

LeanData Routing

Lead Routing Troubleshooting Guide



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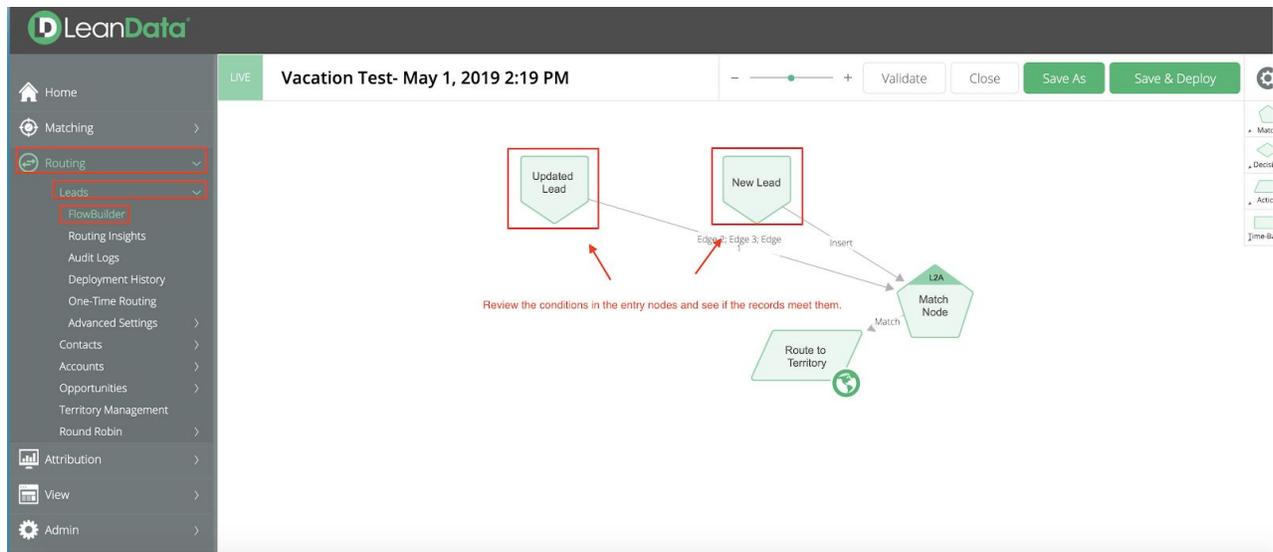
Overview

There are a number of things that can happen to a Lead prior to being routed by LeanData. If your Lead is not processing as expected, there are some things you can check:

- Entry Conditions on the Lead Router
- LeanData Job Status
- Backlogged Records

Entry Conditions on the Lead Router

The New Lead or Updated Lead entry nodes in Flowbuilder can have rules and filtering logic that affects which Leads can be routed by the node. Check to see if your Lead has met the triggering conditions. It is a recommended best practice to create a test lead to make sure the routing conditions are working as intended.



To view the details of the New Lead or Update Lead nodes:

1. Open the LeanData application in Salesforce.
2. On the side menu, click on Routing to expand the menu.
3. Click on Leads (or Contacts, Accounts, or Opportunities as needed).
4. Click on Routing Insights. The routing flow displays in a non-editable version that can be reviewed. Double-click on the New Lead and/or Update Lead nodes and check for filters or rules that would prevent the Lead from routing.

LeanData Job Status

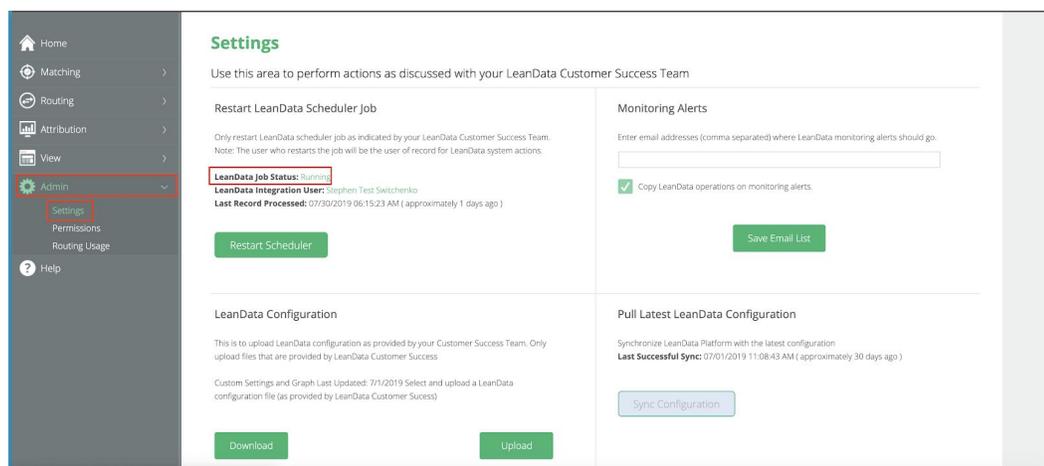
For the next step, check the LeanData Job Status. When checking the job status, please note that there are a few different status options that can be displayed.

To check the LeanData Job Status:

1. Open the LeanData application in Salesforce.
2. On the side menu, click on Admin to expand the menu.
3. Click on Settings and check the status of the LeanData Job.

Please see the definitions of each below:

- **Running:** Queued, Preparing, Processing: Queued, Preparing, Processing
- **Running - Delayed:** Processing but there are backlogs. LeanData jobs are 12 hours behind processing
- **Holding:** If there are 5 currently running apex jobs and LeanData needs to wait until one of those 5 slots becomes available
- **Aborted (job needs to be restarted):** Aborted. Your salesforce instance has hit the governor limits and LeanData was unable to place the jobs in the queue to be processed.
- **Failed:** Failed please check the apex job for error message and contact IT
- **Not Running:** LeanData's jobs are not running at all. Please check the Salesforce Apex job Queue and remove the non-essential jobs. Restart the LeanData scheduler



If LeanData's Job Status is Not Running, Failed, or Aborted, see if you can restart the scheduler. After you restart the scheduler, wait a few minutes and see if the Job Status changes to Running.

If LeanData's Job Status is Running-Delayed, follow the steps below to see if there is a backlog of records pending action. (There can still be a backlog of records if LeanData's Job Status is Running. The difference is that the backlog will take less than 12 hours to clear out)

Check for Backlogged Records

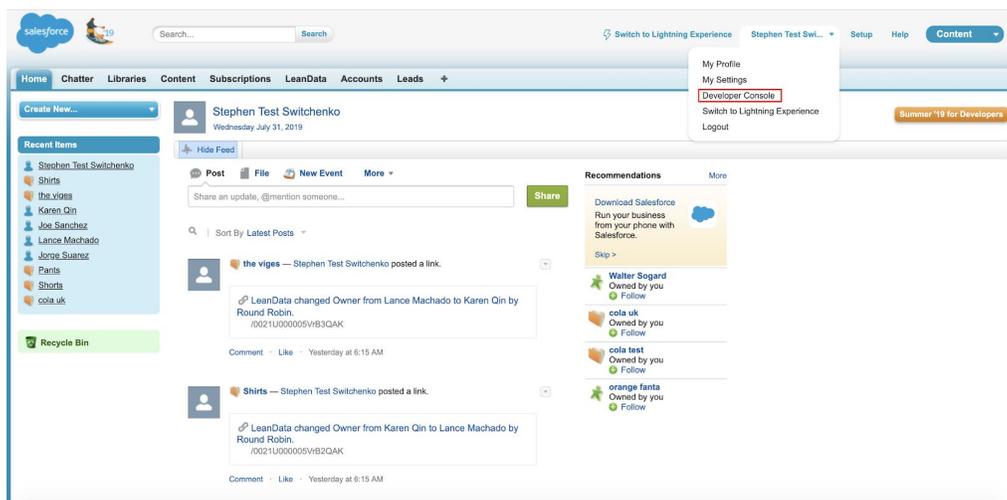
To check if there is a backlog of records, you can use this SOQL Query in the Developer Console to see the amount of records pending action from LeanData:

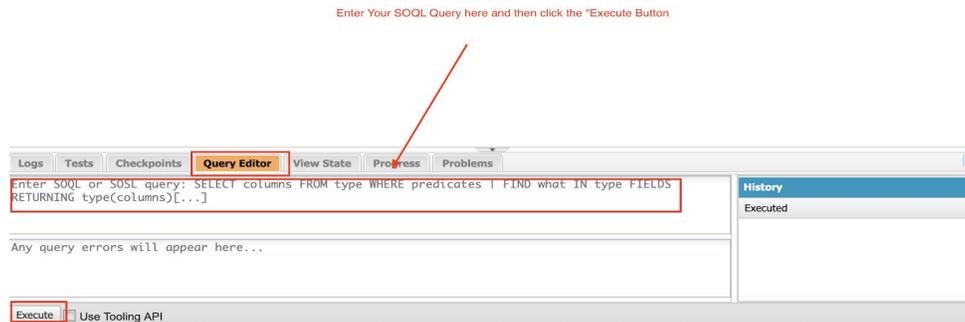
```
SELECT COUNT(Id), LeanData__Pending_Action__c FROM
LeanData__CC__Inserted_Object__c GROUP BY LeanData__Pending_Action__c
```

You can also use this SOQL Query in the Developer Console to view the specific record ids that are pending action from LeanData (You can change the end of the query to search for other pending actions such as tagging. Just replace "%routing%" with "%tagging%"):

```
SELECT LeanData__Lead__c FROM LeanData__CC__Inserted_Object__c WHERE
LeanData__Pending_Action__c LIKE '%routing%'
```

How to use a SOQL Query in the Developer Console:





If LeanData's Job Status is Running and there is no backlog of records, there is likely too many apex jobs running in the Salesforce instance.

It is important to note that LeanData operates within Salesforce and our Apex jobs run alongside all of your other apps and processes. As a result, processing time will vary based on how many other Apex jobs/processes are running within your Salesforce alongside LeanData.

If there are several other Apex Jobs running that take up all of the available Apex processing job slots, LeanData's jobs can temporarily be deprioritized. This means that LeanData processing can be delayed as the other jobs are preventing LeanData from running our jobs in a timely manner. Consequently, the processing of new and updated Leads, Contacts & Accounts would become delayed until enough job slots have opened up for LeanData to resume normal processing.

As long as LeanData Job Status is running, records will be processed within due time. You can check on the apex jobs are running in a Salesforce instance from the apex jobs section in Salesforce.

Expand All | Collapse All

Apex Jobs

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

View: All Jobs [Edit](#) | [Create New View](#)

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class
	9/2/2019 1:12 PM	Batch Apex	Completed		0	0	0	Test_Kevin	9/2/2019 1:12 PM	ContinuousCleanBatch
	9/2/2019 1:10 PM	Batch Apex	Completed		0	0	0	Test_Kevin	9/2/2019 1:10 PM	ContinuousCleanBatch
	9/2/2019 1:07 PM	Batch Apex	Completed		0	0	0	Test_Kevin	9/2/2019 1:07 PM	ContinuousCleanBatch
	9/2/2019 1:05 PM	Batch Apex	Completed		0	0	0	Test_Kevin	9/2/2019 1:05 PM	ContinuousCleanBatch
	9/2/2019 1:03 PM	Batch Apex	Completed		0	0	0	Test_Kevin	9/2/2019 1:03 PM	ContinuousCleanBatch
	9/2/2019 1:01 PM	Batch Apex	Completed		0	0	0	Test_Kevin	9/2/2019 1:01 PM	ContinuousCleanBatch
	9/2/2019 12:59 PM	Batch Apex	Completed		0	0	0	Test_Kevin	9/2/2019 12:59 PM	ContinuousCleanBatch
	9/2/2019 12:57 PM	Batch Apex	Completed		0	0	0	Test_Kevin	9/2/2019 12:57 PM	ContinuousCleanBatch

For a complete list of LeanData’s apex jobs, please refer to the LeanData - Technical Overview guide in the LeanData Help Center: <https://leandatahelp.zendesk.com/hc/en-us/articles/360017618394-LeanData-Technical-Overview>