

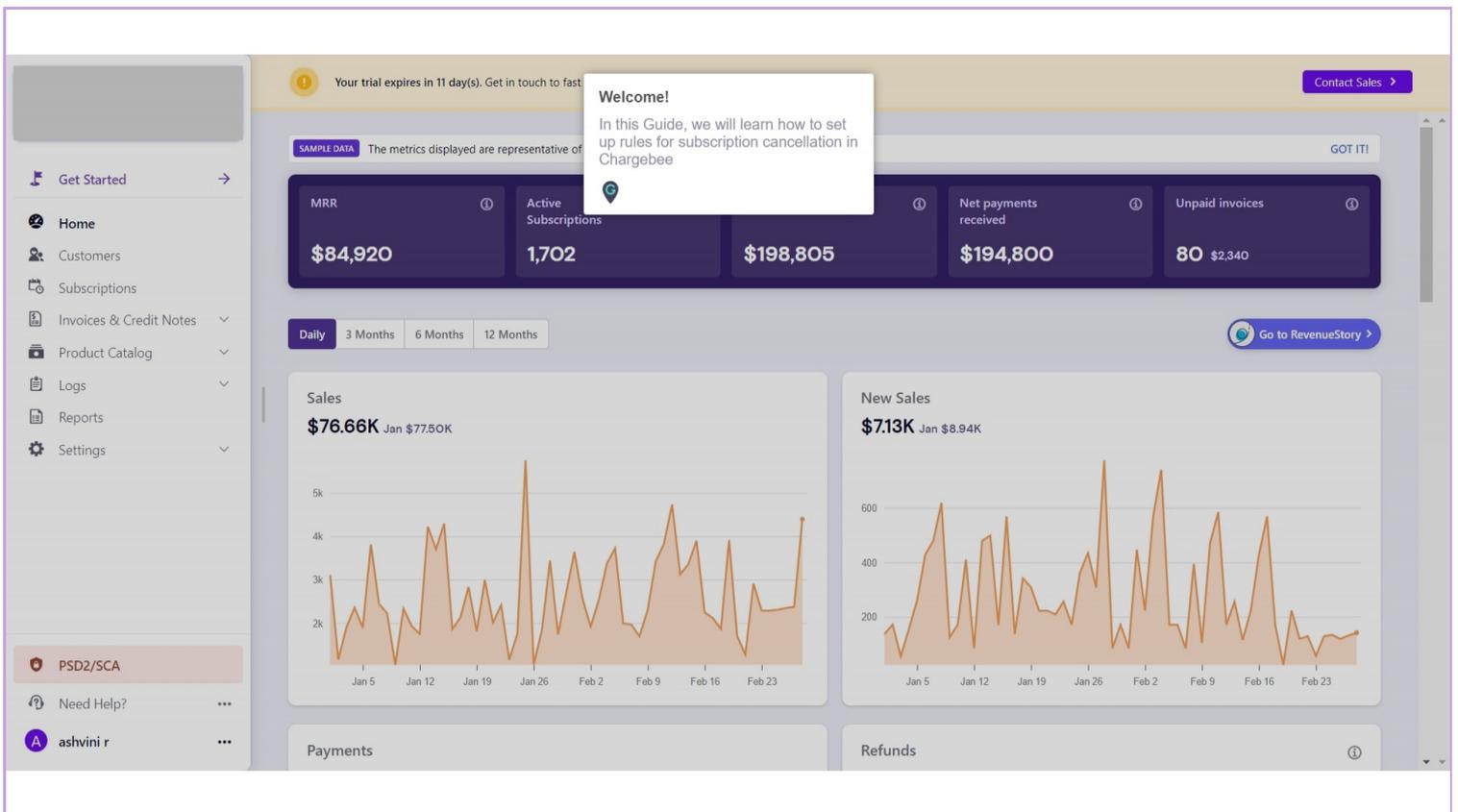


How to set up rules for subscription cancellation  
in Chargebee

# Step: 01

## Welcome!

In this Guide, we will learn how to set up rules for subscription cancellation in Chargebee



# Step: 02

## Click on "Settings"

The screenshot shows a dashboard with a left-hand navigation menu. The 'Settings' option, represented by a gear icon, is highlighted with a blue border. The main dashboard area features a top navigation bar with a trial expiration notice and a 'Contact Sales' button. Below this is a row of five key performance indicators (KPIs): 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' and 'New Sales', both showing data from January 5th to February 23rd. A tooltip with the text 'Click on "Settings"' is positioned over the 'Settings' menu item.

**Navigation Menu:**

- Get Started →
- Home
- Customers
- Subscriptions
- Invoices & Credit Notes
- Product Catalog
- Logs
- Reports
- Settings**
- PSD2/SCA
- Need Help?
- ashvini r

**Top Bar:**

- Your trial expires in 11 day(s). Get in touch to fast track your onboarding.
- Contact Sales

**KPIs:**

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

**Charts:**

- Sales:** Line chart showing sales volume over time. A tooltip points to the 'Settings' menu item.
- New Sales:** Line chart showing new sales volume over time. Total: \$7.13K, Jan: \$8.94K.

# 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 '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). There are also two line charts: 'Sales' showing a trend from Jan 5 to Feb 23 with a total of \$76.66K (Jan \$77.50K) and 'New Sales' showing a similar trend with a total of \$7.13K (Jan \$8.94K). 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 "Subscription cancellation"

The screenshot displays the Chargebee configuration dashboard. 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 main heading is "Configure Chargebee" with the subtext "Set up how you manage subscriptions, customers, billing, and more." The dashboard features several interactive cards: "Discover ways to make the most of your billing", "Speak your brand" (with a "PREVIEW" button), "Time Machine", and "Integrations". A "Billing" section is visible, with a sub-heading "Set up your billing essentials. Manage billing rules, payment gateways, and more." Below this, a list of settings is shown, including "Business profile" (Asia/Calcutta (IST)), "Billing rules", "Pause subscription", "Gift subscription", "Subscription cancellation" (highlighted with a blue border), "Unbilled charges", and "Payment gateways". A callout box with a location pin icon points to the "Subscription cancellation" option, containing the text "Go to 'Subscription cancellation'". The left sidebar contains a navigation menu with items like "Get Started", "Home", "Customers", "Subscriptions", "Invoices & Credit Notes", "Product Catalog", "Logs", "Reports", "Settings", and "Configure Chargebee" (expanded to show "Third-party Integrations", "Import & Export Data", "Team Members", "Chargebee Notifications", and "Security"). The user's name "ashvini r" is visible in the bottom left corner.

## Step: 05

Here, on this page you can set rules for handling unpaid invoices, excess payments, and more when subscriptions are cancelled

**Subscription cancellation**

Set rules for how you handle unpaid invoices, refundable credits, excess payments, and more, when subscriptions are cancelled. [Learn more](#)

When a subscription has to be cancelled	Cancel immediately
When a subscription is cancelled mid-term, how do you want to handle credits for the unused period? <small>(Note: In case cancellation happens due to dunning then the <i>invoice final action</i> configured under dunning settings takes precedence over this option.)</small>	Don't issue credits
If there are existing refundable credits	Retain credits
If there are existing unpaid invoices for the cancelled subscription	Retain as unpaid

**Advanced Settings**

If there are existing unbilled charges for the cancelled subscription	Invoice charges
Apply refundable credits/excess payments, if any, to unpaid invoices	<input checked="" type="checkbox"/>

Here, on this page you can set rules for handling unpaid invoices, excess payments, and more when subscriptions are cancelled

Click here to test all the billing rules you set for your business.  
[Use Time Machine](#)

# Thank You!

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