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Bulk Actions

Bulk actions are used to perform an "action" (send an email, update a lead status, etc.) on a number of leads.

Lead filtering

To initiate bulk actions for a subset of leads you need to provide the structured filtering values that you would normally send to the Advanced Filtering API endpoint such as `query`, `results_limit`, and `sort` fields.

The only difference is that Bulk Actions endpoints require you to rename the `query` field to `s_query` (shorthand for structured query).

For example, this is the payload that you would send to the Advanced Filtering API endpoint:

Copy

```
{
    "query": {
        "queries": [
            ...
        ],
    },
    "results_limit": 100,
    "sort": [
        {
            ...
        }
    ]
}
```

and this is the equivalent payload you would send to Bulk Actions endpoints (note the renamed `query -> s_query` field):

Copy

```
{
    "s_query": {
        "queries": [
            ...
        ],
    },
    "results_limit": 100,
    "sort": [
        {
            ...
        }
    ]
}
```

Pausing and resuming

You can pause an in-progress bulk action by sending `{ 'status': 'paused' }`. You can also resume it afterwards (`{ 'status': 'resuming' }`), unless more than 7 days passed since you paused the action.

Receiving an email after you're done

Use `"send_done_email": false` if you don't want to get a confirmation email after a bulk action is done.

List bulk emails.

`GET /bulk_action/email/`

Example Request/Response

Initiate a new bulk email.

`POST /bulk_action/email/`

`contact_preference` can be set to `lead` (only email the primary/first contact email of the lead) or `contact` (email the first contact email of each contact of the lead).

Example Request/Response

Fetch a single bulk email object.

`GET /bulk_action/email/{id}/`

Example Request/Response

List bulk sequence subscriptions.

`GET /bulk_action/sequence_subscription/`

Example Request/Response

Initiate a new bulk sequence subscription.

`POST /bulk_action/sequence_subscription/`

`action_type` must be one of:

- `subscribe` to create a new sequence subscription for contacts that have never received the given sequence.
- `resume` to resume any paused sequence subscriptions for the given sequence or all sequences if `sequence_id` is not provided.
- `resume_finished` to resume any finished sequence subscriptions for the given sequence or all sequences if `sequence_id` is not provided.
- `pause` to pause any active sequence subscriptions for the given sequence or all sequences if `sequence_id` is not provided.

`sequence_id`, `sender_account_id`, `sender_name`, `sender_email` and `contact_preference` are required if `action_type` is `subscribe`.

`contact_preference` can be set to:

- `lead` to only subscribe the primary/first contact email of the lead.
- `contact` to subscribe the primary email of each contact of the lead.

Example Request/Response

Fetch a single bulk sequence subscription object.

`GET /bulk_action/sequence_subscription/{id}/`

Example Request/Response

List bulk deletes.

`GET /bulk_action/delete/`

Example Request/Response

Initiate a new bulk delete.

`POST /bulk_action/delete/`

Use `"send_done_email": false` if you don't want to get a confirmation email after the bulk action is done.

Example Request/Response

Fetch a single bulk delete object.

`GET /bulk_action/delete/{id}/`

Example Request/Response

List bulk edits.

`GET /bulk_action/edit/`

Example Request/Response

Initiate a new bulk edit.

`POST /bulk_action/edit/`

Pass additional parameters depending on which `type` is passed:

- `set_lead_status` will set the Lead Status on all leads. It expects:
- `lead_status_id` - ID of the Lead Status to use.
- `clear_custom_field` will clear/remove/unset a specific custom field from all leads. It expects:
- `custom_field_id` or `custom_field_name` - ID or exact name of the custom field to remove.
- `set_custom_field` will set/update/add a specific custom field on all leads. It expects:
- `custom_field_id` or `custom_field_name` - ID or exact name of the custom field to set/update.
- `custom_field_value` - New value. Use `custom_field_values` to pass multiple values to custom fields that support it.
- `custom_field_operation` - `replace`, `add`, or `remove` (defaults to `replace`). Only applicable for custom fields that accept multiple values.

Use `"send_done_email": false` if you don't want to get a confirmation email after the bulk action is done.

Example Request/Response

Fetch a single bulk edit object.

`GET /bulk_action/edit/{id}/`

Example Request/Response