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GLM Opportunity Pipelines

Laura Gibson - 2026-07-25 - [Opportunities & Pipelines](#)

Your **Opportunities dashboard** is where you view, filter, and manage every lead in your Gym Lead Machine pipelines. This article covers how to navigate the dashboard, what happens automatically as leads move through the pipeline, and what actions you need to take manually to keep your data accurate.

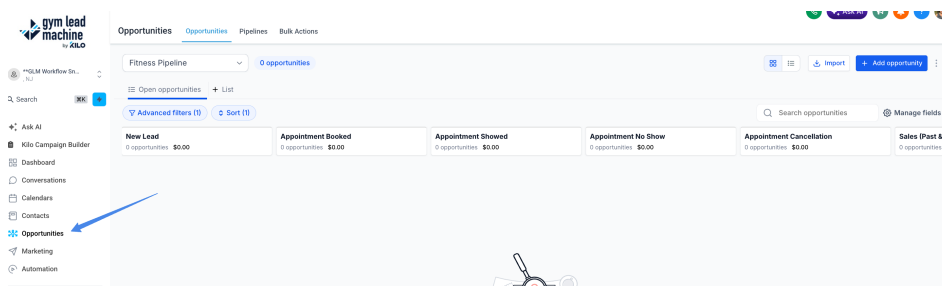
Watch the video below for a walkthrough, or read on for the full guide.

What you can do on the Opportunities dashboard

- View every opportunity in your Fitness Pipeline (and any additional pipelines)
- Filter by status (Open, Won, Lost, Abandoned, or All)
- Toggle between pipelines when you have more than one
- Move opportunities between stages by dragging cards
- Update statuses (Won, Lost, Abandoned) using the drag-and-drop status buckets
- See how much of the pipeline runs automatically and where you need to step in

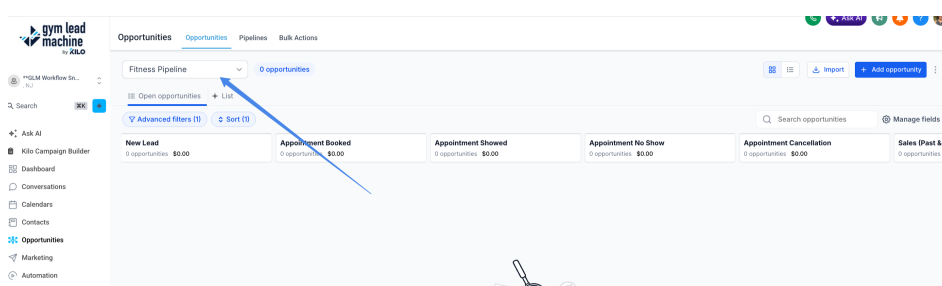
Getting to the Opportunities dashboard

Select **Opportunities** in the left menu of your Gym Lead Machine account.

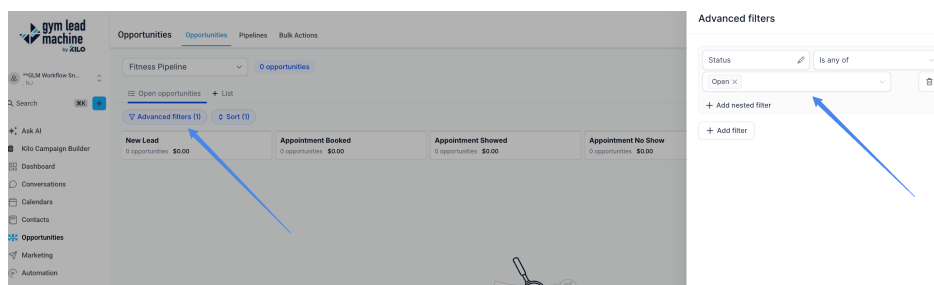


Views and filters

You can toggle between pipelines at the top of the page. Pipelines are listed in alphabetical order.



By default, the dashboard shows your **Open**, or active, opportunities. You can change this to view **All** opportunities, or narrow down to just **Won**, **Lost**, or **Abandoned**.



To change what statuses you're viewing:

1. Click the **Filters** button with the funnel icon.
2. Click the **edit icon** next to the filter.
3. Check the boxes for any opportunity statuses you want to view alongside or in place of Open.
4. Click **Apply**.

To clear the default **Status: Open** filter, click the trash can icon next to it, then select, customize, and apply a new filter.

There are a variety of filters available on the Opportunities dashboard so you can see your opportunities in different ways.

Automatic actions in the pipeline

Some things happen in your pipeline without you needing to do anything. Gym Lead Machine handles these automatically.

New Lead. When a lead submits a form connected to your GLM system, an opportunity is automatically created in the **New Lead** stage.

Appointment Booked. When an appointment is scheduled through your GLM sales calendar, the opportunity card automatically moves to or is created in the **Appointment Booked** stage.

Sales (Past & Present). When you update an opportunity's status to **Won**, the card is automatically moved to the **Sales (Past & Present)** stage.

Abandoned. If a lead doesn't respond or make progress within a set timeframe, GLM automatically marks them as **Abandoned**. Their status updates and they're enrolled in the **Long Term Lead Nurture** workflow so they continue receiving communication.

Manual actions in the pipeline

The rest of the pipeline depends on you keeping statuses current. Without these updates, your reporting won't reflect what actually happened.

Appointments Showed, No Show, or Cancellation. After a scheduled appointment, update the appointment's status in **Calendars → Appointments**. The opportunity card moves to the matching stage on the pipeline.

Won. When a lead becomes a paying client, drag their card to the **Won** bucket at the bottom of the pipeline (or edit the **Status** field on the opportunity card). This moves the card to the **Sales (Past & Present)** stage automatically.

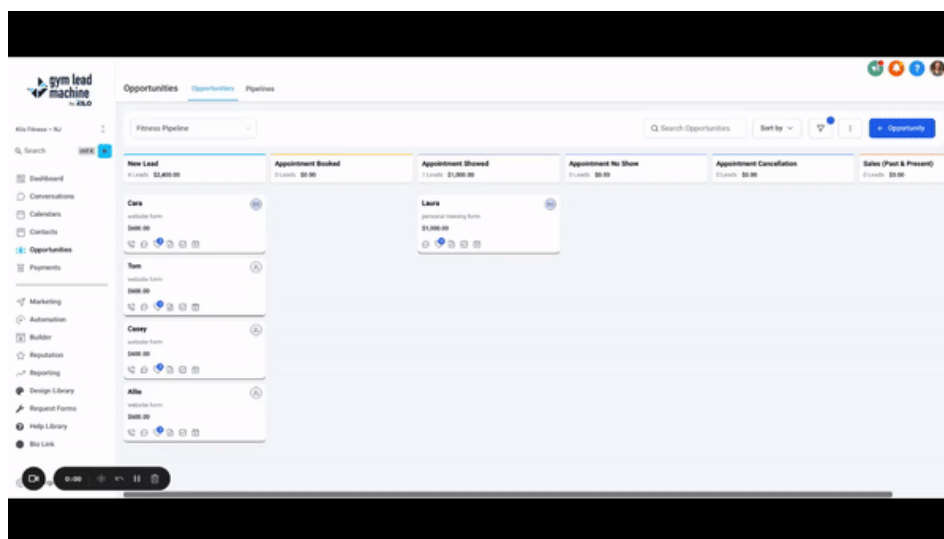
Lost. When a lead decides not to proceed with a membership, drag their card to the **Lost** bucket. Their status updates to Lost and they're filtered out of the Open view.

Cancelling a Client. To cancel a client's membership, tag their contact as **fitness cancelled client (member)** or **nutrition cancelled client (member)** (matching the pipeline they came through). This tells the system the person is no longer an active member and updates their pipeline status accordingly.

Working with cards: the status buckets

When you drag an opportunity card in the pipeline, three status update options appear at the bottom of the screen: **Lost**, **Abandoned**, and **Won**. Think of these as buckets.

To update the status of an opportunity, drag and drop the card into one of the buckets.



Note

If you drop a card into the Lost or Abandoned bucket, the card returns to its most recent stage rather than moving to a separate Lost or Abandoned column. This is expected behavior. You'll still see the Lost or Abandoned status label to the right of the opportunity's name, so you can tell at a glance what happened to that lead.

Other pipelines: Nutrition and beyond

The **Nutrition Pipeline** (and any other pipelines in your Gym Lead Machine account) work the same way as the Fitness Pipeline. The differences are:

- **The forms** associated with the New Lead stage (for example, a Nutrition Form instead of a Fitness Form)
- **The calendar** linked to the Appointment stages (for example, Nutrition Consultation or Nutrition Intro)
- **The workflows** contacts flow through as they move between stages (for example, Nutrition Campaigns instead of Fitness Campaigns)

The stages, statuses, and dashboard behavior are otherwise identical.

Frequently asked questions

What's the difference between Lost and Abandoned?

Lost is a manual status you apply when a lead has told you they're not moving forward. **Abandoned** is applied automatically by GLM when a lead stops responding or making progress within a set timeframe. Use Lost when you know the outcome; the system uses Abandoned when it can't tell one way or the other.

Why did my card go back to the previous stage when I dragged it to Lost or Abandoned?

That's expected behavior. The Lost and Abandoned buckets update the opportunity's status but return the card to its most recent stage rather than moving it to a separate column. Look for the Lost or Abandoned label to the right of the opportunity's name to confirm the status change.

Do I need to update Appointment Showed manually?

Yes. GLM can automatically move cards to Appointment Booked when a lead schedules an appointment, but it can't tell whether the lead actually showed up. After each appointment, update the appointment's status in **Calendars → Appointments** so your NSI Showed metrics stay accurate.

How do I mark a lead as Won?

Drag their card to the Won bucket at the bottom of the pipeline, or edit the Status field on the opportunity card. Either action moves the card to the Sales (Past & Present) stage.

How do I cancel a member's status?

Tag their contact as "fitness cancelled client" / "nutrition cancelled client" or "fitness cancelled member" / "nutrition cancelled member," matching whichever pipeline they came through. The tag tells the system they're no longer active and updates their pipeline status.

How do I see all my Won opportunities from last month?

Change the status filter from Open to Won. Click the Filters button with the funnel icon, edit the filter, uncheck Open, check Won, and click Apply. You can further narrow by date range using the other available filters.

Can I filter for multiple statuses at once?

Yes. In the filter edit view, check every status you want to see. For example, checking Open, Won, and Lost lets you see the full picture of what's active alongside what's already resolved.

What happens when a lead gets marked as Abandoned automatically?

Their status updates to Abandoned and they're enrolled in the Long Term Lead Nurture workflow. They continue receiving communication from your gym even though they're out of your active view. If they re-engage later, you can move them back to an active status.

Helpful tips

- Keep the status filter set to **Open** for day-to-day work. Switch to All or Won only when you're reporting or auditing.
- Update appointment statuses after every meeting. The Showed metric on your dashboard depends entirely on this.
- Drag-and-drop is faster than editing the Status field for most updates. Use edit only when you need to change multiple fields on the card at once.
- If you have multiple pipelines, be intentional about which pipeline a lead belongs in. Nutrition leads should live in the Nutrition Pipeline, not the Fitness Pipeline.
- Once a client cancels, tag them properly. The tag is what lets your Abandoned automation and cancelled-client workflows do their job.

When this feature is most helpful

- Reviewing your active pipeline at the start of each day
- Updating appointment outcomes after your sales meetings

- Cleaning up stale opportunities by moving them to Lost or Abandoned
- Reporting on Won opportunities month over month
- Managing multiple pipelines side by side (Fitness, Nutrition, Kids Program)

If you have questions about the Opportunities dashboard or your pipelines in Gym Lead Machine, our Support team is happy to help. Reach us at **hello@usekilo.com**.

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