Salesforce Incident Management Runbook

General Salesforce Failure Modes (Examples)

The general Salesforce failure modes based on a combination of:

1. Prevalence in Production Incidents

These issues frequently appear across Salesforce orgs and are among the most common causes of real-world service degradation or outages:

- **Governor Limit Exceeded** is a classic and recurring issue in any Salesforce environment with custom Apex or Flow automations.

- **API Call Limit Exceeded** affects integrations, often during peak loads or due to misconfigured external systems.

- **Authentication Failures** (OAuth/SAML) frequently appear in enterprise SSO configurations, especially when certificates expire or federated IDPs have changes.

- **Deployment Failures** are a common pain point during releases, especially when metadata dependencies or coverage aren't fully understood.

- **Data Corruption or Loss** is a high-risk failure mode with business-critical implications, often due to automation or integration bugs.

2. Coverage Across Key Domains

These modes span the major operational layers of Salesforce:

- **Runtime execution (Apex, Flows)** → Governor limits.

- **Security/Access (Auth)** → SSO, OAuth, certs.

- **Integration (APIs)** → External systems.

- **DevOps/Change Management** → Deployment.

- **Data Integrity** → Record-level failures or corruption.

3. Incident Response and SRE Relevance

From a **Site Reliability Engineering (SRE)** and **Production Support** lens, these failure types:

- Can be proactively monitored.

- Often involve cross-functional coordination.

- Have remediations that can be standardized (e.g. alerting, rollback plans, circuit breakers).

4. Vendor Support Patterns

Salesforce documentation, Premier Support cases, and Trust site advisories also reflect these as frequently diagnosed root causes.

Failure Mode:
Governor Limit Exceeded

Symptoms:
Apex errors like LIMIT_EXCEPTION, process automation fails

Diagnostics:
Debug logs, Apex Execution Overview, API usage reports

Causes:
Excessive DML/SOQL in loops, unoptimized automation

Actions:
Review failing code/flows, optimize queries and logic, temporarily disable heavy automation

Remediation:
Refactor automation, implement limits monitoring, educate devs on governor constraints

Failure Mode:
Authentication Failure (OAuth/SAML)

Symptoms:
Users cannot log in, SSO redirects fail

Diagnostics:
Login history, Auth provider logs, connected app error logs

Causes:
Expired certificates, misconfigured identity provider, revoked tokens

Actions:
Update expired certificates, validate IDP configs, reauthorize integrations

Remediation:
Proactive cert renewal alerts, implement backup login methods, monitor auth endpoints

Failure Mode:
API Call Limit Exceeded

Symptoms:
Integration calls fail with 403 or 429 error, external system errors

Diagnostics:
System Overview > API Usage, Event Monitoring API logs

Causes:
Bulk data loads, inefficient polling, runaway integrations

Actions:
Throttle or pause external calls, prioritize critical API clients

Remediation:
Implement caching, rate limiting, and optimize external integrations

Failure Mode:
Deployment Failure

Symptoms:
Changesets or CI/CD pipelines fail, metadata mismatch errors

Diagnostics:
Deployment error logs, Apex test failures

Causes:
Missing dependencies, bad test coverage, validation rule conflicts

Actions:
Review dependency trees, rollback or patch failed deployment

Remediation:
Pre-validate in full sandbox, enforce 100% test coverage with realistic data

Failure Mode:

Data Corruption or Loss

Symptoms:
Missing records, incorrect field values, audit trails show unwanted deletes

Diagnostics:
Field History Tracking, Debug logs, Data Export comparisons

Causes:
Improper automation, faulty ETL jobs, admin errors

Actions:
Restore from backup, rollback data changes, disable offending flows

Remediation:
Enable Shield (Field Audit Trail), validate ETL logic, enforce restricted permissions

Salesforce Automotive Cloud (N/A - direct sales model)

Purpose and Function: Designed for automotive companies to manage the end-to-end customer journey from marketing to after-sales service. Includes industry-specific data models, customer lifecycle management, and integrations with dealer management systems.

Platform-Specific Incident Management Runbook

Failure Mode:

Integration failure with Dealer Management System (DMS)

Symptoms:
Missing or delayed vehicle service records, broken workflow automation, 500 errors in dashboards

Diagnostics:
Check DMS integration logs, Monitor Event Bus and platform events, Review API callout failures from debug logs

Causes:
Expired authentication token for DMS, API schema changes on the DMS side, Platform event throttling

Re-authenticate the DMS connector, Review schema with DMS provider, Apply exponential backoff for retries

Remediation:

Deploy a webhook health check and alerting mechanism, Implement schema version validation, Add fallback queues for failed messages

Salesforce Sales Cloud

Purpose and Function: Core CRM module for managing leads, opportunities, accounts, and sales pipelines. Enhances productivity with lead scoring, forecasting, and automation.

Platform-Specific Incident Management Runbook

Failure Mode:

Opportunity creation failure

Symptoms:

Users cannot create opportunities; UI displays 'Unknown Error'

Diagnostics:

Apex logs for insert triggers, Check validation rules and flows, Monitor governor limits in logs

Causes:

Trigger logic error or uncaught exception, Validation rules with recent changes, Field-level security issues

Actions:

Roll back recent metadata deployments, Disable suspect automation temporarily, Enable debug logs for affected users

Remediation:

Add test classes for edge case scenarios, Introduce pre-deployment sandbox regression tests, Refactor complex triggers into managed flows

Salesforce Service Cloud

Purpose and Function: Built for customer service teams to handle case management, SLAs, and omnichannel support through chat, voice, email, and bots.

Failure Mode:

Case routing fails

Symptoms:

Cases are not assigned; Omni-Channel queue remains idle

Diagnostics:

Omni-Channel debug logs, Queue membership and presence status, Routing rules and assignment flows

Causes:

Improper agent presence configuration, Broken routing rule criteria, Object sharing settings misconfigured

Actions:

Restore default presence configuration, Temporarily route all cases to fallback queue, Use 'Audit Trail' for recent admin changes

Remediation:

Build alerting on high queue backlog, Establish routing rule test scripts, Automate validation of agent presence health

Salesforce Field Service

Purpose and Function: Manages mobile workforces, schedules service appointments, and optimizes resource routing using AI.

Platform-Specific Incident Management Runbook

Failure Mode:

The scheduling optimizer does not allocate appointments

Symptoms:

Appointments remain unscheduled; 'no matches' error

Diagnostics:

Analyze optimization job results, Check Service Territory setup and working hours, Review skill requirement configurations

Technicians lack required skills, No overlap in operating hours, Optimization job fails due to data inconsistency

Actions:

Manually allocate critical appointments, Adjust skill matrix or working hours, Re-run optimizer with reduced constraints

Remediation:

Run daily validation of territory and skill mappings, Create fallback assignment logic, Monitor optimization job success rates

Salesforce Experience Cloud

Purpose and Function: Builds branded portals and digital experiences for customers, partners, or employees with secure Salesforce data access.

Platform-Specific Incident Management Runbook

Failure Mode:

Community site outage or slow load

Symptoms:
Site inaccessible (404/503), slowness, or login failures

Diagnostics:

Analyze Site Status in Experience Builder, Salesforce Trust status page, Lightning Component logs

Causes:

Large custom Lightning components, Overuse of SOQL/DML inside Aura components, Platform maintenance window

Actions:

Notify users via fallback status page or social, Revert to previous site version if recent changes occurred, Log a case with Salesforce Support

Remediation:

Implement Performance Monitoring (Page Load Analysis), Use static caching for content, Avoid client-heavy initialization scripts

Salesforce Digital Engagement

Purpose and Function: Handles messaging channel interactions (WhatsApp, SMS, FB Messenger, Web Chat) and extends Service Cloud capabilities.

Platform-Specific Incident Management Runbook

Failure Mode:

Incoming messages not appearing in console

Symptoms:

Chat messages not visible; customer sessions drop

Diagnostics:

Messaging session logs, Channel configuration status, Connected App OAuth settings

Causes:

Channel disconnect or expired token, Platform Event delivery issues, Message-to-case mapping error

Actions:

Re-authenticate channel connections, Requeue failed platform events, Review and update the inbound message handler logic

Remediation:

Add monitoring on message queue length, Validate token expiry with proactive alerts, Periodic review of mapping logic and API contracts