Build Workflows with AI in GLM

Tom Regier - 2026-11-09 - Automation (Workflows)

Workflow AI Builder lets you create a complete automation in your Gym Lead Machine account by describing what you want in plain language, instead of manually configuring triggers and actions. You generate a workflow from a prompt, review what the AI built, and refine it with more prompts until it matches what you need.

What you can do with Workflow AI Builder

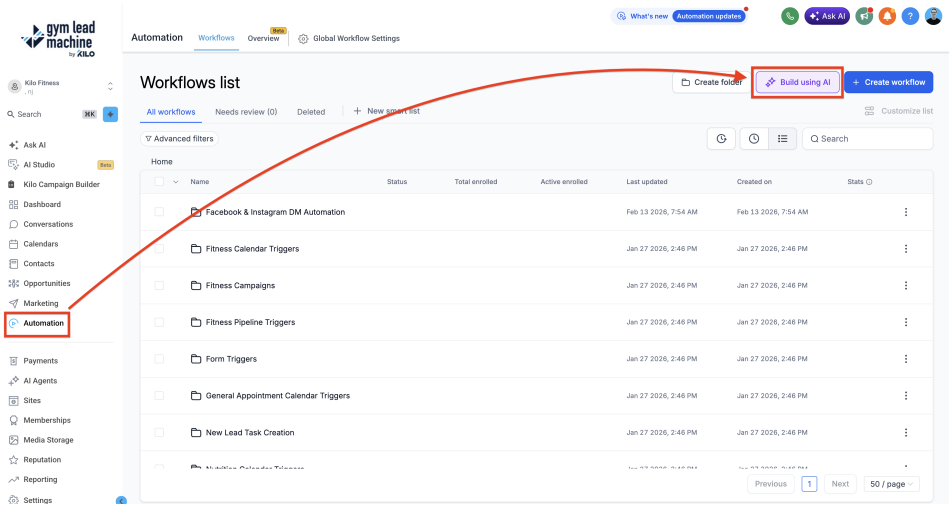
- Generate a full workflow, triggers and actions included, from a single prompt
- Refine a generated workflow using follow-up prompts instead of rebuilding it manually
- Target a specific action, trigger, or group of steps for an edit using Point and Edit
- Plan out a workflow in Chat Mode before you commit to building anything
- Review a to-do list of items that still need your input before you publish

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How do I generate a workflow with AI?

You can open Workflow AI Builder from any of these places in your Gym Lead Machine account:

- From your workflow list, click **Build with AI**.
- From inside the workflow builder, when starting a workflow from scratch, use the AI prompt box.
- From inside the workflow builder, use the AI chatbot assistant.



Once you have it open:

1. Enter a prompt describing the automation you want, either by typing or using voice dictation. You can also select a pre-written prompt template instead of writing your own.

2. Optionally, include the workflow name, any settings you want applied, which apps or integrations to use, and how one step should use data from an earlier step.

3. Click the **purple up arrow**

4. Wait for the AI to finish. This typically takes under a minute.

5. Review the summary of what was built, along with the workflow itself.

   NOTE: Workflow AI Builder autosaves as you go. Your workflow saves automatically the moment the AI creates it, and every edit you make through AI saves in the background after that.

You can also ask the AI to view, enable, disable, or update common workflow settings directly in your prompt, including:

- Allow re-entry
- Allow multiple opportunities
- Stop on response
- Time zone and time window (business hours)
- Sender details (from name, from email, from number)
- Marking conversations as read
- The workflow name

For example, a single prompt can rename a workflow, update its sender email, restrict messages to a set window of days and hours, and confirm re-entry is off, all at once.

Writing an effective prompt

- Be specific. State the trigger, the channel, the timing, and any conditions, rather than describing the goal in general terms.
- Use action verbs to start each instruction, such as send, notify, create, update, wait, or check if.
- Name the apps or integrations you want used, if any (for example, creating a task in a connected project management tool).
- If you are editing rather than generating, state the scope: whether the change should apply to every matching step, a set number of steps, or a specific action or trigger.

A vague prompt like "follow up with the lead" leaves out the trigger and the timing, so the AI may ask you to clarify before it builds anything. A prompt like "when a lead books an appointment, wait one day, then send a confirmation email and a reminder text the day before" gives the AI enough to work with on the first try.

How do I edit a workflow using AI?

After reviewing your generated workflow, refine it with more prompts in the AI chatbot. Describe the change you want and, if it applies to more than one step, tell the AI the scope: all matching steps, a set number of steps, or a specific action or trigger.

Conversational edits currently support:

- Adding a new action anywhere in the workflow
- Removing an existing action or trigger
- Replacing an action or trigger with a different one
- Modifying an action's configuration or settings
- Moving an action to a different position in the workflow
- Updating an action to use a value from an earlier step
- Adding or updating an action that uses a connected app
- Adding, removing, or updating branches and conditions in an If/Else action
- Updating the wait length, reply settings, or timeout branches in a Wait action
- Combining several of the above into a single prompt

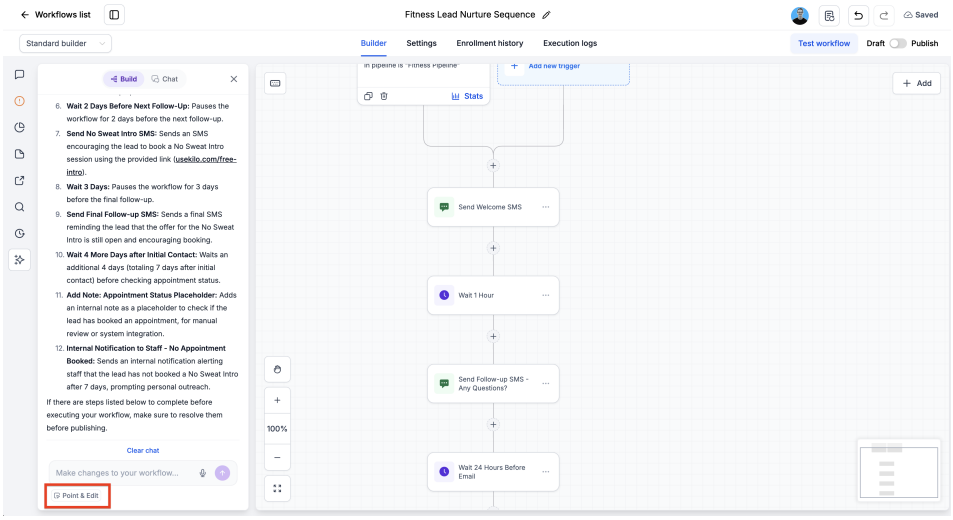
Targeting an edit with Point and Edit

Use Point and Edit when it is easier to select the actions you want to change than to describe them.

1. Click **Point and Edit** in the AI chat panel to turn on selection mode.
2. Select the actions you want to edit. Click to select one, click on additional actions to add them, or hold

Shift and drag to select a range.

3. Describe the change in the chat. The AI applies it only to the actions you selected.



This is especially useful in a workflow with many similar actions, where a written description alone could be ambiguous about which one you mean.

Planning first with Chat Mode

Chat Mode lets you plan a workflow with AI before anything gets built.

1. Click **Chat Mode** in the AI panel.
2. Talk through the triggers, actions, branches, and timing you want, going back and forth until you have a plan.
3. Click on **Build** to turn off Chat Mode.
4. Ask the AI to build the workflow you just planned.

When the AI asks clarifying questions

If your prompt is missing a key detail, such as the trigger, the channel, or the timing, the AI may ask up to three quick clarifying questions before it builds or edits anything. You can select one of the options it offers, type your own answer, or skip a question and let the AI decide.

Undoing an AI-generated change

Within your current editing session, you can undo and redo changes the AI makes:

- Press **Ctrl+Z** (Windows) or **Cmd+Z** (Mac) to undo the last AI-generated change.
- Press **Ctrl+Y** (Windows) or **Cmd+Y** (Mac) to redo a change you just undid.

You can also open **Recent Changes** in the workflow builder to review what was edited.

Before you publish: reviewing your AI-generated workflow

An AI-generated workflow is not automatically ready to go live. Before you publish, check the to-do list the AI provides, which flags anything that still needs your input, such as connecting integration credentials, selecting an account or pipeline, adding a required field value, or choosing between options on a step that has more than one.

1. Open the to-do list in the AI panel after your workflow is built.
2. Select an item to jump directly to the related action.
3. Complete the missing detail.
4. Repeat until the list is clear.

> TIP: Always run a live test of triggers, actions, and timing before you activate a workflow, whether the AI built it or you built it manually. The AI cannot test a workflow for you.

Workflow AI Builder vs. building workflows manually: which should you use?

Situation	Use Workflow AI Builder	Build manually
You know roughly what you want but not the exact trigger and action names	Describe it in plain language and let the AI configure it	Requires knowing each trigger and action by name
You need to change the same setting across many similar steps	Give one scoped prompt or use Point and Edit	Requires opening and editing each step individually
You want tight, step-by-step control over a highly specific configuration	Use it to draft a starting point, then adjust manually	Better suited when every detail must be set exactly as you go
You are still deciding what the workflow should even do	Use Chat Mode to plan before building anything	Requires deciding the full structure up front

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Frequently asked questions

Can I edit a generated workflow using AI?

Yes. Use conversational prompts to add, remove, replace, move, or modify actions and triggers, including multi-path configurations in If/Else and Wait actions.

Can I target only certain steps when editing?

Yes. State the scope in your prompt (all matching steps, a set number, or a specific action or trigger), or use Point and Edit to select the exact steps visually.

What if the generated workflow does not match what I wanted?

Refine your prompt with more detail, or make conversational edits to adjust specific steps. You can also use Chat Mode to plan out the structure with AI before building it.

Do I still need to test a workflow the AI built for me?

Yes. Always validate triggers, actions, timing, and outcomes with a live test before you activate any workflow, whether it was built with AI or built manually.

Why do items show up on the post-generation to-do list?

Some settings require a decision only you can make, such as which credentials to connect, which account or pipeline to use, or a required field value. The to-do list flags these so nothing incomplete goes live.

How do I turn off Workflow AI Builder for my account?

Go to Automations → Global Workflow Settings → Workflow AI and turn off AI Builder.

Helpful tips

- Start with a simple workflow to get a feel for how the AI interprets your prompts before trying something more complex.
- Include the trigger, channel, and timing in your first prompt to reduce the number of follow-up edits you need.
- Use Point and Edit instead of a written description when a workflow has several similar actions.
- Use Chat Mode when you are still deciding what a workflow should do, and switch to building only once you have a plan.
- Always clear the post-generation to-do list and run a live test before you activate a workflow.

When this feature is most helpful

- Building a new automation quickly without looking up specific trigger and action names
- Making the same change across many similar steps in one request
- Planning out a complex workflow's structure before committing to building it
- Adjusting an existing workflow's wording, timing, or conditions without opening every step individually

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If you have questions about Workflow AI Builder in Gym Lead Machine, our Support team is happy to help. Reach us at **hello@usekilo.com**.

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