TROUBLESHOOTING TIPS

MASTERING AUTOMATION WORKFLOWS ONE STEP AT A TIME

Have You Tested It?

To ensure your automation is configured to your liking, go through your process as a client would, using placeholder information. The log tabs, along with contact record data, can help you optimize your setup. Don't hesitate to permanently delete your contact and try again to get it just right.

Have You Cleared Your Cache?

Updates pushed by your browser, system, or other services can fill up your browser cache. Clearing your cache solely removes data stored on your device from the websites and apps you visit, with no influence on your photos or saved files. A simple search for instructions depending on your browser you use will give you the directions you need.

Do Your Triggers Need Additional Filters?

To give more clarity to your workflow triggers, incorporate suitable filters that outline your requirements for it to execute. Merely having it set to trigger off of "Form Submitted" is vague and doesn't provide any specifics about which form is being referred to. Incorporating the "form is" filter can help alleviate this issue.

Have You Sent A Loom Video To Support?

To expedite finding a solution, take advantage of loom.com as a communication tool when reaching out to the support team. The website provides us with valuable context about the issue, helping us help you more efficiently.

Is Allow Re-Entry on?

The "Allow Re-entry" toggle in your workflow settings is responsible for allowing a contact to enter your workflow multiple times. Consider if this feature is necessary for your project and if you only need it temporarily for testing purposes.

Have You Looked Through Workflow Logs?

If you're ever in need of troubleshooting a workflow, there are two tabs you can check out. Firstly, the Execution Logs tab will show you every step executed in chronological order for all contacts. Secondly, you can go to the Enrollment History tab to see each contact in your flow and which step they are currently on, as well as their next scheduled execution. These features are incredibly useful when it comes to tracking the execution of workflows.

Have You Checked Your Audit Logs?

When you access your account settings, take a look at the left side menu and scroll down to "Audit Logs" to view various logs and changes made to contacts, custom fields, values, and more. This feature is incredibly useful when you need to know who made a change, what was changed, and when it was changed.

Have You Tried An Incognito Tab or Other Browser?

If you're experiencing issues with updates or your cache interfering with the system's functionality, consider testing it out in an incognito private browser. This allows you to bypass the cache and start fresh. Another option is to use a different browser like Safari to see if the issue persists.

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