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Onboard a New Athlete via the Sales Portal

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If your athletes purchase their membership through a **Sales Portal link** rather than during an in-person consult, the onboarding flow looks different and relies more on automation. This guide covers what happens automatically, what you need to configure correctly, and how to give new members a strong start.

How Sales Portal onboarding works

When an athlete purchases through your Sales Portal:

- They create and activate their own Kilo account
- They enter their payment method
- They purchase their initial membership
- Their package begins
- Their contact record moves through Gym Lead Machine automatically

You do not need to manually activate them, collect payment details, or move them forward in Gym Lead Machine. That is already handled. Your role becomes making sure the system is configured correctly and making sure they receive strong onboarding communication.

Step 1: Share your Sales Portal link

You can start this process in two ways.

Public link

- Added to pricing blocks on your website's Info page
- Added to a pricing page on your website
- Linked from buttons such as Join Now

Tip

To request that a pricing block or pricing page be added to your website, submit the [open pricing block request form](#).

Private link

- Sent by email

- Sent by text
- Shared after a consult or lead conversation

Once the athlete completes checkout, the onboarding process begins automatically.

Step 2: Configure the package correctly

The automation runs off the status your package applies, so the initial membership has to be set correctly in the **Package Builder**.

Set the initial membership to **Package Upon Start: Member**.

When the package applies a **Member** status:

- The contact is pushed into Gym Lead Machine, if they are not already there
- They are automatically marked as **Won**
- The New Client campaign begins

If you prefer your initial membership package to use a status other than Member, such as Trial, you will need to use the **Kilo to GLM** options in **Integrations -> Gym Lead Machine** to make the necessary updates in your Gym Lead Machine account. Speak to your Onboarding Advisor about these personalizations.

Step 3: What happens after the purchase

Once the package is configured, the rest runs on its own:

1. The athlete purchases their membership.
2. **Member** status is applied.
3. The contact is marked as **Won** in Gym Lead Machine.
4. Your **New Client campaign** begins automatically.

These behaviors can be adjusted if you want them to work differently for your gym. Talk with your Onboarding Advisor about customizing them.

Because you may not meet this person before their first class, your New Client campaign becomes especially important. It should include:

- How to download and log in to the Kilo app
- How to reserve classes
- Booking window rules
- Cancellation policies

- Gym expectations
- What to expect in their first week

Tip

In online sales models, strong onboarding emails replace the in-person walkthrough.

Personalized, clear communication here prevents confusion and increases retention.

Get an alert when someone buys online

The automation moves the athlete forward without you, which also means a purchase can happen without you noticing it. If you want to know in the moment, set up an Integration that:

- Applies a tag when a specific package starts
- Sends you an internal alert by email or SMS

This is optional. The onboarding automation runs either way.

Your role in Sales Portal onboarding

When athletes buy online, your job shifts from walking them through setup to making sure they feel supported before they have to ask questions. That means:

- Clean automation
- Strong New Client emails
- Clear next steps
- Clear expectations

The more clarity you provide up front, the fewer support questions you receive later.

Quick summary

When you sell through the Sales Portal:

1. The athlete purchases their membership through the link.
2. They activate their own account.
3. Their payment method is collected.
4. Their package begins.
5. Member status triggers the Gym Lead Machine automation.

6. The New Client campaign handles onboarding communication.

Make sure:

- The package is set to **Package Upon Start: Member**, or you have personalized a GLM Flow for another status
- Your New Client campaign is customized for online buyers
- You have a purchase alert set up if you want to be notified when someone buys

If you have questions about Sales Portal onboarding in Kilo GMS, our Support team is happy to help. Reach us at **hello@usekilo.com**.

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