

Alert and reminders activity



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

- Send a row-level alert
- Create an automated alert



Follow these steps to get the course activity assets

1. Go to the Get the Course Activity Assets lesson on the left
2. Click the appropriate link for your region
3. Open the following sheet:
03_Automation Course Assets >
10_Alerts and Reminders Activity >
10_Marketing Request Tracker - Alerts & Reminders

Setup a row-level reminder

In the interactive lesson you set up a row-level reminder. Let's practice setting up one more. Pick a row on the sheet and start your reminder. Here are some additional details:

- Send to: yourself
- On: 3 days before
- Date: Date Needed By
- Message: add whatever you'd like

Automated reminder workflow

Create the following two alert workflows.

Workflow 1 Title: Alert for new and urgent projects

If a new request is added, send an alert immediately if the date needed by is in the next 20 days and isn't marked urgent with a custom message about the project being due in the next 20 days. Send a different alert if the request is marked urgent with a custom message that the request is urgent.

- Trigger: When rows are added
 - Run workflow: when triggered
- Condition
 - Date Needed By is in the next 20 days
 - AND Urgent is not checked
- Action
 - Alert Someone
 - Send to the contact in the Assigned To column
 - Customize your message and columns
- Second Condition Path (click on the blue plus button above the condition > Add a condition path)
 - Urgent is checked
- Second Alert below the second condition
 - Alert Someone
 - Send to the contact in the Assigned To column
 - Customize your message and columns

Workflow 2 Title: Requests started in the last week

For the next four weeks you want to get an alert showing you all the newly started requests in the past week.

- Trigger: When a date is reached
 - When: Run on Friday for the next four weeks.
 - Run workflow: 11:00am
- Condition
 - Date Started is in the last 7 days
- Action
 - Send an alert to you
 - Customize your message and columns

Great job! You reached the end of the activity!