

How to select lead?

Selecting leads allows you to perform actions on one or more leads at the same time. Once selected, leads can be used for various CRM operations such as assigning tags, stages, alerts, action plans, exporting data, and other bulk actions.

Steps

1. Navigate to the **CRM** page.
2. To select all leads currently displayed on the page, click the **Select All** checkbox located in the left-most column of the Leads row.
3. To select specific leads, click the checkbox next to each lead you want to select.
4. To view all selected leads, click **Selected Leads** located in the Leads row.
5. A pop-up window will appear displaying the list of currently selected leads.
6. To remove an individual lead from the selection, click the **X** icon next to that lead.
7. To remove all selected leads at once, click **Clear All**.

Result

The selected leads will remain available for bulk actions until they are removed individually or cleared from the selection list.

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