifications', 'Security', 'PSD2/SCA', 'Need Help?', and a user profile 'ashvini r'. The main content area features a top banner with a trial expiration notice and a 'Contact Sales' button. Below this is a 'SAMPLE DATA' section with five key metrics: MRR (\$84,920), Active Subscriptions (1,702), Net revenue (\$198,805), Net payments received (\$194,800), and Unpaid invoices (80 \$2,340). The dashboard also includes two line charts: 'Sales' (\$76.66K) and 'New Sales' (\$7.13K), both showing data from Jan 5 to Feb 23. A callout box with a location pin icon points to the 'Configure Chargebee' menu item, with the text 'Click on "Configure Chargebee"'. Other visible elements include a 'Go to RevenueStory' button and 'Payments' and 'Refunds' sections at the bottom.

Step: 04

Go to "Billing rules"



Step: 05

Here, on this page you can set your billing rules

Your trial expires in 11 day(s). Get in touch to fast track your onboarding. [CONTACT SALES](#)

Configure Chargebee

Billing rules

Here, on this page you can set your billing rules

- Hide Zero-Value Line Items
Enable this to hide any zero-value line items on invoices and hosted pages.
- Enable Accounting Fields for integration
Enable this option if you need additional fields that will help you pass information required for your accounting system (Xero, QuickBooks). [Learn more.](#)
- Attempt payment collection when payment method is added
Automatically attempt payment collection for the latest recurring invoice, if unpaid, whenever a new payment method is added. Not applicable for one-time invoices.
- Notify and wait to close invoices
Generally used for metered / usage based billing. Enabling this will keep the invoice in Pending state. You may include additional charges and close invoice. [Learn more.](#)
- Round off Invoice Amount
Enabling this will round off the Invoice Total to the nearest whole number. This is not applicable for zero-decimal currencies
- Hide Chargebee Branding (This setting can be modified in your LIVE site.)
Use this setting to hide the "Powered by Chargebee" brand text from your invoices, hosted payment pages and customer portal.

Step: 06

Click on "Update Billing Rules" and you're done!

The screenshot shows the Chargebee configuration interface. At the top, a yellow banner indicates "Your trial expires in 11 day(s). Get in touch to fast track your onboarding." with a "CONTACT SALES" button. The left sidebar contains navigation options: Get Started, Home, Customers, Subscriptions, Invoices & Credit Notes, Product Catalog, Logs, Reports, Settings, Configure Chargebee (with sub-items: Third-party Integrations, Import & Export Data, Team Members), PSD2/SCA, Need Help?, and user profile "ashvini r". The main content area is titled "Configure Chargebee" and "Billing rules". It includes a checkbox for "Display alerts on fraud detection at customer level" with a descriptive note and a "Learn more" link. Below this is the "Card Address Verification" section, which includes a note about API vs. hosted payment pages and a list of "Address Verification Settings": Street Address (checked), City, ZIP/Postal Code, and Country. A blue "Update Billing Rules" button is visible, and a callout box points to it with the text "Click on 'Update Billing Rules' and you're done!". At the bottom left of the main area, there are links for "Privacy" and "Terms".

Thank You!

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