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Create, Send, and Share Documents or Contracts in GLM

Mavilyn Carlos - 2026-09-03 - [Payments & Documents](#)

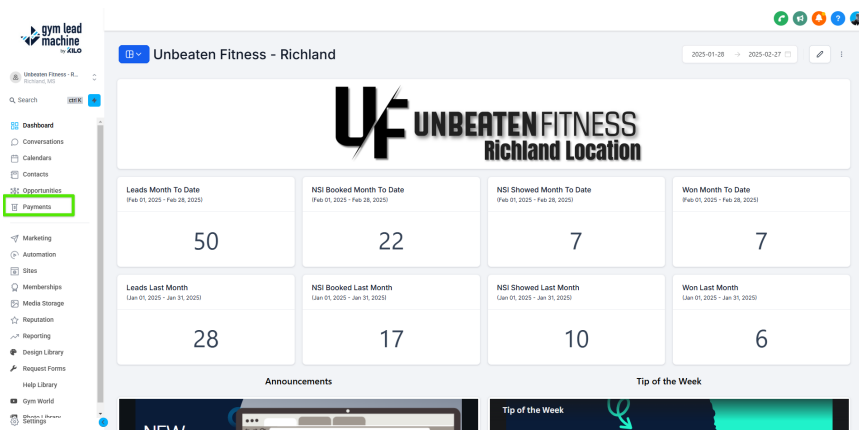
Documents & Contracts in Gym Lead Machine is where you build waivers, agreements, and any other form that needs a signature. Once a document is saved, you can send it to a specific contact, publish it as a link you share yourself, or attach it to a workflow so it goes out automatically.

What you can do with Documents & Contracts

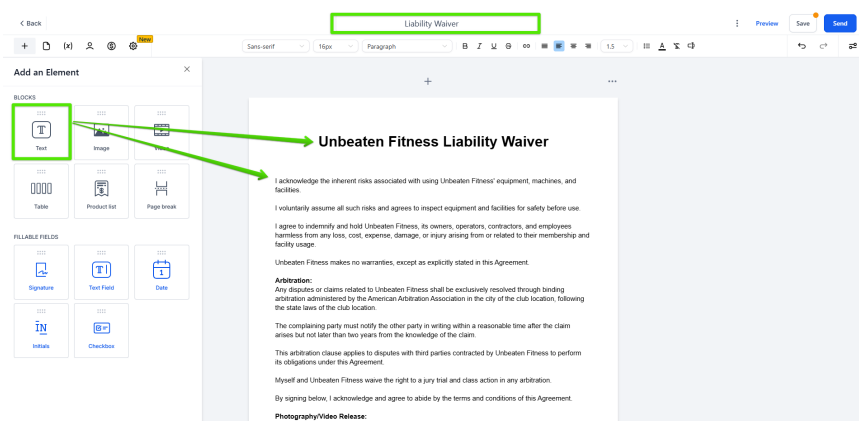
- Build a document from scratch and name it
- Add fillable fields and signature fields anywhere in the document
- Send a saved document to a contact you choose
- Publish a document and share it as a public link
- Retrieve a published link later without regenerating it
- Send a document automatically as part of a workflow

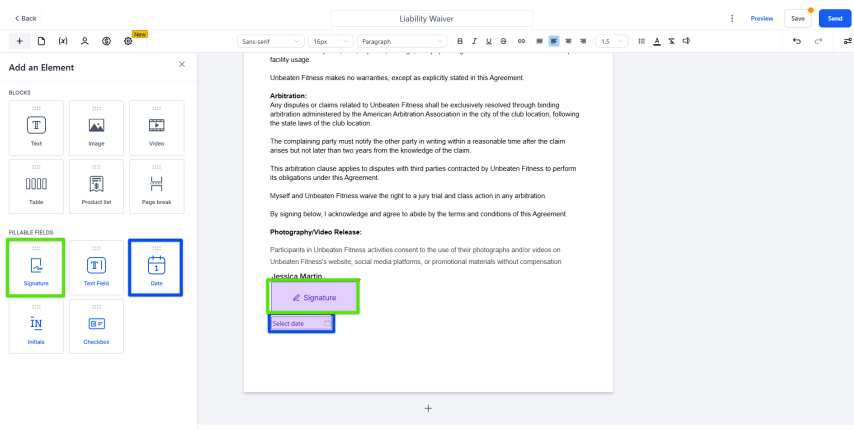
How do I create a new document or contract?

1. Go to **Payments** → **Documents & Contracts**.

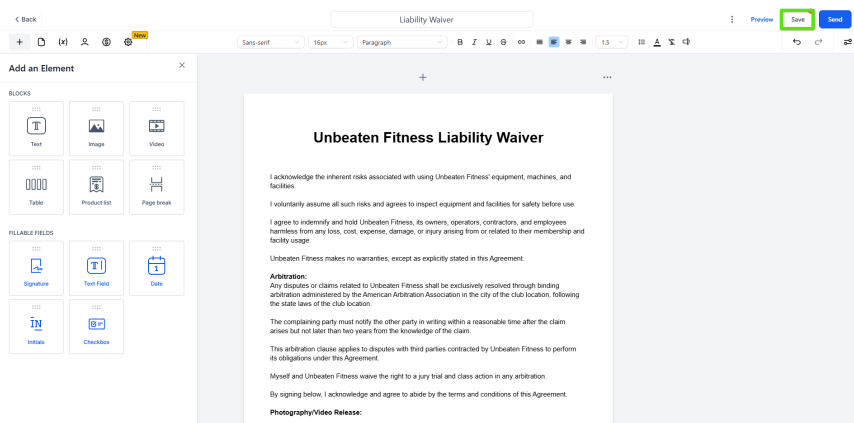


2. Click **New** in the upper right corner.



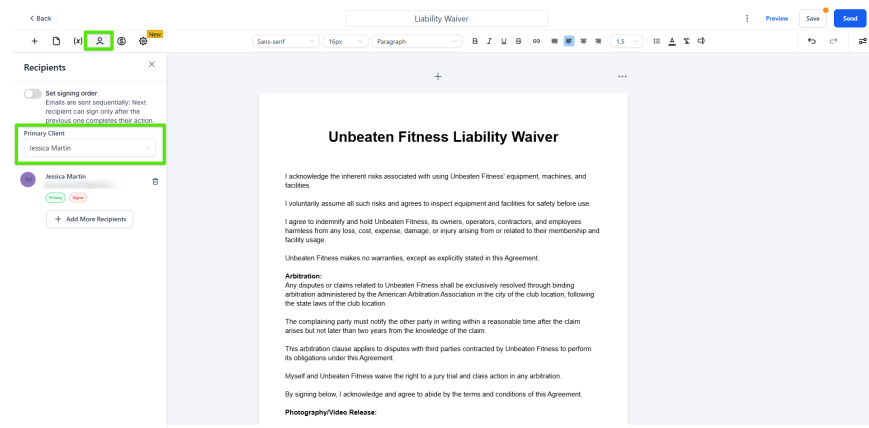


6. Click **Save** in the upper right corner.



How do I send a document to a specific contact?

1. Open the saved document.
2. Select **Recipients** in the upper left corner.
3. Choose the contact you want to send the document to.
4. Click **Send** in the upper right corner.



How do I share a document with a public link?

Publishing a document generates a link you can share yourself, which is useful when you want a waiver out in the world rather than sent to one named contact.

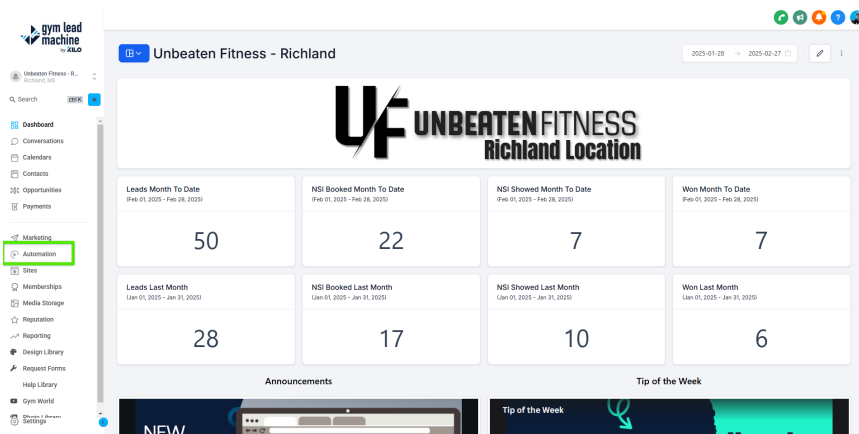
1. Go to **Payments → Documents & Contracts → Templates**.
2. Click the template you want to share to open it, such as your waiver.
3. Click **Publish**.
4. Click **Generate Links**.

Once the document is public, you can get to the link again at any time:

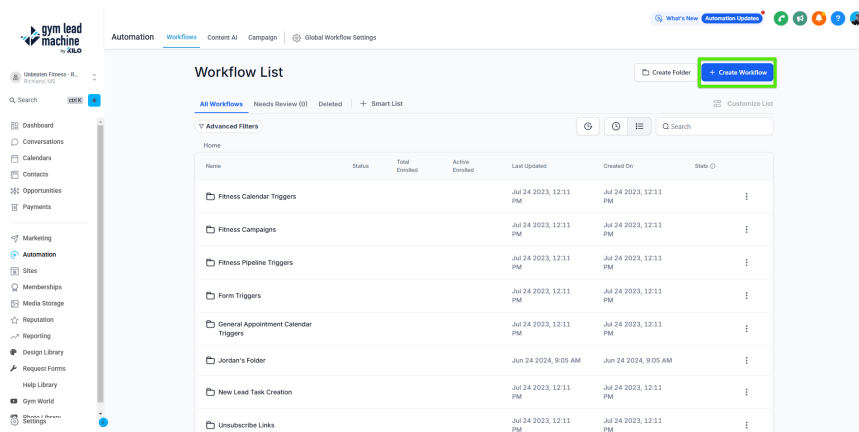
1. Go to **Payments → Documents & Contracts → Public Documents**.
2. Find the document in the list.
3. Click the three-dot menu.
4. Click **Share Link**.

How do I send a document automatically with a workflow?

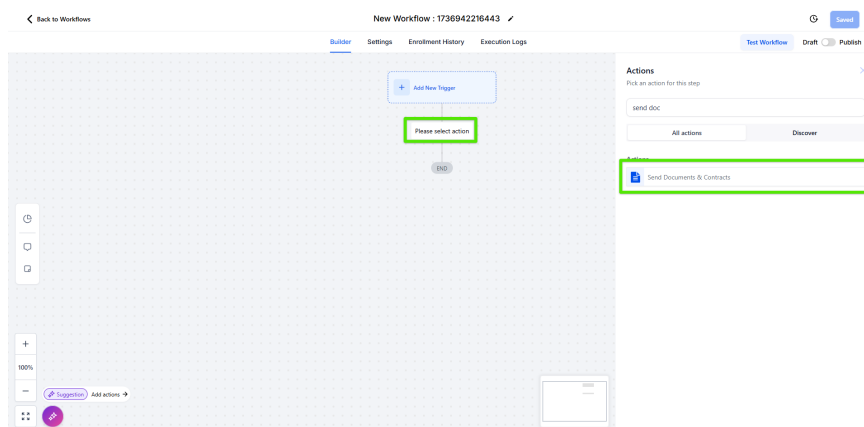
1. Go to **Automation**.



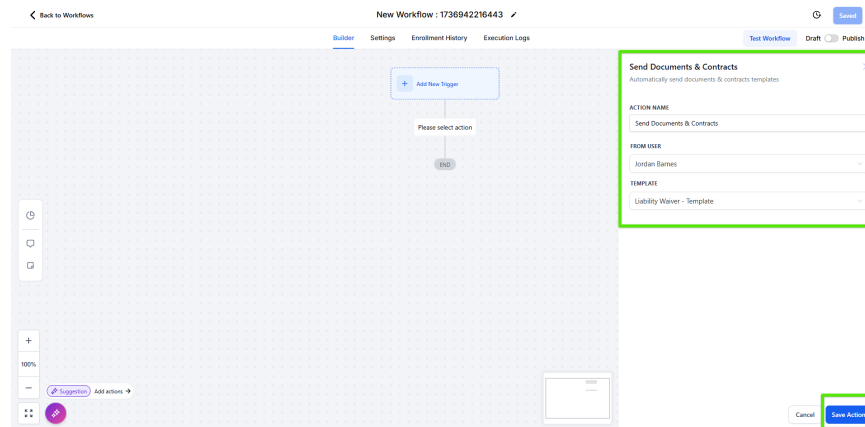
2. Click **Create Workflow**.



3. Add an action step and choose **Send Documents & Contracts from User**.



4. Select the document template you want to send, such as your liability waiver.



5. Click **Save**.

Every contact who enters that workflow now receives the document automatically.

Choosing how to send a document

Option	How the document reaches the person	Use it when
Recipients	You pick a contact and send the document to them from inside the document	You are sending to one person you can already find in your contacts
Public link	You publish the document and share the link yourself	You want the same document available to anyone you hand the link to, on your site, in an email, or in a text
Workflow	The document goes out automatically to every contact who enters the workflow	The document is part of a repeatable process, like onboarding a new member

Frequently asked questions

What is the difference between sending a document to a recipient and sharing a public link?

Sending to a recipient delivers the document to one contact you select inside Gym Lead Machine. Generating links publishes the document so you can distribute, share, or post the link yourself. Use Recipients when you know exactly who needs to sign. Publish and generate links when you want a single reusable URL to hand out.

Do I have to create the document before I build the workflow?

Yes. The **Send Documents & Contracts from User** action asks you to pick from your saved templates, so the document needs to exist and be saved before you can select it.

Where do I find a document link after I have already generated it?

Go to Payments → Documents & Contracts → Public Documents, click the three-dot menu next to the document, and click Share Link. You do not need to open the template or generate the link a second time.

How do I add a signature line to a document?

Insert a signature field while you are editing the document. Signature fields work the same way as fillable fields for name, email, and date, and they appear highlighted in blue in the editor so you can confirm placement before saving.

Helpful tips

- Name documents in a way you will recognize in a picker list, since that is how you will select them in a workflow action
- Save the document before you start building the workflow
- Check that every field a signer needs to complete is a fillable or signature field, since blue highlighting is your confirmation
- Use **Public Documents** rather than regenerating links, which keeps one link in circulation instead of several
- Reserve workflow delivery for documents that go to everyone in a process, and send one-off agreements from **Recipients**

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

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