Onboard a New Athlete via the Sales Portal

Mavilyn Carlos - 2026-10-06 - Onboarding & New Users

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

How Sales Portal onboarding works

When an athlete purchases through your Sales Portal:

- They create their own Kilo account during checkout, and it's active right away
- They sign your agreement and waiver during checkout, if the package has them
- They add a payment method, if the billing plan requires one
- They purchase their initial membership
- Their package begins
- Their contact record moves through Gym Lead Machine automatically

You don't need to activate their account, collect payment details, or move them forward in Gym Lead Machine. Your role is making sure the system is configured correctly and that they receive strong onboarding communication.

Note

- Athletes who buy through the Sales Portal set their own password at checkout, so they don't receive an activation email.
- When someone buys a package for a linked profile, that athlete signs their own waiver later from their own account.

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, onboarding 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 aren't already there
- They're automatically marked as **Won**
- The New Client campaign begins

If you'd like your initial membership package to use a status other than Member, such as Trial, 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 Success Manager 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 Success Manager about customizing them.

Because you may not meet this person before their first class, your New Client campaign is 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. Clear, personalized 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 create and activate their own account during checkout.
3. They sign your agreement and waiver, if the package has them.
4. Their payment method is collected, if the billing plan requires one.
5. Their package begins.
6. Member status triggers the Gym Lead Machine automation.
7. The New Client campaign handles onboarding communication.

Make sure:

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

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

- Tags
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