

Editing, Archiving, and Duplicating Subscription Memberships

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Once a subscription membership is added to a patient's chart, there could be instances where the plan needs to be edited, archived, deleted, or duplicated. Here is how you can do each of those tasks.

Editing | Archiving | Duplicating

Editing a Subscription Membership category

You can edit any of your existing subscription memberships whenever the need arises.

1. Navigate to **Account > Custom Fields > Custom Memberships**
2. Locate the membership category that needs updating.
3. Press **Edit** on the row that corresponds with the membership that needs updating.

Creation Date	Membership Name	Description	Payment	Payment Frequency	Enrollment Duration	Auto Renewal	Total Count	Action
Feb 10, 2025	10 chiro treatment plan	10 treatment plans	75	Monthly	1	False	0	Edit Archive Duplicate
Feb 11, 2025	\$250 weekly facial	weekly facial bundle	250	Monthly	4	True	0	Edit Archive Duplicate
Feb 11, 2025	10 stretching sessions	10 monthly stretching sessions	150	Monthly	10	True	0	Edit Archive Duplicate

4. The detail box will open to allow changes to be made.

Create Custom Membership

Name

Description

Billing Frequency Monthly
 Bimonthly
 Quarterly
 Annually

Number of Billing Cycles

Total Duration **2 months**

Auto-Renewal

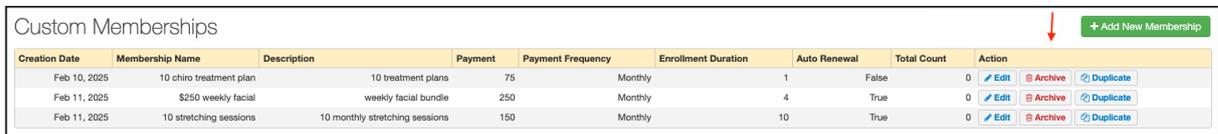
Monthly Cost \$

5. Once updates are made, press **Save**.

Archiving/Deleting a Subscription Membership category

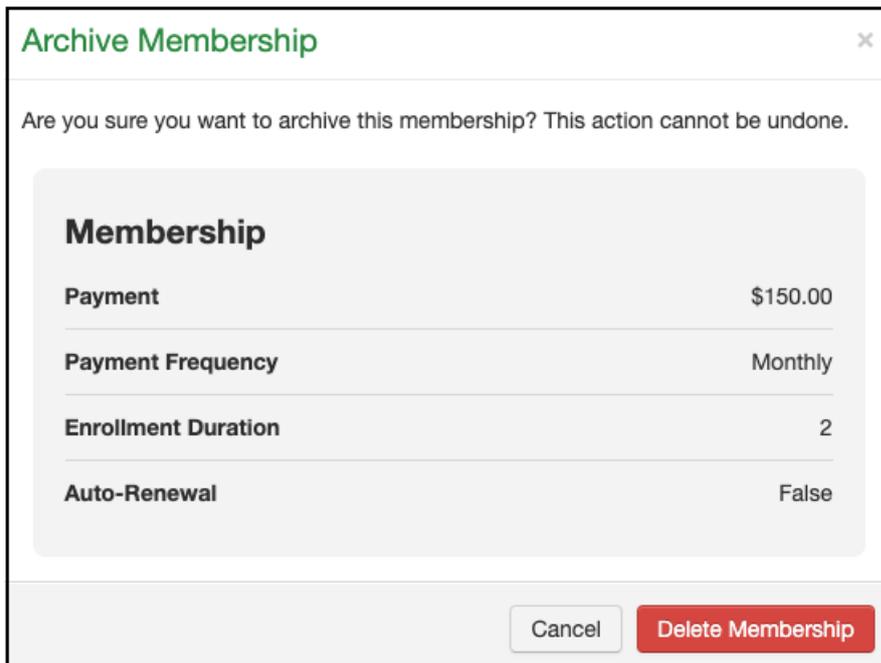
If you no longer need or utilize a subscription membership offering, it can be archived so it does not show as an option.

1. Navigate to **Account > Custom Fields > Custom Memberships**
2. Locate the membership category that needs archiving.
3. Press **Archive** on the row that corresponds with the subscription membership to be archived.



Creation Date	Membership Name	Description	Payment	Payment Frequency	Enrollment Duration	Auto Renewal	Total Count	Action
Feb 10, 2025	10 chiro treatment plan	10 treatment plans	75	Monthly	1	False	0	Edit Archive Duplicate
Feb 11, 2025	\$250 weekly facial	weekly facial bundle	250	Monthly	4	True	0	Edit Archive Duplicate
Feb 11, 2025	10 stretching sessions	10 monthly stretching sessions	150	Monthly	10	True	0	Edit Archive Duplicate

4. A pop-up menu will appear asking you to verify that you want to delete the subscription membership category.



Archive Membership ✕

Are you sure you want to archive this membership? This action cannot be undone.

Membership

Payment \$150.00

Payment Frequency Monthly

Enrollment Duration 2

Auto-Renewal False

5. Press **Delete Membership** and the offering will be removed from the account.

Duplicating a Subscription Membership category

If you want to duplicate a subscription membership offering to track

1. Navigate to **Account > Custom Fields > Custom Memberships**
2. Locate the membership category that you would like to duplicate.

Custom Memberships										+ Add New Membership
Creation Date	Membership Name	Description	Payment	Payment Frequency	Enrollment Duration	Auto Renewal	Total Count	Action		
Feb 10, 2025	10 chiro treatment plan	10 treatment plans	75	Monthly	1	False	0	Edit	Archive	Duplicate
Feb 11, 2025	\$250 weekly facial	weekly facial bundle	250	Monthly	4	True	0	Edit	Archive	Duplicate
Feb 11, 2025	10 stretching sessions	10 monthly stretching sessions	150	Monthly	10	True	0	Edit	Archive	Duplicate

3. Press Duplicate on the row that corresponds with the subscription membership to be duplicated.
4. The detail box will open so you can make changes to distinguish it from the original subscription membership category.

Create Custom Membership

Name

Description

Billing Frequency Monthly
 Bimonthly
 Quarterly
 Annually

Number of Billing Cycles

Total Duration **2 months**

Auto-Renewal

Monthly Cost

5. After you have made updates, press **Save**.