Rovo: Bulk Changes to Leads

Rovo and AI · https://mriacrm.com/docs/rovo-bulk-changes-to-leads/

One change on many Leads

For Leads, the assistant has dedicated bulk tools that apply one change to every Lead matching a filter, in a single confirmation. They cover tags, products, status, source, owner and notes.

1. What you can change in bulk

Change	Ask something like	Leads per run
Add, remove or replace tags	*“Add the tag VIP to all leads tagged Budget Approved.”* · *“Replace the tag churn-risk with recovery.”* · *“Add needs follow-up to leads that have no tags.”*	150
Add, remove or replace products	*“Add CRM Pro Plan to all New leads.”* · *“Replace Basic Plan with Premium Plan on every lead.”*	150
Set the source	*“Set the source of all Pending leads tagged webinar-2026 to Webinar.”*	150
Assign or unassign	*“Assign all Pending leads to me.”* · *“Unassign all Contacted leads.”*	150
Set the status	*“Set all New leads from Paid Ads to Contacted.”*	60
Add the same note	*“Add the note ‘Reached out via email’ to all Contacted leads.”*	100

When more Leads match than a run allows, the assistant asks you to narrow the filter — by status, source, tag or owner — and run it again for the rest.

2. Read the filter on the card

A bulk change does not take a list of Leads. It takes a **filter**, and the Please review card shows that filter, not the Leads it will reach. When your request has conditions the filter cannot express, the card

is broader than what you asked for.

> *Tag every New lead created this month that has nobody assigned with “Q4 outreach”, and assign them all to me.*

The assistant found the right seven Leads. But the card filters only on **Lead status: New** — it would also have tagged and reassigned every other New Lead — Laura Green, created a month earlier, and any New Lead that already has an owner:

Tag every New lead created this month that has nobody assigned with "Q4 outreach", and assign them all to me.

I found 7 leads created this month with the status **New** that currently have no assignee:

- LEAD - Rafael Costa
- LEAD - Ingrid Solberg
- LEAD - Marcus Webb
- LEAD - Priya Nair
- LEAD - Jonas Berg
- LEAD - Elena Marchetti
- Website inquiry: Northwind Logistics

I will now:

1. Add the tag **"Q4 outreach"** to these 7 leads.
2. Assign all 7 leads to you (Nataliia Timoshyna).

Shall I proceed?

Yes, go ahead

Please review

Bulk update lead tags

This will add the following tag to leads with the specified status.

Tag name: `Q4 outreach`

Lead status: `New`

Operation: `add`

Bulk update lead scalar field

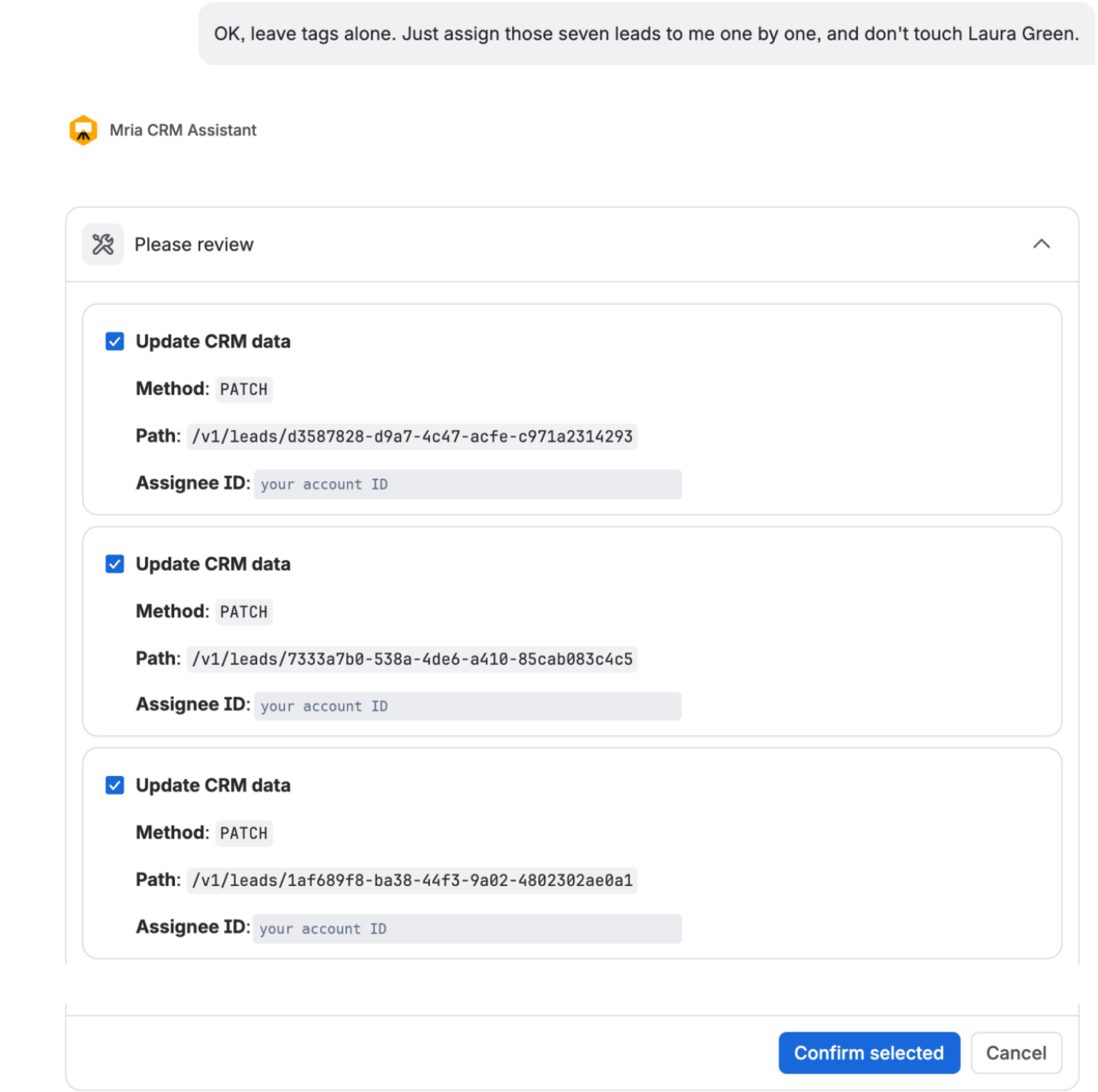
This will update the assignee for leads with the specified status.

Field: `assignee`

Lead status: `New`

Target assignee account ID: `your account ID`

The fix is to cancel and ask for the change **one by one**. The assistant then makes one change per Lead, each on the card, and touches nothing else:



Check the filter before you confirm

If the card's filter is wider than your request, click **Cancel**. A bulk change with no filter at all applies to every active Lead in the workspace, up to the limit for that change.

3. What a bulk change does — and does not do

- **Each Lead's timeline records it,** under your name.
- **No notifications are sent.** Reassigning 150 Leads does not send 150 messages to the new owner. Tell people yourself when it matters.
- **It cannot be undone from the chat.** To reverse it, ask for the opposite change — remove the tag, set the old status — and check that its filter reaches the same Leads.
- **Names must exist.** Statuses and sources are matched by the names configured in your workspace.
- **Only Leads.** Deals, Contacts and Companies are changed one record at a time — the assistant can still do several in one card, as above.

Related Pages

- Rovo: Finding Information — questions across leads, deals, contacts, companies and products.
- Rovo: Creating and Updating Records — new records, edits, notes, tasks, conversions and closing deals.
- Rovo: Complex Requests Step by Step — real multi-step conversations, from triage to a closed deal.
- Rovo: Permissions and Safety — for admins: whose rights apply and what can never happen.
- Rovo Studio: Build Your Own Agent — use the same CRM tools in an agent you design.
- Leads — statuses, sources, tags and bulk actions in the app.