## Editing, Archiving, and Duplicating Subscription Memberships

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## **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.

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

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

Create Custom Me	mbership	×
Name	Membership	
Description	membership	
Billing Frequency	<ul> <li>Monthly</li> <li>Bimonthly</li> <li>Quarterly</li> <li>Annually</li> </ul>	
Number of Billing Cycles	2	
Total Duration	2 months	
Auto-Renewal		
Monthly Cost	\$ 150	
	Cancel Save	

5. Once updates are made, press Save.

## Archiving a Subscription Membership category

If you no longer need or utilize a subscription membership offering, it can be archived it 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.

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	a Archive	2 Duplicate
Feb 11, 2025	\$250 weekly facial	weekly facial bundle	250	Monthly	4	True	0	🖋 Edit	Archive	2) Duplicate
Feb 11, 2025	10 stretching sessions	10 monthly stretching sessions	150	Monthly	10	True	0	🖋 Edit	@ Archive	2) 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	o? This actio	n cannot be undone					
Membership							
Payment	Payment						
Payment Frequency		Monthly					
Enrollment Duration		2					
Auto-Renewal		False					
	Cancel	Delete Membershi	р				

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										
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	C	🖋 Edit	a Archive	② Duplicate
Feb 11, 2025	\$250 weekly facial	weekly facial bundle	250	Monthly	4	True	C	🖋 Edit	Archive	2 Duplicate
Feb 11, 2025	10 stretching sessions	10 monthly stretching sessions	150	Monthly	10	True	0	🖋 Edit	a Archive	2 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	Membership					
Description	membership					
Billing Frequency	<ul> <li>Monthly</li> <li>Bimonthly</li> <li>Quarterly</li> <li>Annually</li> </ul>					
Number of Billing Cycles	2					
Total Duration	2 months					
Auto-Renewal						
Monthly Cost	\$ 150					
	Cancel					

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