

Subscription Style Services

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Overview

If you have services that are delivered over a series of appointments, you may have what we call Subscription Style Services

Subscription-style services are used for cases where you want to schedule a fixed length service where the appointments are distributed over a series of visits. The most common applications are seasonal pest control or lawn services.

This article will review:

- [Recurring vs. Seasonal](#)
- [Scheduling Settings](#)
- [Invoicing Settings](#)
- [Subscription Options](#)
- [Pro-Rating](#)
- [Spillover](#)
- [Recurring Billing](#)
- [FAQs](#)

Recurring vs. Seasonal

There are several ways to schedule subscription services, and the right approach depends on whether your service is continuous or seasonal.

A **continuous service** repeats on a regular interval (weekly, monthly, or otherwise) and continues until the client cancels. These are scheduled using the recurrence settings on appointments. Learn more about [Recurring Appointments](#).

A **seasonal service**, on the other hand, runs for a defined period with clear start and end dates. For these, you'll want to check the **Subscription service** option when setting up the service. Seasonal subscriptions can also be set to auto-renew if you communicate that expectation to your clients. When it's time to renew, the **Renew Season** function can generate proposals for the upcoming period. This is also an opportunity to include additional options, allowing clients to upgrade their service level. Once proposals are ready, you can bulk-accept them—either for all renewing clients or just those flagged for auto-renew—to start the new season.

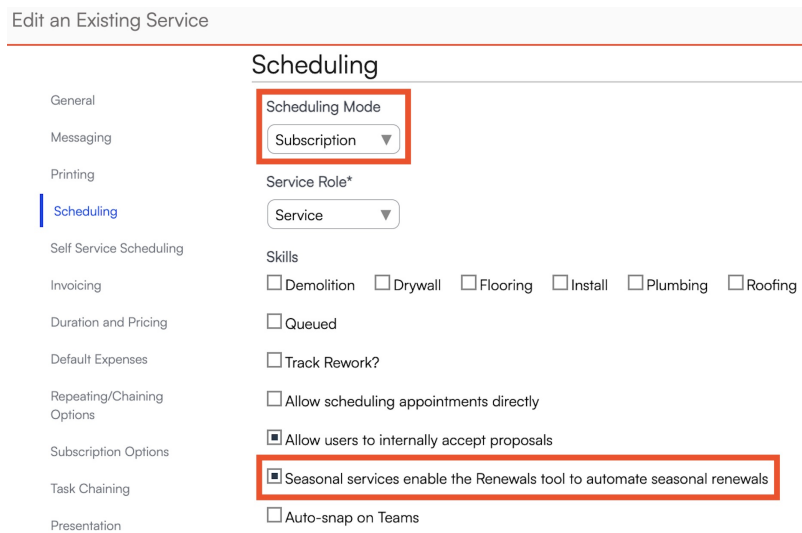
The key difference in scheduling comes down to whether your service runs continuously or in defined seasons. Continuous delivery points to recurring appointments, while seasonal delivery relies on subscription appointments.

Key Differentiator

- Continuous delivery → use recurring appointments.
- Seasonal delivery → use subscription appointments.

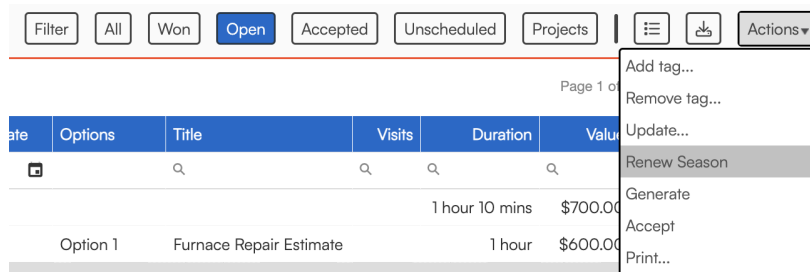
Scheduling Settings

The first thing you will want to do to configure a Subscription Style service is to set the **Scheduling Mode** as **Subscription** when editing the service (**Control Panel > Services > Edit**).



Check the box for **Seasonal** in order to enable the **Renewals Tool** which allows you to automatically generate the proposals for the next season.

You can use this tool to generate the proposals for the next season in the **Proposals grid** under the **Actions** menu.



When renewing the season, you can configure **Route Schedule** settings, select a **Proposal Template**, apply payment plans, and more. If you generate them as open proposals, clients can accept their own proposals or you can bulk-accept them on their behalf using the **Actions** menu again.

Invoicing Settings

The next place you'll want to look is the **Invoicing** section. This will depend on your desired workflow, but a common configuration is:

- **Finish Action** → **Close Appointment**
- **Invoicing Mode** → **Proposal Accept**

This will create a flow in which the invoice for the subscription is generated upfront, allowing you to take deposits or set up payment plans directly on the invoice.

Invoicing

General

Messaging

Printing

Scheduling

Self Service Scheduling

Invoicing

Finish Action

Close Appointment ▼

Invoicing Mode

Proposal Accept ▼

Determines how proposals are invoiced

Automatically mark appointment-generated invoices as unapproved

Subscription Options

Further down on the page, you will find a section to set **Subscription Options**.

Subscription Options

Season Start

Season launch service date

Season Expiration

Auto-renew through this date

Total Visits

Total number of subscription visits

Initial N Count

Number of appointments to be discounted based on Initial N Price setting found in Pricing Bands

- **Season Start** - set the start of your season for this year
- **Season Expiration** - set the end of you season for this year
- **Total Visits** - set a total number of visits to be scheduled for the season
- **Initial N Count** - Set the number of initial appointments to be pro-rated

Create Appts

Select when to create the chained service appointment.

Align Day of Week?

 day of week

Schedule on the closest or next same day of week.

Carry Forward Ad-ons?

For auto-created followups, check this to carry forward any add on lines.

Invoice Mode

Select when to invoice for subscriptions.

Pro-rating?

Display price per appointment

Display Per Label

- **Create Appts** - determine how each appointment will be scheduled
 - **Schedule** - schedule all appointments upfront
 - **Tentative on Finish** - schedule tentatively based on the finish of the previous appointment

- **Queue on Finish** - queue based on the finish of the previous appointment
- **Align Day of Week?** - choose to align to the nearest or next closest day of the week based on the scheduled, target, or actual appointment date
- **Carry Forward Add Ons?** - continue to include add-ons from one appointment on future appointments in the subscription
- **Invoice Mode** - choose to invoice once, per appointment, or per season
- **Pro-rating?** - enable pro-rating which will automatically adjust pricing when appointments are added or taken away.
- **Display Per Appointment?** - display the pricing per appointment
- **Display Per Label** - provide a label for the per appointment pricing

Pro-Rating

You can turn on pro-rating for your subscriptions service, which will automatically adjust pricing when appointments are added or taken away.

In addition, turning on pro-rating in **Control Panel > Scheduling** will automatically drop appointments that are past date from your proposal when scheduling.

Example: a proposal for a barrier spray is created with ten upcoming appointments. The customer accepts the proposal after the first date passed. With these settings turned on, when you schedule the treatments that first appt will drop off the schedule, and the price will adjustment for one fewer appointment in the chain.

Spillover

Activating the Spillover feature, follow the steps listed below. All of these steps will take place in **Control Panel > Services**.

On the Route Schedule:

Clear the end date on your [Route Schedule](#)

The screenshot shows a form titled "Edit a Route Schedule" with the following fields:

- Name***: A text input field containing "2025 Lawn Routes".
- Active**: A checkbox that is currently checked.
- Base Date***: A date input field containing "3/1/2025".
- End Date**: A date input field that is currently empty and is highlighted with a red rectangular border.

On the individual service(s):

1. Make sure the service Scheduling Mode is set to Subscription

Edit an Existing Service

Scheduling

General
Messaging
Printing
Scheduling

Scheduling Mode

Subscription

Service Role*

Service

2. Turn off Pro-rating (in the Subscription Options section)

Invoice Mode

Per Appointment

Select when to invoice for subscriptions.

Pro-rating?

Display price per appointment

Display Per Label

3. Set a Season Expiration date

a. This year's season

Subscription Options

Season Start

04/01/2025

Season launch service date

Season Expiration

10/01/2025

Auto-renew through this date

- b. Once your season starts, then change the **Season Start** date so that it's the beginning of your **next** season.

Subscription Options

Season Start

04/01/2026

Season launch service date

Season Expiration

10/01/2025

Auto-renew through this date

Any dates that don't fit on the current season will "spill over" to the beginning of the next season. Any part distributions you have will continue to follow the steps you've set up.

Recurring Billing

For either subscription-based services or more standard recurring services, you may want to include recurring billing plans for specific customers. To learn more about the options for recurring payments, please read [Payment Plans and Methods](#).

FAQs

The part associated with the service is priced at the per-visit price. I want the proposal template to show the total price after a certain number of visits. How would I set that up?

Typically for subscription based Services, the full price will be generated on the Proposal and then, with either the setting checked on the Service, or via a payment plan, the price will be shown per appointment. That is how the subscription model was built.

The options you have here would be:

1. Use subscription pricing as is, with the full season price being calculated on the individual part based on property size (or however you measure) and using Pro-Rating to calculate that total based on the number of appointments. Additionally on the Service you can check "Display Price Per Appointment" to show that breakdown if not offering payment plans
2. Make the Service recurring instead and set the per appointment price and then manually change the quantity when creating the Proposal to be the number of appointments. Then the quantity would be directly tied to the number of appointments and the price on the part would reflect that per appoint price. The catch would be when creating Proposals, the quantity would have to be manually input depending on the number of appointments.

How do I determine if I want to use a Subscription or Recurring Scheduling Mode?

A service may be seasonal or recurring. Seasonal has defined start/end dates for each season and recurring just repeats at equal intervals indefinitely until the client cancels. If seasonal, then check the Subscription service checkbox on the service. Otherwise, just schedule as Recurring or Normal and use the recurrence settings for the appointments.
