FAQ - Managing Users & Portal Access in Bulk

This article explains how to use new bulk actions for user removal and portal access management to save time on administrative cleanup.

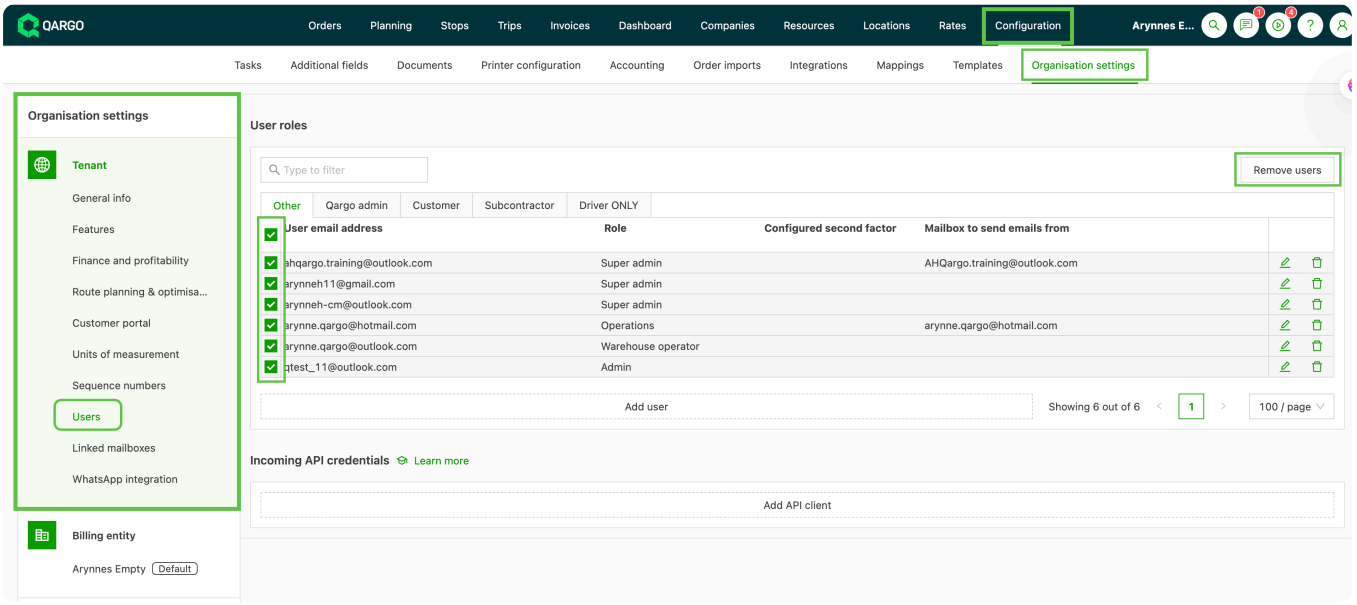
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Q: I need to clean up my system after a large testing phase (like a GO LIVE in a sandbox) or efficiently off-board multiple external users. How do I use the bulk actions to save time?

A: You can easily process many accounts at once using the bulk management features, significantly cutting down on administrative cleanup time:

1. Bulk User Removal (Normal Users & Admins): Bulk remove users from your tenant.

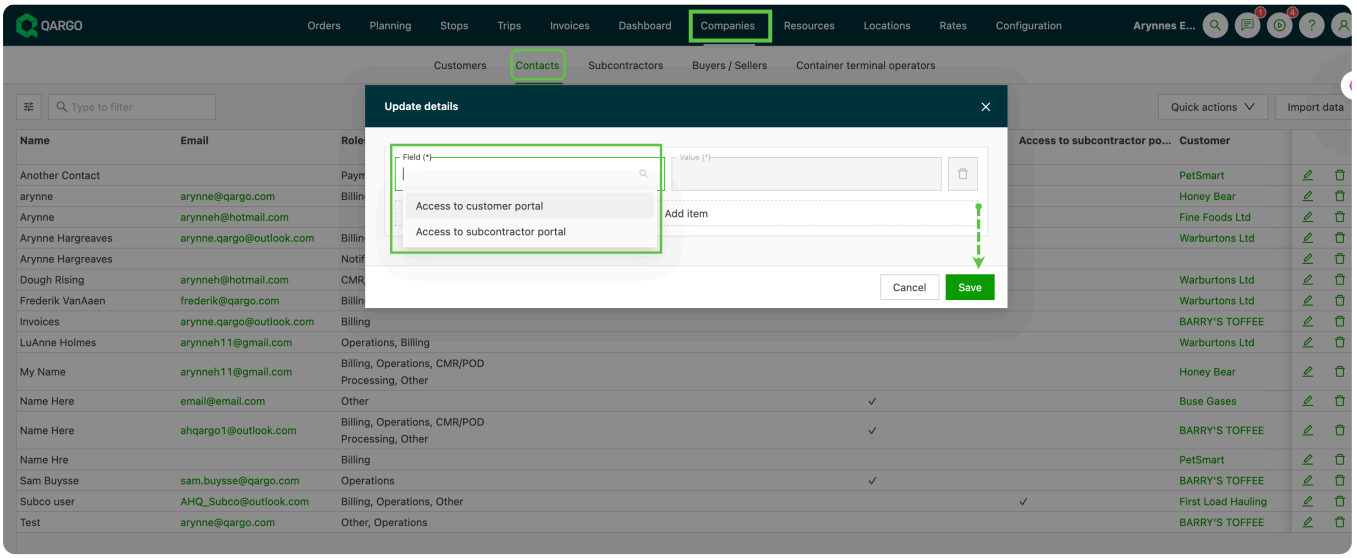
- Navigate to **CONFIGURATION > Organisation Settings > Users**.
- Select the users to remove
- Use the **'Remove Users'** button to delete them simultaneously.



2. Bulk Portal Access Removal (Customer/Subcontractor Contacts): Revoke external access for multiple customer or subcontractor contacts to customer / subcontractor portal.

- Navigate to **COMPANIES > Contacts** tab.
- Use **quick action** to select the contacts
- and collectively remove their access to the **Customer Portal** and/or the **Subcontractor Portal** in one step.

📚 Use the 'Add item' to select multiple fields to update.



These functionalities eliminate the need for repetitive, one-by-one actions, ensuring your user and access lists are accurate and secure.