Use Opportunity Actions in Workflows

Mavilyn Carlos - 2026-11-09 - Automation (Workflows)

Opportunity actions let a Gym Lead Machine workflow find, create, update, and remove opportunities in your pipelines automatically. This article covers what each of the four actions does, how to configure them, and how to combine them so every lead has one accurate opportunity in the right stage.

What you can do with opportunity actions

- Check whether a lead already has an opportunity before creating one
- Create opportunities in the pipeline and stage you choose
- Move opportunities to a new stage, pipeline, or status
- Update an opportunity's name, source, or value
- Remove opportunities that no longer belong in a pipeline
- Branch a workflow based on whether an opportunity exists

Which opportunity action should you use?

Action	What it does	Use it when
Find Opportunity	Looks up an existing opportunity for the contact and branches on the result	You need to check before creating, or your trigger isn't opportunity-based
Create Opportunity	Adds a new opportunity to the pipeline and stage you choose	The lead doesn't have an opportunity yet
Update Opportunity	Changes the pipeline, stage, status, name, source, or value of an existing opportunity	The lead's opportunity needs to move or change
Remove Opportunity	Deletes one or all of the contact's opportunities in a pipeline	An opportunity no longer belongs in your pipeline

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How do I add an opportunity action to a workflow?

1. Go to **Automations → Workflows**.
2. Open the workflow you want to change, or click **+ Create Workflow** to start a new one.
3. Click the **+** icon below the trigger or step where the action belongs.
4. Select the action from the **Opportunity** section of the actions list.

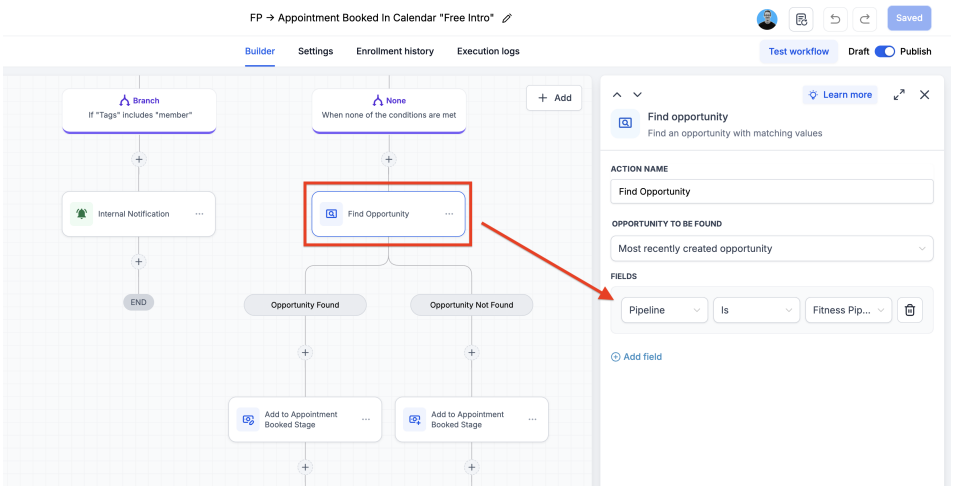
5. Enter an **Action Name** that describes what the step does, for example "Move to Appointment Booked." Action names help your team follow the workflow and are never shown to contacts.

6. Configure the action's settings, described in the next section.

7. Click **Save Action**.

Configure each opportunity action

Find Opportunity



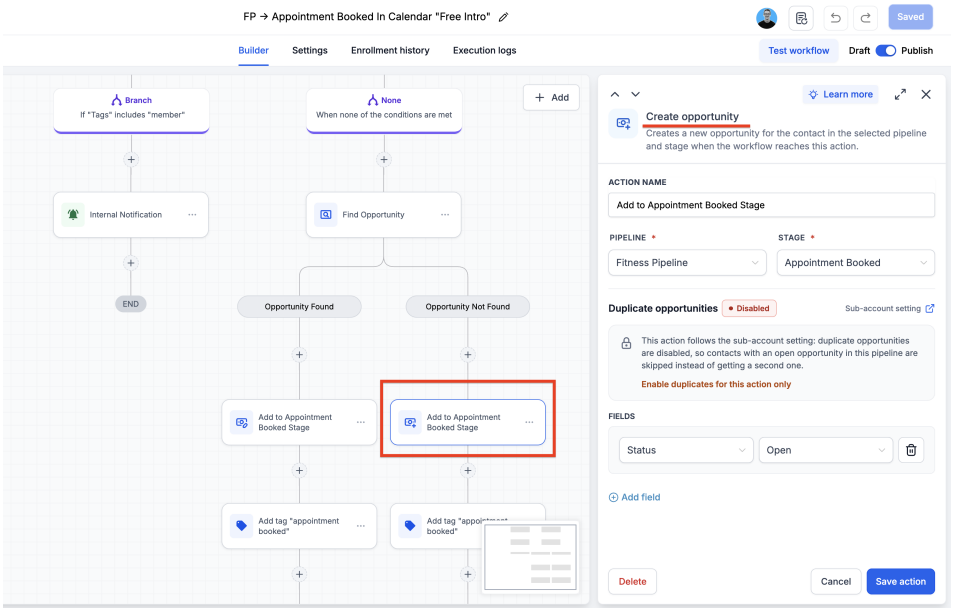
Find Opportunity searches for an existing opportunity linked to the contact in the workflow. You set two things:

- **Opportunity to be Found:** choose **Earliest** (first created) or **Latest** (most recently created). If more than one opportunity matches your filters, only this one is returned.

- **Filters:** add one or more conditions, such as a pipeline, pipeline stage, or status. An opportunity must match every filter to be found, and you can filter on any standard or custom opportunity field.

After this action, the workflow splits into two branches: **Opportunity Found** and **Opportunity Not Found**. Add the next steps for each outcome to its own branch. When an opportunity is found, it becomes the opportunity that later actions in the workflow work on.

Create Opportunity



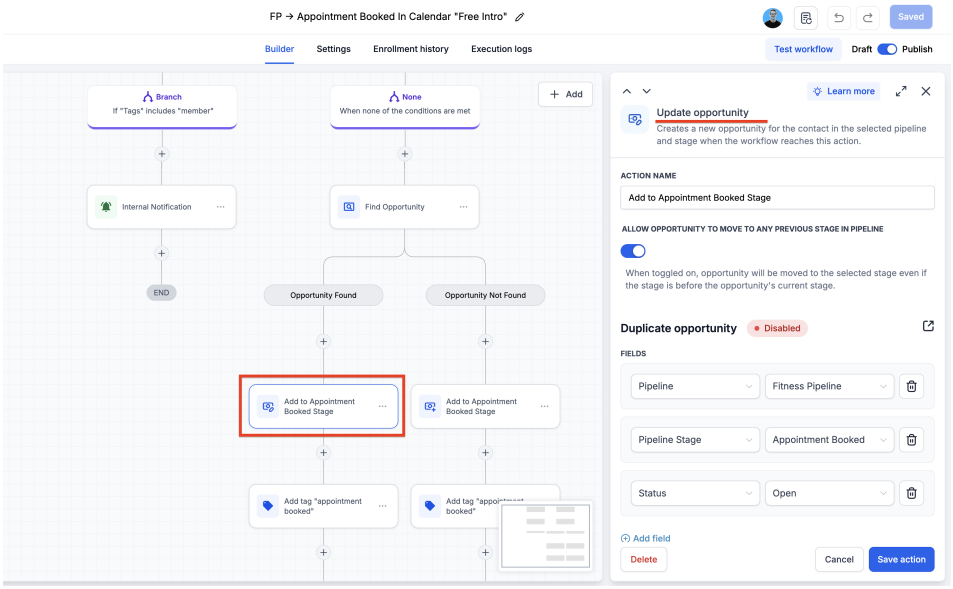
Create Opportunity adds a new opportunity for the contact in the workflow. **Pipeline** is the only required setting. Everything else is optional and falls back to a default:

- **Pipeline Stage:** defaults to the first stage of the pipeline
- **Opportunity Name:** defaults to the contact's name, and can use custom values such as {{contact.first_name}}
- **Opportunity Source:** stays blank unless you set it
- **Status:** defaults to Open
- **Opportunity Value:** defaults to 0
- **Duplicate Opportunity:** when turned off, no new opportunity is created if the contact already has one

You can also fill in any other opportunity custom fields. The duplicate check is based on the contact, so two opportunities with different names still count as duplicates for the same lead.

> NOTE: An opportunity made by Create Opportunity isn't automatically available to an Update Opportunity step later in the same workflow. To update it further down the workflow, add a Find Opportunity step before the Update Opportunity step.

Update Opportunity



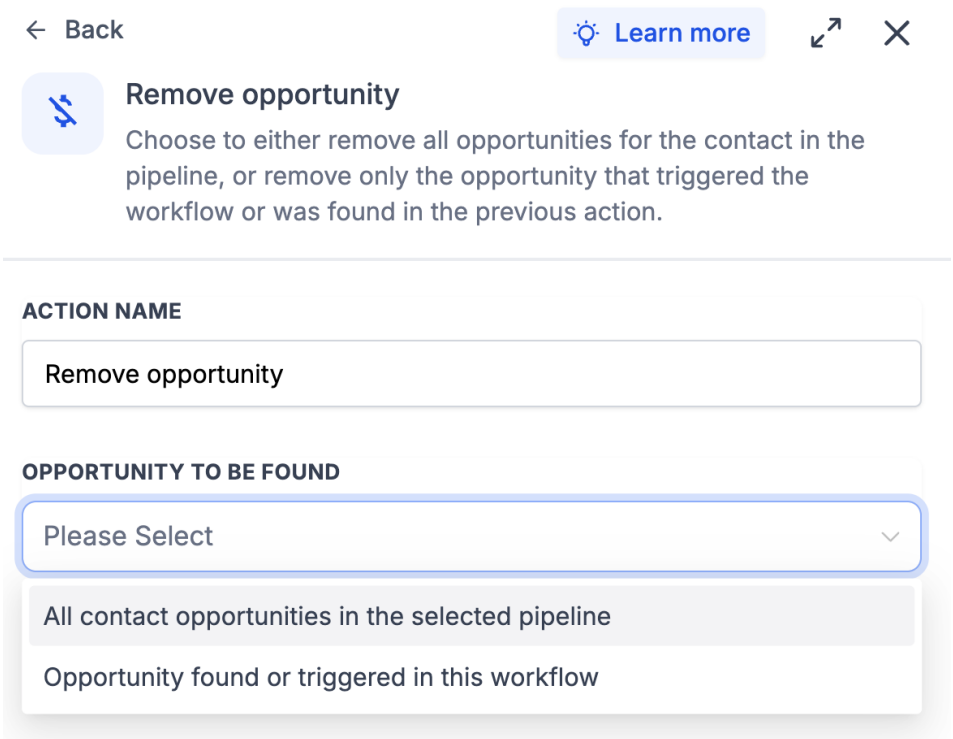
Update Opportunity changes an opportunity the workflow already knows about: either the opportunity that triggered the workflow, through an opportunity-based trigger such as **Opportunity Status Changed**, or one located by an earlier Find Opportunity step. If the workflow has neither, this action is skipped.

Click **Add field** to choose what to change. You can update the **Pipeline**, **Pipeline Stage**, **Status** (for example, Open, Won, or Lost), **Opportunity Name**, **Opportunity Source**, and **Opportunity Value**. Custom values work in these fields, so you can pull details from the contact record.

By default, an opportunity can only move forward in its pipeline or stay in the same stage. To move it to an earlier stage, turn on **Allow Opportunity to Move to Any Previous Stage**.

Update Opportunity also shows a **Duplicate Opportunity** toggle. This action only changes existing opportunities and never creates new ones, so the toggle has no effect here.

Remove Opportunity



Remove Opportunity deletes opportunities linked to the contact. Choose one of two options:

- Remove all of the contact's opportunities in the selected pipeline
- Remove only the opportunity that triggered the workflow or was found by an earlier Find Opportunity step

> WARNING: Removed opportunities can be recovered for up to two months, and only one at a time. Recovering many opportunities removed by the "all opportunities" option means restoring each one individually, so confirm which option you've selected before saving.

Example: track a No-Sweat Intro booking

This example uses a workflow that runs when someone books a No-Sweat Intro, such as a walk-in who wants to meet with a coach. The workflow checks for an existing opportunity, updates it if one exists, and creates one if it doesn't. It's one of many ways to combine these actions.

1. Go to **Automations → Workflows** and open the workflow that runs when someone books a No-Sweat Intro.
2. Add a **Find Opportunity** action below the trigger.
3. Set **Opportunity to be Found** to **Latest**.
4. Add a filter that limits the search to your **Fitness Pipeline**.
5. On the **Opportunity Found** branch, add an **Update Opportunity** action.
6. Click **Add field**, select **Pipeline Stage**, and choose **Appointment Booked** (or the stage that matches your gym's process).
7. On the **Opportunity Not Found** branch, add a **Create Opportunity** action.
8. Set **Pipeline** to **Fitness Pipeline** and **Pipeline Stage** to **Appointment Booked**.
9. Add your usual follow-up steps, such as reminders, tasks, or team notifications, so both branches are handled.

Every No-Sweat Intro booking now ends with one opportunity in Appointment Booked, whether the lead was already in your pipeline or brand new to it.

Frequently asked questions

Why didn't my Update Opportunity action change anything?

Update Opportunity is skipped when the workflow has no opportunity to work on. The workflow needs an opportunity-based trigger or an earlier Find Opportunity step that found a match. If the opportunity was made by a Create Opportunity step in the same workflow, add a Find Opportunity step before updating it.

Can I move an opportunity back to an earlier stage with a workflow?

Yes, if you turn on Allow Opportunity to Move to Any Previous Stage in the Update Opportunity action. With that setting off, opportunities can only move forward or stay where they are.

Will Create Opportunity make a duplicate if the lead already has an opportunity?

Only if Duplicate Opportunity is turned on. With it off, no new opportunity is created when the contact already has one. The check looks at the contact, not the opportunity name.

What happens if Find Opportunity matches more than one opportunity?

Only one opportunity is returned: the earliest or the latest, depending on your Opportunity to be Found setting. Add more filters if you need to narrow the match to a specific pipeline or status.

Can I get back an opportunity I removed by mistake?

Yes, within two months of removing it. Removed opportunities can only be restored one at a time, so take care with the option that removes all of a contact's opportunities in a pipeline.

Helpful tips

- Add a Find Opportunity step before Update Opportunity or Remove Opportunity whenever your trigger isn't opportunity-based.
- Give every action a descriptive Action Name so the workflow is easy to read later.
- Leave Duplicate Opportunity off in Create Opportunity unless a lead can genuinely need more than one opportunity in a pipeline.
- Use the single-opportunity option in Remove Opportunity when you only want to clear one record.
- Add follow-up steps to both the Opportunity Found and Opportunity Not Found branches so no lead slips through.

When opportunity actions are most helpful

- Logging walk-ins and No-Sweat Intro bookings in your pipeline
- Keeping one opportunity per lead and preventing duplicates
- Moving leads to the right stage as they book, show, or sign up
- Routing a lead into a different pipeline, such as your Nutrition Pipeline
- Cleaning up opportunities that no longer belong in a pipeline

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