

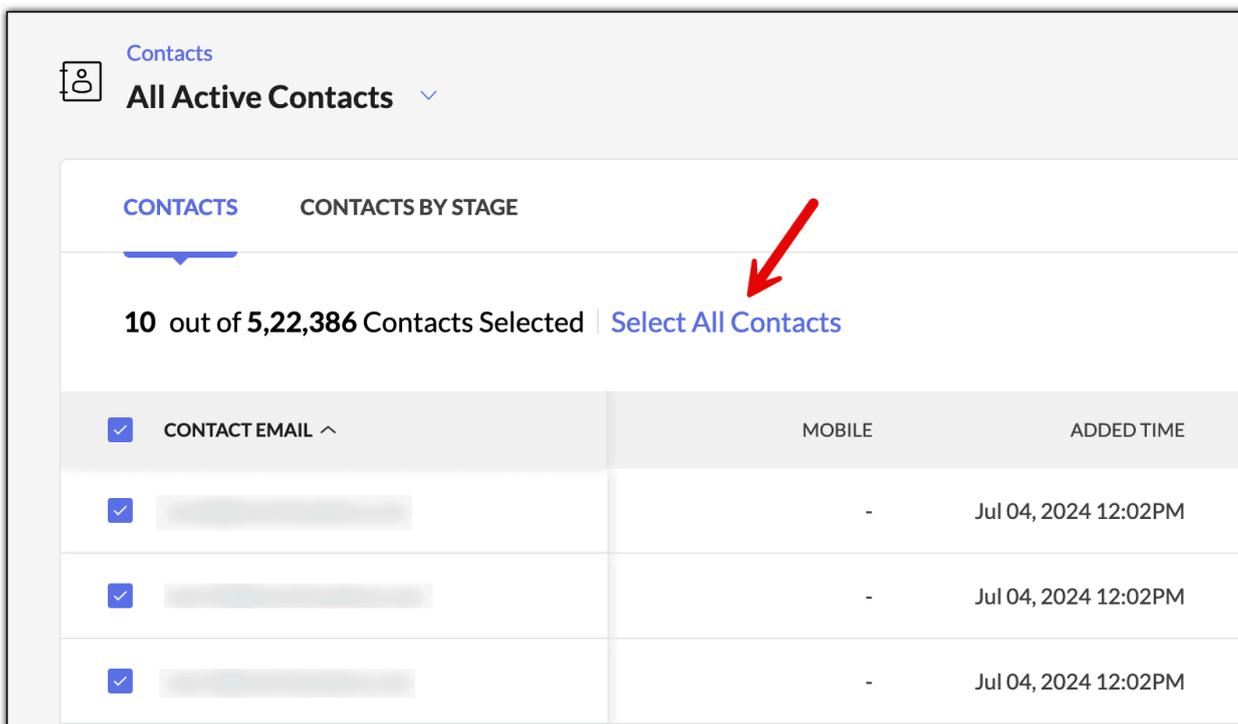


Bulk operations on contacts

Before we dive into the bulk operations, it is necessary to know that you can bulk update the contacts more than what is displayed on a single page.

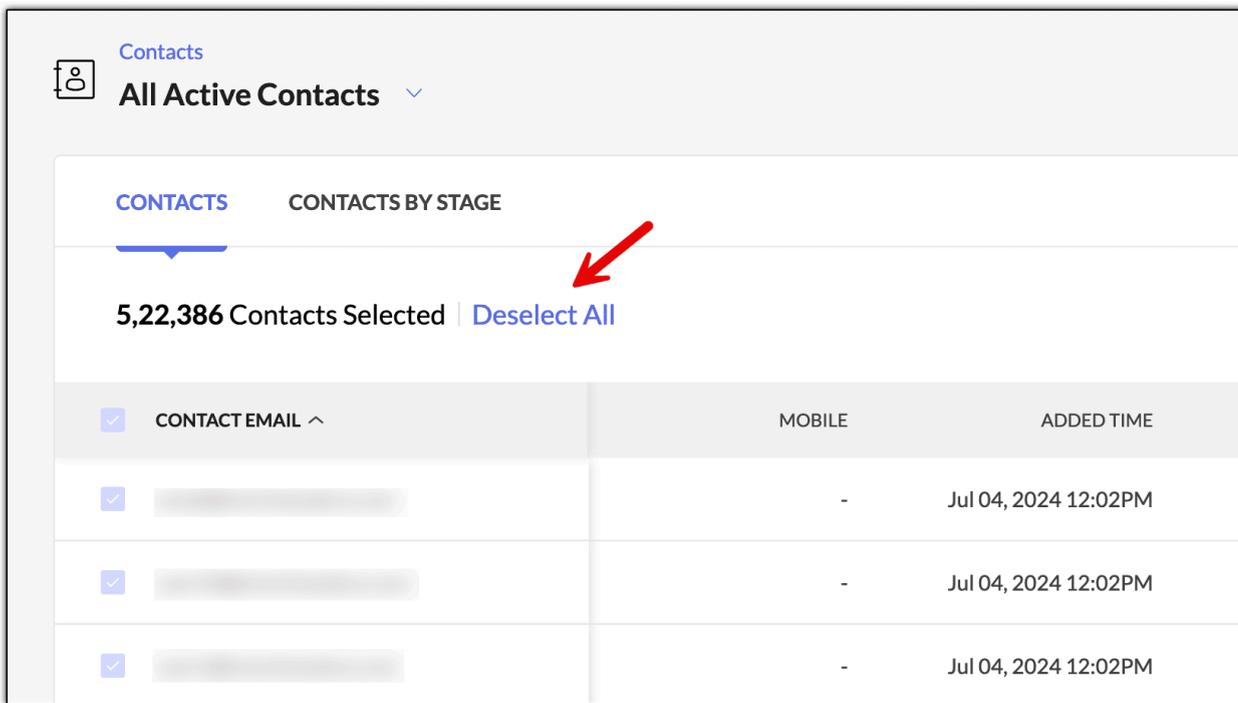
By default, the maximum number of records that can be displayed on a single page is 200. But there can be a situation where you'll need to update thousands of contacts in one go. It would be cumbersome to select 200 contacts each time and perform the bulk update. To eliminate the time required from your side, we've provided an option to select all contacts. To make use of this option:

1. From the *Navigation Toolbar* to the left, click **Contacts** and select **View Contacts**.
2. Select all the contacts in the page by ticking the checkbox next to the Contact Email column.
3. Click on the **Select All Contacts** option that appears beside the number of contacts selected.



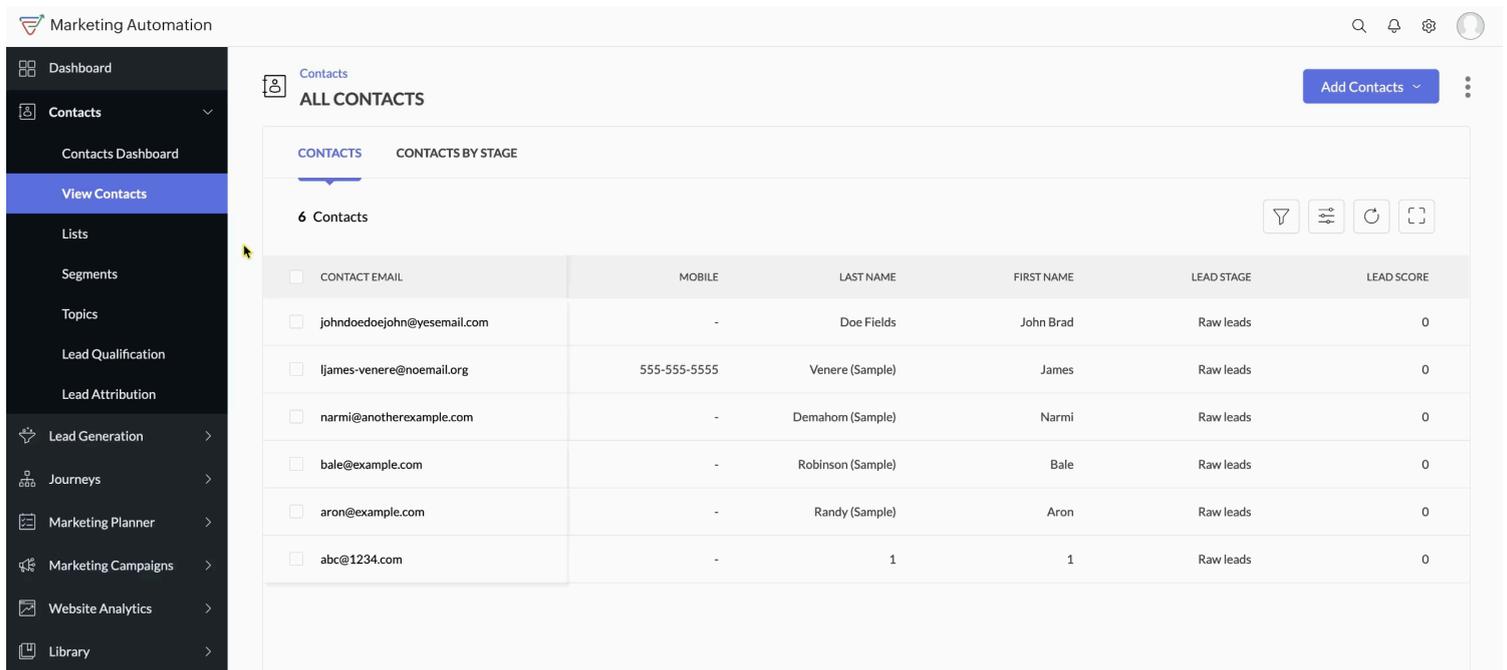
4. You can do the desired bulk update to all the contacts now.
5. Depending on the number of contacts you have in your Zoho Marketing Automation account, it can take time for the bulk update to finish. You'll be notified via email and in-app notification once the update is completed.

6. In case you want to deselect all the selected contacts, click on **Deselect All** option.



You can perform the following bulk operations on a selected group of contacts:

To add/remove contacts from lists

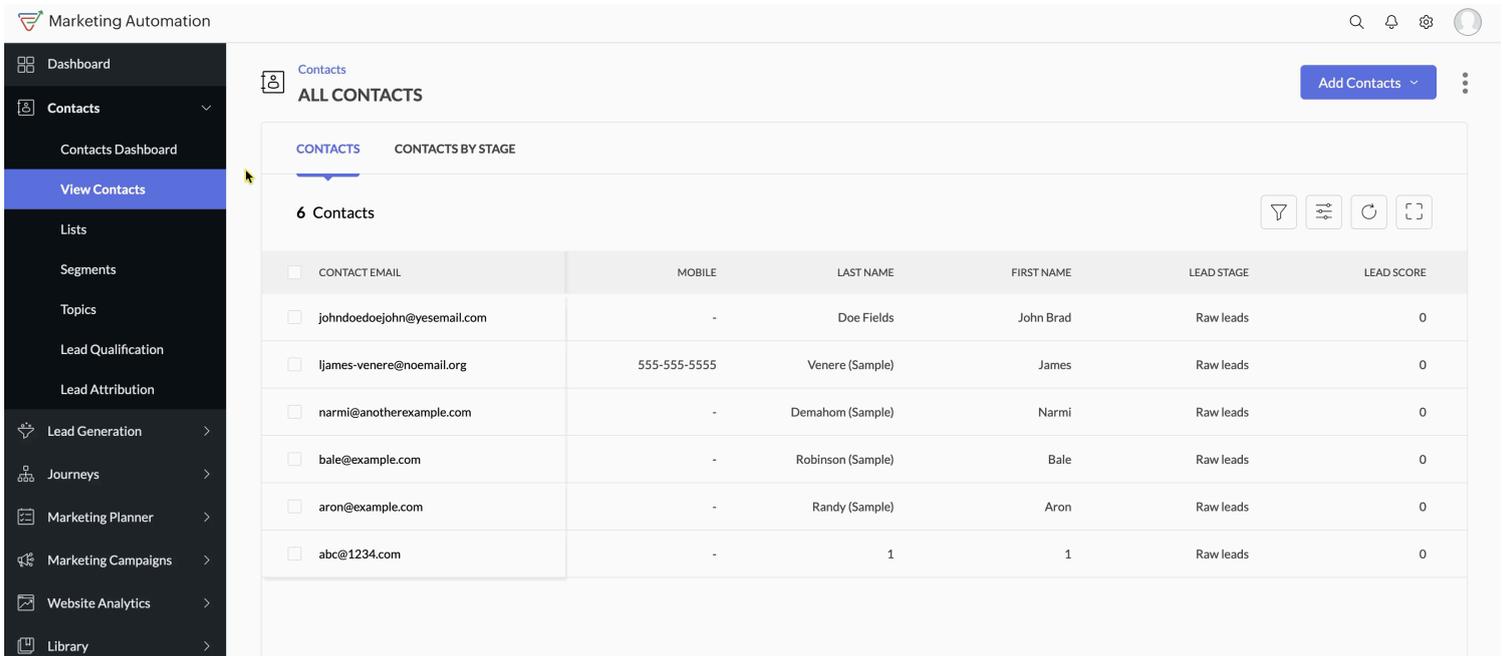


1. From the *Navigation Toolbar* choose **Contacts** and then go to **View Contacts**. By default, all the contacts will be displayed.
2. Select the contacts you want to add to or remove from lists.
3. Click **Add/Remove contacts**  button at far right.
4. If you want to add contacts to a list, choose **Add to list** option and if you want to remove contacts from a list, choose **Remove from list** option.

5. Select a list or multiple lists from the pop-up that appears.
6. Click **Proceed**.



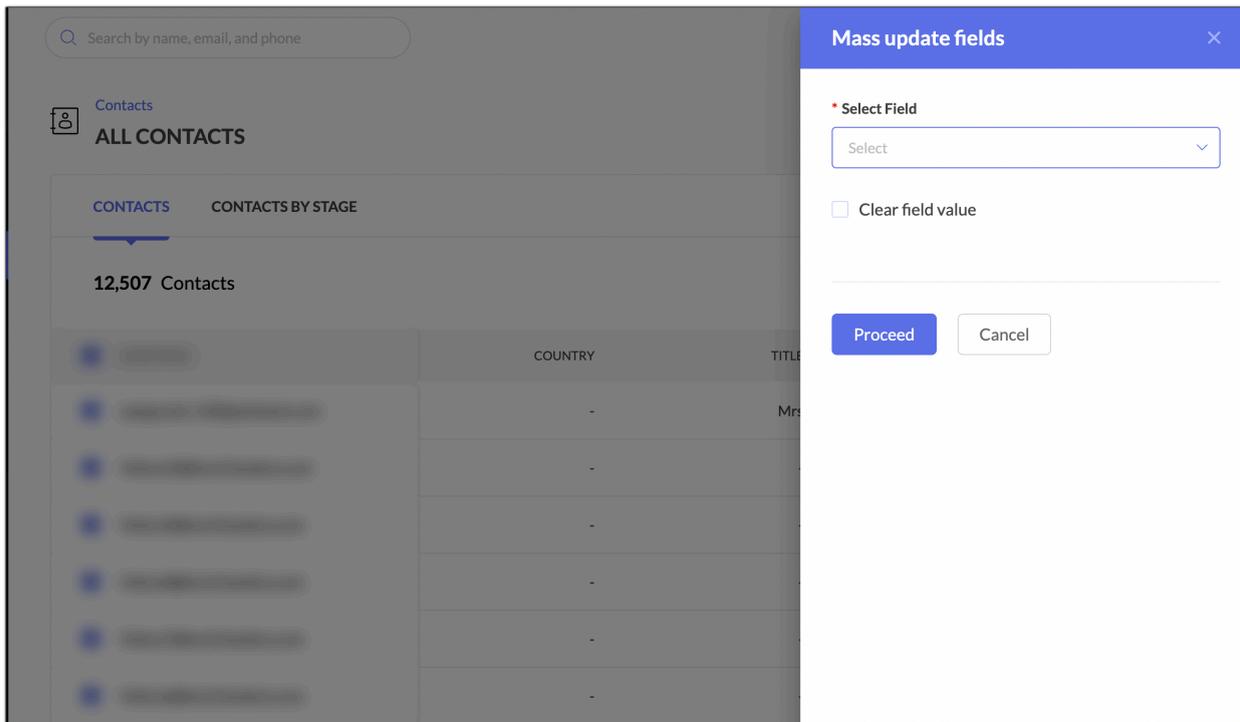
To Mass update contact fields



1. From the *Navigation Toolbar* choose **Contacts** and then go to **View Contacts**. By default, all the contacts will be displayed.
2. Select the contacts whose data field you want to update.
3. Choose **Mass Update** after clicking on the More Actions icon  at far right.



4. Choose the field you want to update and enter the data.
5. Click **Proceed**.



To export contacts

1. From the *Navigation Toolbar* choose **Contacts** and then go to **View Contacts**. By default, all the contacts will be displayed.
2. Select the contacts you want to export.
3. In case you want to export contacts of a particular list, you can do so in the [Lists](#) module.
4. Click on **Export Contacts** after clicking on the More Actions icon  at far right.
5. **Select the data fields** you want to export.
6. **Enter the name** of the file you would like to export the contacts to and choose the file extension by clicking on the .CSV dropdown.
7. Choose one of the following options for password confirmation:
 - **Yes, I'll use:** All the files that are exported will be protected using Zoho Marketing Automation's default password, which is the combination of the first four characters of user's email address and the last four digits of user's Zoho user ID. Opening these files will require users to enter the default password.

Export contacts ✕

Select the field properties you want to include in this export [-] All Fields

<input checked="" type="checkbox"/> Contact Email	<input type="checkbox"/> Mobile
<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name
<input type="checkbox"/> Lead score	<input type="checkbox"/> Lead stage
<input type="checkbox"/> Phone	<input type="checkbox"/> Added time
<input type="checkbox"/> Lead source	<input type="checkbox"/> Country
<input type="checkbox"/> Gender	<input type="checkbox"/> Is Converted

Enter file name*

.CSV ▼

Use the default password?

Yes No

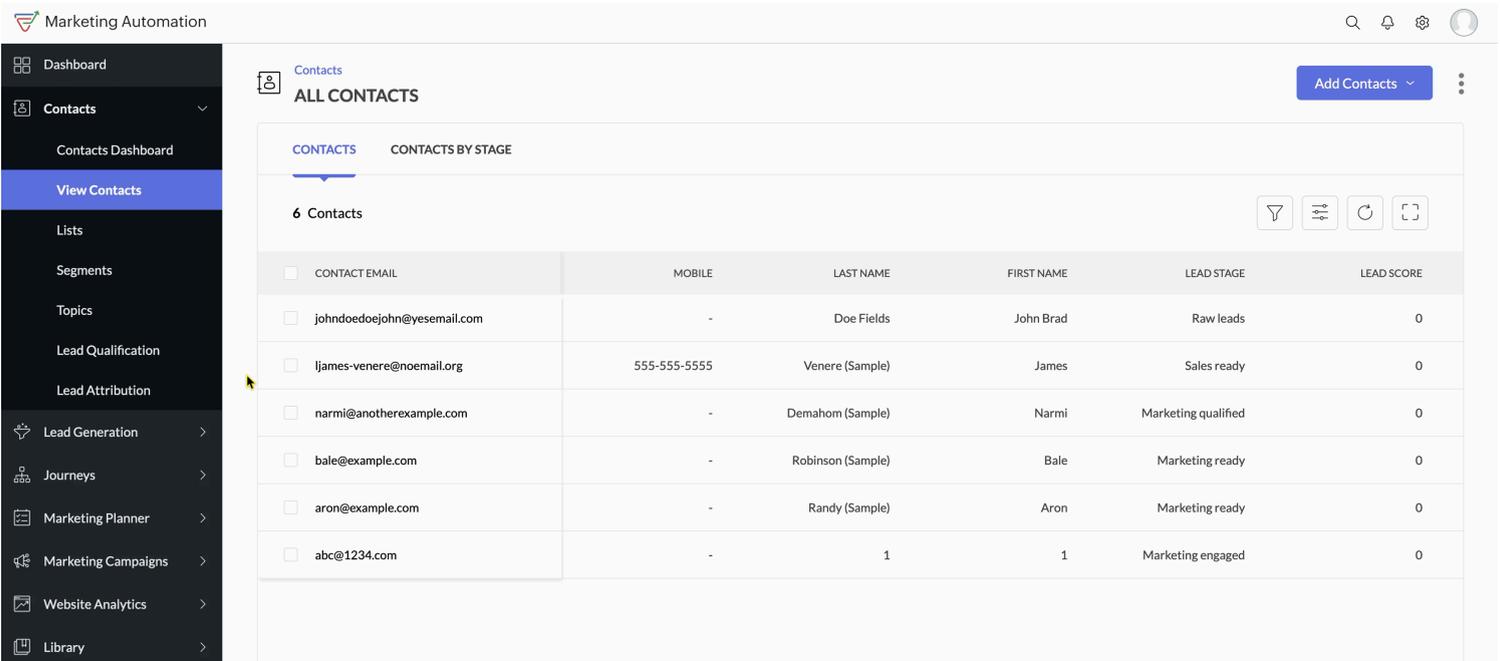
i The default password is the first four characters of your email address and last four digits of your user ID. (Example: User email - patricia@zylker.com & Customer ID - 567891011; default password - patr1011)
Using this password is limited to the current file; it can't be opened if the password is incorrect.

Export Cancel

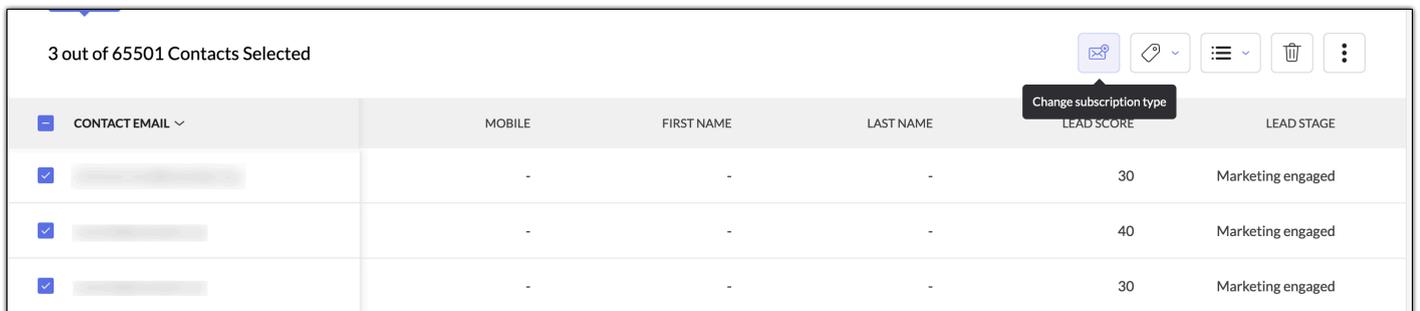
- **No, I'll skip:** When this option is chosen, you can export contact data to a file without having them password protected. Opening these files will not require users to enter a password.

7. Click **Export**.

To change contacts' [subscription type](#)



1. From the *Navigation Toolbar* choose **Contacts** and then go to **View Contacts**. By default, all the contacts will be displayed.
2. Select the contacts whose subscription type you want to change.
3. In case you want to change the subscription type of contacts of a particular list, you can do so in the [Lists](#) module.
4. Click on **Change subscription type** icon.
5. Choose the **Subscription type** for the contacts.
6. Click **Proceed**.



To delete contacts

1. From the *Navigation Toolbar* choose **Contacts** and then go to **View Contacts**. By default, all the contacts will be displayed.
2. Select the contacts you want to delete.
3. If you wish to delete the contacts from a specific list, you can do in the [Lists](#) module.
4. Click on **Delete** icon.

CONTACTS CONTACTS BY STAGE

3 out of 65501 Contacts Selected

CONTACT EMAIL	MOBILE	FIRST NAME	LAST NAME	LEAD SCORE	LEAD STAGE
<input checked="" type="checkbox"/>	-	-	-	30	Marketing engaged
<input checked="" type="checkbox"/>	-	-	-	40	Marketing engaged
<input checked="" type="checkbox"/>	-	-	-	30	Marketing engaged

5. Confirm by clicking **Delete Contacts** button in the pop-up that appears.

In this pop-up, you'll see that you can still manually re-add the contacts. Here's how it works:

If you are bulk deleting the contacts, they will get deleted from your Zoho Marketing Automation account. But they won't be permanently deleted. Data related to these deleted contacts will still be available from our end. So, if you manually re-add these contacts either individually or via import, as soon as these get added to Zoho Marketing Automation, their data will be automatically populated.

For example, say you've deleted a contact for whom the First Name and Date of Birth were filled. If you manually re-add this contact without filling data in these two fields, those fields will get auto populated with data that was present at the time of deletion.

[Learn more about the limitation for deleting marketing contacts in Zoho Marketing Automation.](#)

To Assign/Remove tags

Marketing Automation

Contacts ALL CONTACTS Add Contacts

CONTACTS CONTACTS BY STAGE

6 Contacts

CONTACT EMAIL	MOBILE	LAST NAME	FIRST NAME	LEAD STAGE	LEAD SCORE
<input type="checkbox"/> johndoejohn@yemail.com	-	Doe Fields	John Brad	Raw leads	0
<input type="checkbox"/> ljames-venere@noemail.org	555-555-5555	Venere (Sample)	James	Raw leads	0
<input type="checkbox"/> narmi@anotherexample.com	-	Demahom (Sample)	Narmi	Raw leads	0
<input type="checkbox"/> bale@example.com	-	Robinson (Sample)	Bale	Raw leads	0
<input type="checkbox"/> aron@example.com	-	Randy (Sample)	Aron	Raw leads	0
<input type="checkbox"/> abc@1234.com	-	1	1	Raw leads	0

1. From the *Navigation Toolbar* choose **Contacts** and then go to **View Contacts**. By default, all the contacts will be displayed.
2. Select the contacts you want to update the tags for.

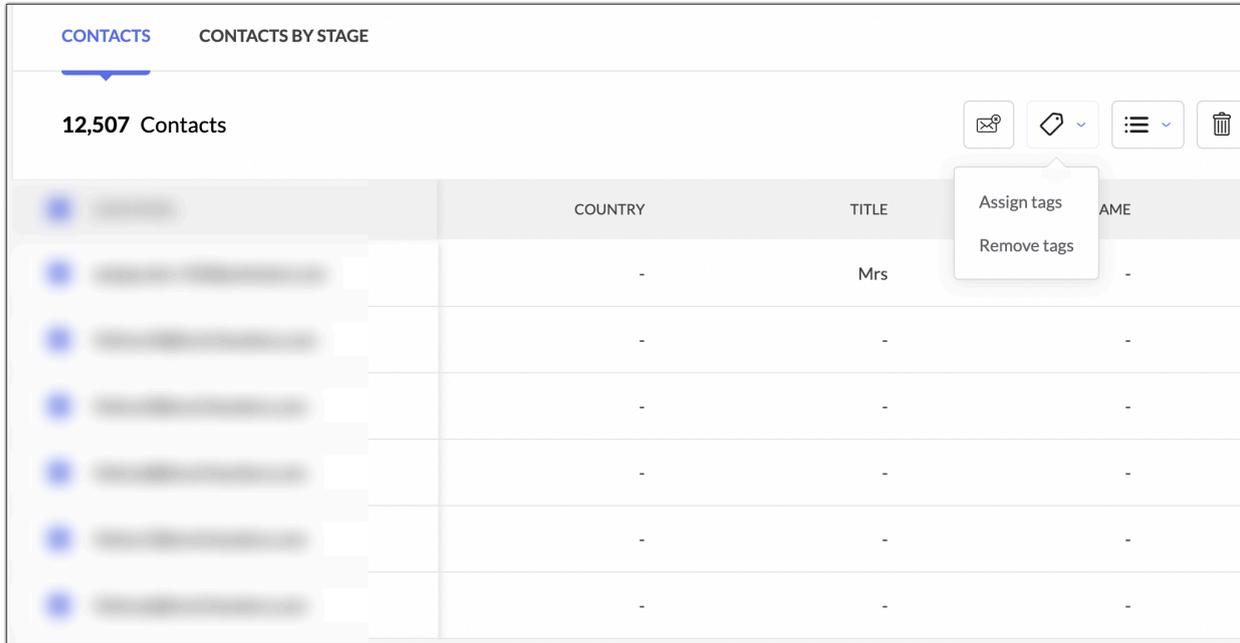
3. If you want to update the tags for the contacts in a specific list, you can do so in the [Lists](#) module.

4. Click on **Tag** icon  at far right.

5. If you want to assign tags to contacts, choose **Assign tags** option and if you want to remove tags from contacts, choose **Remove tags** option.

6. From the list of tags, **Select the tags** you want to assign or remove.

7. Click **Proceed**.



The screenshot displays the 'CONTACTS' section in Zoho CRM, specifically the 'CONTACTS BY STAGE' view. It shows a list of 12,507 contacts. The interface includes a header with 'CONTACTS' and 'CONTACTS BY STAGE', a sub-header with '12,507 Contacts', and a toolbar with icons for tag management, list view, and deletion. A dropdown menu is open over the tag management icon, showing 'Assign tags' and 'Remove tags' options. The contact list table has columns for 'COUNTRY', 'TITLE', and 'NAME'. The first row shows 'Mrs' in the 'TITLE' column and '-' in the 'COUNTRY' and 'NAME' columns. The rest of the rows are blurred.

	COUNTRY	TITLE	NAME
	-	Mrs	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-
	-	-	-

You can also add new tags by clicking [Add New Tag](#) link.