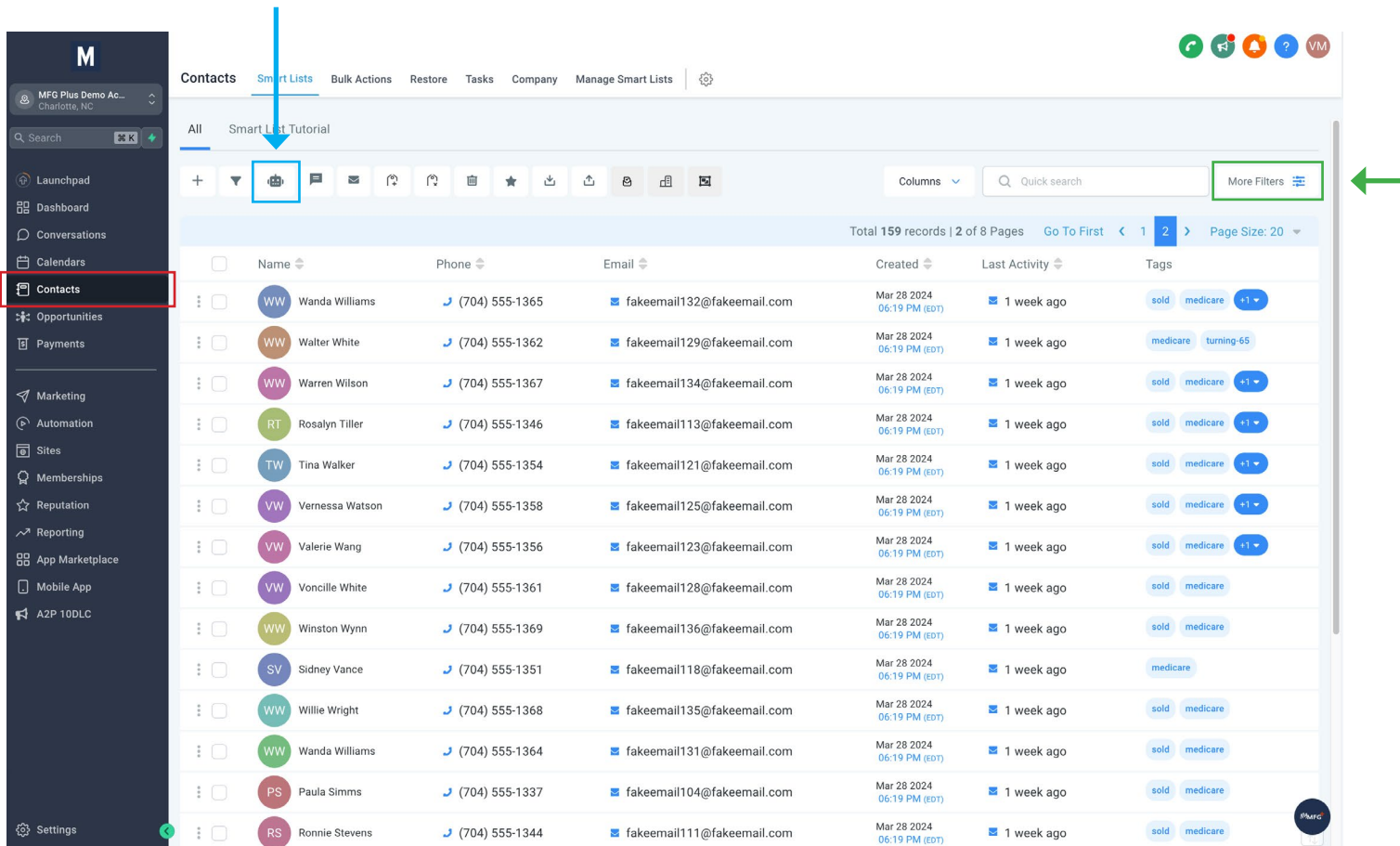
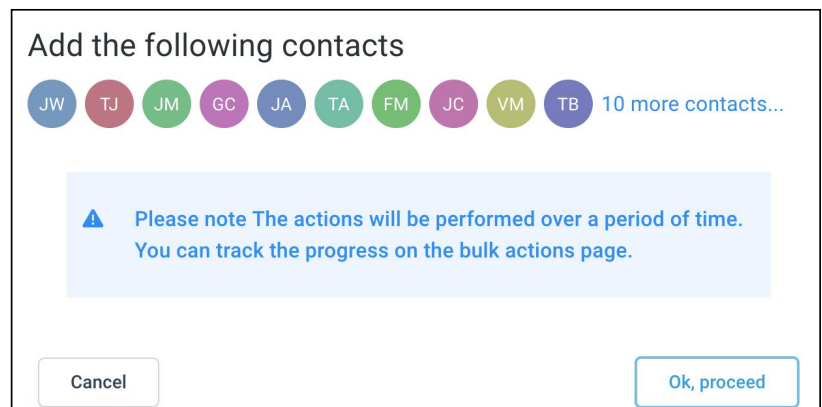


How to Bulk Add Contacts to an Automation



1. Navigate to the **Contacts** tab (highlighted above in red).
2. You'll need to select the contacts you want to add to the automation before anything else. This can be done in any of three ways:
 - a. **Manually** - Individually select the contacts using the checkbox to the left of their name.
 - b. **Bulk** - Bulk select all the contacts on a page by using the checkbox to the left of the "Name" column. To select all available contacts, use the checkbox and then click "Select all [xyz] records."
 - c. **Filtered** - Click **More Filters** in the top right (highlighted above in green). Apply filters as needed, then return to the contacts screen. Use the bulk select checkbox to the left of the "Name" column, then click "Select all [xyz] records."
3. Once you've selected the contacts, click the "Add to Automation" button. It's a small robot head, third in the line of white buttons at the top of the list of contacts (highlighted above in blue).
4. You will now see a pop-up. This screen means larger lists of contacts and more complicated automations take a longer time. Small lists and simple automations don't. Click "Ok, proceed."
5. Under "Workflow," select the automation you want to add to.



6. Under “Action” give a short description of what you’re doing, such as “Bulk add to XYZ automation”
7. You now have three ways to add the contacts.
 - a. **Send all at once** - Immediately adds all selected contacts at the same time.
 - b. **Send all at scheduled time** - Adds all selected contacts at a specified time in the future.
 - c. **Add in drip mode** - Allows you to set the contacts to enter the workflow in batches. See below:

Add the following contacts

WW VW TW RT WW VW WW WW SV VW 10 more contacts...

Workflow

Type to search ▼

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

Action

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

Cancel
Add to Automation

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

Action

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

Start On

Batch Quantity

Repeat After

Days
▼

Send On

Mon Tue Wed Thu Fri Sat Sun

Process between hours (optional)

Start From

End At

Start On: Select a specific date and time to start the drip

Batch Quantity: Set how many contacts to add in each group

Repeat After: How often a batch of contacts will be added. Type a number in the “Repeat After” bar, then select if the number corresponds to every ## of days, hours, minutes, or seconds.

Send On: What days the contacts are allowed to be added on. By default, all of the days are selected. Deselect a day to keep contacts from being added on that day.

Process between hours (optional): What time of day the contacts can be added in.

Here’s an example. Settings: Start On: 05/05/20xx | Batch Quantity: 5 | Repeat After: 5 Days | Send On: Mon, Tue, Wed, Thu, Fri | Process between hours: Start From 10AM, End At 2PM

Result: Beginning on 05/05/20xx, 5 contacts are added every 5 days. If the 5th day falls on a Sunday or Saturday, the drip will wait until Monday to continue. Contacts will be added at 10AM and cut off at 2PM. If it doesn’t finish by 2pm, it will save the leftover contacts for the next batch.

7. Once you’ve chosen your settings, click “Add to Automation.” To view progress, click the link or go to the Bulk Actions tab in the Contacts section.