

package.md

07-troubleshooting/common-errors.md

PS> boring fix lead-followup

status: practical, transparent, no hype

Common Errors and Fixes

Lead does not appear in the system

Likely causes:

- form is not connected
- automation is turned off
- field mapping changed
- API/webhook URL changed
- database credentials expired

Quick fix:

1. Submit a fresh fake lead.
2. Check the form submission log.
3. Check the automation run history.
4. Check the destination tool.
5. Remap fields if names changed.

Email did not send

Likely causes:

- email provider not connected
- domain not verified
- automation failed
- sender address not allowed
- recipient email invalid

Quick fix:

1. Check provider logs.
2. Verify sender domain.
3. Send a manual test.
4. Check spam.
5. Confirm the email step receives the right fields.

SMS did not send

Likely causes:

- phone number formatted incorrectly
- provider credentials missing
- SMS compliance/permission issue
- unsupported destination
- automation condition skipped the SMS step

Quick fix:

1. Test with your own number.
2. Normalize phone format.
3. Check provider logs.
4. Confirm opt-in/compliance requirements.

Follow-up reminder missing

Likely causes:

- `next_follow_up_at` is blank
- timezone mismatch
- task/calendar step failed
- reminder filter excludes the lead

Quick fix:

1. Check the lead record.
2. Check timezone settings in every tool.
3. Confirm the due-date formula or automation.
4. Create a test due today.

AI reply sounds weird

Likely causes:

- not enough business context
- prompt asks for too much

- no tone guidelines
- AI invented missing information

Quick fix:

1. Add business context.
2. Use a shorter prompt.
3. Give examples of good replies.
4. Tell the AI what not to invent.
5. Human review before sending.

The system works, but no one uses it

Likely causes:

- too many fields
- no clear owner
- no daily view
- reminders land in the wrong place
- team still lives in email

Quick fix:

1. Reduce required fields.
2. Assign one owner.
3. Create a `Needs Follow-Up Today` view.
4. Send reminders where the operator already works.
5. Review the system once per week until it becomes habit.