Add a Contact to a Pipeline Manually

Mavilyn Carlos - 2026-07-28 - Opportunities & Pipelines

If you have a new lead by phone call, walk-in, or any other means except your website, you may want to **add them to the opportunities pipeline manually**. They won't be there automatically if they haven't completed a form or booked an appointment in your GLM calendar.

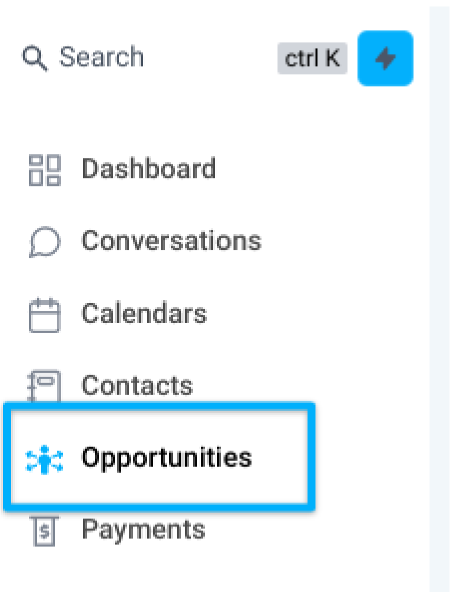
It is best to add these contacts through **Opportunities**, rather than **Contacts**, so that both a contact and an opportunity card are generated for the lead or client at the same time.

Note

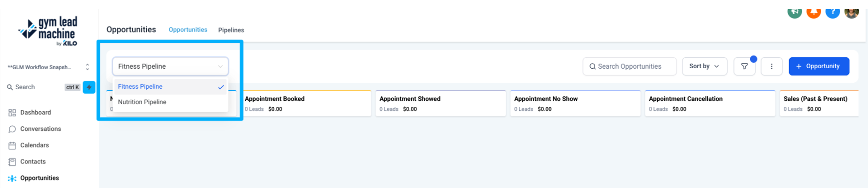
Adding the person to Contacts only will not create an opportunity card.

How do I manually add a contact to a pipeline?

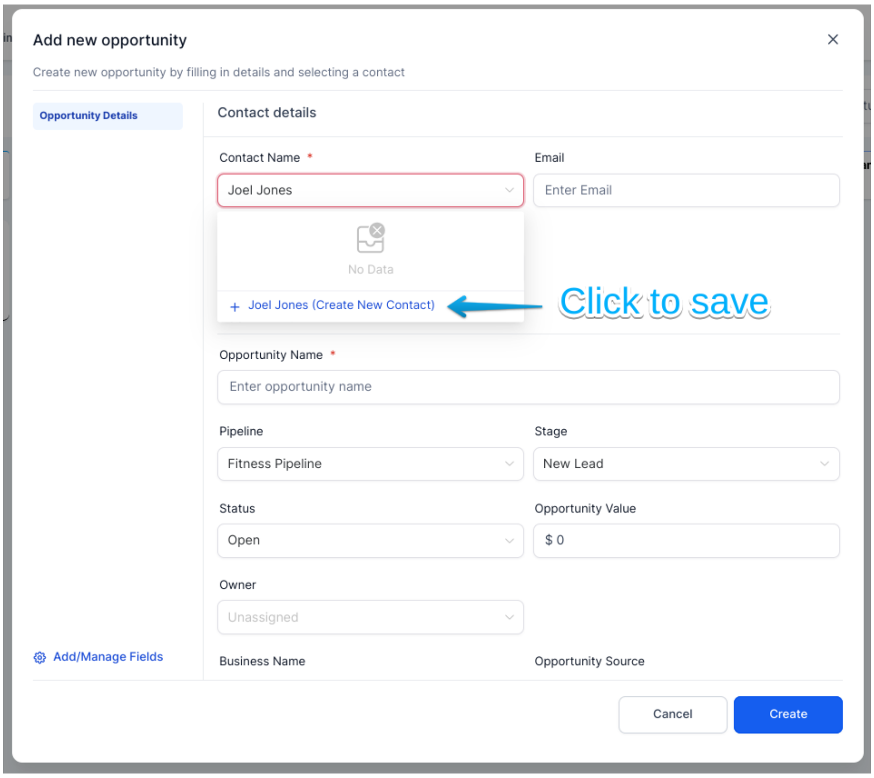
1. In your GLM account, select **Opportunities** on the left menu.



2. Navigate to the proper pipeline for this lead. Usually, this will be the Fitness Pipeline and will be selected by default.

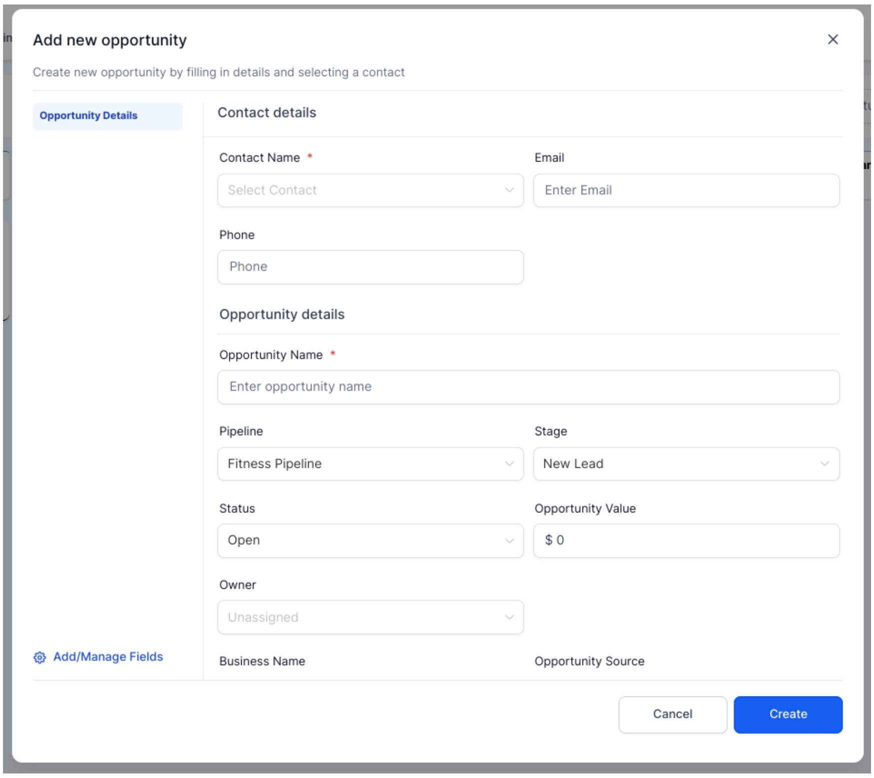


3. On the far right of your screen, select **+ Opportunity**.



4. When the pop-up appears, enter the contact's information in the upper portion. As you type the contact name, any possible matches will list in the drop-down below the **Contact Name** field. If one of these is the contact for whom you are adding an opportunity card, click on the name and the information will be filled into the contact fields. If this is a new contact, enter their name and then click on that name (the first one in the drop-down) to save the new contact.

5. If you are adding this contact as a lead, add appropriate lead tags such as **fitness lead** and **lead**. These tags will not be added automatically, as they are typically triggered by the submission of a form. If you are adding this person as a client, you can skip adding tags; the system will add them when you give the opportunity the status **Won**.



6. In the lower portion of the pop-up, add the **Opportunity Name**. This can be the first name only, or first and last.
7. Select the proper **Pipeline**.
8. Select the proper **Stage** (New Lead, Sales, etc.).
9. Set the **Status** field: leave it as **Open** for a lead, or update it to **Won** if you are adding this person as a client.
10. Optionally, fill in **Opportunity Value**, **Business Name**, and **Opportunity Source**.
11. Assign a user to the contact. You should do this so the automated emails can fill in a signature.
12. Click **Create**.

The opportunity card will populate into the pipeline and stage that you indicated in the pop-up, and the contact can now continue on the lead journey.

Adding a lead vs. adding a client

If you're adding a...	Tags	Status field
Lead	Add lead tags such as **fitness lead** and **lead** manually	Leave as **Open**
Client	Skip tags; the system adds them when the opportunity is marked **Won**	Update to **Won**

If you have questions about adding contacts to the opportunity pipeline in Gym Lead Machine, our Support team is happy to help. Reach us at **hello@usekilo.com**.

- Tags
- Gym Lead Machine