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Update Requests activity

By the end of this activity, you will be able to:	Follow these steps to get the course activity assets
• Send a manual update request • Create a time-based workflow to automate the sending of update requests • Create a data-based workflow to automate the sending of update requests	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 > 09_Update Requests Activity > 09_Marketing Request Tracker - Update Requests

Send a manual update request

In the interactive lesson you sent an update request for a row. Let's practice sending one more. Pick a row on the sheet and start your update request. Here are some additional details:

- To field: put in your email address
- Subject & Message: customize the subject and message
- Columns to include: Progress, Request Description, Status, % Complete, Assigned To, Estimated Completion Date
- Send: daily every 1 day from today until two days from now at whatever time is appropriate for you

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Automated update request workflow

Create the following two update request workflows.

Workflow 1 Title: New or Urgent Request Update

If a new request is added or a request is marked urgent send an update request that day if the department is HR, Legal, Operations, or Sales AND the Date Needed By is in the next 10 days to the team member in the Assigned To column. If the department is any value and the date needed by is in the future, but not in the next 10 days, send an alert to the assigned to team member instead.

- Trigger: When rows are added or changed
  - When: Status changes to Requested OR when urgent changes to Flagged
  - Run workflow: daily
- Condition
  - Department is one of Legal, Operations, HR, or Sales
  - AND Date Needed By is in the next 10 days
- Action
  - Send an update request
  - 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)
  - Department is not blank
  - AND Date Needed By is in the future
  - AND Date Needed By is not in the next 10 days
- Second Alert below the second condition
  - Alert Someone
  - Send to the contact in the Assigned To column

Workflow 2 Title: Urgent Request Update - 2 Days Before Due Date

Two days before the date needed by, send an update request to the team member in the assigned to column if the department is HR, Legal, Operations, or Sales, the status is not closed, and the urgent flag is checked.

- Trigger: When a date is reached
    - When: Run Once 2 days before the estimated completion date
    - Run workflow: 6:00am
- Condition
    - Department is one of Legal, Operations, HR, or Sales
    - AND status is not closed
    - AND urgent flag is checked
- Action
    - Send an update request
    - Send to the contact in the Assigned To column
    - Customize your message and columns

Great job! You reached the end of the activity!