

Bulk Actions – Pipeline Change

Modified on Sun, 04 Dec 2022 at 09:15 PM

Apply opportunity to following contacts

Select Pipeline: Demo Pipeline

Select Stage: Booked Call

Opportunity Name: Test

Opportunity Source: This is a test

Lead Value: Lead value

Opportunity Status: Select status

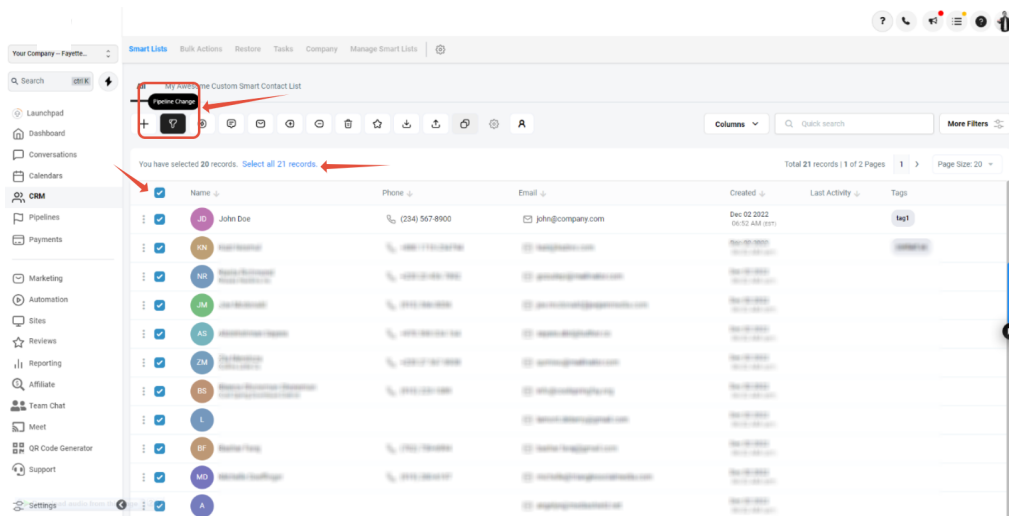
Description: Enter a description for the action (to be shown in tracking report)

Name	Last Activity
Kathleen Test	15/10/2021 10:15 PM (web)
John Test	15/10/2021 10:15 PM (web)
Testing Person	06/10/2021 11:43 PM (web) 1 day ago
Tester Persona	04/10/2021 10:05 PM (web) 1 week ago
Test Person	28/09/2021 10:19 AM (web) 2 weeks ago
Demo Person	27/09/2021 10:17 PM (web) 2 weeks ago
Test Person	16/09/2021 10:42 PM (web) 3 weeks ago
Firstname Lastname	11/09/2021 10:23 PM (web) 1 day ago
Sally Test	11/09/2021 10:21 AM (web) 1 month ago
TP	27/09/2021 10:25 AM (web) 1 month ago

Using the Bulk Actions features in your Contacts/Smart Lists section, you can perform multiple one-off actions to selected or all contacts. Here's how to do a pipeline change to add or update opportunity statuses using the bulk action feature:

Step 1: Choose Your Contacts

- Navigate to your contacts.
- Check the box to select contact records.
- You can also check the box at the top to select all on that page, and you can click the hyperlink to select all contacts in your system.



Step 2: Choose Your Action

- Choose the icon for “Pipeline Change”. In the “Add/Update Opportunity” window that pops up, choose a pipeline, stage, opportunity, lead value, opportunity status, and more.
- Click Add/Update Opportunity to confirm your changes.

Add/Update Opportunity

Apply opportunity to following contacts

(2)

Select Pipeline

Select pipeline

* Pipeline required

Select Stage

Select stage

* Stage required

Opportunity Name

Opportunity Name

Opportunity Source

Opportunity Source

Lead Value

Lead value

Opportunity Status

Select status

Cancel

Add/Update Opportunity

NOTE: When scheduling a bulk action in drip mode, the "repeat after" does not repeat the

entire process. Instead, it can be viewed as "run every". As shown in the example below, 100 contacts would be processed per every 5 hours. This process would repeat until all selected contacts received the drip communication. (If you had 780 contacts selected, there would be a total of 8 batches – 7 x 100 and 1 x 80).

☐ Send all at once ☐ Send all at schedule time ☒ Send in drip mode

Start On

Thu, Apr 1, 2021 8:15 AM

Batch Quantity

100

Repeat After

5

Hours

Send On

Mon

Tue

Wed

Thu

Fri

Sat

Sun

Process between hours (optional)

Start From

End At

Cancel

Send Email