




















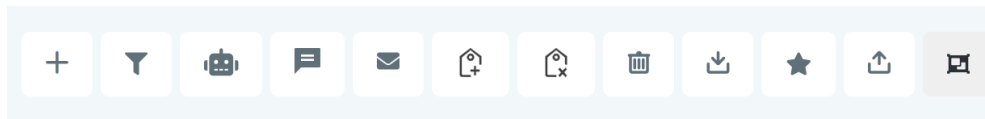


Using the Bulk Action Features

You have selected 4 records.

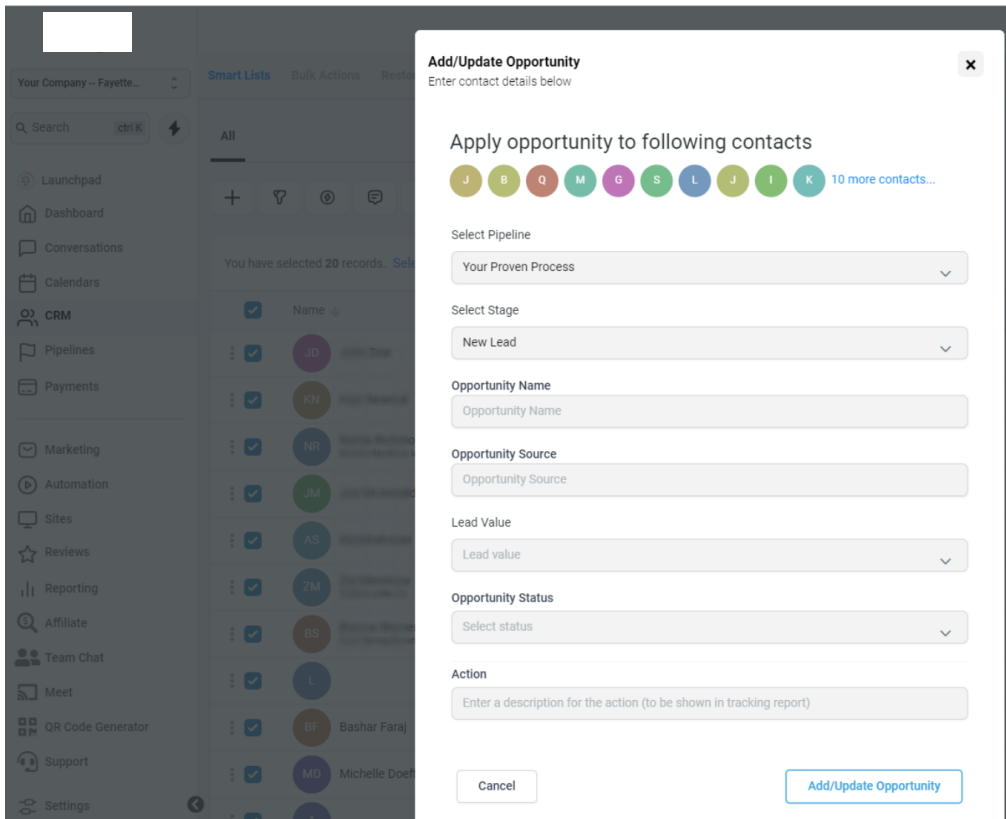
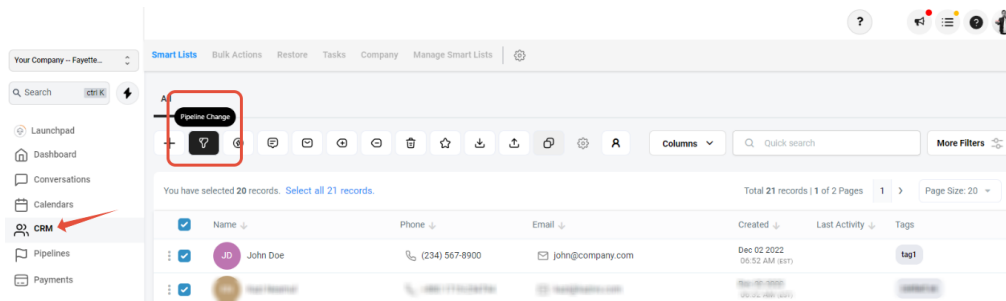
<input type="checkbox"/>	Name	Phone	Email
<input checked="" type="checkbox"/>	 Kathleen Test		 test4@testeremail.com
<input type="checkbox"/>	 John Test		 test3@testeremail.com
<input checked="" type="checkbox"/>	 Testing Person	 (713) 377-2903	 email@test.com
<input type="checkbox"/>	 Tester Persona	 (626) 636-1424	 testerpersona@test.com
<input checked="" type="checkbox"/>	 Demo Person	 (718) 219-9397	 demouser@demotester.com
<input checked="" type="checkbox"/>	 Test Person	 (805) 205-5559	 testuser@demoaccount.com
<input type="checkbox"/>	 Firstname Lastname	 (904) 747-8830	 test@demoemail.com
<input type="checkbox"/>	 Sally Test	 (805) 555-9999	

Using the Bulk Actions features in your Contacts/Smart Lists section, you can perform multiple one-off actions to selected or all contacts. From sending an email or SMS to updating the pipeline stage and more, follow the steps below to learn how to use this feature.

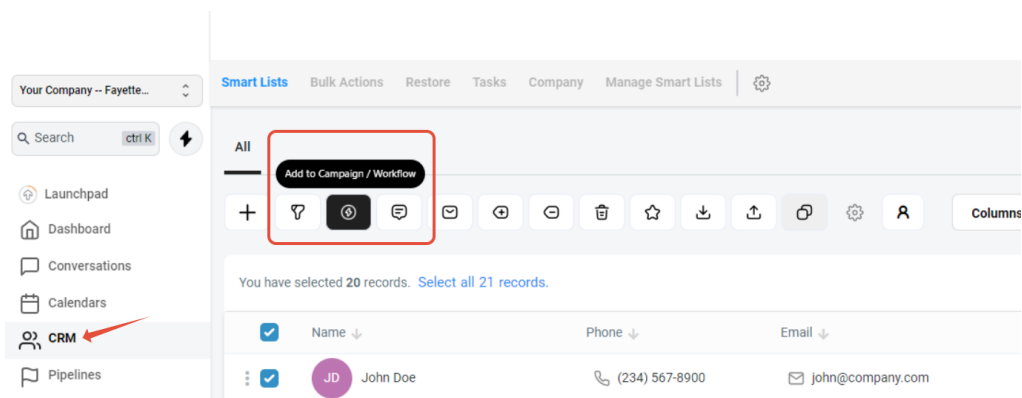


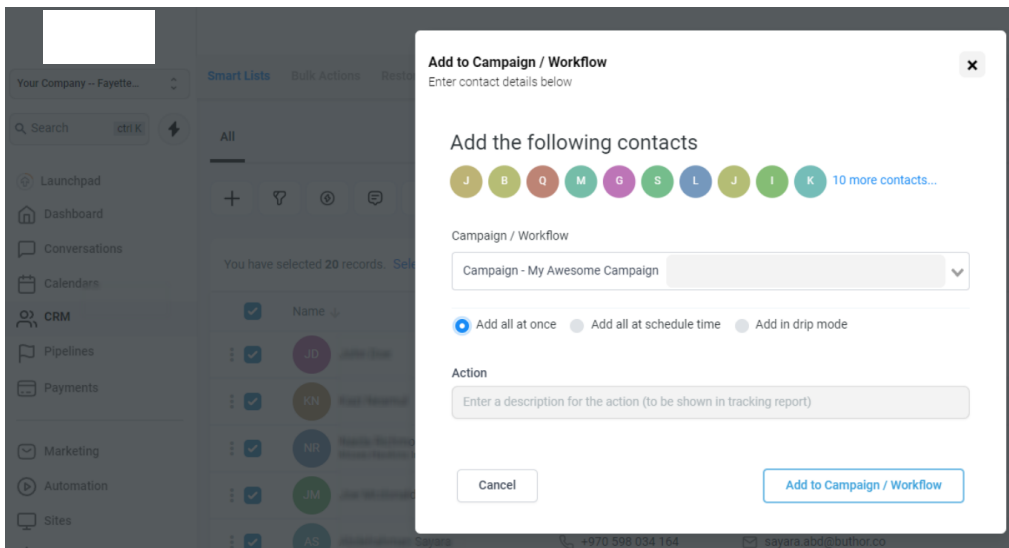
Part 1: What Actions Are Available

- **Pipeline Change:** Add/Update the Opportunity for multiple Contacts. Choose a pipeline, stage, opportunity, lead value, and more.

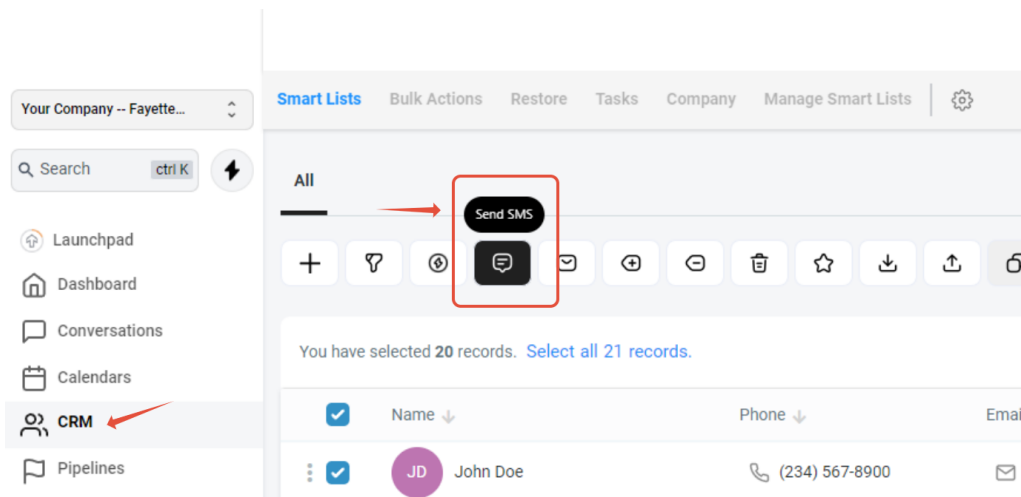


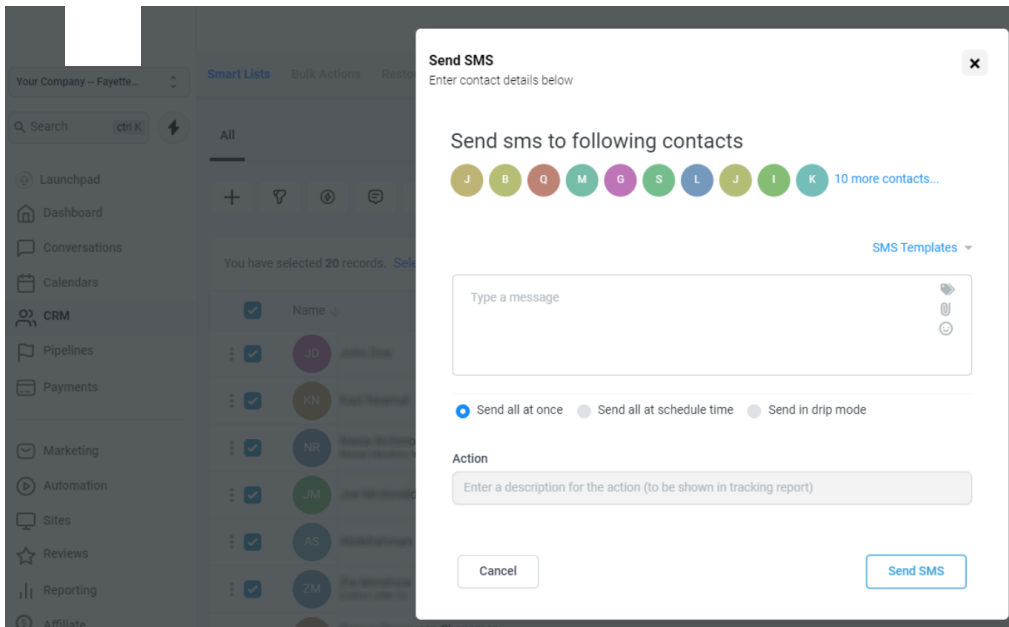
- **Add to Campaign/Workflow:** Choose a campaign or workflow to bulk-add contacts into:



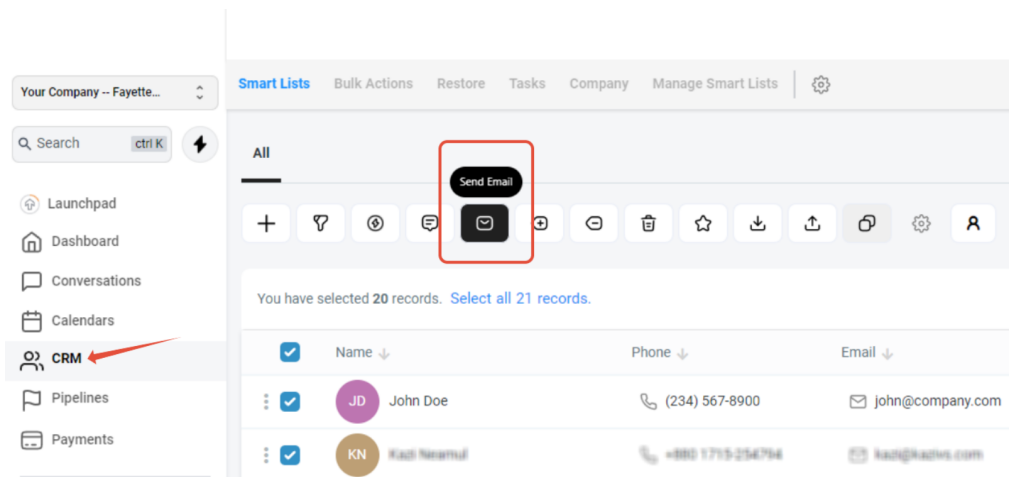


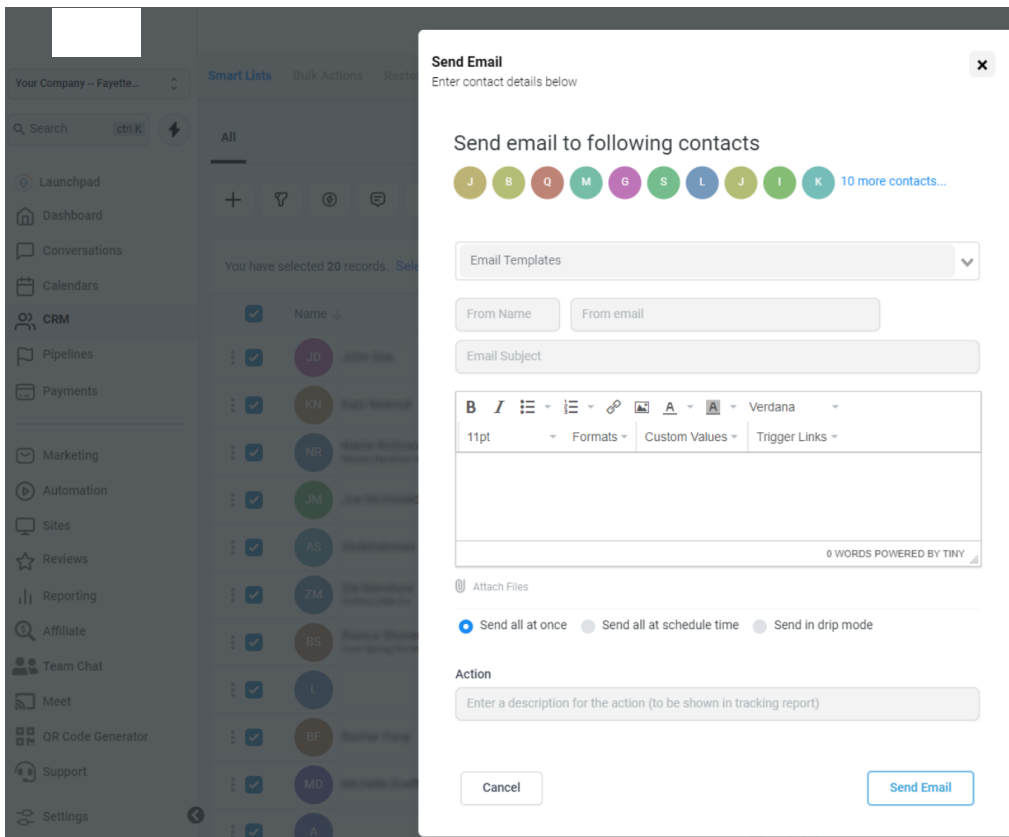
- **Send SMS:** Type out a one-time SMS or select from your templates.



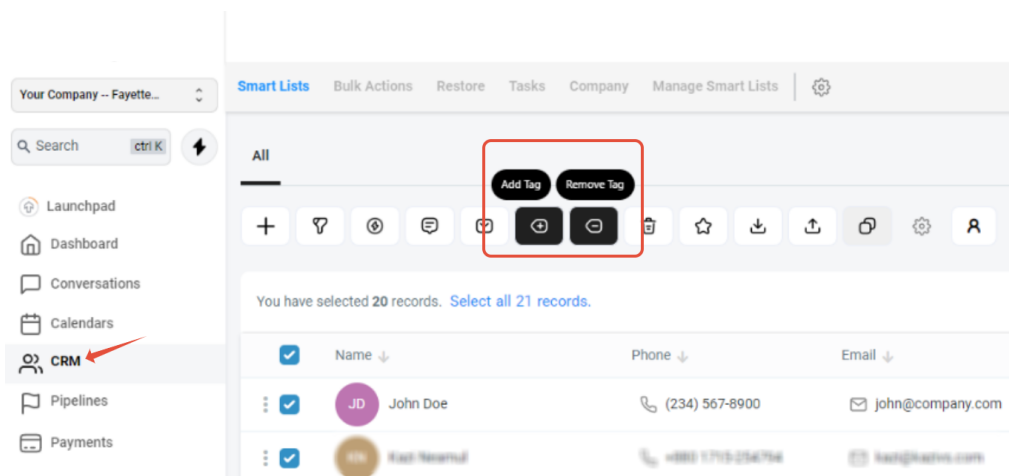


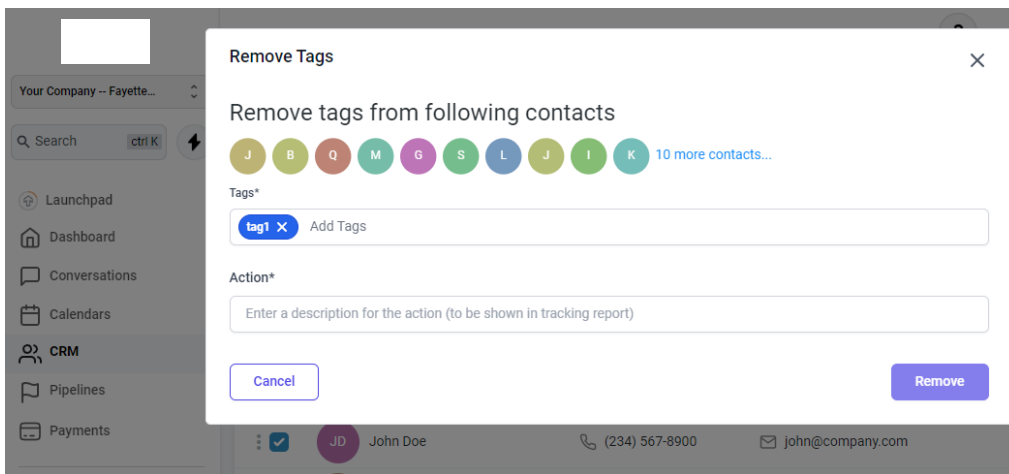
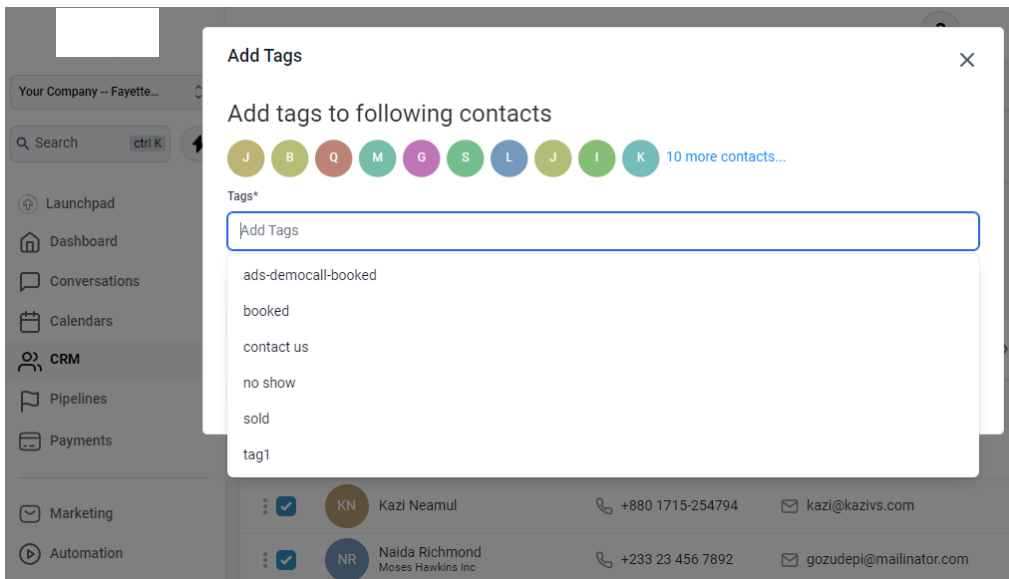
- **Send Email:** Type out a one-time email or select from your templates.



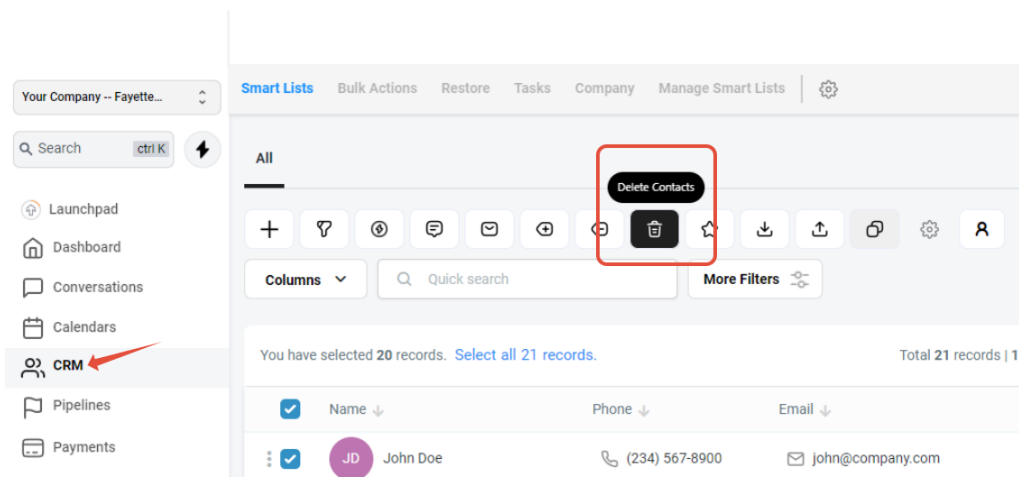


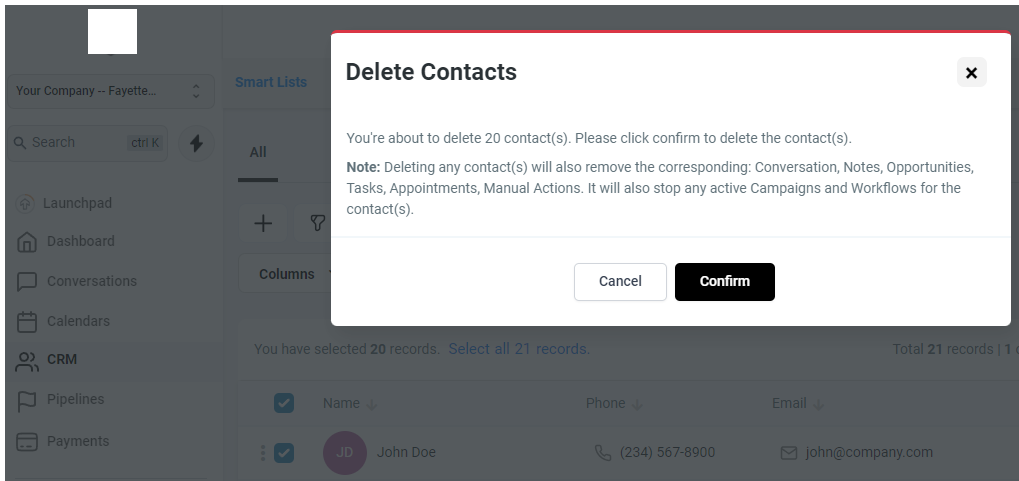
- **Add/Remove Tag:** Apply or remove one or multiple tags from the selected contacts.



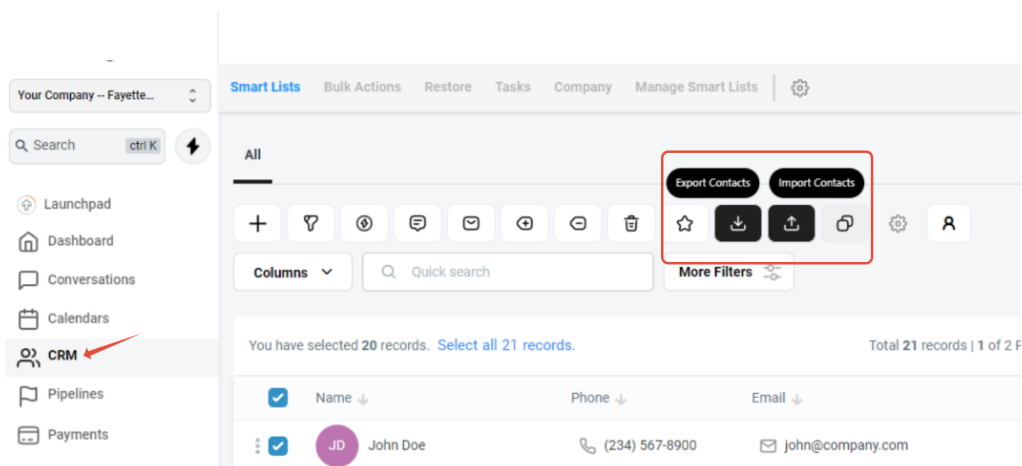


- **Delete Contacts:** Delete the selected contacts from your system. Please note: deleting any contact will also remove them from Conversations, Notes, Opportunities, Tasks, Appointments, Manual Actions, and Campaigns.





- **Export Contacts:** Export a list of selected contact records from the system into a .csv file that will save to your computer.
- **Import Contacts:** Please refer to our article on How to Import Contacts for a full tutorial.



Export Contacts

Export following contacts

TP TP JT ST 6 (9) TP KT TP (2) 10 more contacts...

Cancel

Export Contacts

+ Import Contacts



Step 1: Upload Document

File must be CSV



Upload contacts

File must be CSV

Select File

- **Send Review Requests:** Here, you can send a review request to multiple contacts at once. (Be sure you have your “Reputation” section set up for reviews.)

The screenshot shows the CRM interface with a sidebar on the left containing navigation links: Launchpad, Dashboard, Conversations, Calendars, CRM (highlighted with a red arrow), Pipelines, and Payments. The main area has a top navigation bar with links: Smart Lists, Bulk Actions, Restore, Tasks, Company, and Manage Smart Lists. Below this is a search bar and a list of contacts. The 'Send Review Requests' button is highlighted in a red box in the toolbar above the contact list.

	Name ↓	Phone ↓	Email ↓
<input type="checkbox"/>	JD John Doe	(234) 567-8900	john@company.com
<input type="checkbox"/>	KN Kari Newman	+1 (913) 254-7964	kari@kadios.com

Add the following contacts



Review Request Options

A dropdown menu titled 'Review Request Options'. It contains two options: 'SMS review request' (highlighted in blue) and 'Email review request'. A red arrow points to the 'SMS review request' option.

Description

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

Cancel

Send review request

- **Merge Duplicate Contacts:** Merge up to 10 duplicate contacts (Please refer to our article on merging duplicates for a full walk-through).

A screenshot of a CRM interface. On the left is a sidebar with navigation items: Launchpad, Dashboard, Conversations, Calendars, CRM (highlighted with a red arrow), Pipelines, and Payments. The main area shows a 'Smart Lists' view with a table of contacts. The table has columns for Name, Phone, and Email. Two contacts are selected: John Doe (JD) and Rach Neeraj (KN). Above the table, a toolbar contains various icons, including a 'Merge up to 10 Contacts' button which is highlighted with a red box.

Merge Contacts
X

Select relevant information from different contacts and merge them as one.

	<div> <div> MASTER RECORD Select All </div> <div> MASTER RECORD Select All </div> </div>	
First Name	<div> Sally </div>	<div> </div>
Last Name	<div> Test </div>	<div> </div>
Phone	<div> </div>	<div> +15629275541 </div>
City	<div> </div>	<div> DOWNEY </div>
State	<div> </div>	<div> CA </div>
Postal Code	<div> </div>	<div> 90660 </div>
Timezone	<div> America/Los_Angeles </div>	<div> </div>
DND	<div> </div>	<div> </div>
Date Added	<div> September 22nd 2021, 9:03 am </div>	<div> September 22nd 2021, 8:04 am </div>
Conversation	<div> <input checked="" type="checkbox"/> Merge? </div>	<div> <input checked="" type="checkbox"/> Merge? </div>
Appointment	<div> <input checked="" type="checkbox"/> September 22nd 2021, 9:00 pm - September 22nd 2021, 9:30: pm </div>	

Showing Fields With Different Values.
Show All Field

This operation is irreversible, please type 'CONFIRM' to confirm and resolve.

CONFIRM

Back

Resolve

Part 2: How To Use The Actions

Step 1: Navigate to CRM > Contacts/Smart Lists.

Step 2: Select the contact records you want to use a bulk action for. You can individually click through and select specific contacts, or you can check the box at the top to select all.

Step 3: Choose the action you want to apply.

Step 4: Follow the steps for the specific action in the pop-up window.

Part 3: View a list of your pending and current bulk actions in the Contact

Request Page.

Step 1: Navigate to CRM > Bulk Actions.

Here you can view a list of all your pending Bulk Actions.

Step 2: Cancel or edit a pending action.

- You can cancel or edit a pending bulk action. You can also toggle to "Completed" in the top right to view a list of completed Bulk Actions in your system.

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 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).

Add the following contacts

TP TP JT ST 6 (9) TP KT TP (2) 10 more contacts...

Campaign / Workflow

Campaign - A New Test Campaign



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

Description

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

Start On

Mon, Nov 1, 2021 7:27 PM

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

Add to Campaign / Workflow