How to view, edit, and delete membership types

David H. - 2023-04-05 - [Membership](#)

You may need to manage the membership types in your organization to perform updates. This will allow you to view, edit and remove membership types.

Modifying Membership Types

1. Click **Settings** or the **Gear** icon on the left menu.

2. In the Membership Management section, click **Membership Types and Plans**.

3. This will display a list of the current membership types. You can **view** or **delete** a membership type by clicking on the **down arrow** on the same line as the membership type. To edit or modify a membership type, click view first.

4. After clicking view, it displays the membership type's profile. There are two tabs:

Details Tab

- **Membership Details**

  - **Name** - The name of the membership type.

  - **Code** - The code of the membership type.

  - **Sequence** - The order which this membership will appear on forms with the rest of the membership types.

- **Membership Finance Settings**

  - **Payment Account** - The financial account linked in MemberNova.

  - **GL Account** - Payment for the membership type will be deposited into this account.

- **Membership Management Settings**

  - **Record Type** - The record type that this membership type applies to.

  - **Additional Roles to Assign** - Members who subscribe to this membership type will receive these additional membership roles.

  - **Show Renewal Link on Login Page** - When a member with an expired subscription with this membership type attempts to log in, a link to the renewal form will be displayed on the login page.

- ○ **Renewal Form** - Determines which renewal form will be displayed to the member to renew membership.

- **Description** - The description of the membership type.

Plans

- Price Plans - This displays the Price Plans associated with the membership type. (E.g., Introductory, Monthly, Annual, etc.)

Next Steps

Once your membership type is configured you will want to configure the price plans next.

Related Content

- How to add a member
- How to setup renewal reminders
- How to setup price plans
- How to search for a member