

Subscription Style Services

04/17/2025 10:12 am CDT

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:

- Scheduling Settings
- Invoicing Settings
- Subscription Options
- Subscription Dates
- Pro-Rating
- Automating Part Distribution
- Spillover
- Federal Rules regarding "Click to Cancel"
- FAQs

Considerations

There are many ways to schedule subscription services, depending on the service delivery model.

1. A service may be seasonal or recurring (where seasonal has defined start/end dates for each season and recurring just repeats periodically, depending on the recurrence settings until the client cancels). If seasonal, then check the Subscription service checkbox on the service. Otherwise, just schedule as normal but use the recurrence settings for the appointments.
2. Seasonal services may still auto-renew, assuming you disclose that to your clients and they expect it. You can use the Renew Season function to generate the proposals for the next season. You can also include additional options as part of the renewal to enable the clients to upgrade their service level. Once you are ready to start service delivery for your season, you can then bulk accept all of the proposals for all clients (or only those that are set to auto-renew).

The primary differentiator for how you'll schedule is whether your service is continuous (so no breaks/seasons) or seasonal (with an off-season period). Continuous delivery indicates using recurring appointments, seasonal indicates using 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**.

Scheduling

Scheduling Mode Subscription ▼

Service Role* Service ▼

Skills ☐ House Washing ☐ Install ☐ Tile

Queued? ☐

Track Rework? ☒

Direct Schedule? ☒ Allow scheduling appointments directly

Internal Accept? ☒ Allow users to internally accept proposals

Seasonal? ☒ Seasonal services enable the Renewals tool to automate seasonal renewals

Route Optimize ☒ Auto-snap on Teams

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 **Actions**.

projects Actions ▼

- Add tag...
- Remove tag...
- Update...
- Renew Season**
- Generate
- Print...
- Launch Email Campaign
- Duplicate Proposals

You can also include additional options as part of the renewal to enable the clients to upgrade their service level. Once you are ready to start service delivery for your season, you can then bulk accept all of the proposals for all clients that are set to auto-renew.

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 to set the **Finish Action** to **Close Appointment** and **Invoicing Mode** to **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

Finish Action Close Appointment ▼

Subscription Hours Kind None ▼

Invoicing Mode Proposal Accept ▼

Determines how proposals are invoiced

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

12

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

Schedule

Select when to create the chained service appointment.

Align Day of Week?

No

Scheduled

day of week

Schedule on the closest or next same day of week.

Carry Forward Add Ons?

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

Invoice Mode

Per Season

Select when to invoice for subscriptions.

Pro-rating?

Display Per Appointment?

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 for those initial N appointments
- **Display Per Appointment?** - display the pricing per appointment
- **Display Per Label** - provide a label for the per appointment pricing

Subscription Dates

When configuring subscription services, you can specify settings such as the current season start and end dates as well as the interval between visits. You can also specify a maximum number of visits. When you configure the pricing for these services, remember that the prices calculated are for the entire season. You can use the Pro-rating

option to change the price for the season based on the number of visits. With this option enabled, adding visits to the subscription will increase the price and removing visits will reduce the price.

When scheduling, each subscription date may also have specific notes and specific parts/add-ons that are to be done on those dates. These can be configured when scheduling/editing the subscription appointments or the proposal. In both cases, all of the appointments will get created using the template you set up with creating the proposal or scheduling the service.

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.

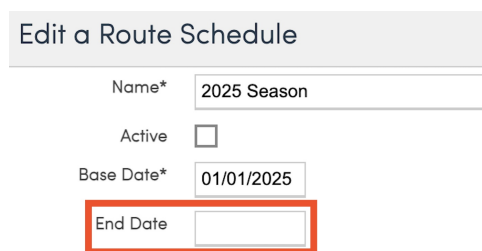
Example: a proposal for a barrier spray is created with ten upcoming appointments. The customer accepts the proposal after the first date passed. With these settings turned on, when you schedule the treatments that first appt will drop off the schedule, and the price will adjustment for one fewer appointment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

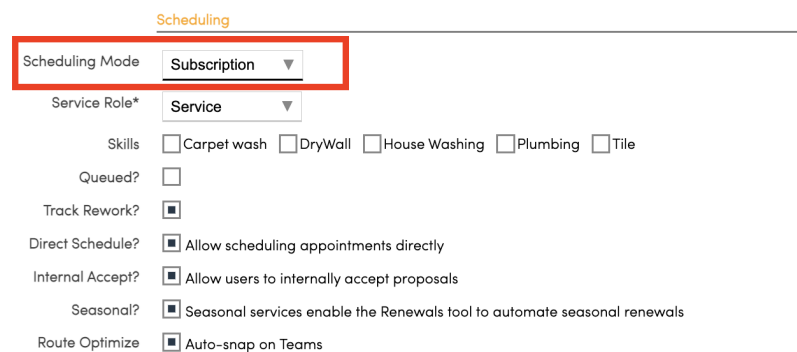
1. Clear the end date on your Route Schedule



The screenshot shows a form titled "Edit a Route Schedule". It contains the following fields: "Name*" with the value "2025 Season", "Active" with an unchecked checkbox, "Base Date*" with the value "01/01/2025", and "End Date" which is an empty text box highlighted with a red rectangular border.

On the individual service(s):

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



The screenshot shows the "Scheduling" settings for a service. The "Scheduling Mode" dropdown menu is set to "Subscription" and is highlighted with a red rectangular border. Below it, the "Service Role*" dropdown is set to "Service". There are several checkboxes for skills: "Carpet wash", "DryWall", "House Washing", "Plumbing", and "Tile", all of which are unchecked. Other settings include "Queued?" (unchecked), "Track Rework?" (checked), "Direct Schedule?" (checked with the label "Allow scheduling appointments directly"), "Internal Accept?" (checked with the label "Allow users to internally accept proposals"), "Seasonal?" (checked with the label "Seasonal services enable the Renewals tool to automate seasonal renewals"), and "Route Optimize" (checked with the label "Auto-snap on Teams").

2. Turn off Pro-rating

Pro-rating? ☐

Display Per Appointment? ☐ Display price per appointment

Display Per Label

Task Chaining

3. Set a Season Expiration date

a. This year's season

Subscription Options

Season Start

Season launch service date

Season Expiration

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

Season launch service date

Season Expiration

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.

"Click to Cancel" Rule from the FTC

The Federal Trade Commission updated rules regarding subscription and recurring services billing in October of 2024 (Negative Option Rule.) Sellers of these services **MUST** give consumers an "easy" and clear way to cancel.

[Click here for the FTC Fact Sheet](#)

[Click here for full FTC "Negative Option Rule"](#)

Key Takeaways:

- The “Click-to-Cancel Rule” now covers agreements or transactions that include automatic renewals, free trial subscriptions, memberships and recurring-payment programs.
- A seller must disclose all material terms prior to obtaining or gaining access to a consumer’s banking information (including credit or debit card information).
- Sellers must include the deadline as to when the consumer must cancel to prevent further charges. Notably, sellers must exercise care to continue to abide by more protective state statutes, many of which proscribe reminder notice requirements and time periods for cancellations.
- Sellers must obtain a consumer’s express informed consent, which can be via checkbox, signature or similar method, prior to charging them.
- Sellers must maintain records of a consumer’s express informed consent for at least three years.
- Sellers must include an easy to locate “Click-to-Cancel” or otherwise simple cancellation mechanism that makes it as easy to cancel as it was to sign up.
- Any seller that violates the new “Click-to-Cancel Rule” can be subject up to \$10,000 per violation (*Note: each day that a violation continues is considered a “new” violation for purposes of civil penalties.*) (see generally 15 U.S.C.A. § 45(m).

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.
