

# Bulk Actions Enhancements

Updated: March 27, 2024

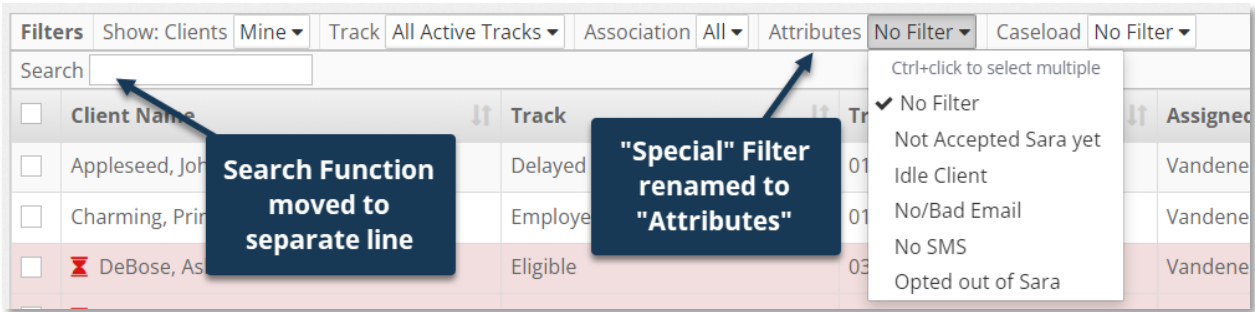
We are excited to share some recent enhancements to Sara's Bulk Actions. Though these changes are minor we wanted to make sure our users were aware so they can take advantage of the improved functionality.

## Bulk Actions Enhancements

### 1. Search box moved and 'Special' filter renamed to 'Attributes'

Filters now appear across the top row of the Bulk Actions table and the Search Function will appear on the second row.

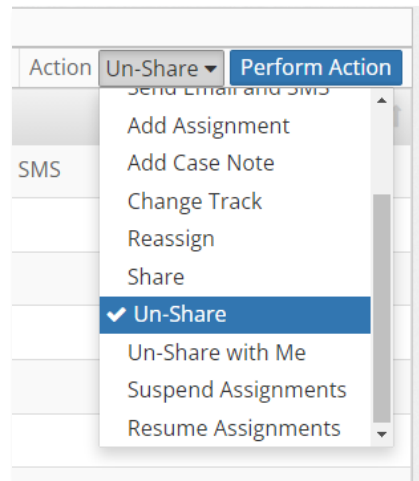
The "Special" filter (Not Accepted Sara yet, Idle Client, etc.), has now been renamed "Attributes" and will appear before any agency-specific filters.



### 2. Bulk Un-Share option added to Bulk Actions

We have added a bulk **[Un-Share]** option for users to remove staff they previously shared multiple cases with (Example: You shared your caseload with Jane, and now Jane has moved to a different office and no longer needs access to your cases).

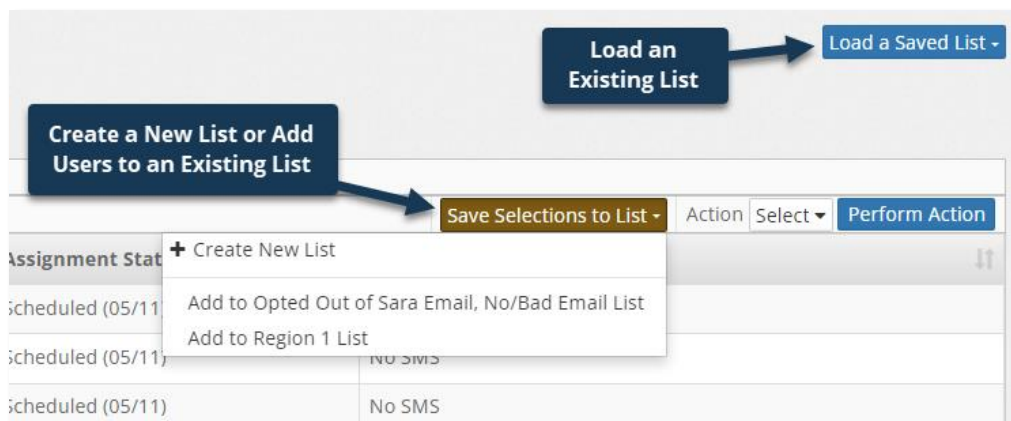
Previously, users only had the option to share clients with other staff (via the **[Share]** action button) or to remove clients that other staff have shared *with them* (via the **[Un-Share with Me]** action button). Now they will be able to also un-share their clients with others.



## Enhancements to Saved Lists

### 3. Saved Lists are now fully editable

Saved Lists are now fully editable. Users can add and remove clients from Saved Lists individually and in bulk.



#### i) Adding Clients to a Saved List in Bulk:

1. From the Bulk Actions activity, select all the clients you'd like to add to a List.
2. Click the **[Save Selections to List]** button. In the dropdown, you'll have the option to add the selected client(s) to a new list or to an existing Saved List that will appear in the dropdown.
3. A pop-up will appear, providing you the option to stay on the Bulk Actions screen or load the Saved List for further editing.

**Bulk Actions** Global Client Search

Select Clients on which to perform bulk action [Load a Saved List -](#)

Showing: Clients: Mine; Track: All Active Tracks; Association: All;

Clients: 7 total; 7 visible; 3 selected;

Filters Show: Clients Mine Track All Active Tracks Association All Attributes No Filter Caseload No Filter

Client Name	Track	Track Date	Assigned To	Ass	Attributes
<input type="checkbox"/> Appleseed, Johnny	Delayed	01/24/2024	Vandenende, Carly	Ne	
<input checked="" type="checkbox"/> Charming, Prince W	Employed	01/10/2024	Vandenende, Carly	Ne	
<input checked="" type="checkbox"/> DeBose, Asha	Eligible	03/12/2024	Vandenende, Carly	Nothing Scheduled	Idle Client
<input checked="" type="checkbox"/> Shrute, Dwight	Service - I	01/11/2024	Vandenende, Carly	On Hold	Idle Client
<input type="checkbox"/> Vandenende, Carly	Referral - Open	01/10/2024	Vandenende, Carly	Scheduled (02/06)	

Display 250 records per page

**Save Selections to List -** (2)

- + Create New List
- Add to All
- Add to Region 25 List

## ii) Adding Clients to a Saved List Individually:

Users can also add individual clients by following the steps above or through the Saved List view, as shown below.

1. From the Bulk Actions activity, click **[Load a Saved List]** and select the list you'd like to edit.

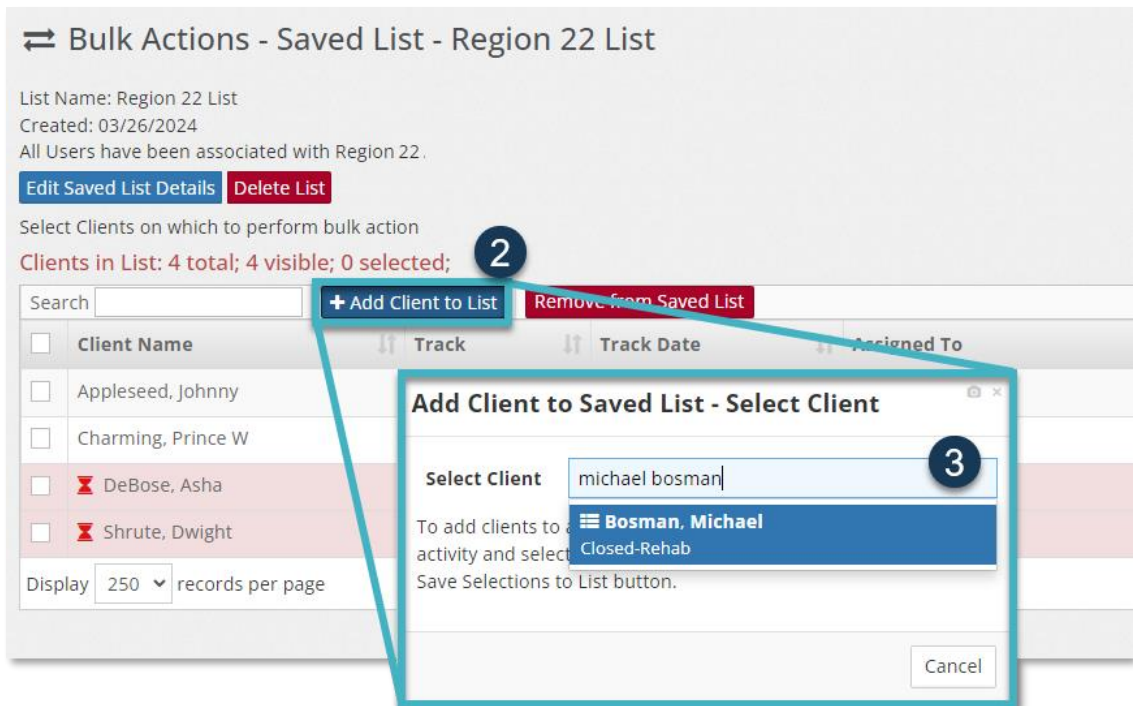
**1** **Load a Saved List -**

- All
- Region 22 List

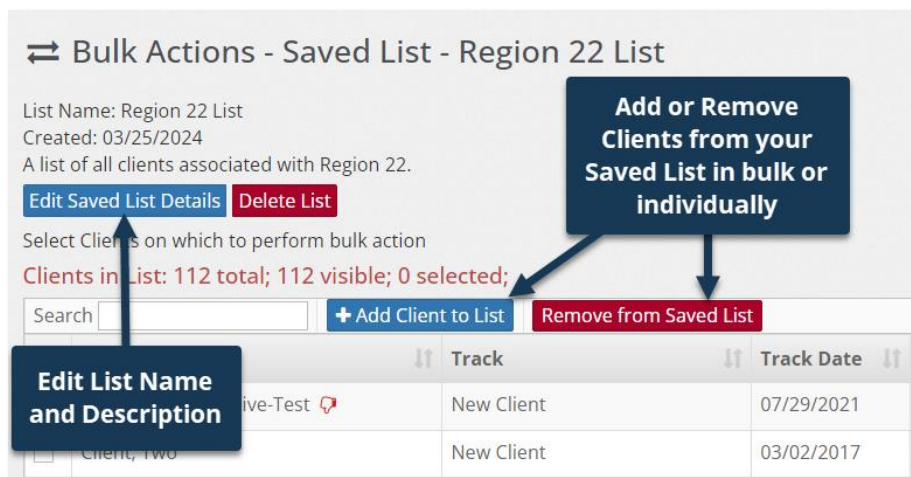
**Save Selections to List -** Action Select **Perform Action**

atus Attributes

2. You will be taken to your Saved List view. Click **[+Add Client to List]** to load the **Add Client to Saved List** search feature.
3. Begin typing your client's name and select their name when visible.
4. The client will be added to your Saved List.



From the Saved List view, a User can also remove client(s) using the **[Remove from Saved List]** button or edit the name and description of a Saved List by selecting the **[Edit Saved List Details]**.



As always, if you have any questions pertaining to these features, we encourage you to reach out to our Support Team by clicking the **[Contact Tech Support]** button in the bottom right corner of your screen.