



Manage Subscriptions

Highlights

- FSM has a **volume-based** [pricing](#)
- Subscriptions are available with a **monthly** or **annual** billing frequency
- The calculations for upgrade are done on a **pro-rata** basis
- When you make changes to your subscription, you will receive an email notification with the details
- You will get [appointment credits](#) when you purchase appointments.

 **Permission Required:** Administrator profile

Purchase a subscription

To purchase a subscription:

1. Log in to Zoho FSM.
2. Click the profile icon at the top-right corner and click **Manage Subscription**.



Marianne Sheehan
User Id: 69176821
Zylker

[My Account](#) [Sign Out](#)

Subscription Standard Trial

 0 / 60  0 / 60
Appointments Credit : 0 / 6 

Standard edition trial expires in 29 day(s)

[Manage Subscription](#) [Try Other Editions](#)

Need Help?

-  Help Guide
-  FAQ
-  support@zohofsm.com

3. Click **Upgrade** for the desired edition.

You can choose the number of additional appointments you want to purchase. You can also choose the subscription frequency as **Monthly** or **Yearly**.

Subscribe to Zoho FSM in 4 easy steps

Plan Add-Ons Pay Confirmation

Monthly Yearly [Get 16% discount on yearly subscription](#)

Choose the number of appointments you need per month

200

STANDARD

\$100

/month

- Customer Management
- Work Order Management
- Dispatch Console
- Service Report
- Invoicing and Payments
- Workforce Management

UPGRADE

PROFESSIONAL

\$150

/month

STANDARD+

- Multi Day Appointments
- Assets
- Scheduled Maintenance Plans
- Date Time based Workflows
- Inventory Control

UPGRADE

4. On the *Add-Ons* page, you can include (if needed) an invoice add-on and click **Proceed**.

Subscribe to Zoho FSM in 4 easy steps

Plan Add-Ons Pay Confirmation

<p>Standard 200 Appointments \$100</p>	<p>ADD-ONS</p> <p>Invoice 200 invo \$20</p>	<p>Summary</p> <hr/> <p>Subtotal \$120.00</p> <hr/> <p>Total Amount \$120.00</p> <p style="text-align: center; font-weight: bold; color: #0070c0; border: 1px solid #0070c0; border-radius: 10px; padding: 5px; display: inline-block;">PROCEED</p>
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5. Enter the payment details and click **Make Payment**.

Subscribe to Zoho FSM in 4 easy steps

Plan Add-Ons Pay Confirmation

Billing Details

Billing Name/Company Name Lucy Robins	Phone Number 111-111-1111
United States	
Street Address 2175 Rosaline Ave	City Redding
California	ZIP 96001

Summary

Subtotal	\$120.00
Total Amount	\$120.00

MAKE PAYMENT

By proceeding, you agree to our [Privacy Policy](#)

Credit Card PayPal

Card Number

_____ 

_____ **CVV** _____ 

Use my billing address as my credit card address

 Safe and Secured Payment Gateway

Once the payment is done successfully, you can either navigate to the FSM application or click **View Your Subscription Details** to go to the *Dashboard* page. Your subscription details will be displayed on the *Dashboard* page.



Subscription ID: RTCW2000653437771

Subscription Details

[Change Plan](#)

[Upgrade Add-Ons](#)

[Downgrade Add-Ons](#)

ITEM	NO. OF UNITS	TOTAL /MONTH
Standard Plan	200 appointments	\$ 100.00
Invoice Add-on	200 invoice	\$ 20.00
	Net Total	\$ 120.00

Next Payment

[Payment History](#)

27 Dec 2023
(Monthly)

\$120

[Move to yearly](#)

Payment Method

[Change Address](#)

VISA

XXXX XXXX XXXX 1111

Exp Date 11/31

[Change Payment Method](#)

The details of the appointments, and invoices created and subscribed for the current month can also be seen in the profile menu. The date on which the subscription will be renewed is also indicated.



Marianne Sheehan
User Id: 69176821
Zylker

[My Account](#) [Sign Out](#)

Subscription Standard

0 / 200 0 / (200 + 200)
Appointments Credit : 0 / 20

Reset Date: Mar 28, 2024 12:00 AM

[Manage Subscription](#) | [Try Other Editions](#)

Need Help?

[Help Guide](#)

[FAQ](#)

support@zohofsm.com

Change Plan

You can change your existing subscription plan. You can switch editions as well as increase or decrease the number of appointments of your current subscription. To change your existing subscription plan:

1. In the *Dashboard* page, click **Change plan**.

Subscription ID: RTCW2000653437771

Subscription Details

ITEM	NO. OF UNITS	TOTAL /MONTH
Standard Plan	200 appointments	\$ 100.00
Invoice Add-on	200 invoice	\$ 20.00
	Net Total	\$ 120.00

Next Payment [Payment History](#)

27 Dec 2023 (Monthly) **\$120**

[Move to yearly](#)

Payment Method [Change Address](#)

VISA
XXXX XXXX XXXX 1111 Exp Date 11/31

[Change Payment Method](#)

2. You can increase or decrease the number of appointments available for a month and click **Change**.

Manage your Zoho FSM Subscription

Change Plan

Confirm Order

Confirmation

STANDARD

\$130

/month

- ✓ Customer Management
- ✓ Work Order Management
- ✓ Dispatch Console
- ✓ Service Report
- ✓ Invoicing and Payments
- ✓ Workforce Management

...

300 Appointments

CHANGE

PROFESSIONAL

\$200

/month

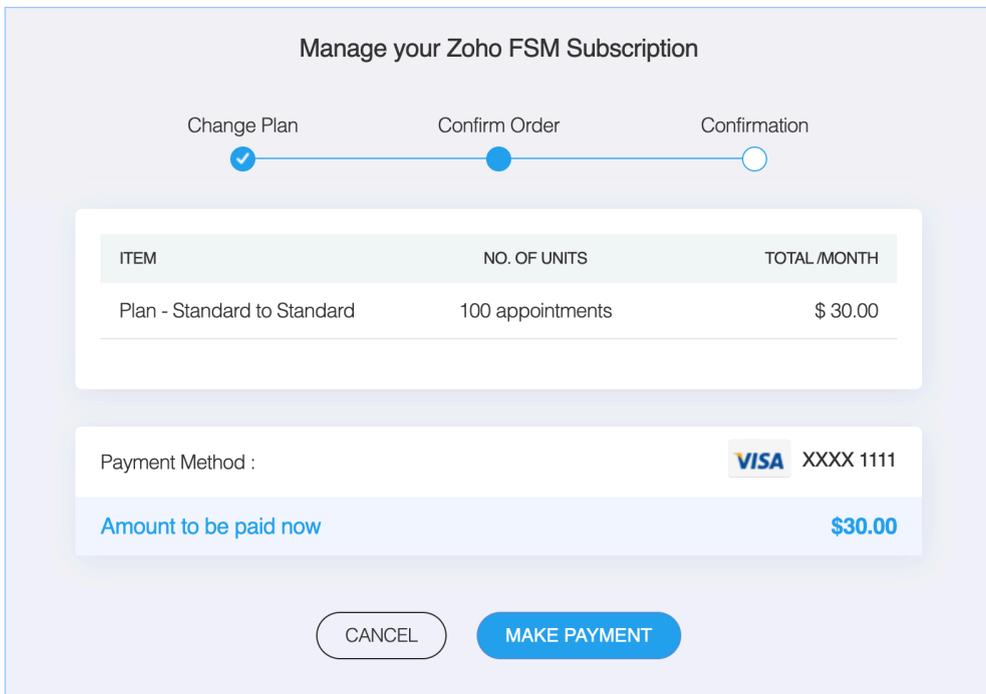
STANDARD +

- ✓ Multi Day Appointments
- ✓ Asset Management
- ✓ Scheduled Maintenance Plans
- ✓ Date Time based Workflows
- ✓ Inventory Control

300 Appointments

CHANGE

3. Click **Make Payment**.

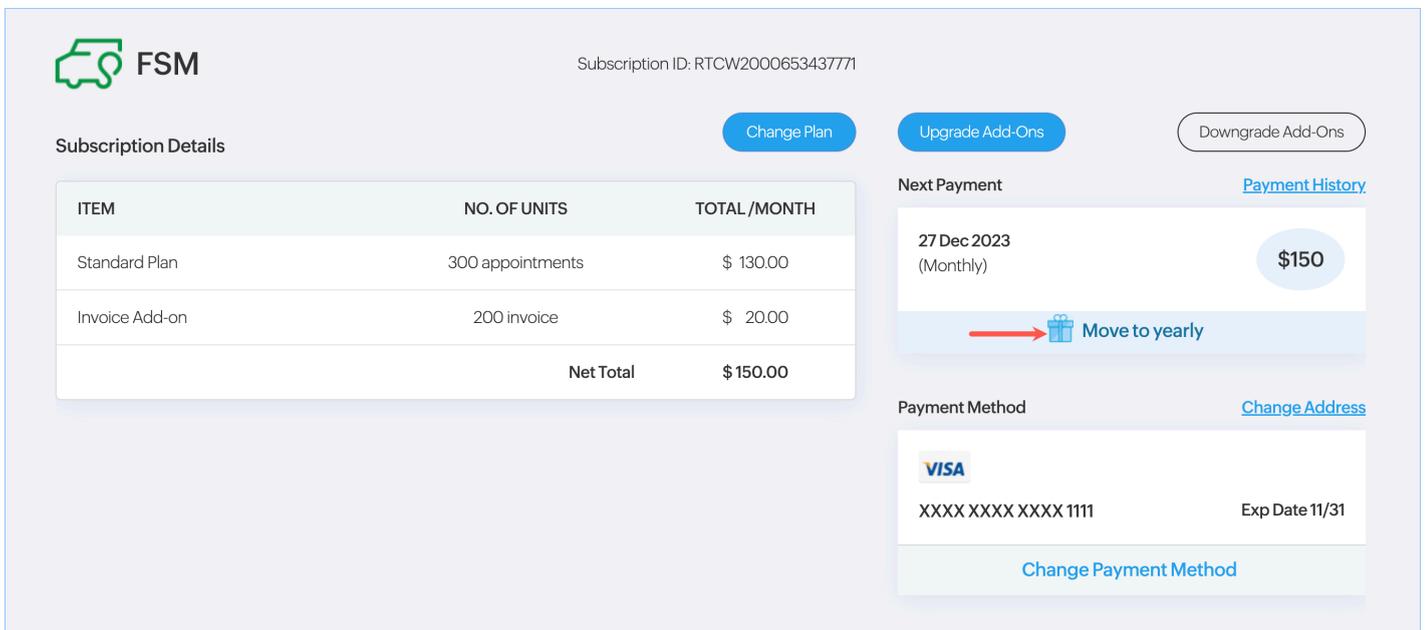


Once the payment is done successfully, click **Go To Dashboard** to find the changed subscription details.

Switch to yearly plan

If your current subscription frequency is monthly, you can switch to a yearly plan at anytime. To do so:

1. In the *Dashboard* page, click **Move to yearly**.



2. Click **Make Payment** to continue.

The details of the calculations for the prorata amount to be paid for the yearly subscription can be viewed by clicking on the information icon [].

Manage your Zoho FSM Subscription

Confirm Order

Confirmation

ITEM	TOTAL /YEAR
Payment Duration - Monthly to Yearly	\$ 1,400.00**
Subtotal	\$ 1,400.00

** Amount per year for existing subscription

Payment Method :

VISA XXXX 1111

Prorata Amount

\$1,250.00*¹

Amount to be paid now

* Amount calculated on Pro-rata basis

CANCEL

MAKE PA

Amount for 31 remaining days in this month's bill cycle:

$$\left[\$1,400.00 - \frac{\$150.00 \times 31}{31} \right] = \$1,250.00$$

Amount per year	\$1,400.00
Amount paid for existing subscription	\$150.00
No.of remaining days in current month's bill cycle	31
No.of days in this billing month	31

You can also switch to an yearly plan while [purchasing add-ons](#).

Purchase an add-on

You can purchase invoice add-ons if you are on the [Standard](#) plan. To do so:

1. In the *Dashboard* page, click **Upgrade Add-Ons**.



Subscription ID: RTCW2000653437771

Subscription Details

[Change Plan](#)

[Upgrade Add-Ons](#)

[Downgrade Add-Ons](#)

ITEM	NO. OF UNITS	TOTAL /YEAR
Standard Plan	300 appointments	\$ 1,200.00
Invoice Add-on	200 invoice	\$ 200.00
	Net Total	\$1,400.00

Next Payment

[Payment History](#)

28 Nov 2024
(Yearly)

\$1,400

Payment Method

[Change Address](#)

VISA

XXXX XXXX XXXX 1111

Exp Date 11/31

[Change Payment Method](#)

2. Select the **No of Units** of invoices you want to purchase as add-ons. Click **Proceed**.

If your subscription frequency is monthly, you will have the option **Switch to Yearly**. The amount for the yearly subscription of the appointments and add-ons will be shown.

Manage your Zoho FSM Subscription

Upgrade Add-Ons

Confirm Order

Confirmation

ITEM	NO. OF UNITS	AFTER ADDITION
Invoice Add-On \$ 50 / 50 invoice / year	100 invoi ▾	200 invoice → 300 invoice

Amount to be paid now

\$ 100.00

[CANCEL](#)

[PROCEED](#)

3. Click **Make Payment**.

Manage your Zoho FSM Subscription

Upgrade Add-Ons Confirm Order Confirmation

ITEM	NO. OF UNITS	TOTAL /YEAR
Invoice	100 invoice	\$ 100.00

Payment Method : XXXX 1111

Amount to be paid now **\$100.00**

CANCEL
MAKE PAYMENT

Once the payment is done successfully, click **Go To Dashboard** to find the upgraded subscription details.

Downgrade add-on

You can downgrade your add-ons. You can decrease the number of add-ons in your current subscription. To downgrade your add-ons:

1. Click **Download Add-Ons**.

FSM

Subscription ID: RTCW2000653437771

Downgrade Add-Ons

Subscription Details [Change Plan](#)

ITEM	NO. OF UNITS	TOTAL /YEAR
Standard Plan	300 appointments	\$ 1,200.00
Invoice Add-on	300 invoice	\$ 300.00
Net Total		\$1,500.00

Next Payment [Payment History](#)

28 Nov 2024
(Yearly)

\$1,500

Payment Method [Change Address](#)

XXXX XXXX XXXX 1111 Exp Date 11/31

[Change Payment Method](#)

2. Select the number of add-on invoices you want to remove and click **Proceed**.

Manage your Zoho FSM Subscription

Downgrade Add-Ons Confirm Downgrade Confirmation

ITEM	NO. OF UNITS	AFTER REDUCTION
Invoice Add-on	50 invoice ▾	300 invoice → 250 invoice

3. Click **Proceed**.

Manage your Zoho FSM Subscription

Downgrade Add-Ons Confirm Downgrade Confirmation

ITEM	NO. OF UNITS REDUCED	AFTER REDUCTION
Invoice Add-On	50 invoice	250 invoice

Once the downgrade is done successfully, click **Go To Dashboard** to find the downgraded subscription details.

You can also downgrade from the Standard plan to the Free plan using the **Change Plan** option. Refer to [this](#) section on how to use **Change Plan**.

Cancel subscription

To cancel a subscription:

1. In the *Dashboard* page, click **Change plan**.

2. Click **Cancel Subscription** at the bottom of the screen.

Manage your Zoho FSM Subscription

Change Plan Confirm Order Confirmation

STANDARD
\$1200
/year

- ✓ Customer Management
- ✓ Work Order Management
- ✓ Dispatch Console
- ✓ Service Report
- ✓ Invoicing and Payments
- ✓ Workforce Management

300 Appointments

CHANGE

PROFESSIONAL
\$420
/year

STANDARD +

- ✓ Multi Day Appointments
- ✓ Asset Management
- ✓ Scheduled Maintenance Plans
- ✓ Date Time based Workflows
- ✓ Inventory Control

60 Appointments

CHANGE

→ [Cancel Subscription](#)

3. Click **Confirm Downgrade** after providing a reason for cancellation.

Manage your Zoho FSM Subscription

Change Plan Confirm Downgrade Confirmation

✓ ● ○

Help Us to Improve

As our valued customer, it would be a great pleasure if you can share the reason to cancel FSM subscription:

Want to explore alternatives

Remaining Characters : 472

Downgrade automatically at the end of current billing cycle(ie., **02 Mar 2024**)

CANCEL
CONFIRM DOWNGRADE

Click **Go To Dashboard**. In the Dashboard, click **Resume Subscription** to revert to the scheduled downgrade. Click **Downgrade Immediately** to put the downgrade into effect immediately.

i As per your request, we have scheduled your subscription downgrade at the end of the current billing cycle (ie., 28 Nov 2024). Please click "Resume Subscription" to revert your scheduled downgrade and continue with further purchase. Once you resume subscription, you will be automatically charged on your next renewal date (28 Nov 2024).

Resume Subscription
Downgrade Immediately

FSM

Subscription Details Subscription ID: RTCW2000653437771

ITEM	NO. OF UNITS	TOTAL /YEAR
Standard Plan	300 appointments	\$ 1,200.00
Invoice Add-on	250 invoice	\$ 250.00
Net Total		\$1,450.00

Next Payment [Payment History](#)

28 Nov 2024 (Yearly) **\$1,450**

Payment Method [Change Address](#)

VISA

XXXX XXXX XXXX 1111 Exp Date 11/31

The subscription will be downgraded to the free plan.



Successfully Downgraded



Zoho FSM

Standard Plan → Free Plan

Since you are no longer subscribed to any of our paid plans, your yearly subscription has been closed with immediate effect from now.

[Go to Zoho FSM](#)

Other actions

On the *Dashboard* screen, you will find other subscription-related options:

1. Change Payment Method
2. Payment History
3. Change Address

Subscription ID: RTCW2000466708635

Subscription Details

ITEM	NO. OF UNITS	TOTAL /MONTH
Standard Plan	200 appointments	\$ 100.00
Invoice Add-on	200 invoice	\$ 20.00
	Net Total	\$ 120.00

Next Payment

02 Apr 2023
(Monthly)

\$120

 Move to yearly

Payment Method

VISA

XXXX XXXX XXXX 1111

Exp Date 4/23

1 [Change Payment Method](#)

2 [Payment History](#)

3 [Change Address](#)

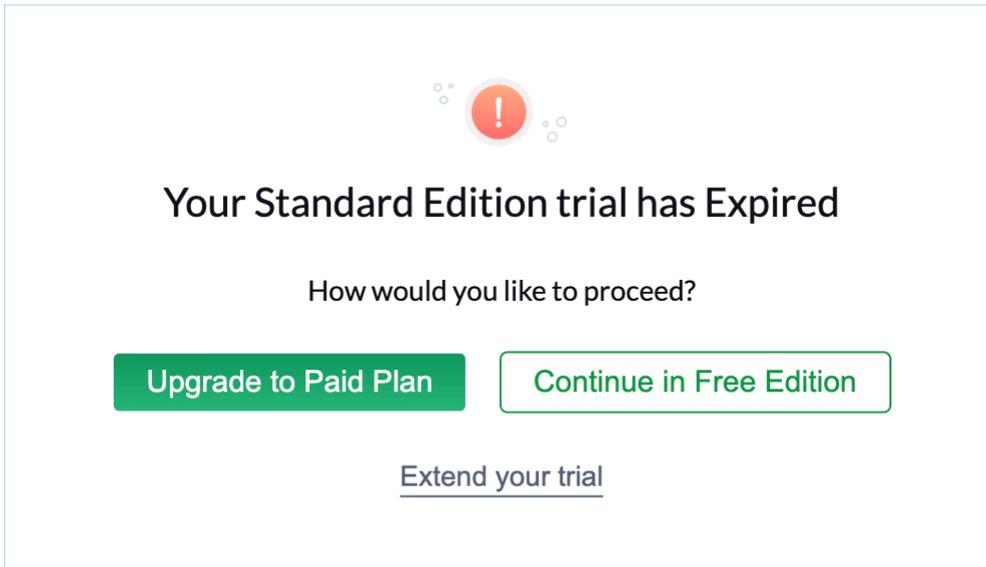
[Change Plan](#)

[Upgrade Add-Ons](#)

[Downgrade Add-Ons](#)

Trial expiry

At the end of the 15-day, free trial, you will encounter the following message:



You can proceed with one of the following options:

Upgrade to the paid plan: If you choose this option, you will be redirected to the Zoho Store page where you can [purchase](#) the paid edition.

Continue in free edition: You can choose to switch to the free edition.

Extend the trial: You can extend your trial period by a period of 15 days. When you choose this option, you will be required to provide certain details. The trial can be extended twice.

Extend Trial

Contact Info

Name	<input type="text" value="Marianne Sheehan"/>
Email id	<input type="text" value=" .com"/>
Phone	<input type="text" value="9102348512"/>

Company Info

Company Name	<input type="text" value="Zylker"/>
Company Size	<input type="text" value="50 - 100 Employees"/>
Your Role in the Company	<input type="text"/>
Industry	<input type="text"/>
Why do you like to extend the trial	<input type="text" value="Need more time to explore the features"/>
Expected Org Usage	<input type="text" value="60 Appointments / month"/>

Cancel

Submit

Try Editions

At any point, you can switch to the 15-day trial of other editions. To switch to another edition:

1. Click the profile icon at the top-right corner and click **Try Other Editions**.

The screenshot shows a user profile for Marianne Sheehan (User Id: 78482287, Zylker) with 'My Account' and 'Sign Out' buttons. Below this, the 'Subscription' section is set to 'Standard' and displays usage metrics: 0/60 appointments, 0/60 invoices, and 0/10 GB storage. It also shows 'Appointments Credit: 0/6' and a 'Reset Date: Jul 18, 2024 12:00 AM'. Two options are listed: 'Manage Subscription' and 'Try Other Editions', with the latter circled in red. A 'Need Help?' section provides links for 'Help Guide', 'FAQ', and the email 'support@zohofsm.com'.

2. Click **Try Now** for the desired edition.

You will get to use the other edition for a trial period of 15 days. You can use the trial version of Zoho FSM for a maximum of 45 days (this includes any trial period before purchase). If you have used up your 45 days of trial period, then you will not be able to use this option.

×

Try Other Editions for Free

Standard Edition

- ✓ Customer Management
- ✓ Work Order Management
- ✓ Dispatch Console
- ✓ Service Report
- ✓ Invoicing & Payments
- ✓ Workforce Management
- ✓ Maps & Location Tracking
- ✓ Workflow Automation
- ✓ Custom Fields
- ✓ Custom Functions
- ✓ Mobile App
- ✓ API's

👉 Current Edition

Professional Edition

Standard +

- ✓ Multi-Day Appointments
- ✓ Asset Management
- ✓ Scheduled Maintenance Plans
- ✓ Date Time Based Workflows
- ✓ Inventory Control

Try Now
15 Days Free Trial

For more information check out [complete edition comparision](#)

You can switch back to your paid edition anytime by clicking on **Switch Back To [Edition Name]**. Trying another edition doesn't affect the existing duration of your subscription period.



Marianne Sheehan
User Id: 78482287
Zylker

[My Account](#) [Sign Out](#)

Subscription Standard

 0/60  0/60  0/10 GB
Appointments Credit : 0/6 

Reset Date: Jul 18, 2024 12:00 AM

Professional edition trial expires in 14 day(s)

[Manage Subscription](#) [Switch Back To Standard](#)

Need Help?

 [Help Guide](#)

 [FAQ](#)

 support@zohofsm.com

You can also try the other editions when you are in the Free edition.

Try Other Editions for free



Standard Edition

- ✔ Customer Management
- ✔ Work Order Management
- ✔ Dispatch Console
- ✔ Service Report
- ✔ Invoicing and Payments
- ✔ Workforce Management
- ✔ Maps and Location Tracking
- ✔ Workflow Automation
- ✔ Custom Fields
- ✔ Custom Functions
- ✔ Mobile App
- ✔ APIs

Try Now

15 Days Free Trial

Professional Edition

Standard +

- ✔ Multi Day Appointments
- ✔ Asset Management
- ✔ Scheduled Maintenance Plans
- ✔ Date Time based Workflows
- ✔ Inventory Control

Try Now

15 Days Free Trial

For more information check out [complete edition comparison](#)

Appointment Credits

When you purchase appointments, you will also get appointment credits amounting to 10% of the appointments purchased. These credits will be valid during that Billing Cycle. You can see the details of these credits by clicking the profile icon at the top-right corner. Click on the **Info** [?] icon to see more details.



Marianne Sheehan
User Id: 69176821
Zylker

[My Account](#) [Sign Out](#)

Subscription Standard

 1 / 300  4 / 300

Appointments Credit : 0 / 30 

Reset Date: Mar 19, 2024 12:00 AM

[Manage Subscription](#) | [Try Other Editions](#)

Need Help?

-  [Help Guide](#)
-  [FAQ](#)
-  support@zohofsm.com

! **Important:** Do bear in mind that the credits you use will affect the appointment count from the next billing cycle. The number of credits (appointments) that you use will be deducted from the appointment count of the next billing cycle.

Example

The user has a subscription for 300 appointments. The user uses 12 credits. In the next billing cycle, when the appointment count is replenished, instead of 300, they will only be getting 288 (300-12) appointments.

Click on the **Info**  icon to see the details.

Usage History

Billing Cycle	Opening Balance Monthly Limit - Previous Month Credi...	Appointment Usage (Appointments Usage + Credit Usage) ...	Credit Usage	Invoice Usage Invoice Usage / (Free Invoice + Addon L...
Mar 19 - Apr 18	288 (300-12)	0 / 288	0 / 30	0 / 300
Feb 19 - Mar 18	300 (300-0)	312 (300+12) / 300	12 / 30	20 / 300

Current Month Details
Appointments-288 / 300, Appointments Credit-0 / 30, Invoices-0 / 300 Reset Date -Apr 19, 2024 12:00 AM

In case you upgrade before the renewal date, the number of credits used will be added to the count of appointments used. The credits used will be disregarded. Consider that the user has a subscription for 300 appointments. The user uses 12 credits.

Marianne Sheehan
User Id: 69176821
Zylker

My Account Sign Out

Subscription **Standard**

300 / 300 4 / 300
Appointments Credit: 12 / 30 ?

Reset Date: Mar 19, 2024 12:00 AM

Manage Subscription | Try Other Editions

Need Help?

- Help Guide
- FAQ
- support@zohofsm.com

The user purchases 100 more appointments. Then, the total appointment usage will be 312 and the credit used will be 0.

The screenshot shows a user profile for Marianne Sheehan (User Id: 69176821, Zylker) with 'My Account' and 'Sign Out' buttons. Below this, the 'Subscription' section is set to 'Standard'. A red box highlights the appointment and credit information: '312 / 400' appointments and '4 / 400' credits, with 'Appointments Credit : 0 / 40' and a help icon. A 'Reset Date: Mar 19, 2024 12:00 AM' is also visible. At the bottom, there are links for 'Manage Subscription' and 'Try Other Editions', and a 'Need Help?' section with links to 'Help Guide', 'FAQ', and 'support@zohofsm.com'.

When can you use them?

You will be able to use the credits when you have exhausted all of your purchased appointments for the Billing Cycle. Using credits, you can thus continue creating appointments without having to make a new purchase before the next renewal date. When you attempt to create a service appointment after your purchased appointments have been exhausted, then you will be shown a message as shown in the screenshot below.

- **Continue:** Choose this if you want to create the appointment using the credits.
- **Upgrade:** Choose this if you want to purchase more appointments.

The screenshot shows the 'Create Service Appointment' form in Zoho FSM. A modal dialog box is displayed in the center with the following text:

Appointments Limit Reached!
You've reached your appointment limit for current billing cycle
You can still create another 30 appointments before your credit limit is reached. [Learn More](#)

Buttons: Upgrade, Continue

The background form includes sections for Work Order Details, Contact Details, Address, and Service Appointment details (Currency, Exchange Rate, Scheduled Start Date Time, Scheduled End Date Time, Service Resource).

Points to remember

- Unused credits don't get carried over to the next Billing Cycle.
- Except in the Free edition, appointment credits will be available in all the editions, including in the trial versions of Zoho FSM.
- When a time sheet is ended, the credits will automatically be used if the user has exhausted the available appointments.