Find and Replace in the GLM Workflow Builder

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

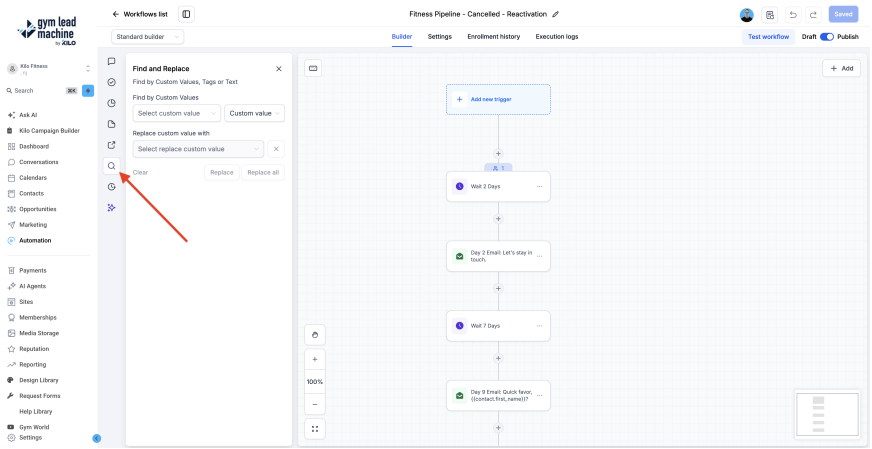
Workflow Find and Replace is a search and bulk-edit tool inside the Workflow Builder that lets you locate every place a custom value, tag, or text string is used in a single workflow, then update it from one place instead of opening each action one by one.

What you can do with Find and Replace

- Search a single workflow for a custom value, tag, or text string
- Jump between every match without opening each action manually
- Replace a custom value or tag in just the match you're viewing
- Replace a custom value or tag everywhere it appears in the workflow at once
- Confirm a change is safe to undo before you make it

How do I open the Find panel?

1. Go to **Automation → Workflows** and open the workflow you want to search.



2. Click the **search icon** in the workflow toolbar.
3. Choose a search mode: **Custom values**, **Tags**, or **Text**.

4. Enter your search term.

Matching results appear as soon as you type. The first match opens automatically, and the builder centers on that step so you can review it in context.

> NOTE: Search is not case-sensitive and matches partial words, so searching "priority" also returns matches for "Priority" or "HighPriority."

What can I search for?

Find and Replace supports three search modes, and which one you choose determines what you can search and, later, replace.

- **Custom values** find every action in the workflow that uses a specific custom value, such as an email or SMS step referencing a value you've set up (i.e. {{contact.first_name}} or {{user.first_name}})
- **Tags** find every action in the workflow that adds, removes, or branches on a specific contact tag.
- **Text** finds a word or phrase anywhere in a step's content or configuration, including message bodies. Step names and trigger names can also be found through text search, but they cannot be updated using Replace.

How do I move between matches?

Once a search returns results, use the **Next** and **Previous** controls in the Find panel to step through them. The builder automatically centers on each matching step as you move, so you can review or edit it without losing your place in the workflow.

How do I replace a custom value or tag?

Replace and Replace All work for **custom values** and **tags**. Step names and trigger names can be found through text search but can't be changed with Replace.

1. Enter the custom value, tag, or text you want to find.
2. Choose the replacement: for custom values, select the new value using the custom value picker; for tags, choose or type the new tag name, following your normal tagging conventions.
3. Click **Replace** to update only the match currently in focus, or click **Replace All** to update every supported match in the current workflow.

> NOTE: Replace All only updates matches inside the workflow you currently have open. It does not search or update any other workflow.

Where does Find and Replace work, and what are its limits?

- Find and Replace searches and updates **one workflow at a time**. It does not search across multiple workflows at once.
- Replace and Replace All currently work only for **custom values** and **tags**. Text matches, including step names and trigger names, are find-only.
- To find or update the same custom value or tag across several workflows, you'll need to open and search each workflow separately.

Is it safe to use Replace All on a workflow I rely on?

Yes, as long as you review the change afterward, since Replace All can be undone. Any Replace or Replace All action can be reversed with **Undo** from the toolbar, the same as other edits in the Workflow Builder. If you undo something by mistake, **Redo** reapplies it.

For larger changes, your workflow's version history gives you a further safety net: you can roll the entire workflow back to an earlier saved state if a bulk replacement doesn't turn out the way you expected.

> TIP: Before running a large Replace All on a workflow that's critical to your gym's automations, confirm you have a recent saved version to fall back on.

Frequently asked questions

Can I search across more than one workflow at a time?

No. Find and Replace only searches the workflow you currently have open. To review or update a different workflow, open it and run a new search there.

What can I actually replace, and what can I only find?

Replace and Replace All work for **custom values and tags.** Step names and trigger names show up in text search results, but they can't be changed using Replace in this version.

Is the search case-sensitive?

No. Search is case-insensitive and matches partial words or phrases, so searching "member" also returns "Member" or "MEMBER."

Will Replace All change anything outside the workflow I'm working in?

No. Replace All only affects supported matches inside the current workflow. Other workflows are not touched.

What happens if I make a mistake with Replace All?

Use Undo to reverse it, the same as any other edit in the Workflow Builder. For larger changes, you can also roll back to an earlier saved version using the workflow's version history.

Do I need special permissions to use Find and Replace?

You need permission to edit the workflow you're searching. The same permissions that let you open and modify a workflow determine whether you can use Find and Replace on it.

Helpful tips

- Use **Text** search first if you're not sure whether something is a custom value, a tag, or plain text.
- Use **Replace** on a single match when you're not confident every instance should change the same way.
- Use **Replace All** once you've confirmed the change is correct on at least one match.
- Check your workflow's version history before a large Replace All on a workflow you depend on.

When this feature is most helpful

- Updating a custom value across a workflow after changing what it should point to, such as a front desk contact detail
- Retagging leads or members consistently across a workflow's actions and branches
- Auditing where a specific tag or custom value is used before making a change
- Cleaning up a large or long-running workflow without opening every action individually

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

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