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Understand Staff Profiles and Permissions

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Add or Edit Staff Members in Kilo

1. In your Kilo system, go to Users and click to drop down
2. Go to Staff
3. Select '+ Staff'
4. Enter the personal/contact information for the staff member
5. Enter medical info, optional
6. Set permissions for this staff member. See the section below for a breakdown of the permissions options.
7. Save

To later edit a staff members information or permissions:

1. Return to the Staff list
2. Click the blue arrow action button to the far right of their name
3. Select Edit
4. Make changes to the info or permissions
5. Save

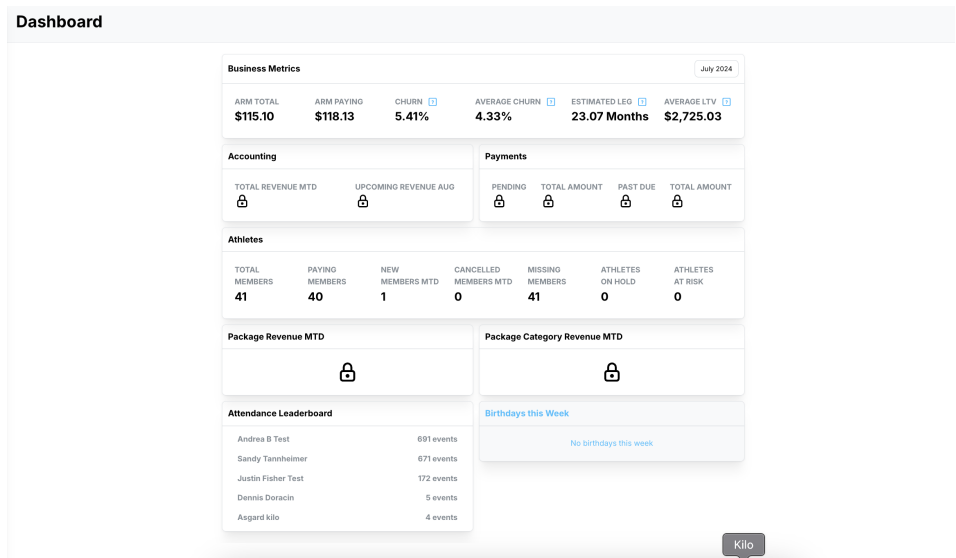
Understanding Staff Permissions

Manage permissions for staff members in the Permissions drop-down menu visible at the time of staff creation or when editing staff member information.

The title of each section informs you of the section of the software impacted by the permissions.

● **Dashboard Metrics and Reports**

- Permissions here are labeled according the the report labels on the Kilo Dashboard.
- If a permission is not granted, the staff member will see a lock icon rather than the metric.
- All staff will see the Attendance and Birthday reports on the Dash, regardless of other permissions.

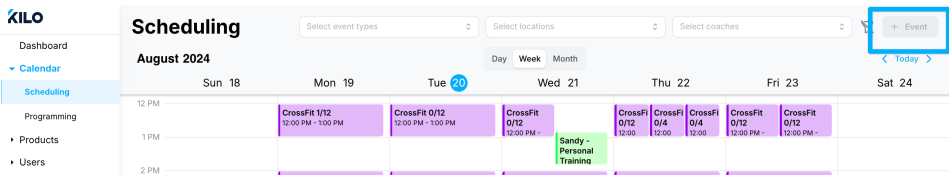


Staff Member has Business Metrics and Athlete Report permissions.

● **Calendar and Events**

- Without permissions checked for 'Create/Edit/Delete Event Types and Locations, Events and Attendance, and Programming' the staff member *will still be able to view* the event types, schedule, and programming calendar.

They *will not* be able to make adjustment to these features.



Staff member does not have permission to Create/Edit/Delete Events and Attendance.

- If 'Use Kiosk' is left unchecked, the staff member will not see Kiosk on the left menu of their Kilo system.

To see and use the Kiosk, 'Use Kiosk' must be checked.

● **Products**

- If 'Create/Edit/Delete Package Templates' is unchecked, the staff member *can view* Package templates but not make any changes.
- If 'Create/Edit/Delete Retail, Fees, and Miscellaneous Items,' the staff member *can view* the Retails and Item lists, but they cannot add to the

lists, delete products, or edit items.

- Important Note: The ability to *charge athletes* for Retail, Fees, and Misc. Items is controlled by a later permission under the Invoices heading.

- If 'Create/Edit/Delete Tax Rates' is unchecked, the staff member can view tax rates but not make any changes.
- Allowing 'Manage Sales Portal' permissions will let the staff member edit the Sales Portal settings under products as well as the package and billing plans available in the Sales Portal Options for each package.

- **Users**

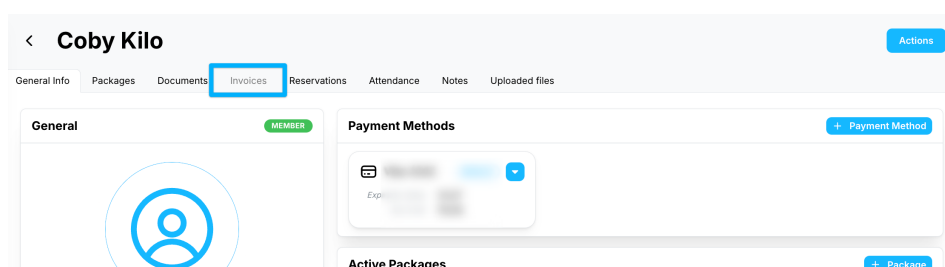
- In this portion of the permissions, we have places where the system will assume or force permissions when needed.
- If you opt to allow staff to 'Create/Edit/Delete Athletes' the 'View Athletes' option will check off automatically.
- The system will act similarly for 'Create/Edit/Delete Staff.'
- If you have staff who sell, adjust, or cancel memberships for athletes, be sure to give them the 'Manage Athlete Packages' permissions. Otherwise, they will not be able to make package adjustments within athlete profiles.

- **Documents**

- 'Create/Edit/Delete Document Templates' allows staff to adjust document templates in Kilo. Without this permission, this can view templates, but make no changes.
- 'Manage Issued Documents' controls a staff member's ability to apply documents to an athlete, view the document for signing, or delete the document from the profile.

- **Invoices**

- If 'View Athlete Invoices' is unchecked, the Invoices tab within the athlete profile will be grey and not able to be clicked.



- If 'View Invoices Page' is left unchecked, the Invoices option will not appear on the left menu for this staff member.

- 'Manage Invoices' allows the staff member to collect, void, and refund invoices in the Kilo system.
- *In order to charge athletes for Retail, Fees, and Misc. Items, the 'Make Charges for Retail, Fees, and Miscellaneous' permission must be selected.* Otherwise the staff member can see these lists, but will not be able to add anything to the cart in order to apply charges.
- **Flows**
 - Flows is a beta feature being prepared for general release.
 - Upon release, staff members can View and Manage Flows, or View only.
- **Payroll**
 - If only 'View Payroll' is checked, the staff member *can see* the Payroll -> Payroll Report option in the left menu. They can select a payroll period and see the report.
 - If 'Manage Payroll' is also selected, the staff member *can also see* the Pay Rates and Assign Rates options under Payroll.
 - If nothing is selected here, the staff member *will not see* Payroll in their left menu.
 - All staff members will see the Log Work option in the left menu.
- **Gym Settings**
 - If 'Manage Gym Settings' is left unchecked, the staff member *will not see* a Settings option when they click on their name in the lower left in Kilo.

Disable Staff

When a Staff member leaves your team, you can delete their staff profile to remove their ability to log in to Kilo as staff.

1. Go the Users -> Staff in the left menu
2. Click on the blue arrow action menu to the right of the name
3. Choose 'Delete'

Staff members who have been Delete will be removed from the main staff list. This is a 'soft delete' - historical data will be preserved.

KILO

Dashboard

- Kiosk
 - Calendar
 - Workouts 2/17
 - Products
 - Users
 - Athletes
 - Staff
 - Events
 - Documents
 - Invoices
 - Payroll
 - Notifications

Staff

Search by name, email, phone

Login Enabled

Arrange by last name

Staff

Name	Email	Coach	Phone	Date of Birth	
			(613) 438-3056	04/18/2000	
			(613) 401-4573	11/17/1986	
			(705) 340-9301	05/01/1993	
			(343) 645-5099	08/27/2002	
			(705) 715-5898	04/20/1998	
			(613) 919-1774	08/11/1977	
			(613) 961-9536		

if EditDelete

For further questions related to Staff profiles in Kilo, email our Support team at hello@usekilo.com.