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Set Up Gift Cards

Mavilyn Carlos - 2026-05-18 - [Retail, Fees & Misc.](#)

Kilo Gym Management System doesn't currently include a dedicated "Gift Card" feature, but you *can* sell gift cards by using either of the two alternative methods below.

This guide walks you step-by-step through both options so you can choose the one that fits your workflow.

Option 1: Sell Gift Cards as a Misc. Product (Simple Method)

This option works best if you sell gift cards occasionally and prefer to process them manually.

Step 1 — Add a Gift Card Product

1. Go to **Settings → Fees & Misc. Products**.
2. Click **Add Product**.
3. Name your product (examples: "Gift Card - \$50," "Gift Card - Custom Amount").
4. Set the price.
5. Choose whether the item is taxable.
6. Save.

You now have a product you can charge for anytime someone wants to purchase a gift card.

Step 2 — Process the Purchase

When someone reaches out to purchase a gift card:

If the purchaser is an existing member

1. Open their **Settings → Fees & Misc. Products**.
2. Select the gift card product you created.
3. Search for and select the **Athlete**.
4. Choose to charge now or later and select the proper payment method.
5. Select **Charge** to complete the checkout.

If the purchaser is *not* a member

Non-members don't have profiles, so you should **create a temporary profile for the purchaser**.

1. Go to **Users → Athletes** and **+ Athlete**.
2. Create a profile using the purchaser's name and email.
3. Collect a payment method.
4. Complete the purchase per the steps above.
5. (Optional) You may remove the payment method after the transaction.

Step 3 — Deliver the Gift Card

Because this method doesn't automatically generate a code or credit, you or the purchaser will provide the gift manually:

- Check out Kilo's Design Library (In Gym tab) for gift certificate templates you can personalize on Canva.
- Edit an upcoming invoice to apply the **credit** or log the gift internally so you know to apply it when the recipient redeems it.

Option 2: Sell Gift Cards Using Events & Packages (Automated Method)

This option creates a more automated purchase flow and allows you to sell gift cards from your Sales Portal.

Step 1 — Create a Gift Card Appointment Type

1. Go to **Events → Appointments → Add Appointment Type**.

2. Name it something like **Gift Card Purchase**.

Step 2 — Create a Gift Card Package

1. Go to **Products → Packages → Add Package**.
2. Name the package (example: “Gift Card”).
3. Connect it to the appointment type you created above.
4. Set the **validity period to 1 day**.
5. Save.

Step 3 — Add Billing Plans for Gift Card Values

Create a billing plan for each gift card amount you want to offer:

1. Name the plan (“Gift Card - \$50,” “Gift Card - \$100”).
2. Set the price.
3. Set to 1 installment.
4. Save.

Step 4 — Add the Gift Card Package to Your Sales Portal (Optional)

If you want customers to purchase gift cards online:

1. Go to the **Sales Portal Options** in the Package action options.
2. Enable the Gift Card package.
3. Publish your Sales Portal link.

Your gift cards can now be purchased like any other plan or program.

Step 5 — Set Up a Notification for Gift Card Purchases

Because this method uses a package, you can be notified automatically when a gift card is sold.

1. Go to **Notifications → Automation Flows**
2. Create a new notification for **Package Purchased**.
 1. Note: This will send the notification for all packages purchased, but for this short time you can delete miscellaneous messages and be alerted when the Gift Card package is purchased.
3. Choose who should receive the notification (likely, select Staff)
4. Save.

This ensures you're alerted every time someone buys a gift card so you can follow up and deliver it.

How to Redeem Gift Cards

- After purchase has been completed, make a **Note** in the Athlete account who will be receiving the gift card. Notes are internal and Athletes are not able to view these. State the gift card amount and date of purchase.
- When the Athlete is ready to apply the gift card, you can reduce an upcoming invoice by the gift card amount.
- Then, make a new Note documenting that the gift card has been redeemed.