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## Set a Follow-Up Package

Laura Gibson - 2026-10-18 - [Packages & Memberships](#)

A **follow-up package** is the package an athlete moves into when their current one finishes. It is how a trial, an intro offer, or an On Ramp converts into a standing membership without anyone remembering to do it manually. Set it on the package so every athlete who buys it converts the same way, or set it at the point of sale for one athlete.

The one thing to know before you start: **a follow-up package is only available when Auto Renew is off**. A package either renews into itself or rolls into a different one.

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### What you can do with a follow-up package

- Convert a trial, intro, or On Ramp into an ongoing membership automatically
- Choose the follow-up package and its billing plan
- Have the follow-up appear on the athlete's account straight away, scheduled to start when the current package ends
- Set the follow-up on the package itself, or per athlete at the point of sale

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### Set a follow-up package in the builder

1. Build a **Time-based Package** as usual.
2. Set **Auto Renew** to Off.
3. Check **Include Follow-up Package**.
4. Choose the package the athlete should move into.
5. Finish building and save.

**Two Week Unlimited Trial**

**Package Details**

Name \* Two Week Unlimited Trial

Description Enter description

Proration Off

Auto Renew Off

☒ Include Follow-up Package

CrossFit 12x Per Month 120 Per Month

Contract test document template create! Generate new contract upon package renew

Athlete Status Upon Start Trial Upon End No status change

**Advanced Settings**

Enable Rollover Credits Off

Limited Quantity Off

Set Specific Start Date Off

**Attendance Rules**

Grant access to events via rules. Rules will dispense credits in a repeating (per) or one-off behavior (pack).

Total Package Length 1 Weeks

**CrossFit**

Attendance \* Sessions pack Validity \* 1 week Delay Start 0

**Billing**

Create and manage billing plans for this Package.

Tax Rate Select tax rate

**\$99 Trial**

Plan Name \$99 Trial

Total Price \$ 99.00

# of Installments 1

Edit Package Edit Billing Plans

Every athlete who buys this package will be set up to convert into the follow-up when their term ends.

## Set a follow-up package at the point of sale

You can also decide the follow-up when you apply the package to a specific athlete, which is useful when different athletes should convert into different memberships.

1. Open the athlete's profile and add the package.
2. Check **Include Follow-up Package**.
3. Choose the follow-up package and its billing plan from the dropdowns.
4. Finish applying the package and save.



## When does the follow-up package appear on the athlete's account?

**Immediately, in an Upcoming state.** It is created the moment you save, with a start date matching the end of the current package, and it activates on its own when that package expires.

## Does the follow-up package renew after it activates?

**That depends on how the follow-up package itself is built.** It inherits the renewal settings of its own template, so a follow-up set to auto renew will keep renewing once it takes over.

## Can I set a different follow-up for one athlete?

**Yes. Choose it at the point of sale instead of on the package.** This lets you send one trial athlete into an unlimited membership and another into a smaller pack, using the same trial package for both.

## Can I use proration on a follow-up package?

**No. Proration is not supported on follow-up packages.** If the first payment on the follow-up needs to be prorated, that has to be handled another way.

## What is the difference between a follow-up package and changing an athlete's package?

**A follow-up is scheduled in advance and happens on its own; changing a package is something you do when an athlete's plans change.** Use a follow-up for a conversion you expect from the start, such as a trial converting to a membership. Use Change Package for upgrades and downgrades decided later.

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## Helpful tips

- Build the follow-up package first. You cannot select it until it exists.
  - Set the follow-up on the package when everyone converts the same way, and at the point of sale when they do not.
  - Turn Auto Renew off before you look for the checkbox. It is the single most common reason people cannot find this setting.
  - Tell the athlete what they are converting into and when, at the point of sale. The upcoming package is already visible on their account, so there is nothing to look up later.
  - Check the follow-up package's own renewal settings. It behaves according to its own template once it takes over.
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## When a follow-up package is most helpful

- Converting a 1-week or 2-week trial into a standing membership
- Moving On Ramp graduates into your group program automatically
- Rolling an intro offer into full-price membership at the end of the promotional period
- Running a kickstart or challenge that is meant to lead somewhere

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If you have questions about follow-up packages in Kilo GMS, our Support team is happy to help. Reach us at **hello@usekilo.com**.

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