

Using Bulk Actions to Manage Content and Users

Last Modified on 01/07/2020 1:19 pm EST

While you are able to manage your users and content by clicking on their individual names and editing settings one at a time, you also have a wide range of bulk actions available from the user or content listing. This article will show you how to **bulk select** items as well as **perform bulk actions** through the listing page. The examples in this article use the listing page for Paks and files, but the process is largely the same for users as well as all other content types.

Overview

Selecting Items in Bulk

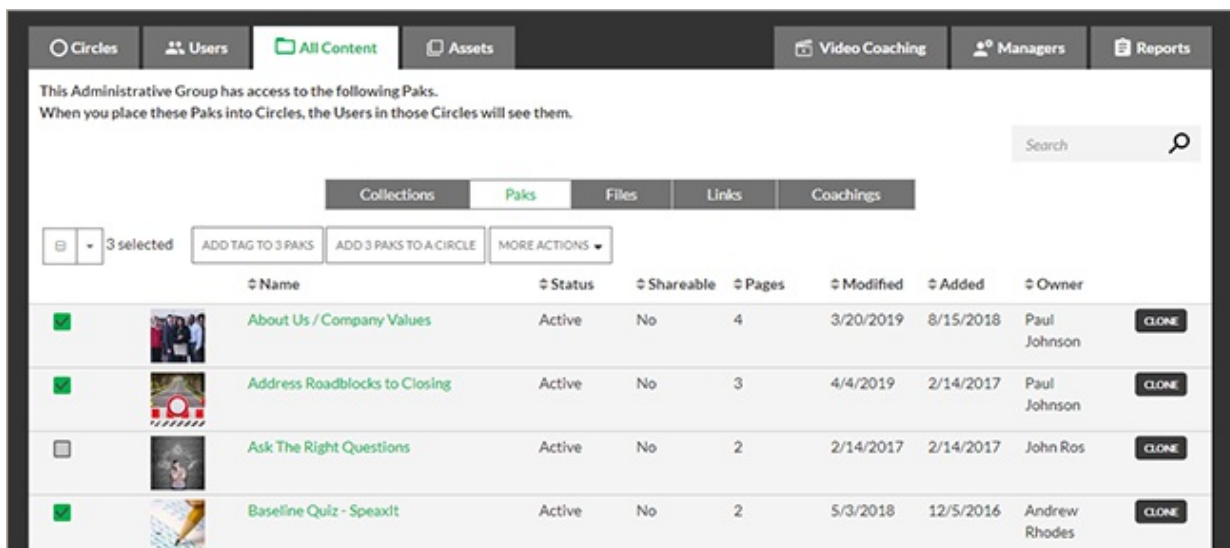
Adding Tags to Selected Items

Adding Selected Items to a Circle

Performing Additional Actions on Selected Items

Selecting Items in Bulk

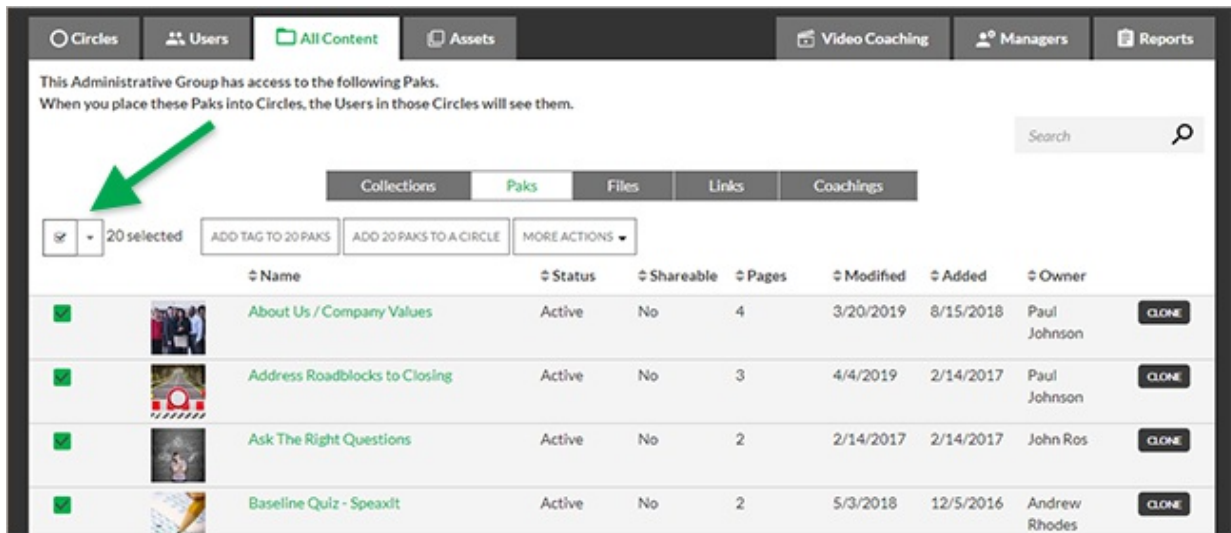
1. You can **select multiple items** individually by clicking on the checkboxes to the left of their names.



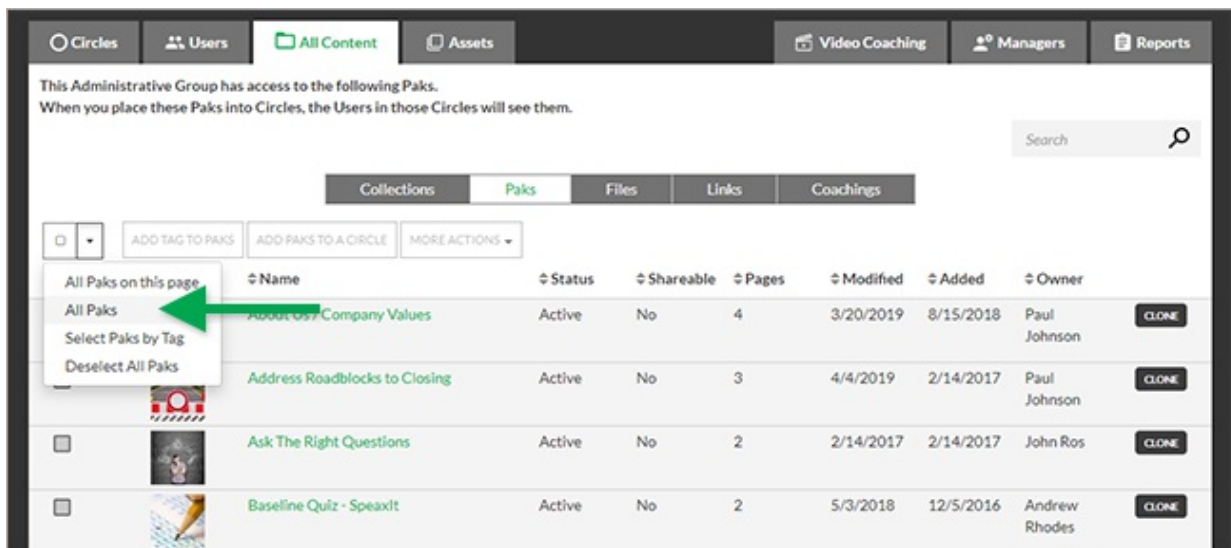
The screenshot shows a web interface for managing content. At the top, there are navigation tabs: 'Circles', 'Users', 'All Content', 'Assets', 'Video Coaching', 'Managers', and 'Reports'. Below the tabs, a message states: 'This Administrative Group has access to the following Paks. When you place these Paks into Circles, the Users in those Circles will see them.' A search bar is located on the right. Below the message, there are tabs for 'Collections', 'Paks', 'Files', 'Links', and 'Coachings'. A toolbar shows '3 selected' items and buttons for 'ADD TAG TO 3 PAKS', 'ADD 3 PAKS TO A CIRCLE', and 'MORE ACTIONS'. A table lists the selected items with columns for Name, Status, Shareable, Pages, Modified, Added, and Owner. Each row has a 'CLOSE' button.

	Name	Status	Shareable	Pages	Modified	Added	Owner	
<input checked="" type="checkbox"/>	About Us / Company Values	Active	No	4	3/20/2019	8/15/2018	Paul Johnson	CLOSE
<input checked="" type="checkbox"/>	Address Roadblocks to Closing	Active	No	3	4/4/2019	2/14/2017	Paul Johnson	CLOSE
<input type="checkbox"/>	Ask The Right Questions	Active	No	2	2/14/2017	2/14/2017	John Ros	CLOSE
<input checked="" type="checkbox"/>	Baseline Quiz - SpeaxIt	Active	No	2	5/3/2018	12/5/2016	Andrew Rhodes	CLOSE

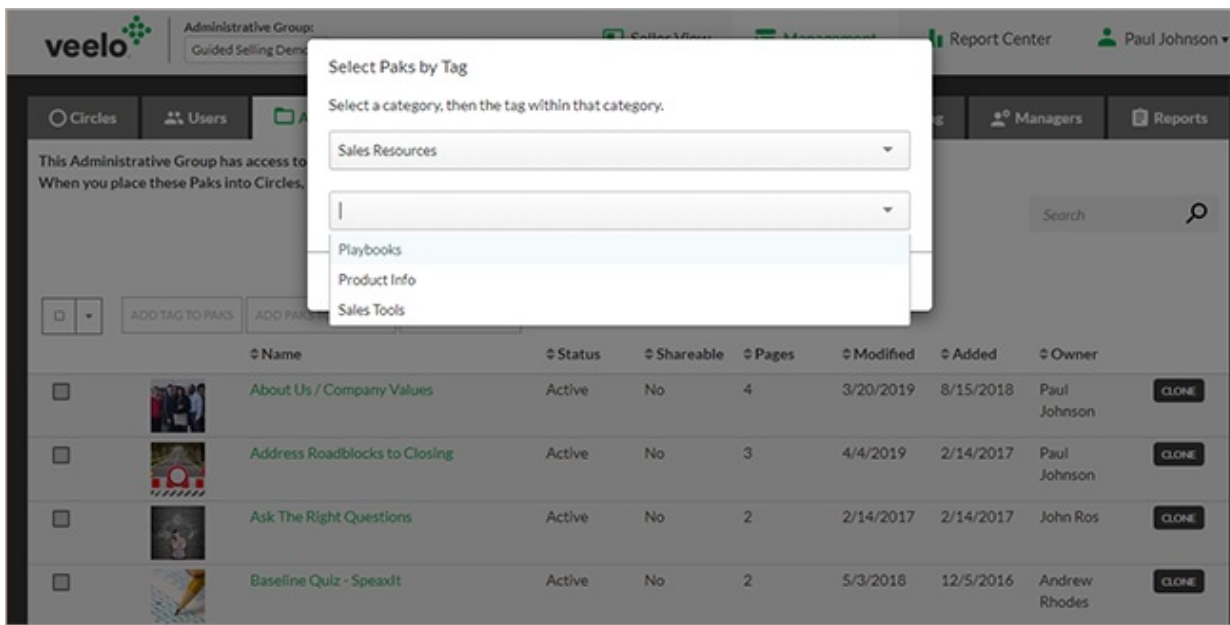
- To **select all items on a page**, click on the checkbox in the upper left area. The number of items selected will show immediately to the right of the checkbox.



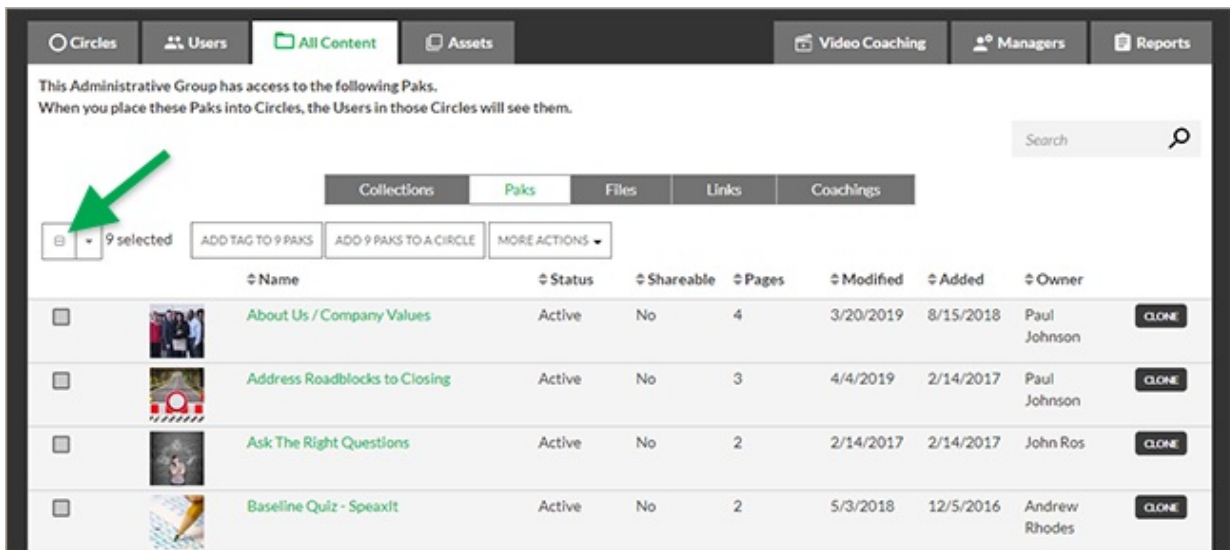
- To select **all items**, not just the ones on the page, click on the dropdown next to the checkbox, and select **All [Items]**.



- To **select all items matching a specific tag** click on **Select [Item] by Tag**, then select the tag category and tag. Click **Select** when done, and the system will select all items that match that tag.



5. To deselect all items, simply click on the checkbox on the top left.



Adding Tags to Selected Items

1. To add tags to selected items, click on the **Add Tag to [# Items]** button.

Circles Users All Content Assets

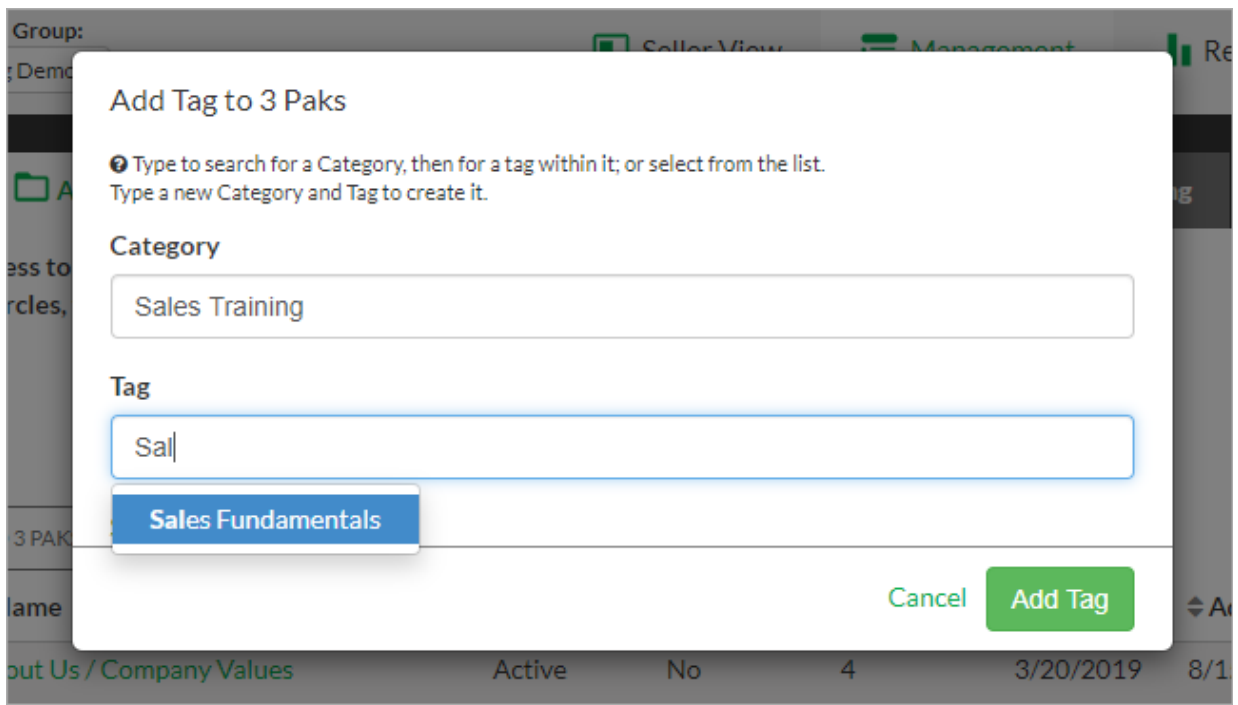
This Administrative Group has access to the following Paks.
When you place these Paks into Circles, the Users in those Circles will see them.

Collections Paks Files

3 selected ADD TAG TO 3 PAKS ADD 3 PAKS TO A CIRCLE MORE ACTIONS

	Name	Status	Shareab
<input checked="" type="checkbox"/>	About Us / Company Values	Active	No
<input checked="" type="checkbox"/>	Address Roadblocks to Closing	Active	No
<input type="checkbox"/>	Ask The Right Questions	Active	No
<input checked="" type="checkbox"/>	Baseline Quiz - SpeaxIt	Active	No

- Fill in the **Tag Category**, then add the **Tag**. The system will autocomplete, or you can click on **Show All Tags** to see a complete list of your tags from which you can select. If you have the correct permissions to **create new tags**, you can do so by typing a new tag category or tag. Click on the **Add Tag** button when done.







Adding Selected Items to a Circle

1. To add the selected items to a Circle so users can access them in the seller view, click on the **Add [# Items] to a Circle** button.

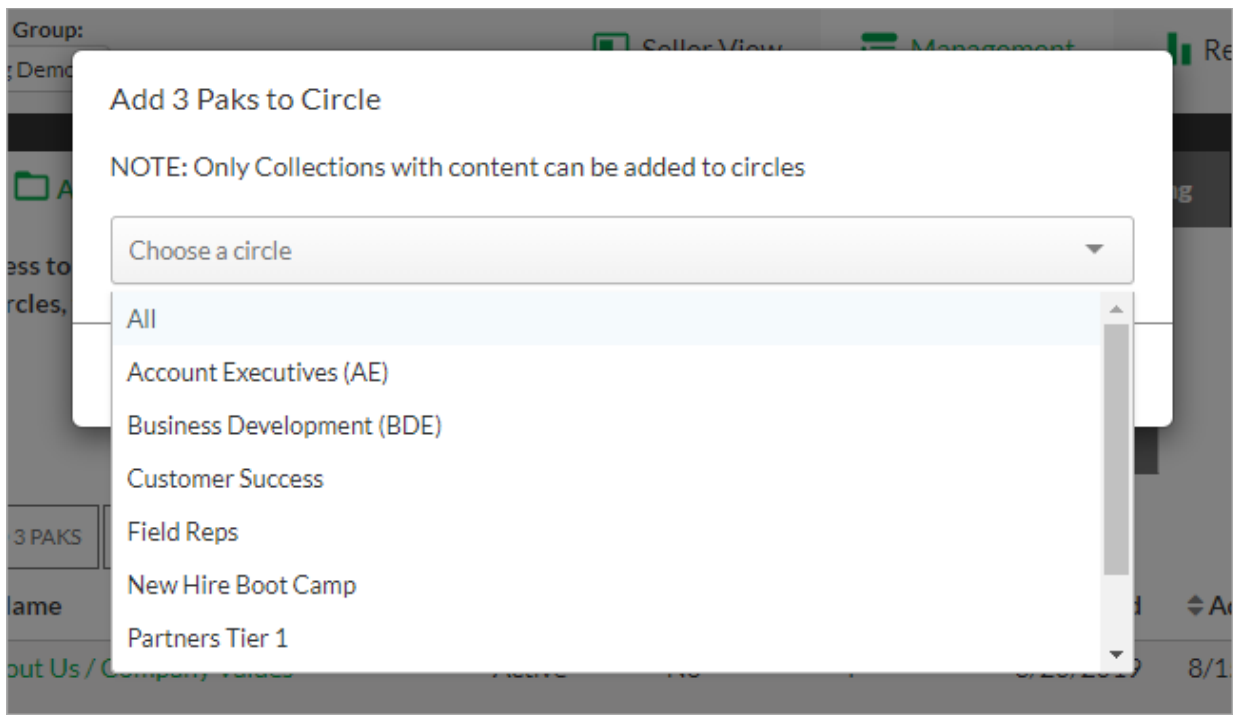
Circles
 Users
 All Content
 Assets

This Administrative Group has access to the following Paks.
 When you place these Paks into Circles, the Users in those Circles will see them.

3 selected

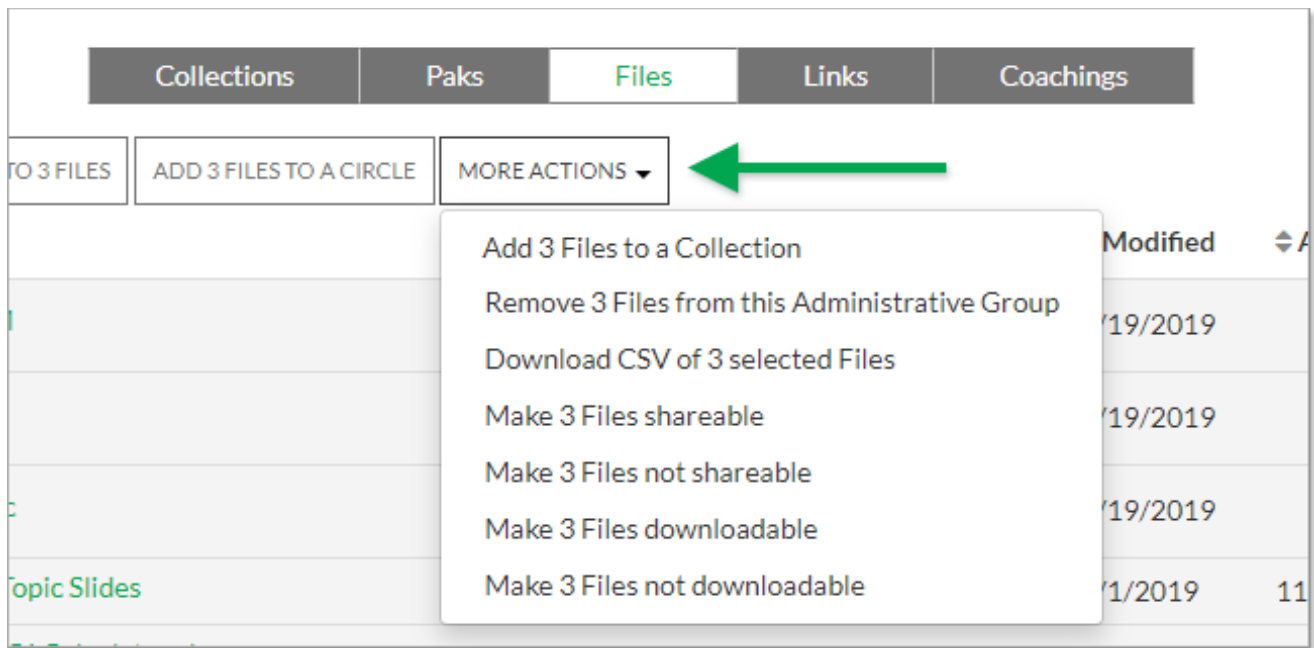
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
		Name		Status		Shareab		
<input checked="" type="checkbox"/>		About Us / Company Values		Active		No		
<input checked="" type="checkbox"/>		Address Roadblocks to Closing		Active		No		
<input type="checkbox"/>		Ask The Right Questions		Active		No		
<input checked="" type="checkbox"/>		Baseline Quiz - SpeaxIt		Active		No		

2. **Select the Circle** you wish to add the items to, then click on **Next**. You'll be given the option to send users in the Circle a notification that the new content is available. Click **Next** to finish adding the items to the Circle.



Performing Additional Actions on Selected Items

A wide variety of other bulk actions are available once you've made your selections. To see them, click on the **More Actions** dropdown. See below for a quick explanation of what each option does.



Add [# Items] to a Collection: Adds the selected items to a chosen Collection.

Remove [# Items] from this Administrative Group:

For customers without the admin group feature, selecting this option archives content and removes it from all Circles.

For customers with the **admin group feature turned on**:if the item listing is accessed from a sub-admin group, removes the content from that sub-admin group. If the item listing is accessed from the top level admin group, selecting this option archives content and removes it from all Circles.

Download CSV of [# Items]: Generates a CSV containing basic information about the selected files, including created date, modified date, and shareable status.

Make [# Items] Shareable: Available only for customers with the Share feature. Allows your users to share the items with your prospects and customers.

Make [# Items] Not Shareable: Available only for customers with the Share feature. Makes the items not shareable with prospects and customers.

Make [# Items] Downloadable: Available only on files. Selecting this allows the selected files to be downloaded by your users, prospects, and customers.

Make [# Items] Not Downloadable: Available only on files. Selecting this prevents this file from being downloaded by your users, prospects, and customers.