

Bulk Actions For Contacts & SmartLists

Quickly update, manage, or delete multiple contacts in using Bulk Actions and SmartLists to streamline your workflow and save time.

The Bulk Actions page now uses unified UX for faster filtering, clearer status tracking, and one-click access to job metrics and error logs—so you can audit, troubleshoot, and, when applicable, restore deleted contacts with confidence.

TABLE OF CONTENTS

What is the Bulk Actions Page?

The Bulk Actions page is a central dashboard that lists mass operations initiated from Contacts (e.g., imports, tag updates, bulk messaging, and deletions). It provides live status, outcome metrics, and access to detailed logs so teams can verify results and correct issues quickly.

The page displays each bulk job in a table with columns like Action Name, Action Type, Created By, Created At, and Status. From here, you can open Show Stats for detailed results or use the row's action menu for management options (e.g., pause/cancel for eligible jobs, and restore for supported deletion jobs).

Key Benefits of the Bulk Actions Page

Understanding what this page does best helps you use it for speed, accuracy, and accountability across your CRM workflows.

- Unified UX: A consistent interface with cleaner tables, readable spacing, and predictable controls.
- Faster troubleshooting Open Show Stats to compare successes vs. errors and download error logs for fixes.

- Operational safety: For supported deletion jobs, queue a Restore within the allowed window to recover deleted contacts.
- Team accountability: Filter by Status, Action Type, User, and Date to see who did what and when.
- Traceability: Keep an auditable trail by exporting detailed error logs from the Stats view.

Viewing the Bulk Actions Table

Learn how to read the table and interpret status indicators so you can prioritize jobs that need attention.

- Each job appears as a row with a clear Status (for example, In Progress, Completed, or Canceled).

- Status badges are color-coded, and hovering tooltips can reveal longer action names or counts.
- Use the row's three-dot menu for available controls (e.g., pause/cancel for bulk sends; restore where applicable).

Using Filters to Find Bulk Actions Fast

Filters help you zero in on the exact jobs you care about—especially helpful for audits or when multiple team members run actions daily.

- Status – Narrow to jobs that are In Processing, Complete, Paused, Queued or Cancelled.
- Action Type – Focus on specific operations like Import, Delete Contacts, Add Tag, Remove Tag, Bulk SMS, or Bulk Email.

- User – See jobs initiated by a specific team member.
- Date Range – Use custom dates.

Bulk Actions
View detailed statistics and progress information for your bulk action request

Filters: 14 / 04 / 2025 15 / 10 / 2025 All Status All Actions All Users

| Action Label | Operation | Status | User | Created (ADT) | Completed (ADT) | Statistics | Actions |
|----------------------|-----------|----------|------|----------------------|----------------------|------------|---------|
| Export | Export | Complete | DN | Jun 02 2025 03:49 PM | - | 100% | ⋮ |
| 36_May_2025_5_35_PM | Delete | Complete | | May 26 2025 09:05 AM | May 26 2025 09:05 AM | 100% | ⋮ |
| 20_May_2025_12_36_PM | Delete | Complete | | May 20 2025 03:36 PM | May 20 2025 03:36 PM | 100% | ⋮ |

Viewing Job Stats & Downloading Error Logs

Stats give you an at-a-glance read on what happened during a bulk job, and downloadable logs make it easy to fix issues and re-run cleanly.

- Click Show Stats on any row to open a details drawer with high-level metrics (totals, success/error counts, and relevant delivery outcomes for messaging jobs).
- Use the Download option in the Stats view to export an error log for troubleshooting. The



log typically includes identifiers for failed records and a reason you can act on.

Bulk Delete Stats

All1

Success1100%

Error00%

All

Success

Error

| ID | Identifier | Status |
|----------------------|--------------------|---------|
| JBPa7twEEJdDF26OV11l | LeadConnector Test | Success |

Download

Rows per page201 - 1 of 1Previous1Next

Restore is designed for recovering accidentally deleted contacts—not for undoing other types of bulk actions.

- When a Delete Contacts bulk job is eligible, you’ll see a Restore option. Selecting it opens a confirmation dialog that explains what will be reinstated.

- Timing: Deleted contacts can typically be restored within about 60 days of deletion. After that period, recovery isn't available.
- Submitting the confirmation enqueues a new restore job, which will appear in the Bulk Actions table and run to completion.

Managing Running Jobs (Pause/Cancel for Eligible Actions)

Some bulk sends—like SMS campaigns—can be paused or canceled after they've been queued, giving you control when plans change.

- Open the three-dot menu for a running, eligible job to see Pause, Edit or Cancel.
- Pause temporarily stops processing; Cancel stops remaining processing and Edit enables user to change the schedule time of that bulk action. Items already processed remain as-is.

- After adjusting, refresh the Bulk Actions table and open Show Stats to verify what was completed before the change.

Bulk Actions
View detailed statistics and progress information for your bulk action request

Filters: 14 / 04 / 2025 15 / 10 / 2025 All Status All Actions All Users

| Action Label | Operation | Status | User | Created (ADT) | Completed (ADT) | Statistics | Actions |
|----------------------|-----------|----------|------|----------------------|----------------------|------------|---|
| Test | Email | Queued | MA | Oct 14 2025 09:24 AM | | | |
| Export | Export | Complete | SN | Jun 02 2025 03:43 PM | | | |
| 26_May_2025_5_35_PM | Delete | Complete | LP | May 26 2025 09:09 AM | May 26 2025 09:09 AM | | View Details Pause Cancel Edit |
| 20_May_2025_12_36_PM | Delete | Complete | | May 20 2025 03:36 PM | May 20 2025 03:36 PM | | |
| 20_May_2025_12_36_PM | Delete | Complete | | May 20 2025 03:36 PM | May 20 2025 03:36 PM | | |
| 20_May_2025_12_35_PM | Delete | Complete | | May 20 2025 03:25 PM | May 20 2025 03:25 PM | | |

How To Set Up and Use the Bulk Actions Page

There's nothing to configure, but a few quick steps help you navigate confidently, confirm results, and keep a clean audit trail.

1. Go to Contacts → Bulk Actions in your sub-account.

Contacts Smart Lists Bulk Actions Restore Tasks Companies Manage Smart Lists

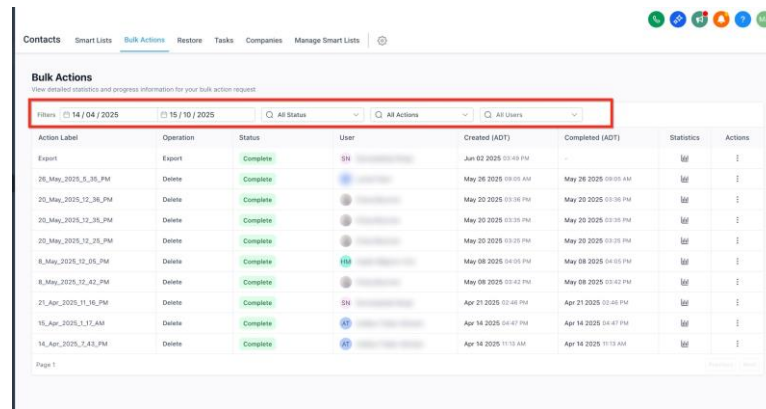
Bulk Actions
View detailed statistics and progress information for your bulk action request

Filters: 14 / 04 / 2025 15 / 10 / 2025 All Status All Actions All Users

| Action Label | Operation | Status | User | Created (ADT) | Completed (ADT) | Statistics | Actions |
|----------------------|-----------|----------|------|----------------------|----------------------|------------|---------|
| Export | Export | Complete | SN | Jun 02 2025 03:43 PM | | | |
| 26_May_2025_5_35_PM | Delete | Complete | LP | May 26 2025 09:09 AM | May 26 2025 09:09 AM | | |
| 20_May_2025_12_36_PM | Delete | Complete | | May 20 2025 03:36 PM | May 20 2025 03:36 PM | | |
| 20_May_2025_12_36_PM | Delete | Complete | | May 20 2025 03:36 PM | May 20 2025 03:36 PM | | |
| 20_May_2025_12_35_PM | Delete | Complete | | May 20 2025 03:25 PM | May 20 2025 03:25 PM | | |
| 6_May_2025_12_05_PM | Delete | Complete | MA | May 06 2025 04:05 PM | May 06 2025 04:05 PM | | |
| 17_May_2025_12_05_PM | Delete | Complete | MA | May 06 2025 04:05 PM | May 06 2025 04:05 PM | | |
| 15_Apr_2025_11_07_PM | Delete | Complete | MA | Apr 14 2025 04:07 PM | Apr 14 2025 04:07 PM | | |
| 14_Apr_2025_11_07_PM | Delete | Complete | MA | Apr 14 2025 04:07 PM | Apr 14 2025 04:07 PM | | |

Page 1

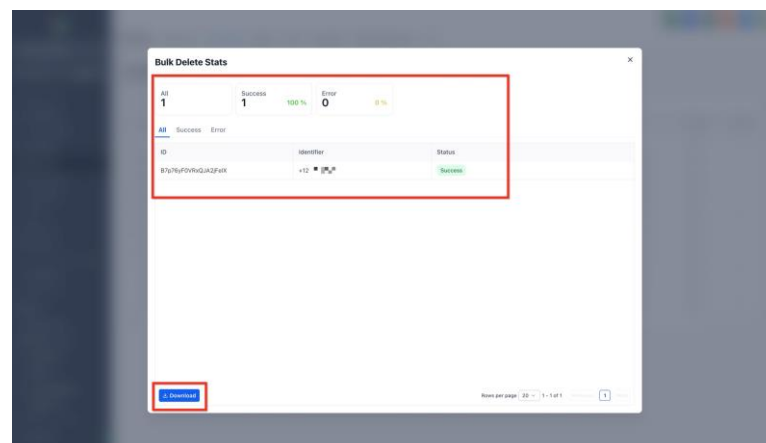
2. Apply Filters (Status, Action Type, User, Date) to narrow to the jobs you need.



The screenshot shows the 'Bulk Actions' section of a software interface. At the top, there are tabs for 'Contacts', 'Smart Lists', 'Bulk Actions', 'Restore', 'Tasks', 'Companies', and 'Manage Smart Lists'. Below the tabs, there's a header 'Bulk Actions' with a sub-header 'View detailed statistics and progress information for your bulk action request.' A red box highlights the filter area, which includes date ranges (14/04/2025 to 15/10/2025), status (All Status), action type (All Actions), and user (All Users). Below the filters is a table with columns: Action Label, Operation, Status, User, Created (ADT), Completed (ADT), Statistics, and Actions. The table lists several 'Delete' actions, all with a status of 'Complete'.

| Action Label | Operation | Status | User | Created (ADT) | Completed (ADT) | Statistics | Actions |
|----------------------|-----------|----------|------|----------------------|----------------------|------------|----------|
| Export | Export | Complete | SN | Jun 02 2025 03:43 PM | - | 100% | Download |
| 26_May_2025_5_35_PM | Delete | Complete | SN | May 26 2025 09:05 AM | May 26 2025 09:05 AM | 100% | Download |
| 20_May_2025_12_36_PM | Delete | Complete | SN | May 20 2025 03:36 PM | May 20 2025 03:36 PM | 100% | Download |
| 20_May_2025_12_35_PM | Delete | Complete | SN | May 20 2025 03:35 PM | May 20 2025 03:35 PM | 100% | Download |
| 20_May_2025_12_31_PM | Delete | Complete | SN | May 20 2025 03:31 PM | May 20 2025 03:31 PM | 100% | Download |
| 8_May_2025_12_05_PM | Delete | Complete | SN | May 08 2025 04:05 PM | May 08 2025 04:05 PM | 100% | Download |
| 8_May_2025_12_42_PM | Delete | Complete | SN | May 08 2025 03:42 PM | May 08 2025 03:42 PM | 100% | Download |
| 21_Apr_2025_11_16_PM | Delete | Complete | SN | Apr 21 2025 02:46 PM | Apr 21 2025 02:46 PM | 100% | Download |
| 18_Apr_2025_11_17_AM | Delete | Complete | SN | Apr 14 2025 04:47 PM | Apr 14 2025 04:47 PM | 100% | Download |
| 14_Apr_2025_2_43_PM | Delete | Complete | SN | Apr 14 2025 11:13 AM | Apr 14 2025 11:13 AM | 100% | Download |

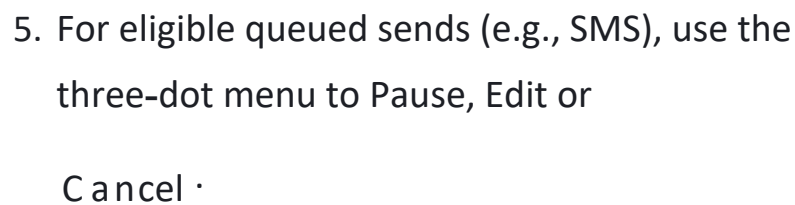
3. Click Show Stats on a job to review totals and error details; use Download to export the error log.



The screenshot shows a 'Bulk Delete Stats' dialog box. It displays statistics for a bulk delete action: 1 job, 1 success (100%), and 0 errors (0%). Below the statistics is a table with columns: ID, Identifier, and Status. The table shows one entry with ID '8707891050402401', Identifier '+10', and Status 'Success'. A red box highlights the 'Download' button at the bottom left of the dialog.

| ID | Identifier | Status |
|------------------|------------|---------|
| 8707891050402401 | +10 | Success |

4. For Delete Contacts jobs within the allowed window, use Restore (when available) to re-create deleted contacts.



Frequently Asked Questions

Q: Which actions appear on the Bulk Actions page?

Most mass operations initiated from Contacts—such as Imports, Delete Contacts, Bulk SMS/Email, Add/Remove Tags—are listed with their status and a link to Show Stats.

Q: How long do I have to restore deleted contacts?

Approximately 60 days from the date of



deletion. After that, contacts are permanently removed.

Q: Can I cancel a job after it starts? For eligible job types (like queued bulk SMS) , use the row's three-dot menu to Pause, Edit or Cancel. Items already processed before canceling remain completed.

Q: Where do I download detailed results?

Open Show Stats for the job and use Download to export the error log with per-record failure reasons.

Q: Is the Bulk Actions page scoped per sub-account?

Yes. Navigate into the sub-account you want to manage, then open Contacts → Bulk Actions.
