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Upgrade or Downgrade an Athlete's Package

Laura Gibson - 2026-07-17 - [Packages & Memberships](#)

Switching an athlete from one package to another just got a lot easier. You can now use the new **Change Package** action to handle upgrades and downgrades as their own kind of update, separate from a true cancellation.

This means coach-built schedules stay intact, upcoming reservations are handled the way you want, and your reports finally tell the real story of how athletes move between packages. Kilo GMS handles the operational side (packages, reservations, reporting) automatically. Any prorated billing adjustments are still handled manually. See "Handling Prorated Billing" below.

What You Can Do with Change Package

- Move an athlete from one package to another in a single flow
- Choose whether the change happens **now** or **when the current package ends**
- Keep upcoming reservations on the schedule and have them re-credited automatically under the new package
- Delete upcoming reservations if you'd rather start fresh
- See exactly what's about to happen in a Review step before you confirm
- Record the move as an **upgrade or downgrade** (not a cancellation) so your reporting stays accurate
- See package change history right on the athlete's profile

All package changes are made from the **Actions** menu on a package, in the new **Package Changes** section.

The Actions Menu

The Actions menu on each package has been reorganized into four labeled sections so you can find the right action faster.

Section	What's in It
Subscription	Enable or Disable Auto-Renew, Renew Package
Billing	Enable or Disable Auto-Pay, Payment Method
Status	Manage Status Changes, Pause Package
Package Changes	Change Package, Cancel Package, Remove Package

The Auto-Renew and Auto-Pay options change labels based on the current state of the package, so you'll always see the action that applies.

Before You Start: Change Package May Be Disabled

The Change Package action is disabled (greyed out) whenever the active package already has an upcoming package scheduled to renew after it. Because Auto-Renew creates upcoming packages automatically, this is the situation you'll see most often.

To enable Change Package, remove the upcoming package first.

1. On the athlete's profile, open the **upcoming package** (not the active one).
2. Click **Actions → Package Changes → Remove Package**.
3. Confirm the removal.
4. Go back to the active package. **Change Package** is now available.

What Happens to Reservations on the Upcoming Package

Any future reservations that were credited under the upcoming package will become temporarily uncredited once it's removed. This is expected.

Once you complete the Change Package flow and the new package activates, Kilo GMS will automatically re-credit those reservations under the new package's rules. You don't need to do anything to trigger this.

How to Change an Athlete's Package

1. Go to the athlete's profile.
2. Find the package you want to change and click the **Actions** menu.
3. Select **Package Changes → Change Package**.
4. Choose the new package.
5. Choose when the change takes effect.
6. Decide what to do with upcoming reservations (if any).
7. Configure the new package details.
8. Review and confirm.

The system will walk you through each step. Here's what to expect at each one.

Step 1: Choose When the Change Takes Effect

You'll be asked to pick one of two options.

Now (early cancel). The current package ends today, the new package starts right away, and any future credit drops the athlete hadn't received yet on the current package will not be issued. Use this when the athlete wants the new package to start immediately.

When the current package ends. The current package continues normally until its scheduled end date, the

athlete keeps receiving credits as usual, and the new package is scheduled to start the day after. Use this when the athlete wants to finish out what they've already paid for before the new package kicks in.

A note on downgrades: if the new package costs less than the current one, many gyms schedule the downgrade to begin **when the current package ends**. This avoids the need for prorated refunds since the athlete uses up what they've already paid for.

Step 2: Handle Upcoming Reservations

If the athlete has reservations on their schedule, you'll be asked what to do with them. You'll see two options:

Keep all upcoming reservations or **Delete all upcoming reservations**.

Keep. Reservations stay on the schedule. Any credited reservations will be uncredited so credits aren't double-counted. Once the new package activates, reservations are automatically re-credited under it.

Delete. All upcoming reservations are permanently removed.

If the athlete has no upcoming reservations, this step is skipped automatically.

Note: This step applies to all upcoming reservations together. You can't pick and choose individual reservations to keep or delete in this version.

Step 3: Configure the New Package

Set the details for the new package:

- Billing plan
- Start date
- Billing start date
- Athlete status upon start
- Athlete status upon end
- Payment method
- Auto-Pay
- Auto-Renew
- Discounts
- Follow-up package

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

Step 4: Review and Confirm

The Review step shows you a summary of everything that's about to happen, including:

- Current package name, billing plan, and end date
- New package name, billing plan, and start date
- Any reservation impacts ("X reservation(s) will be uncredited" or "X reservation(s) will be permanently

deleted")

- A note that future credit drops will be zeroed out (Now path only)
- A note that Auto-Renew on the current package will be turned off
- A warning if the current package has unused rollover credits

Click **Apply Changes** to confirm.

What Happens Automatically When You Confirm

A few things happen behind the scenes so you don't have to manage them yourself:

- A new upcoming package is created and scheduled.
- Auto-Renew on the current package is automatically turned off, so it doesn't renew on top of the new package you just scheduled.
- A **package change event** is recorded, not a cancellation.

This last point is the key difference from the old workaround. Because the system knows this was a change and not a cancellation, your retention reports, churn metrics, and revenue movement reports will all reflect what really happened.

How Reservations and Credits Behave

The outcome depends on which timing path you chose and whether you kept or deleted reservations.

Timing: Now

Your Choice Reservation State		What Happens
Keep	Credited	Uncredited right away. 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.

Timing: When Current Package Ends

Your Choice Reservation State		What Happens
Keep	Credited	Stays credited until the current package ends. Uncredited at that point. Re-credited when the new package activates.
Keep	Uncredited	No change. Credited when the new package activates.
Delete	Any	All reservations permanently deleted.

A Note About Rollover Credits

Rollover credits cannot be transferred to a new package.

If the current package has unused rollover credits, they will be lost when the package ends. This applies to both timing paths.

The Review step will show you a warning with the exact number of rollover credits the athlete has so you can let them know to use those credits before the change takes effect.

Handling Prorated Billing

Change Package handles the operational side of an upgrade or downgrade, but it does not automatically prorate refunds for billing. If an athlete has already paid for time on their current package that they won't use, you'll need to reconcile the billing difference manually.

When Prorated Billing Adjustments Are Needed

- **On the Now path**, when the athlete has paid for a full billing period and the new package activates before that period is over.
- **Usually not needed on the When Current Package Ends path**, since the athlete finishes out the time they've already paid for before the new package starts.
- **Same-price changes** typically don't need any billing adjustment. Align the end date of the current package with the start date of the new one and let it run.

Membership Proration Calculator

To calculate the unused value of the current membership:

Step 1: Calculate the daily value of the membership

Membership Price ÷ Total Days in Billing Period = Daily Rate

Step 2: Calculate unused value

Daily Rate × Unused Days = Credit or Refund Amount

Example

An athlete has a \$160 monthly membership and upgrades halfway through their cycle.

- Membership price: \$160
- Billing cycle: 30 days
- Daily rate: $\$160 \div 30 = \$5.33/\text{day}$

If the change happens with 12 days remaining:

$\$5.33 \times 12 = \63.96 credit

Two Ways to Apply the Adjustment

Once you have the credit amount, you have two options.

Option 1: Issue a partial refund on the previous invoice.

1. Go to the original invoice on the athlete's profile.
2. Click the blue arrow action button on the far right.
3. Select **Refund**.
4. Enter the partial refund amount.

The new membership then begins normally with its full first payment. This option keeps billing clean and easy to track.

Option 2: Reduce the first invoice(s) of the new package.

Instead of issuing a refund, you may choose to reduce the first invoice of the new package by the credit amount. On downgrades, the credit may apply to more than one upcoming invoice.

Invoices can only be edited **before they are charged**. You can accomplish this in one of two ways.

Method 1: Schedule the package. If you used the **When Current Package Ends** timing, the new package's first invoice will be in the Upcoming state until it's charged. Edit the invoice amount while it's still upcoming.

Method 2: Start the package immediately with Auto-Pay off. Add the package with **Auto-Pay turned off**, edit the first invoice amount to reflect the credit, collect the reduced payment, then turn **Auto-Pay back on** for the package.

Cancel Package: What's Changed

The Cancel Package flow has been updated so you have more control over what happens to upcoming reservations.

Use Cancel Package when an athlete is ending a package without replacing it. If they're switching to a different package, use Change Package instead.

How to Cancel a Package

1. Go to the athlete's profile.
2. Find the package and click **Actions → Package Changes → Cancel Package**.
3. Set the end date, cancellation reason, and athlete status after cancellation.
4. Choose whether to keep or delete upcoming reservations (if any).
5. Review and confirm.

Reservation Handling on Cancellation

If the athlete has upcoming reservations, you'll be asked to keep or delete them.

Keep. Credited reservations are uncredited. Uncredited reservations stay as-is. Everything remains on the schedule.

Delete. All upcoming reservations are permanently removed.

If there are no upcoming reservations, this step is skipped.

Cancelling an Upcoming Package

When you cancel a package that hasn't started yet (sometimes called an "upcoming" or "child" package because it was generated by Auto-Renew on the currently active package), Kilo GMS will automatically turn off Auto-Renew on the active package.

This prevents the active package from renewing again and immediately creating another upcoming package to replace the one you just cancelled. You'll see this confirmed in the Review step before anything is applied.

Remove Package: What's Changed

The action previously called **Delete Package** is now **Remove Package**. The behavior is the same: the package is removed from the athlete's profile, but the confirmation modal is now clearer about what happens to invoices.

When you remove a package:

- **Paid invoices are kept.** They stay on the system for your records.
- **Unpaid invoices are removed.** The confirmation modal will tell you exactly how many will be removed.

Removing an Upcoming Package

Just like with Cancel Package, removing an upcoming package will automatically turn off Auto-Renew on the active package, so it doesn't generate a replacement. This is shown in the confirmation modal.

When Auto-Renew Is Automatically Turned Off

To keep things predictable, Kilo GMS will automatically turn off Auto-Renew in these situations.

Action	What Gets Turned Off
Change Package (either timing path)	Auto-Renew on the current package
Cancel Package on an upcoming package	Auto-Renew on the active package
Remove Package on an upcoming package	Auto-Renew on the active package
Disable Auto-Renew on an upcoming package	Auto-Renew on the active package

You'll always see this confirmed in the Review or confirmation step before anything is applied.

How Package Changes Show Up on the Athlete Profile

You can now see at a glance what's happening with a package without opening each one individually.

Current Packages Card

- A package with a scheduled change shows: "*Changing to [Package Name] on [date]*"
- A package created from a change shows: "*Upgraded/downgraded from [Previous Package Name] on [date]*"

Packages Tab

- Active packages linked to an upcoming package from a change are visually connected, so you can tell the upcoming package came from a change and isn't a standalone add.
- Packages that ended as part of a change are labeled "*Ended - changed to [Package Name]*", separating them from packages that were cancelled.

This makes it much easier to understand an athlete's package history at a glance.

Change Package vs. Cancel Package: Which Should You Use?

This is the most common question, so here's a quick comparison.

Use Change Package When...

The athlete is switching to a different package
It's 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 won't be coming back for now
You want it tracked as a cancellation in reporting

When in doubt: if there's a new package coming after, use **Change Package**.

Frequently Asked Questions

Should I use Change Package or Cancel Package?

Use Change Package when the athlete is switching to a different package. Use Cancel Package only when they're ending a package without a replacement. This keeps your reporting clean and preserves scheduled reservations the athlete might want to keep.

Will the athlete keep their reservations when I change their package?

That's your choice. The Change Package flow will ask if you want to keep or delete them. If you choose Keep, reservations stay on the schedule and are re-credited automatically once the new package activates.

What happens to credits the athlete hasn't received yet?

On the Now path, future credit drops on the current package are not issued, since the package is ending early. On the When Ends path, the athlete continues to receive credits normally until the current package's end date.

Does Change Package refund the unused portion of the athlete's payment automatically?

No, prorated billing adjustments are handled manually. Change Package handles the operational side (packages, reservations, reporting), but any refund or invoice credit for time the athlete already paid for needs to be calculated and applied manually. See "Handling Prorated Billing" above for the formula and options.

Can rollover credits be moved to the new package?

No. Rollover credits stay tied to the original package and cannot be transferred. Kilo GMS will warn you in the Review step if any rollover credits exist so you can let the athlete know to use them before the package ends.

Can athletes upgrade or downgrade their own packages?

Not at this time. All package changes, cancellations, and removals are staff-managed from the GMS.

Will paid invoices be deleted when I remove a package?

No. Paid invoices are always kept. Only unpaid invoices are removed, and you'll see a count of them in the confirmation modal before you confirm.

Why is Auto-Renew getting turned off automatically?

To prevent conflicts. If Auto-Renew stayed on, the current package could renew and create a new upcoming package right on top of the one you just scheduled. Turning it off automatically keeps the athlete's package timeline clean.

Can I select individual reservations to keep or delete?

Not in this version. The Keep or Delete choice applies to all upcoming reservations together.

How do I handle a downgrade without giving a refund?

Schedule the downgrade to begin when the current package ends. This lets the athlete use the time they've already paid for before the smaller package kicks in, so there's nothing to prorate.

Helpful Tips

- Use **Change Package** for upgrades and downgrades to keep your reports accurate.
 - Use **Cancel Package** only when there's no new package replacing the current one.
 - Choose **Keep** for reservations when you want to preserve coach-built schedules.
 - Choose **Delete** for reservations when starting completely fresh.
 - Always review the **Review step** before confirming. Every alert there is important.
 - Let the athlete know to use any rollover credits before a package change, since those can't be transferred.
 - You don't need to manually turn off Auto-Renew. Kilo GMS handles that automatically when you confirm a package change.
 - For downgrades, consider scheduling for **when the current package ends** so you don't need to calculate a refund.
 - Clearly communicate any billing adjustment to the athlete so they understand the credit or refund.
 - Document the reason for the adjustment in the athlete's notes.
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When This Feature Is Most Helpful

- An athlete wants to move up to a higher-tier package
 - An athlete wants to scale down to a smaller package
 - You're switching an athlete between billing plans on different packages
 - A coach has already scheduled future reservations you don't want to lose
 - You want your reporting to clearly show upgrades and downgrades separate from cancellations
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If you have questions about changing, cancelling, or removing athlete packages in Kilo GMS, our Support team is happy to help. Reach us at **hello@usekilo.com**.