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Change an Athlete's Package

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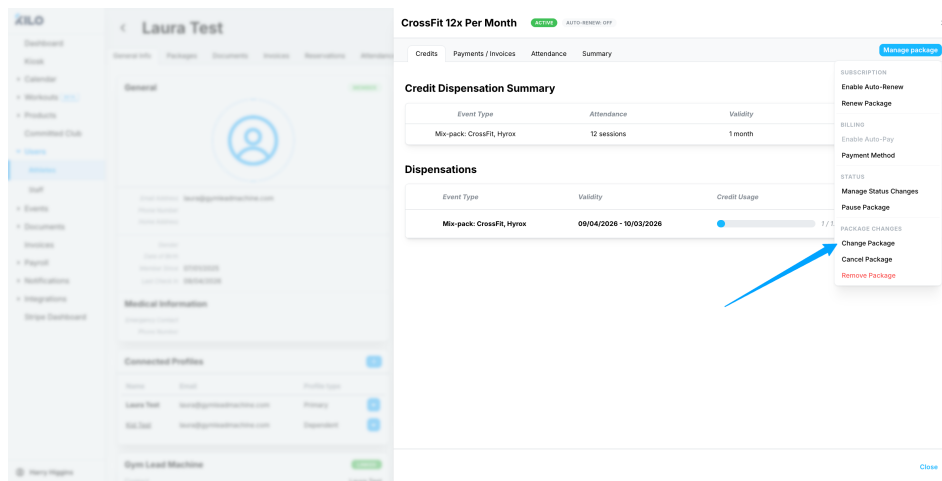
Change Package moves an athlete from one package to another as its own kind of update, separate from a cancellation. Coach-built schedules stay intact, upcoming reservations are handled the way you choose, and your reports show the move as an upgrade or downgrade rather than a member leaving. Kilo GMS handles the operational side automatically. Prorated billing adjustments are still worked out by hand, which is covered further down.

What you can do with Change Package

- Move an athlete from one package to another in a single flow
 - Choose whether the change happens right away or when the current package ends
 - Keep upcoming reservations and have them re-credited automatically under the new package
 - Delete upcoming reservations if you would rather start fresh
 - Review everything that is about to happen before confirming
 - Record the move as an upgrade or downgrade so reporting stays accurate
 - See package change history on the athlete's profile
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Change an athlete's package

1. Go to the athlete's profile and open the package you want to change.
2. Click **Manage package**, then select **Change Package** under Package Changes.
3. Choose the new package.
4. Choose when the change takes effect.
5. Decide what to do with any upcoming reservations.
6. Configure the new package details.
7. Review the summary and click **Apply Changes**.



Choosing when the change takes effect

Option	What happens	Use it for
Apply change starting tomorrow	The current package ends today, and the new one starts tomorrow. Credits the athlete has not yet received on the current package are not issued.	An athlete who wants the new package right away
When the current package ends	The current package runs to its scheduled end date and the athlete keeps receiving credits as normal. The new package starts the day after.	Finishing out what they already paid for, and most downgrades

Scheduling a downgrade for when the current package ends avoids a prorated refund entirely, since the athlete uses up what they have paid for before the smaller package begins.

Note

If the package already has a renewal scheduled, the wizard tells you so and warns that completing it will replace that renewal. This is expected. Auto Renew created the upcoming package, and the change you are making takes its place.

Handling upcoming reservations

If the athlete has reservations on their schedule, you choose between keeping them all or deleting them all. This applies to every upcoming reservation together. If they have none, the step is skipped.

Keep leaves reservations on the schedule. Credited reservations are uncredited so credits are not double-counted, then re-credited automatically once the new package activates.

Delete permanently removes every upcoming reservation.

Configuring the new package

Set the billing plan, start date, billing start date, athlete status on start and end, payment method, AutoPay, Auto Renew, discounts, and follow-up package.

On the **When the current package ends** path, the start date is locked to the day after the current package ends. On the other path, you can edit it.

Warning

Rollover credits cannot move to a new package. If the current package has unused rollover credits, they are lost when it ends, on either timing path. The review step shows you the exact number, so tell the athlete to use them before the change takes effect.

What happens when you confirm

Three things happen on their own:

- A new upcoming package is created and scheduled.
- Auto Renew on the current package is turned off, so it cannot renew on top of the package you just scheduled.
- A package change event is recorded rather than a cancellation, so retention, churn, and revenue movement reports show what actually happened.

How reservations and credits behave

Apply change starting tomorrow

Your choice		Reservation state	What happens
Keep	Credited		Uncredited right away, then re-credited under the new package when it activates
Keep	Uncredited		No change now, credited under the new package when it activates
Delete	Any		All reservations permanently deleted

When the current package ends

Your choice		Reservation state	What happens
Keep	Credited		Stays credited until the current package ends, then uncredited, then re-credited when the new package activates
Keep	Uncredited		No change, credited when the new package activates
Delete	Any		All reservations permanently deleted

Handling prorated billing

Change Package covers packages, reservations, and reporting. It does not prorate refunds. If an athlete has paid for time on their current package they will not use, reconcile the difference yourself.

You will usually need an adjustment when the change starts tomorrow and the athlete has already paid for a full billing period. You usually will not on the other path, since they finish the time they paid for first. Same-price changes generally need nothing at all.

Working out the credit

Divide the membership price by the number of days in the billing period to get the daily rate, then multiply by the days the athlete will not use.

A \$160 monthly membership on a 30-day cycle works out to \$5.33 per day. With 12 days remaining, the credit is \$63.96.

Applying the adjustment

Refund part of the previous invoice. Open the original invoice on the athlete's profile, click the blue arrow action button on the far right, select **Refund**, and enter the partial amount. The new membership then starts normally at its full first payment. This keeps the billing history easy to follow.

Or reduce the first invoice on the new package. Invoices can only be edited before they are charged, so this works two ways. On the **When the current package ends** path, the first invoice sits in Upcoming until it is charged, so edit the amount there. Otherwise, add the package with AutoPay off, edit the first invoice, collect the reduced payment, then turn AutoPay back on.

On a downgrade, the credit may spread across more than one upcoming invoice.

Change Package vs. Cancel Package: which should you use?

Use Change Package when

The athlete is switching to a different package
It is an upgrade or downgrade
You want to preserve coach-built schedules
You want it tracked as a package change in reporting

Use Cancel Package when

The athlete is ending their membership
The package is ending without a replacement
The athlete is not coming back for now
You want it tracked as a cancellation in reporting

If a new package is coming after, use Change Package.

How package changes appear on the athlete profile

On the **Current Packages** card, a package with a scheduled change reads *Changing to [Package Name] on [date]*, and a package created by a change reads *Upgraded or downgraded from [Previous Package Name] on [date]*.

In the **Packages** tab, an active package and the upcoming package that came from a change are visually connected, so you can tell it is a change rather than a standalone addition. Packages that ended as part of a change are labeled *Ended - changed to [Package Name]*, which separates them from packages that were cancelled.

Frequently asked questions

Should I use Change Package or Cancel Package?

Use Change Package when the athlete is switching to a different package, and Cancel Package only when they are ending one without a replacement. This keeps reporting clean and preserves reservations the athlete may want to keep.

Will the athlete keep their reservations?

That is your choice. The flow asks whether to keep or delete them. Keeping them leaves them on the schedule, and they are re-credited automatically once the new package activates.

The wizard says there is already a renewal. What does that mean?

Auto Renew created an upcoming package, and completing the change replaces it. That is the intended behavior. There is nothing to remove first.

What happens to credits the athlete has not received yet?

On the tomorrow path, future credit drops on the current package are not issued, since it ends early. On the other path, they keep receiving credits normally until the current package's end date.

Does Change Package refund the unused portion automatically?

No. Prorated billing is handled manually. Change Package covers packages, reservations, and reporting; any refund or invoice credit is calculated and applied by you.

Can rollover credits move to the new package?

No. They stay tied to the original package and are lost when it ends. The review step warns you and shows the number, so the athlete can use them first.

Why is Auto Renew turned off automatically?

To stop the current package renewing on top of the one you just scheduled. Without it, the athlete could end up with two overlapping upcoming packages.

Can I pick which reservations to keep?

No. The choice applies to all upcoming reservations together.

How do I downgrade someone without giving a refund?

Schedule the change for when the current package ends. The athlete uses the time they already paid for, and the smaller package starts after, so there is nothing to prorate.

Helpful tips

- Use Change Package for upgrades and downgrades. It is what keeps your reporting honest about why members move.
 - Schedule downgrades for when the current package ends and you will rarely need to calculate a refund.
 - Choose Keep for reservations when a coach has already built out the athlete's schedule.
 - Read every alert on the review step. That is where rollover credits, reservation counts, and credit drops are spelled out.
 - Tell the athlete to use their rollover credits before the change. They cannot be carried across.
 - Record the reason for any billing adjustment in the athlete's notes, so the next person looking at the invoice knows why it differs.
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If you have questions about changing athlete packages in Kilo GMS, our Support team is happy to help. Reach us at **hello@usekilo.com**.

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