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Contact Cards in GLM

Laura Gibson - 2026-08-19 - [Contacts](#)

Every person in **Gym Lead Machine (GLM)** has a **contact card**: a single screen holding their details, their full message history, who owns them, and every tag, opportunity, workflow, and appointment attached to them. Almost everything you do with an individual client starts here.

This article walks through each part of the contact card and where the most common changes are made.

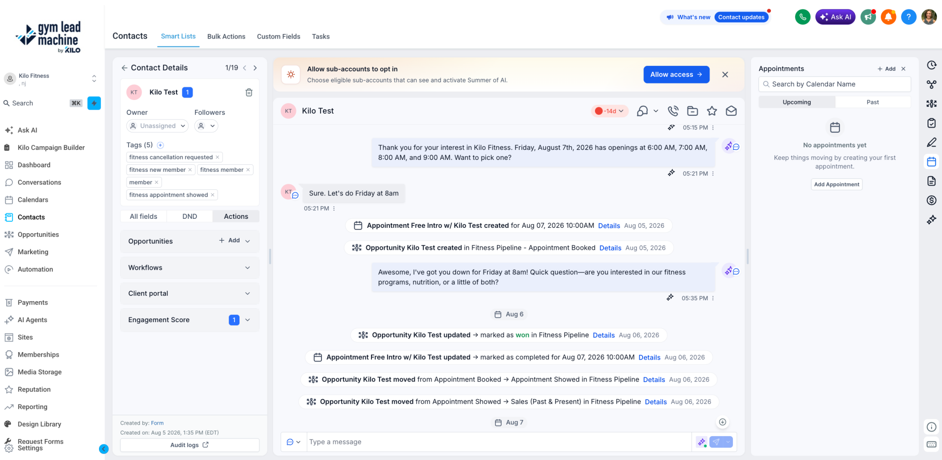
How do I open a contact card?

1. Go to **Contacts** in the left menu of your GLM account.

2. Find the person using **Search**.

3. Click their name.

The contact card opens with three areas: the **Contact Details** panel on the left, the conversation in the middle, and a set of side panels on the right.



Once a card is open, the arrows beside the counter at the top of Contact Details move you through the rest of the list you came from, so you can work through a Smart List without going back to it each time.

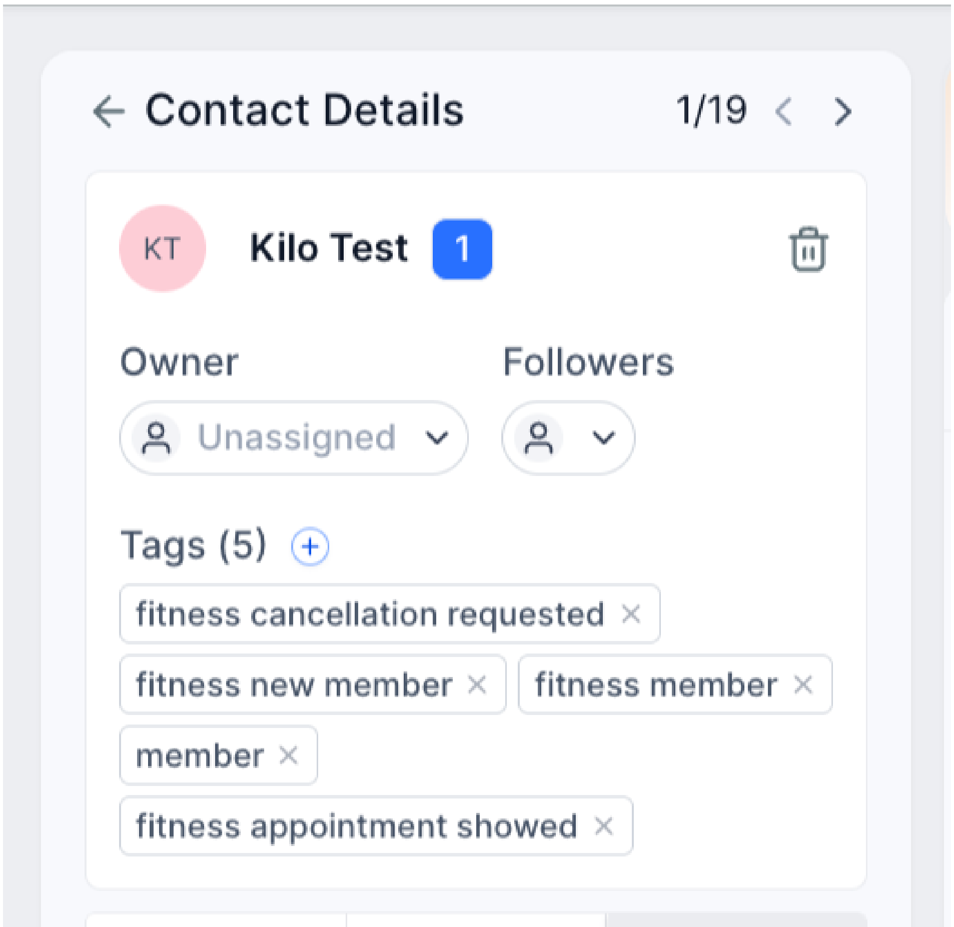
The Contact Details panel

The left panel holds who the contact is and the settings you will change most often.

Owner is the team member responsible for this contact. Assignment usually happens on its own, applied by the workflow that runs when someone submits a form, and it often changes again when a sales appointment is booked. A contact you add by hand has no workflow behind them, so they open as **Unassigned** until you set an owner from the dropdown.

Followers are other team members who want visibility on the contact without owning them.

Tags track where a contact is in their lead or client journey. Some are applied automatically, such as a lead tag when someone submits a form or a member tag when their opportunity is marked **Won**. Add one with the **+** beside the Tags heading, or remove one with the **x** on the tag itself.

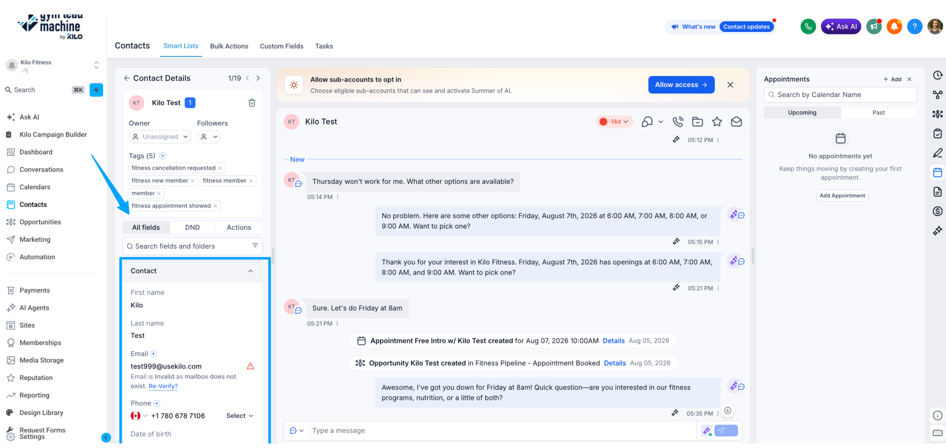


Below that, three tabs hold the rest: **All fields**, **DND**, and **Actions**.

All fields

Every piece of information stored about the contact, grouped into folders. The **Contact** folder holds the basics: first name, last name, email, phone, and date of birth. Use the search box above the folders to jump to a field instead of scrolling.

Click the **+** beside Email or Phone to store more than one. GLM also flags addresses it cannot deliver to, so an email showing a warning here explains why your messages are not arriving.

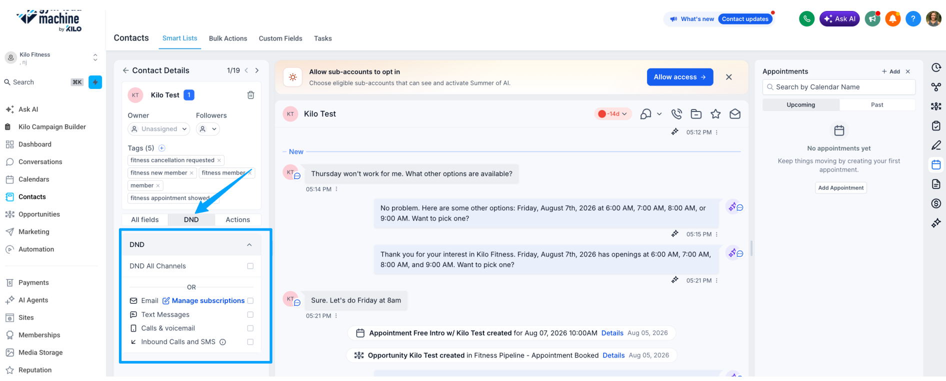


DND

DND (Do Not Disturb) stops GLM sending outbound messages to the contact while keeping them in your system. Check **DND All Channels** to silence everything, or check channels individually:

- **Email**, which also links to **Manage subscriptions**
- **Text Messages**
- **Calls & voicemail**
- **Inbound Calls and SMS**, which blocks messages coming the other way

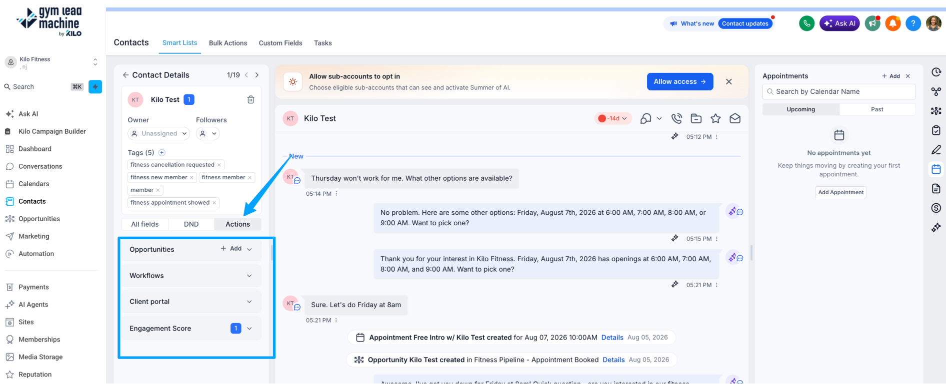
DND can also switch on by itself when a contact clicks the unsubscribe link at the bottom of a marketing email.



Actions

What the contact is currently attached to:

- **Opportunities**, with an **Add** option to create one
- **Workflows** they are enrolled in
- **Client portal** access
- **Engagement Score**



At the bottom of the panel, you can see how and when the contact was created, and open **Audit logs** for a record of changes made to them.

The conversation

The center column is the full message history with this contact, across every channel. Their messages sit on the left and yours on the right.

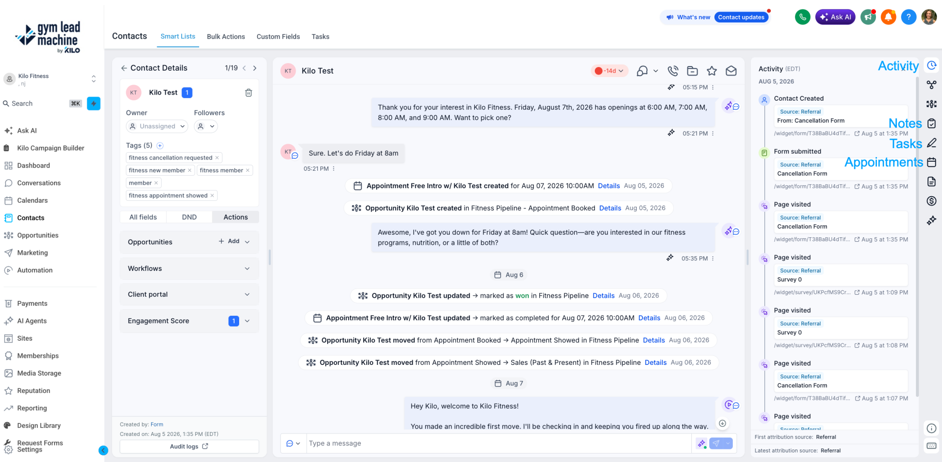
Key moments appear inline alongside the messages, so an appointment being booked or an opportunity being created shows up in sequence with the conversation that led to it.

Send a new message using the composer at the bottom, choosing the message type before you write.

The side panels

The icons down the far right open panels beside the conversation. Four you will use regularly:

- **Activity** is the contact's full history: when they were created, which form they submitted, and which pages they visited, each with its source. The bottom of the panel shows their first and latest attribution source, which tells you where the lead actually came from.
- **Appointments** shows their bookings, split into **Upcoming** and **Past**, with an option to add one.
- **Tasks** holds follow-ups you have set for this contact.
- **Notes** holds anything your team needs to remember that does not belong in a message.



Frequently asked questions

How do I change who a contact is assigned to?

Use the Owner dropdown at the top of the Contact Details panel. Contacts that arrive through a form are assigned automatically by the workflow behind it, but a contact you add by hand opens as Unassigned and stays that way until you set an owner.

Why does the owner matter?

Campaign messages fill in staff details based on who owns the contact. If a contact has no owner, any automation that references their coach or a staff phone number has nothing to pull from, so those fields come through blank or wrong.

Why did the owner change without anyone changing it?

Ownership shifts automatically at points in the lead journey. A contact is assigned by the workflow that runs when they submit a form, and ownership commonly moves again when a sales appointment is booked, passing them from whoever handles leads to whoever handles appointments.

How do I stop GLM from messaging someone?

Open the DND tab and check DND All Channels, or pick individual channels. A contact who has gone quiet may already have DND applied, since clicking the unsubscribe link in a marketing email turns it on automatically.

Where did this lead actually come from?

Open the Activity panel and look at the first and latest attribution source at the bottom. The timeline above it shows the form they submitted and the pages they visited before and after.

Why are my emails to this contact not arriving?

Check the email field under All fields. GLM flags addresses it cannot deliver to, and a flagged address will keep failing until it is corrected or replaced.

How do I add or remove a tag?

Use the + beside the Tags heading to add one, and the x on a tag to remove it. To tag a group of people at once, filter your contact list first and use the bulk tag options instead.

Can I see what has been changed on a contact?

Yes. Open Audit logs at the bottom of the Contact Details panel.

Helpful tips

- Set the owner immediately on any contact you add by hand. Nothing else will do it for you.
- Check DND before chasing someone who has stopped replying. They may have unsubscribed rather than gone cold.
- Use the arrows at the top of Contact Details to work through a list one contact at a time.
- Check Activity before a sales call. Knowing which pages someone visited tells you what they are actually interested in.
- Keep an old phone number or email as a second entry rather than overwriting it, so you do not lose a working way to reach someone.
- Tag people as things change rather than in a weekly cleanup. Smart Lists, automations, and reporting all read from the same tags.

When the contact card is most helpful

- Checking someone's history and interests before you call them
- Setting the owner on a contact you added manually

- Applying DND when a member asks to stop receiving messages
- Working out where a lead came from
- Confirming which tags a contact carries when they are not showing up in the list you expected
- Checking whether a contact is already enrolled in a workflow before adding them to another

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

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