



# Recipient Actions



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# 1 Overview

Recipient Actions takes participants through various aspects covering Adding Recipients to Accounts, Linking Products, Adding, and Managing Product Filters, Single and Bulk Edit Features, Attribute Overriding, Verifying Subscription Status, and Managing Product Lifecycle.

This course also takes you through the concept of Recipient Actions in CES, helping to get a complete overview.

This course is designed with Tell Me, and Support article web links (from Syndigo Help Center) learning format so that you get the maximum benefits.

## 2 Objectives

By the end of this course, you will be able to:

- Understand a quick overview of Adding Recipients to Accounts, Linking Products, Adding, and Managing Product Filters, Single and Bulk Edit Features, Attribute Overriding, and Product Sets.
- Understand how to Publish Products and Manage Product Lifecycle.

## 3 Duration

The course duration is **111** minutes.

## 4 Agenda

### 4.1 Module 1: Adding Recipients – 19 Minutes

- Adding Recipients to Your Account
- Linking Products to Recipients
- Link a Product to a Recipient and Requirement Set (Support Web Link)
- Create a Custom Recipient (Support Web Link)
- Add a New Recipient (Support Web Link)

### 4.2 Module 2: Searching, Filtering, and Columns – 21 Minutes

- Searching for Products
- Adding Product Filters

- Managing Columns
- Find Products (Support Web Link)
- Working with Filters (Support Web Link)
- Create and Manage Saved Filter Sets (Support Web Link)

## 4.3 Module 3: Adding/Editing Products

### – 34 Minutes

- Single Item Add/Single Item Edit
- Bulk Add/Bulk Edit
- Adding Product Categories
- Product Sets
- Add New Products (Support Web Link)
- Edit Products (Support Web Link)
- Manage Bulk Edit (Support Web Link)
- Manage Product Categories (Support Web Link)

## 4.4 Module 4: Editing and Publishing

### – 37 Minutes

- Adding Attribute Overrides
- Verifying Subscription Status
- Publishing Products
- Managing Your Product's Lifecycle
- Add Attribute Overrides (Support Web Link)
- Where to Publish a Product (Support Web Link)
- Publishing Products to Different Types of Recipients (Support Web Link)
- Discontinue and Delete a Product (Support Web Link)
- Manage Subscription Requests (Support Web Link)

## 5 Contact Us

For any additional information on the available catalog, please write to us at the following address [university@syndigo.com](mailto:university@syndigo.com)