Editing, Archiving, and Duplicating Subscription Memberships

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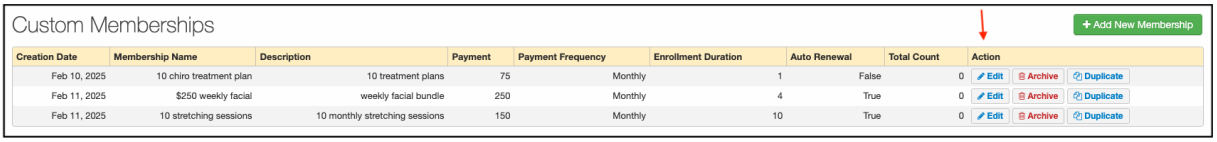
Once a subscription membership is added to a patient's chart, there could be instances where the plan needs to be edited, archived, deleted, or duplicated. Here is how you can do each of those tasks.

Editing | Archiving | Duplicating

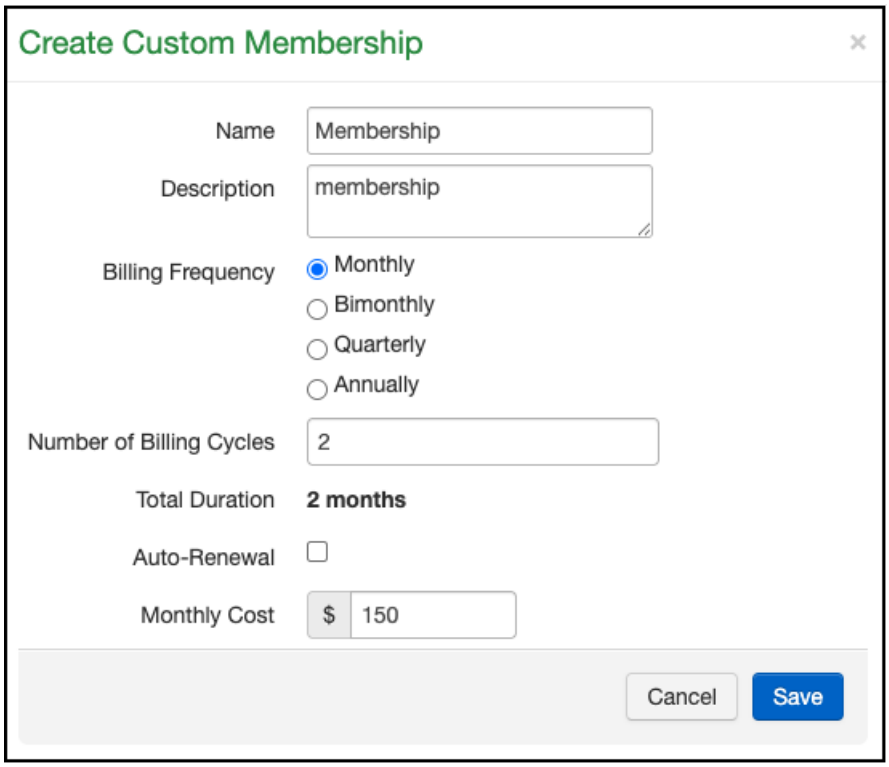
Editing a Subscription Membership category

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.



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

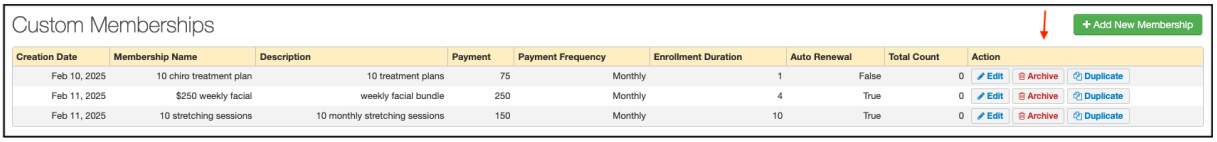


5. Once updates are made, press **Save**.

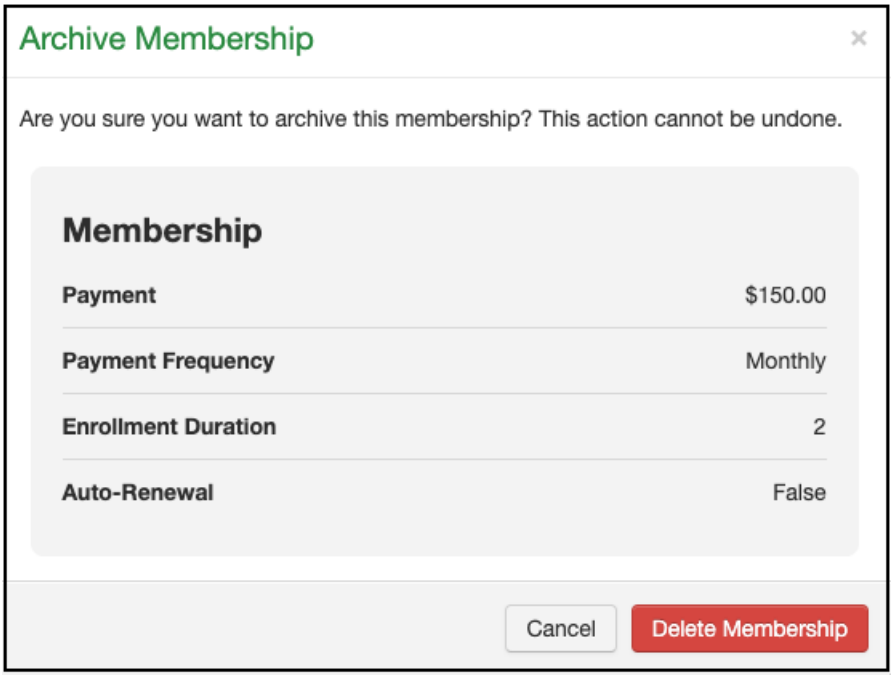
Archiving/Deleting a Subscription Membership category

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.



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

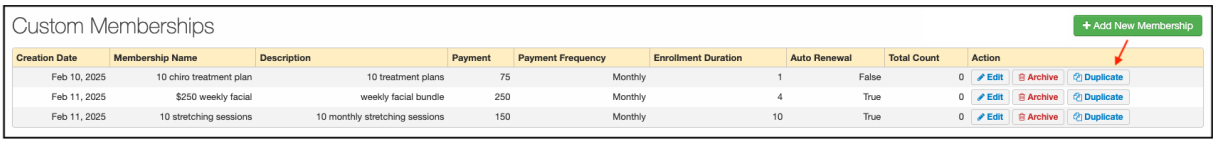


5. Press **Delete Membership** and the offering will be removed from the account.

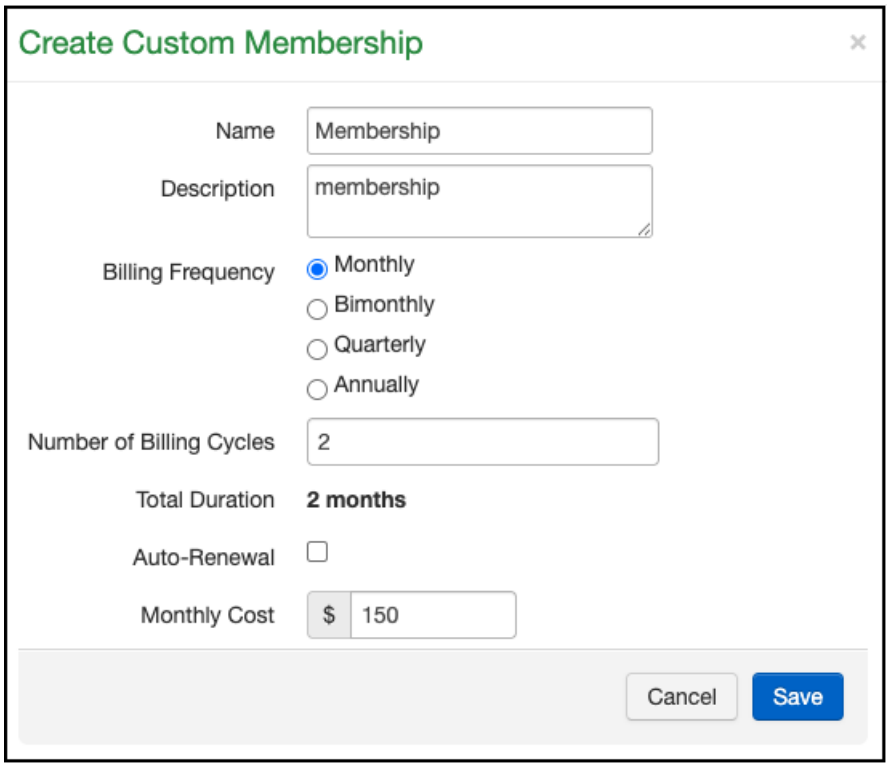
Duplicating a Subscription Membership category

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.



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.



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