

How bulk changes work

The five Marketing areas are introduced in [Marketing: the five areas](#).

Wallets, vouchers, personal promotions and promotional codes all support changing many records at once. They follow the same three-step shape, and learning it once covers all four.

The three steps

Step	What it does	Permission
1. Check	Counts what <i>would</i> be affected. Changes nothing	The area's view permission
2. Apply	Starts the change as a background job	The area's edit permission
3. Track	Follows the job until it finishes	The area's edit permission

The check step is deliberately harmless and deliberately separate. It exists so you can see the blast radius before committing to it.

“ **Always run the check.** It takes seconds and it is the only preview you get. A count that looks wrong — far larger or far smaller than expected — means your criteria are wrong, and that is much cheaper to discover now.

Step 2 runs in the background

Apply does not finish while you wait. It returns a job that runs on its own, and you follow its progress.

This matters in three ways:

- **Closing the screen doesn't stop it.** The job carries on.
- **Progress is polled**, so the figure you see may lag slightly behind reality.
- **A job that is still running is not a job that failed.** Give a large change time before assuming something is wrong.

Already-redeemed records are never touched

Every bulk operation acts only on records that have **not been redeemed**.

Area	What is protected
Wallets	Credit already spent
Vouchers	Vouchers already used
Personal promotions	Promotions already applied to an order
Promotional codes	Coupons already redeemed

You cannot retroactively change or remove value a customer has already received. This is why bulk operations are recoverable in practice, and it is also the usual explanation for a count being smaller than expected.

Delete and update are separate operations

Bulk **update** changes fields — typically dates or amounts — on matching records. Bulk **delete** removes them.

Both are protected by the same non-redeemed rule, and both have their own check step. They are not variants of one action: pick the one you mean.

Promotional codes work differently — read this

Promotional codes use the same three words for a materially different operation.

In wallets, vouchers, personal promotions	In promotional codes
Check counts matching records	Check asks whether the campaign has <i>any</i> redeemed coupons

In wallets, vouchers, personal promotions	In promotional codes
Apply updates matching records	Apply deletes the whole campaign and its coupons — and only if none has been redeemed

So in promotional codes, "apply bulk changes" is a **delete**, gated on the campaign being entirely unused. If even one coupon has been redeemed, it will not proceed.

To retire a campaign that *has* been used, expire it instead — see [Promotional codes](#).

“ This is the single most dangerous naming overlap in the chapter. In four areas "apply" means update; in promotional codes it means delete a campaign. Check which screen you are on before clicking it.

A safe sequence

- 1. Set your criteria narrowly.
- 2. **Check**, and read the count.
- 3. If the count surprises you, stop and work out why.
- 4. Apply.
- 5. Track to completion.
- 6. Spot-check a couple of affected records.

If a job seems stuck

Give it time proportional to the count — tens of thousands of records take a while. If progress genuinely stops advancing, don't re-run the apply: a second job on the same criteria can compound the first. Report it with the area, the criteria and roughly when you started.