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# 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**.
- 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**

• <u>Price Plans</u> - 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 <u>price plans</u> next.

### **Related Content**

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