

LeanData

Email Alerts Guide



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Overview

This guide is designed to give you an overview of the various email alerts LeanData will send administrators. There are 2 types of alert emails you will receive, System Alerts and Interaction Alerts. Each alert is described with the following information:

- Email Subject
- Recipients
- Frequency
- Alert Text
- Alert Triggers

Please Note: To enable these alerts, go to the LeanData Admin Page-->Settings-->Monitoring Alerts.

System Alerts

The system alert emails are designed to inform you when there is a situation that needs attention or to inform you of the system's health. These alerts include:

- Salesforce Monitoring Alert
- LeanData Scheduling Monitor
- Trigger Exceptions
- Token Expired

Salesforce Monitoring Alert

This alert is intended to let you know that there is an issue with either the LeanData Apex Salesforce job or Scheduling Monitor. Additional Information on this alert can be found [here](#).

Email Subject

LeanData: Urgent Salesforce Monitoring Alert for [Organization Name]

Recipients

By default, the integration User will receive these emails. You can also include email addresses of needed contacts in the application settings.

Frequency

1 time every 3 hours



Alert Text

Hello [User First Name]

It appears the LeanData Apex Salesforce job or Scheduling Monitor is currently not running in your SFDC instance: UserInfo.getOrganizationName() (UserInfo.getOrganizationId())
This may affect your lead routing and lead-account matching.

Check job status

1. Log in to SFDC
2. Go to Setup (will require the correct permission level)
3. Search for LeanData under Apex Jobs
4. If you see any exceptions or the job is failed, restart your LeanData Apex job (see below)

Restart LeanData job if it is not running

1. Log in as the current Integration User (the User's name is viewable under Admin > Settings)
2. Navigate to the LeanData Dashboard
3. Navigate to Admin > Settings
4. Click the "Restart LeanData Scheduler" button, and confirm the restart

Please reach out to LeanData Customer Success if you have any questions.

Thanks!

LeanData

Alert Triggers

If a CCIO has never been processed before or a CCIO has been processed before, but hasn't in the past 3 hours with CCIOs present, will cause the email alert to be sent.



LeanData Scheduling Monitor

This alert is intended to let you know there is an issue with the LeanData Scheduling Monitor. Additional information on this alert can be found [here](#).

Email Subject

LeanData Scheduling Monitor not active

Recipients

By default, the integration User will receive these emails. You can also include email addresses of needed contacts in the application settings.

Frequency

1 time every 3 hours

Alert Text

Hi [Name],

Scheduling Monitor hasn't been enabled in this org ([Org ID], [Org Type]) yet. Matching & Tagging results may be impacted.

How to resolve:

1. Log in as the Integration User
2. Navigate to the LeanData Dashboard
3. Navigate to Admin > Settings
4. Click the "Restart LeanData Scheduler" button, and confirm the Scheduler is running.

Please contact your Implementation Consultant or the Support Team [support@leandatainc.com] if you have any questions.

Thanks,
The LeanData team

Alert Triggers

When the Scheduling Monitor aborts, the email alert will be triggered.



Trigger Exceptions

This alert is intended to let you know that there is an issue with a LeanData trigger action in Router that has caused a Salesforce Exception.

Email Subject

Trigger Exceptions

Recipients

By default, the integration User will receive these emails. You can also include email addresses of needed contacts in the application settings.

Frequency

1 time every hour.

Alert Text

ACTION REQUIRED: LeanData [Object Type] Routing Error ([Org Type]: [Org Name])

Hello,

LeanData Routing has recently experienced an error within the [Object Type] trigger.

The most recent error is experienced is:

[Org Type]: [Org Name] + ([Org Id])

Time: [Time of Exception]

Trigger condition: [Condition]

Salesforce Exception: [Exception]

The error is most likely due to a configuration or filter rule setting within the [Action Type] [Object Type] node in your deployed [Object Type] LeanData workflow

If you are unable to determine what is causing this error, please reach out to LeanData Customer Support for help. You will continue to receive this email on an hourly frequency until the issue is resolved.

Thanks,

The LeanData Team

Alert Triggers

If CCIOs are failing or Live Routing fails, the email alert will be triggered. This is most likely due to a field has been deleted or its type has changed and it's utilized in a Leanata condition.

Token Expired

This alert is intended to let you know that there is an issue with the OAuth Token that is used by LeanData to check the health of the LeanData Application. Additional information on this alert can be found [here](#).

Email Subject

Token Expired

Recipients

By Default, the integration User will receive these emails. You can also include email addresses of needed contacts in the application settings.

Frequency

On demand as needed.

Alert Text

A valid OAuth Token no longer exists.

Please authorize a new token on the Home Page of LeanData. Tokens are required for LeanData to monitor performance and enable settings.

- Org Name:
- SFDC Id: [Org Id]
- Type: [Org Type]
- Invalid Token User: [User Email]
- LeanData Version: [Version Number]

Alert Triggers

LeanData monitors when a token has expired and sends an email alert accordingly.

Interaction Alerts

The interaction alerts are designed to inform you when an activity has completed such as Tagging has been completed. These alerts include:

- LeanData Scheduler Restarted
- List Analyzer Run Complete
- 1x Tagging Complete
- Mass Lead Conversion Complete
- Mapped Account Fields Update Complete
- Owner Mapping File Upload Complete



LeanData Scheduler Restarted

This alert is intended to let you know that the LeanData Schedule has been restarted. Additional information on this alert can be found [here](#).

Email Subject

LeanData Scheduler Restarted for LeanData (Org ID)

Recipients

By Default, the integration User will receive these emails. You can also include email addresses of needed contacts in the application settings.

Frequency

The email is sent on demand.

Alert Text

"LeanData Continuous Clean and Continuous Clean Scheduler have been successfully restarted for [Org Name] ([Org Id]) by [User Name] ([User Id])"

This User is now the Integration User. Please ensure the Integration User has the necessary permissions for LeanData to function as expected.

LeanData Continuous Clean and Continuous Clean Scheduler have failed to restart for [Org Name] ([Org Id]) by [User Name] ([User Id])

The most common reason for restart failures is an overage in scheduled jobs running. Aborting Scheduled Jobs (with your Admin's permission) will help LeanData restart Scheduler.

Note: Until CC Scheduler restarts, tagging and routing are stalled.

Please reach out to LeanData Support (hyperlink <support@leandatainc.com>) with any questions.

Alert Triggers

This email is sent whenever the LeanData Scheduler restarts.



List Analyzer Run Complete

This alert is intended to let you know that the LeanData List Analyzer has completed its run and the results are ready for viewing. There are 2 versions of this email, one if there were errors in the run and one if there are no errors in the run. Additional information on this alert can be found [here](#).

Email Subject

LeanData List Analyzer Run Complete for [File Name]

Recipients

The user that started the List Analyzer run.

Frequency

On demand as needed.

Alert Text

<<IF THERE ARE ERRORS>>

Hello [First Name],

LeanData has completed partial analysis of your file [File Name]. The results are included below and available on the List Analyzer page in LeanData.

- Number of errors: [Number of Errors] :
- Lead-to-Account matches: [Related Accounts]
- Lead-to-Lead matches: [Related Leads]
- Duplicate (to existing lead): [Duplicate Leads]
- Duplicate (to existing contact): [Duplicate Contacts]
- Unmatched Leads (unmatched to existing records): [No Match]

[LINK: View Results]

Please reach out to the LeanData Support Team (hyperlink <support@leandatainc.com>) with any questions.

Thanks,
The LeanData Team



<<IF NO ERRORS>>

Hello [First Name],

LeanData has successfully completed the analysis of your file [File Name]. The results are included below and available on the List Analyzer page in LeanData.

- Lead-to-Account matches: [Related Accounts]
- Lead-to-Lead matches: [Related Leads]
- Duplicate (to existing lead): [Duplicate Leads]
- Duplicate (to existing contact): [Duplicate Contacts]
- Unmatched Leads (unmatched to existing records): [No Match]

[LINK: View Results]

Thanks,
The LeanData Team

Alert Triggers

The alert email is triggered when the List Analyzer completes a user initiated run.

1x Tagging Complete

This alert is intended to let you know that the LeanData 1x Taggings has completed its run and the results are ready for viewing. There are 2 versions of this email, one if there were no errors in the run and one if there are errors in the run. Additional information on this alert can be found [here](#).

Email Subject

LeanData: 1x Tagging results inside!

Recipients

The user that started the List Analyzer run.

Frequency

On demand as needed.

Alert Text

<<IF NO ERRORS>>

The 1x Tagging Job initiated by [Current User] is complete!



Below are the tagging results for [Org Name] ([Org ID]):

- Status: [Status]
- Status Details: [Extended Status]
- Processed: [Items Processed] / [Total Items]
- Number of uncaught batch errors (critical SFDC errors) : [Number of Errors]

Leads that met the conditions (Insert Parameters / query here in parentheses):

- [Total Leads] Total Leads
- [Matched Leads] Leads found with Account Matches
- [Num Filtered Out Leads] Leads with matching Accounts filtered out
- [Update Errors for Lead] Database update failures (errors with attempted update)
- [Num Tagged Leads] Tagged

<<IF ERRORS>>

Below are the error details:

- Database update errors: [Num Update Failures]
- Update Errors by Type:
[ERRORS]
- Total non-update errors: [Num Non-Update Errors]
- Non-Database Update Errors By Type:
[Exception Types]

Note: these numbers may be different from above ""Database update failures"" numbers due to updates to untagged Leads.

Please contact support@leandatainc.com with any questions.

Thanks,
The LeanData team

Alert Triggers

The alert email is triggered when the 1 time tagging completes a user initiated job.



Mass Lead Conversion Complete

This alert is intended to let you know that the LeanData Mass Lead Conversion has completed its run and the results are ready for viewing.

Email Subject

LeanData Mass Lead Conversion Complete

Recipients

The user that started the List Analyzer run.

Frequency

On demand as needed.

Alert Text

<<If L2A>>

Hello [User First Name],

LeanData has completed the mass conversion of [Num of Successful Conversions] Salesforce Leads to Contacts under the account <Account URL>[Account Name]

Thanks,
LeanData Team

--

<<If NOT L2A>>

Hello [User First Name],

LeanData has created a new Salesforce account <Account URL>[Account Name] with [Num of Successful Conversions] Contacts.

Thanks,
LeanData Team

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<<If Bad CSV File>>

Hello [User First Name],

LeanData failed to convert Leads in [Org Name] ([Org Id]).



Error Reason:

CSV file: [CSV INFO]

Please contact support@leandatainc.com with any questions.

Thanks,
LeanData Team

Alert Triggers

There are 3 email alerts that can be triggered depending on the outcome of the conversion:

- Successful mass conversion
- Partial Successful conversion (some leads not converted)
- Bad CSV file

Mapped Account Fields Update Complete

This alert is intended to let you know that the LeanData Mapped Account Fields Update has completed its run and the results are ready for viewing. Additional information for this alert can be found [here](#).

Email Subject

LeanData Mapped Account Fields Update Complete

Recipients

By Default, the integration user and the user that initiated the job will receive these emails. You can also include email addresses of needed contacts in the application settings.

Frequency

On demand as needed.

Alert Text

<<If L2A>>

Hello [User first name] ,

LeanData has completed the mass conversion of [Num of Successful Conversions] Salesforce Leads to Contacts under the account <Account URL>[Account Name]

Thanks,
LeanData Team

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<<If NOT L2A>>

Hello [User first name],

LeanData has created a new Salesforce account <Account URL>[Account Name] with [Num of Successful Conversions] Contacts.

Thanks,
LeanData Team

--

<<If Bad CSV File>>

Hello [User first name],

LeanData failed to convert Leads in [Org Name] ([Org Id]).

- Error Reason: [Null Blob]
- CSV file: [CSV INFO]

Thanks,
LeanData Team

Alert Triggers

This email is triggered when the Mapped Account Fields sync has completed.

Owner Mapping File Upload Complete

This alert is intended to let you know that the LeanData Owner Mapping has been updated by uploading a new csv file. Additional information for this alert can be found [here](#).

Email Subject

LeanData Owner Mapping File Upload Results

Recipients

By Default, the integration user and the user that initiated the job will receive these emails. You can also include email addresses of needed contacts in the application settings.

Frequency

On demand as needed.

Alert Text

Hello [User Name],

The LeanData owner mapping file has been processed. The attached file contains detailed results.

[CSV FILE]

- [Total Processed] Owner Mappings processed
- [Total Successful] successful
- [Total Failures] failed

Thanks,
LeanData Team

Alert Triggers

This alert is triggered when you update the Owner Mappings in Router by uploading a new csv.

Summary

This guide has provided an overview of the various Alert Emails that LeanData will send out. Alerts are categorized in 2 groups: System Alerts and Interaction Alerts. System Alerts are sent as needed when there is a situation in LeanData that needs your attention. The interaction alerts are designed to inform you when an activity has been completed.