Salesforce Troubleshooting Guide

Login Issues

Problem: Unable to log in to Salesforce
Possible Causes:

1. Incorrect password.
2. Attempting to log in from an unauthorized IP range.
3. Trying to log in outside your organization's permitted login hours.

Steps to Resolve:

1. Verify the username and password.
2. Confirm with the admin if login IP ranges or login hours are restricted.
3. Admins can check login history:
   - Navigate to:
     `Setup → User → Select User → Login Histories`

Checking Password Policies

Steps to Access Password Policies:

1. Navigate to:
   `Setup → Search "Password Policies"`
2. View details such as:
   - Invalid login attempts.
   - Account lockout period.

Common Errors and Fixes

Error: Too many DML statements: 151

Cause: Salesforce limits DML (Data Manipulation Language) statements to 150 per transaction.
Fix:

- Avoid placing DML operations inside loops.
- Use collections to process records in bulk.

Error: Too many SOQL queries: 101

Cause: More than 100 SOQL (Salesforce Object Query Language) queries are executed in a single transaction.
Fix:

1. Avoid writing SOQL queries inside loops.
2. Retrieve data in bulk and process it outside loops.

Error: Apex CPU time limit exceeded

Cause: Transaction processing time exceeds Salesforce’s CPU limit.
Fix:

1. Filter SOQL queries to fetch only required data.
2. Avoid placing DML or SOQL operations inside loops.
3. Use aggregate SOQL queries and optimize logic for efficiency.

Error: Too many query rows

Cause: A query retrieves more than 50,000 rows in a single transaction.
Fix:

1. Use batch processing to handle large data sets.
2. Apply filters in queries to fetch only necessary records.

Error: FIELD_CUSTOM_VALIDATION_EXCEPTION

Cause: A custom validation rule is violated (e.g., mandatory field left empty).
Fix:

- Check the validation rules applied to the object.
- Ensure all required fields have valid values.

Error: Attempt to de-reference a null object

Cause: Accessing a variable, object, or list without initialization or when it contains null values.
Fix:

1. Ensure variables are properly initialized.
2. Apply null checks before using variables.
3. For lists, verify they are not empty before accessing elements.

Error: REQUEST_LIMIT_EXCEEDED

Cause: Exceeding the allowed number of API requests in a 24-hour period.
Fix:

1. Optimize integration logic to reduce unnecessary API calls.
2. Ensure API usage is efficient.

Error: SObject row was retrieved via SOQL without querying the requested field

Cause: Trying to access a field not included in the SOQL query.
Fix:

- Include all fields you intend to access in your SOQL query.

Error: CANNOT_INSERT_UPDATE_ACTIVATE_ENTITY

Cause: This error occurs when a trigger fails during an insert or update operation, often due to recursive calls or unhandled exceptions.
Fix:

1. Check the trigger code to avoid recursive calls.
2. Use static variables to prevent recursion.
3. Debug the trigger to identify and handle exceptions properly.

Error: INVALID_FIELD_FOR_INSERT_UPDATE

Cause: Trying to insert or update a field that is either read-only or not accessible to the current user profile.
Fix:

1. Verify the field-level security settings for the user profile.
2. Ensure the field is accessible and writable.

Error: DUPLICATE_VALUE

Cause: An attempt to insert a record with a duplicate value in a field that enforces uniqueness (e.g., Unique Fields, External IDs).
Fix:

1. Check for existing records with the same value in the unique field.
2. Ensure the new record has unique data in the required field.

Error: STORAGE_LIMIT_EXCEEDED

Cause: The Salesforce org has reached its allocated data or file storage limits.
Fix:

1. Clean up unnecessary records or files.
2. Archive old data.
3. Purchase additional storage from Salesforce if required.

Error: FIELD_INTEGRITY_EXCEPTION

Cause: Attempting to insert or update a field with invalid or inappropriate values (e.g., a picklist field with a value not defined in the picklist).
Fix:

1. Ensure the values being set match the valid options for the field.
2. For picklist fields, validate the field values before insertion or update.

Error: MIXED_DML_OPERATION

Cause: This occurs when DML operations on setup and non-setup objects are mixed in a single transaction.
Fix:

1. Separate the operations into different transactions.
2. Use asynchronous processing (e.g., future methods) for one of the DML operations.

Error: UNABLE_TO_LOCK_ROW

Cause: This error occurs when a record is locked due to another process or user action and cannot be updated.
Fix:

1. Use a retry mechanism to attempt the update later.
2. Optimize queries to reduce record contention.
3. Check for and avoid locking conflicts in workflow processes.

Error: INVALID_CROSS_REFERENCE_KEY

Cause: An invalid or non-existent reference is provided for a lookup or master-detail field.
Fix:

1. Verify that the referenced record exists.
2. Ensure the field is populated with a valid record ID.

Error: STRING_TOO_LONG

Cause: The value provided for a text field exceeds the maximum allowed length.
Fix:

1. Validate the field length before inserting or updating the record.
2. Truncate or shorten the input string to fit the field's limit.

Error: INVALID_QUERY_FILTER_OPERATOR

Cause: An unsupported operator is used in a SOQL query filter.
Fix:

1. Review the query filter and replace the invalid operator with a valid one.
2. Refer to the Salesforce SOQL documentation for the list of supported operators.

Slow Page Performance

Problem: Pages load slowly or take time to respond.
Causes:

- Complex customizations.
- Large amounts of data on the page.
- Browser caching issues.

Solution:

1. Optimize page layouts by removing unnecessary fields.
2. Use filters to display only relevant data.
3. Clear browser cache or switch to another browser.

Reports and Dashboards Not Loading

Problem: Users cannot access or view reports and dashboards.
Causes:

- Insufficient user permissions.
- Missing report folder access.
- Large data volumes causing timeouts.

Solution:

1. Ensure the user has the correct permissions to access reports and dashboards.
2. Share the report folder with the user.
3. Reduce the data scope by adding filters.

Missing Data or Records

Problem: Users cannot find specific records or data.
Causes:

- Insufficient sharing or visibility settings.
- Records filtered out due to list view criteria.
- Records deleted or archived.

Solution:

1. Check sharing settings and ensure the user has access.
2. Adjust list view filters to include all relevant records.
3. Look in the recycle bin for deleted records.

Workflow Rules or Processes Not Triggering

Problem: Automation such as workflows, process builders, or flows are not working as expected.
Causes:

- Criteria for triggering is not met.
- Errors in workflow or process logic.
- Process conflicts or deactivation.

Solution:

1. Review the criteria and logic of workflows or processes.
2. Check the process execution logs for errors.
3. Ensure there are no overlapping or conflicting processes.

Incorrect Email Notifications

Problem: Users receive incorrect or no email notifications.
Causes:

- Email delivery issues.
- Misconfigured email templates.
- Workflow or process criteria not met.

Solution:

1. Check the email logs under: `Setup → Email Logs`.
2. Verify the email template and ensure it is correctly linked.
3. Test the workflow or process to ensure it is triggering properly.

Integration Errors

Problem: Third-party integrations fail or behave unexpectedly.
Causes:

- Incorrect API keys or credentials.
- Exceeding API limits.
- Changes in the third-party system.

Solution:

1. Verify API credentials and keys.
2. Monitor API usage and optimize API calls.
3. Update integration settings to align with third-party changes.

Record Locking Issues

Problem: Users cannot update or delete records.
Causes:

- Record locked by another process or user.
- Validation rules blocking updates.

Solution:

1. Wait for the process or user to release the lock.
2. Modify validation rules if they are unnecessarily restrictive.

Missing Custom Buttons or Links

Problem: Custom buttons or links are not visible to users.
Causes:

- Incorrect page layout assignment.
- Profile-level visibility restrictions.

Solution:

1. Assign the correct page layout to the user profile.
2. Ensure the button or link is visible for the user profile.

Data Import Issues

Problem: Users face errors while importing data using the Data Loader or Import Wizard.
Causes:

- Incorrect field mappings.
- Data format mismatches.
- Validation rule failures.

Solution:

1. Verify field mappings and ensure all required fields are included.
2. Format data according to Salesforce requirements (e.g., date format).
3. Disable unnecessary validation rules temporarily during import.

Unable to Edit Records

Problem: Users cannot edit specific records.
Causes:

- Record-level security restrictions.
- Validation rules or triggers preventing edits.

Solution:

1. Check record ownership and sharing rules.

2. Review validation rules and triggers for potential issues.

Error: “Insufficient Privileges”

Problem: Users encounter an "Insufficient Privileges" error while accessing certain features.
Causes:

- Missing permissions on the object, field, or record level.

Solution:

1. Update user permissions via profiles or permission sets.
2. Adjust sharing settings to grant access to the user.

Sandbox Login Issues

Problem: Users cannot log in to the Salesforce Sandbox.
Causes:

- Incorrect login URL.
- Wrong username or password.

Solution:

1. Use the correct login URL: `https://test.salesforce.com`.
2. Verify the username, which usually includes `.sandboxname` after the username.
3. Reset the password if needed.

Field Not Updating

Problem: Fields are not updating as expected during record changes.
Causes:

- Automation conflicts (e.g., workflow and process builder updating the same field).
- Field-level security restrictions.

Solution:

1. Check field-level security to ensure edit permissions.
2. Review and resolve conflicts in automation processes.
3. Test changes with a simplified process to isolate the issue.

Error: “MALFORMED_QUERY” in SOQL

Problem: Users encounter the "MALFORMED_QUERY" error while running a query.
Causes:

- Incorrect syntax in SOQL.
- Referencing invalid fields or objects.

Solution:

1. Verify the syntax and field names in the SOQL query.
2. Use the Salesforce Object Reference guide to ensure all fields and objects are valid.
3. Test the query in the Developer Console.

Duplicate Records

Problem: Users find duplicate records in Salesforce.
Causes:

- Lack of duplicate rules or matching criteria.
- Manual data entry errors.

Solution:

1. Enable duplicate management rules under:
   - `Setup → Duplicate Rules`.
2. Use the Data Import Wizard with matching criteria to avoid duplicates.
3. Use a deduplication tool like DemandTools or Data.com to clean up existing records.

Workflow Email Alerts Not Sending

Problem: Email alerts set up in workflows are not being sent.
Causes:

- Workflow criteria not met.
- Email Deliverability settings are restricted.

Solution:

1. Review and update workflow criteria.
2. Ensure Email Deliverability is set to "All Emails" under:
   - `Setup → Deliverability`.
3. Check the email template and recipient's email address.

Record Not Visible in Reports

Problem: Records do not appear in reports as expected.
Causes:

- Filters in the report exclude the record.
- Insufficient sharing settings or record ownership.

Solution:

1. Adjust report filters to include the missing records.
2. Check sharing settings to ensure visibility.
3. Confirm that the record meets the report criteria.

Chatter Feed Not Visible

Problem: Users cannot see the Chatter feed on records.
Causes:

- Chatter is disabled for the object.
- User lacks permissions to view the feed.

Solution:

1. Enable Chatter for the object under:
    - `Setup → Feed Tracking`.
2. Verify the user has "Read/Write" access to the record.
3. Ensure Chatter is enabled for the organization.

Error: "Insufficient Access Rights on Cross-Reference Id"

Problem: Users see this error while creating or updating a record.
Causes:

- The user does not have access to a related record referenced in the action.

Solution:

1. Ensure the user has proper access to the related record.
2. Update sharing settings or grant permissions through permission sets.

Dashboards Showing Incorrect Data

Problem: Dashboards display outdated or incorrect data.
Causes:

- Source report filters are incorrect.
- Dashboard refresh is overdue.

Solution:

1. Verify and update the filters in the source report.
2. Refresh the dashboard manually or schedule a refresh.
3. Ensure the user running the dashboard has access to the correct data.

Files Not Uploading

Problem: Users are unable to upload files to Salesforce.
Causes:

- File size exceeds the allowed limit.
- File type is unsupported.

Solution:

1. Check Salesforce's file size and type limitations (e.g., max file size is 2GB).

2. Compress large files or convert unsupported formats.
3. Ensure users have "Attach Files" permissions.

Error: "Uncaught Error in Visualforce Page"

Problem: Users encounter an error when interacting with a Visualforce page.
Causes:

- Error in Apex controller logic.
- Incorrect page parameters.

Solution:

1. Debug the Apex controller to identify and resolve errors.
2. Verify the input parameters passed to the Visualforce page.
3. Use the Developer Console to debug issues.

Data Export Issues

Problem: Users cannot export data from Salesforce.
Causes:

- Insufficient permissions to export data.
- Data export limits exceeded.

Solution:

1. Grant "Export Reports" permission in the user profile.
2. Break down large exports into smaller chunks.
3. Use the Data Loader for bulk exports.

Custom Button or Link Not Working

Problem: Custom buttons or links fail to perform the intended action.
Causes:

- Incorrect URL or action logic.
- API changes affecting the functionality.

Solution:

1. Verify the URL or logic behind the custom button.
2. Update the action to align with the current API version.
3. Test the button in a sandbox environment.

Error: "INVALID_FIELD_FOR_INSERT_UPDATE"

Problem: Users see this error when trying to insert or update a record.
Causes:

- Attempting to update a field that is read-only or system-controlled.

Solution:

1. Verify the field's permissions and ensure it is editable.
2. Remove system-controlled fields from the update request.

AppExchange App Issues

Problem: Installed apps from AppExchange are not working as expected.
Causes:

- Version incompatibility.
- Missing permissions or configuration.

Solution:

1. Ensure the app version is compatible with your Salesforce instance.
2. Follow the app's setup and configuration guide.
3. Grant required permissions for the app to function properly.

Record Type Not Available

Problem: Users cannot select a record type while creating a record.
Causes:

- Record type is not assigned to the user profile.

Solution:

1. Assign the record type to the user's profile.
2. Enable the record type for the user via permission sets.

Error: "Apex Heap Size Too Large"

Problem: Users encounter this error during processing.
Causes:

- Transaction uses more memory than allowed (6MB for synchronous, 12MB for asynchronous).

Solution:

1. Reduce data processing by filtering SOQL queries.
2. Use collections to minimize heap usage.
3. Break large processes into smaller chunks.

Unable to Schedule Reports

Problem: Users cannot schedule reports.
Causes:

- User lacks "Schedule Reports" permission.

Solution:

1. Enable "Schedule Reports" permission in the user’s profile or permission set.
2. Ensure the user has access to the report and folder.

Data Import Wizard Not Importing Records

Problem: Records are not imported as expected using the Data Import Wizard.
Causes:

- Invalid data format in the import file.
- Missing required fields.

Solution:

1. Ensure all required fields are populated and match Salesforce field types.
2. Validate the file format (e.g., CSV) before importing.
3. Check for error messages in the import log for troubleshooting.

Lightning Component Not Loading

Problem: Custom Lightning components fail to load or display in the Lightning app.
Causes:

- Missing permissions for the component.
- Syntax errors in the component code.

Solution:

1. Grant users access to the component via:
   - `Setup → Lightning Component Access`.
2. Debug the component using Chrome Developer Tools or the Salesforce Lightning Inspector.
3. Deploy components using valid syntax

Validation Rules Blocking Record Save

Problem: Users cannot save records due to validation rule errors.
Causes:

- Validation rules are too restrictive or do not account for specific scenarios.

Solution:

1. Review the validation rules under `Setup → Validation Rules`.
2. Update the rules to include exceptions for specific use cases.
3. Educate users about the required data to avoid errors.

Record Sharing Not Working

Problem: Users are unable to view records they should have access to.
Causes:

- Sharing settings are too restrictive.
- Manual sharing is not applied correctly.

Solution:

1. Review the organization-wide defaults and sharing rules.
2. Use manual sharing or create custom sharing rules if needed.
3. Check the user's profile and role hierarchy for access permissions.

Scheduled Jobs Failing

Problem: Scheduled Apex jobs fail to execute or complete successfully.
Causes:

- Errors in the Apex job logic.
- Exceeding governor limits during execution.

Solution:

1. Check the Apex job status under `Setup → Apex Jobs`.
2. Review the job's logic for errors or inefficiencies.
3. Reschedule the job with optimized logic.

Workflow Rules Not Triggering

Problem: Workflow rules fail to execute even when conditions are met.
Causes:

- Rule criteria are not properly defined.
- Conflicts with other automation tools like Process Builder or Flows.

Solution:

1. Ensure the rule's criteria match the conditions in the record.
2. Prioritize one automation tool to avoid conflicts.
3. Test the workflow in a sandbox.

Duplicate Field Values in Records

Problem: Duplicate values appear in fields meant to be unique, such as email or account numbers.
Causes:

- Unique field constraints are not applied.
- No validation rules to enforce uniqueness.

Solution:

1. Enable "Unique" constraints in the field settings.
2. Create validation rules to prevent duplicate entries.
3. Use data cleanup tools to remove existing duplicates.

Email-to-Case Not Creating Cases

Problem: Incoming emails do not create cases automatically.
Causes:

- Incorrect email services configuration.
- Email exceeds size limits or contains unsupported attachments.

Solution:

1. Verify the Email-to-Case settings under `Setup → Email-to-Case`.
2. Ensure the email address used matches the configured email service.
3. Test with a smaller email or supported attachments.

Integration API Calls Failing

Problem: External integrations using the Salesforce API fail.
Causes:

- Authentication errors.
- Exceeding API usage limits.

Solution:

1. Ensure API credentials (client ID, secret, token) are correct.
2. Check the organization’s API usage under `Setup → API Usage`.
3. Optimize API calls by combining queries and reducing unnecessary requests.

Files Tab Missing for Users

Problem: Users cannot see the "Files" tab in Salesforce.
Causes:

- Files tab is not added to the app.
- User profile lacks access to the tab.

Solution:

1. Add the Files tab to the app under `Setup → App Manager`.
2. Update the user profile or permission set to include Files access.

Reports Showing Incorrect Totals

Problem: Totals and summaries in reports do not match expected values.
Causes:

- Filters in the report are excluding records.
- Grouping or formula errors in the report.

Solution:

1. Verify the report filters and ensure they include the correct data.
2. Review grouping levels and formulas for accuracy.
3. Use the "Debug Report" feature to identify discrepancies.

Lightning Record Page Not Updating

Problem: Changes to a Lightning record page do not reflect for users.
Causes:

- Page is not activated for the app or profile.
- Cache issues.

Solution:

1. Activate the page for the intended app and user profiles.
2. Clear the browser cache and refresh the page.
3. Ensure the correct version of the page is being used.

Custom Objects Not Appearing in Global Search

Problem: Custom objects do not show up in Salesforce global search.
Causes:

- Search indexing is not enabled for the object.

Solution:

1. Enable "Allow Search" for the custom object under `Setup → Object Manager`.
2. Re-index the object if needed.
3. Ensure users have access to the records and fields.

Unable to Mass Update Records

Problem: Users cannot perform mass updates on records.
Causes:

- Lack of "Mass Edit" permissions.
- Field-level security restrictions.

Solution:

1. Grant "Mass Edit for Lists" permission in the profile or permission set.
2. Verify edit access for the specific fields being updated.
3. Use tools like the Data Loader for bulk updates.

Data Loss During Field Type Change

Problem: Data is lost when changing the field type (e.g., from text to number).
Causes:

- Incompatibility of existing data with the new field type.

Solution:

1. Export the data before making changes.
2. Ensure the new field type supports the existing data.
3. Re-import the data if necessary after the field type change.

Error: “Invalid Cross-Reference Key”

Problem: This error occurs during record updates or imports.
Causes:

- Invalid or non-existent reference ID in a related field.

Solution:

1. Verify that the related field contains valid IDs.
2. Use lookups to confirm the reference values before updating.
3. Correct any invalid data in the import file.

List Views Not Showing All Records

Problem: Users cannot see all expected records in a list view.
Causes:

- List view filters exclude some records.

Solution:

1. Edit the list view filters to include the missing records.
2. Ensure the user has access to all records included in the list view.
3. Use "All Records" instead of "My Records" if needed.

Process Builder Not Updating Fields

Problem: Process Builder fails to update fields as expected.
Causes:

- Field update criteria are not met.
- Conflicts with other automation tools.

Solution:

1. Validate the criteria used in the process.
2. Test the process in isolation to identify conflicts.
3. Simplify automation logic to reduce overlaps.

Login As Another User Not Working

Problem: Admins cannot log in as another user.
Causes:

- Feature is disabled in the org.
- User profile permissions are restricted.

Solution:

1. Enable "Login Access" for admins under `Setup → Login Access Policies`.
2. Ensure the admin has "Manage Users" permission.
3. Verify the user's settings to allow admin login access.

“Record Not Found” Error

Problem: Users receive a "Record Not Found" error when trying to access a record.
Causes:

- Incorrect or deleted records.
- Field-level security or sharing settings blocking access.

Solution:

1. Verify the record exists and the user has the correct permissions.
2. Check sharing settings and ensure the user has appropriate access.
3. Use Salesforce's Recycle Bin to check for deleted records.

“Invalid Session ID” Error

Problem: Users encounter “Invalid Session ID” when trying to log in or interact with Salesforce.
Causes:

- Session timeout due to inactivity.
- Session-related issues, such as session expiration or token expiration.

Solution:

1. Ask users to log in again or refresh their session.
2. Ensure Single Sign-On (SSO) tokens are properly configured and not expired.
3. Check the session settings under `Setup → Session Settings`.

Data Loss During Mass Deletion

Problem: Mass deletion of records results in data loss or incomplete deletes.
Causes:

- Insufficient permissions or customizations preventing proper deletion.
- Deleting related records without considering dependencies.

Solution:

1. Verify the user has the "Mass Delete" permission.
2. Ensure related records (like lookup or master-detail relationships) are deleted first if necessary.
3. Use the Data Loader or Data Export to back up data before mass deletion.

Chatter Feed Not Updating Properly

Problem: Chatter feed updates are delayed or not showing recent posts.
Causes:

- Caching issues or network delays.
- Chatter API throttling.

Solution:

1. Clear the cache or refresh the page to ensure updates.
2. Ensure network latency issues are resolved.
3. Contact Salesforce support if issues persist.

Page Layout Not Reflecting Changes

Problem: Changes made to a page layout do not display correctly.
Causes:

- Incorrect profile or user access permissions.
- Caching preventing the layout from updating.

Solution:

1. Ensure the page layout is assigned to the correct profile or user.
2. Clear cache or force a hard refresh in the browser.
3. Test in a sandbox environment before making changes in production.

Missing Custom Fields

Problem: Custom fields are not visible in the record or object settings.
Causes:

- Field-level security settings hiding the field.
- Permission set not assigned to the user.

Solution:

1. Ensure the custom field is added to the correct object.
2. Verify field-level security is enabled for the relevant profiles.
3. Update permission sets to grant access to the field.

Duplicate Records Created by External Systems

Problem: Duplicate records are being created by external systems or APIs.
Causes:

- Lack of deduplication logic in external systems.
- Salesforce automation tools not detecting duplicates.

Solution:

1. Implement deduplication rules or matching logic in external systems.
2. Use Salesforce duplicate management tools like Data Import Wizard or Data Quality rules.
3. Enable duplicate rules or validation rules in Salesforce to prevent duplicates.

Errors When Uploading Large Files

Problem: Users encounter errors when uploading large files (over 25 MB).
Causes:

- File size exceeds Salesforce limits.
- File type not supported by Salesforce.

Solution:

1. Split large files into smaller chunks and upload separately.
2. Ensure the file type is supported by Salesforce (e.g., CSV, PDF).
3. Contact Salesforce support if file size limits need adjustment.

Reports Not Showing Recent Data

Problem: Reports display outdated or incorrect data.
Causes:

- Report filters exclude recent records.
- Schedule frequency not set correctly.

Solution:

1. Review report filters and ensure they include recent records.
2. Ensure reports are scheduled to refresh at the appropriate intervals.
3. Run reports manually to verify data accuracy.

Long Load Times for Record Pages

Problem: Record pages load slowly or times out.
Causes:

- Excessive custom components or page layouts.
- Inefficient SOQL queries or Apex code.

Solution:

1. Review and optimize custom components and page layouts.
2. Optimize SOQL queries to avoid excessive record retrieval.
3. Profile or performance reports can help identify bottlenecks.

Dashboard Not Loading Properly

Problem: Dashboards do not display data or show incomplete results.
Causes:

- Dashboard filters excluding relevant data.
- Data refresh intervals not set properly.

Solution:

1. Review dashboard filters and ensure they are set to display all relevant data.
2. Ensure dashboard components refresh at the correct intervals.
3. Check for any data access issues impacting dashboard visibility.

Incorrect Field Values Displayed in a Report

Problem: Field values in reports are not accurate or expected.
Causes:

- Formula fields or field dependencies not correctly configured.
- Incorrect report grouping or summarization.

Solution:

1. Verify the formula fields and field dependencies for accuracy.
2. Review report grouping and summarization settings.
3. Use Salesforce's "Debug" or "Error Checking" features for formulas.

User Cannot Reset Password

Problem: Users are unable to reset their password.
Causes:

- Password policies not configured properly.
- User not assigned to the correct permission sets.

Solution:

1. Ensure password policies are set under `Setup → Password Policies`.
2. Check the user's profile or permission sets to verify they have reset password access.
3. Provide reset instructions or link for the affected users.

Error “Invalid Field” for Custom Object in Reports

Problem: Users encounter “Invalid Field” errors when reporting on custom objects.
Causes:

- Missing or invalid relationship between custom objects.
- Field not indexed or not accessible.

Solution:

1. Ensure all necessary fields are indexed and accessible.
2. Verify relationship queries between custom objects.
3. Check sharing and field-level security settings.

Too Many Workflow Rules or Triggers Causing Overhead

Problem: Performance degrades due to too many workflow rules or triggers.
Causes:

- Excessive use of workflows or triggers on the same object.

Solution:

1. Review the workflow rules and triggers to ensure they are optimized.
2. Use Process Builder or Flow to reduce complex logic.
3. Aggregate multiple related workflows or triggers into fewer, more efficient ones.

"Email Deliverability Issues"

Problem: Emails sent through Salesforce are not delivered or end up in spam/junk folders.
Causes:

- Incorrect email deliverability settings.
- SPF/DKIM settings not configured properly.

Solution:

1. Verify that email deliverability settings are correctly configured under `Setup → Email`.
2. Ensure SPF and DKIM records are set up correctly in your domain.
3. Test email sending using the Salesforce Email Wizard.

"Field Update Trigger Fails"

Problem: Field updates via triggers are not applied correctly or fail.
Causes:

- Recursive triggers causing conflict.
- Incorrect field update logic.

Solution:

1. Ensure there are no recursive trigger loops.
2. Test trigger logic separately in sandbox before deploying to production.
3. Use governor limits to avoid reaching DML or SOQL limits.

"Unable to Log Out" from Salesforce App

Problem: Users cannot log out from the Salesforce app.
Causes:

- SSO or session issues.
- Caching issues preventing logout.

Solution:

1. Clear cache and cookies from the browser.
2. Check session settings and SSO configuration.
3. Use a different browser or incognito mode for logout.

"Missing Validation Error Messages"

Problem: Users do not see validation error messages when saving a record.
Causes:

- Field validation rules not applied correctly.
- Validation messages not enabled.

Solution:

1. Ensure validation rules are configured correctly under `Setup → Validation Rules`.
2. Verify error messages are enabled and displayed properly.
3. Check user permissions for access to error messages.

"Attachment Size Limit Exceeded"

Problem: Users receive errors when uploading attachments that exceed the size limit.
Causes:

- Attachment size exceeds Salesforce limits (up to 25 MB).

Solution:

1. Reduce the size of the attachments before uploading.
2. Consider external storage options (like Amazon S3) if large files are needed.
3. Increase attachment size limits if necessary, but contact Salesforce support.

"Users Cannot Switch Language Preferences"

Problem: Users are unable to change their language preferences in Salesforce.
Causes:

- Language settings not enabled or properly configured.

Solution:

1. Ensure that language preferences are configured under `Setup → User Management → Profiles`.
2. Verify the language settings are set up at the organization level.
3. Ensure users have permission to change language preferences.

"App Exchange App Installation Fails"

Problem: Users encounter errors when installing third-party apps from the AppExchange.
Causes:

- Insufficient permissions or security settings.
- Outdated browser or network issues.

Solution:

1. Ensure user has the necessary permissions to install apps.
2. Clear browser cache and try installing the app again.
3. Check network restrictions or firewall settings.

"Invalid Token or Authorization Error"

Problem: Users see errors due to invalid or expired access tokens.
Causes:

- Incorrect OAuth configuration or token expiration.

Solution:

1. Re-authorize the app or token via OAuth.
2. Ensure token expiration settings are properly configured.

3. Verify that SSO and token policies are up to date.

"Workflow Rule Not Firing"

Problem: Workflow rules do not trigger as expected.
Causes:

- Workflow rule criteria not being met.
- Issues with time-based workflow triggers.

Solution:

1. Review workflow criteria to ensure they are correct.
2. Check for dependencies on time-based triggers.
3. Test the workflow in sandbox before deploying to production.

"Apex Test Coverage Incomplete"

Problem: Apex classes or triggers show incomplete test coverage.
Causes:

- Missing test cases for required methods or lines.
- Test classes not properly written.

Solution:

1. Add test cases to cover all lines and methods of the Apex code.
2. Ensure test classes are run using `Test → New Run` in Salesforce.
3. Fix any assertions and verify results before deployment.

"Invalid Approval Request"

Problem: Users receive errors when trying to submit approval requests.
Causes:

- Approval process criteria not met.
- Required fields missing in the submission process.

Solution:

1. Verify that all required fields are filled out in the approval process.
2. Ensure the approval process criteria are properly configured.
3. Test the process in sandbox before going live.

"Page Load Timeouts in Lightning"

Problem: Lightning pages take too long to load or time out.
Causes:

- Excessive custom components or inefficiencies in SOQL queries.
- Inefficient use of data fetching.

Solution:

1. Review custom components and remove unnecessary ones.
2. Optimize SOQL queries for bulk operations.
3. Test page performance using tools like the Lightning Usage App.

"Unable to Export Data from Reports"

Problem: Users cannot export data from Salesforce reports.
Causes:

- Export permissions not enabled or configuration issues.

Solution:

1. Ensure users have export permissions under `Report & Dashboard Permissions`.
2. Verify export settings in report configuration.
3. Clear cache and try exporting again.

"Record Locking Issue"

Problem: Users encounter errors due to record locking when multiple users access the same record.
Causes:

- DML operations performed by multiple users causing lock conflicts.
- Record-level locking not handled properly in triggers or Apex code.

Solution:

1. Use granular locking strategies or fine-tune Apex triggers to avoid contention.
2. Implement time-based logic or retries in triggers where necessary.

"Page Layout Customizations Are Not Visible"

Problem: Page layout customizations do not reflect for users.
Causes:

- Incomplete deployment or caching issues.

Solution:

1. Clear cache and refresh the browser to see layout changes.
2. Ensure page layouts are assigned to the correct profiles or users.
3. Test layout changes in sandbox before deploying.

"Email Deliverability Issues"

Problem: Emails sent through Salesforce are not delivered or end up in spam/junk folders.
Causes:

- Incorrect email deliverability settings.
- SPF/DKIM settings not configured properly.

Solution:

1. Verify that email deliverability settings are correctly configured under `Setup → Email`.
2. Ensure SPF and DKIM records are set up correctly in your domain.
3. Test email sending using the Salesforce Email Wizard.

"Field Update Trigger Fails"

Problem: Field updates via triggers are not applied correctly or fail.
Causes:

- Recursive triggers causing conflict.
- Incorrect field update logic.

Solution:

1. Ensure there are no recursive trigger loops.
2. Test trigger logic separately in sandbox before deploying to production.
3. Use governor limits to avoid reaching DML or SOQL limits.

"Unable to Log Out" from Salesforce App

Problem: Users cannot log out from the Salesforce app.
Causes:

- SSO or session issues.
- Caching issues preventing logout.

Solution:

1. Clear cache and cookies from the browser.
2. Check session settings and SSO configuration.
3. Use a different browser or incognito mode for logout.

"Missing Validation Error Messages"

Problem: Users do not see validation error messages when saving a record.
Causes:

- Field validation rules not applied correctly.
- Validation messages not enabled.

Solution:

1. Ensure validation rules are configured correctly under `Setup → Validation Rules`.
2. Verify error messages are enabled and displayed properly.
3. Check user permissions for access to error messages.

"Attachment Size Limit Exceeded"

Problem: Users receive errors when uploading attachments that exceed the size limit.
Causes:

- Attachment size exceeds Salesforce limits (up to 25 MB).

Solution:

1. Reduce the size of the attachments before uploading.
2. Consider external storage options (like Amazon S3) if large files are needed.
3. Increase attachment size limits if necessary, but contact Salesforce support.

"Users Cannot Switch Language Preferences"

Problem: Users are unable to change their language preferences in Salesforce.
Causes:

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Problem: Page layout customizations do not reflect for users.
Causes:

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Solution:

1. Clear cache and refresh the browser to see layout changes.
2. Ensure page layouts are assigned to the correct profiles or users.
3. Test layout changes in sandbox before deploying.

"Custom Object or Field Not Visible"

Problem: Custom objects or fields are not visible to certain users.
Causes:

- Field-level security settings not properly configured.
- Page layouts not assigned to profiles.

Solution:

1. Ensure field-level security is set to “Read” or “Read/Write” for the profiles.
2. Verify the object and field visibility under `Setup → Profiles` → [Profile Name] → Object Permissions.
3. Assign custom objects and fields to appropriate page layouts.

"Record Types Not Showing"

Problem: Record types are not appearing for users when creating/editing records.
Causes:

- Record types not assigned to profiles.
- Page layout not associated with the record type.

Solution:

1. Ensure the record types are assigned to the correct profiles under `Setup → Record Types`.
2. Verify that the record types are associated with the relevant page layouts.
3. Check user permissions for access to record types.

"Flow or Process Not Triggering"

Problem: Flows or processes fail to trigger as expected.
Causes:

- Process Builder or Flow criteria not being met.
- Dependencies on approval processes or triggers.

Solution:

1. Review flow or process builder criteria to ensure they are set up correctly.
2. Test the flow in sandbox to identify errors or issues.
3. Ensure approval process dependencies are properly handled.

"Dashboard Loading Slow or Timing Out"

Problem: Salesforce dashboards are loading slowly or timing out.
Causes:

- Large number of components or complex SOQL queries.
- Excessive data volumes in datasets.

Solution:

1. Remove unused or unnecessary dashboard components.
2. Optimize SOQL queries to limit the number of records retrieved.
3. Use aggregation and filters to reduce data volume in reports.

"Incorrect Lookup Field Relationships"

Problem: Lookup fields don’t work as expected between related objects.
Causes:

- Lookup field not properly configured or pointing to incorrect objects.
- Parent-child relationships not correctly defined.

Solution:

1. Ensure lookup field relationships are set up correctly under `Setup → Objects & Fields`.
2. Verify the parent-child relationship and field mapping.
3. Test relationships in sandbox before deploying.

"Login Page Customization Issues"

Problem: Customizations to the login page are not reflecting or causing errors.
Causes:

- Incorrect branding settings or missing files.
- CSS/JS customizations not applied correctly.

Solution:

1. Check login page branding settings under `Setup → Branding`.
2. Verify custom CSS/JS applied in the appropriate Salesforce branding files.
3. Test customizations in sandbox before deploying to production.

"Chatter Feed Not Updating or Showing"

Problem: Chatter feed updates are delayed or not visible.
Causes:

- Data not syncing due to performance issues.
- Incorrect Chatter settings or profiles.

Solution:

1. Check Chatter settings under `Setup → Chatter Settings`.
2. Verify user profiles have permissions to access Chatter feeds.
3. Test in sandbox to ensure updates are properly reflecting.

"Uncaught Error in Flow Builder"

Problem: Flows show uncaught errors and fail to execute.
Causes:

- Incomplete or incorrect flow logic.
- Issue with field references or API calls.

Solution:

1. Review flow design for logic errors or missing field references.
2. Test the flow in sandbox to identify errors.
3. Ensure API calls and field references are correctly configured.

"Picklist Values Missing or Incorrect"

Problem: Picklist values are missing or displaying incorrect options.
Causes:

- Value sets not properly configured or updated.
- Workflow rules interfering with picklist values.

Solution:

1. Verify picklist values under `Setup → Picklist Values`.
2. Ensure workflow rules are not deactivating picklist values.
3. Update value sets if necessary to correct picklist options.

"Custom Labels Not Displaying"

Problem: Custom labels are not displaying in user interfaces.
Causes:

- Custom label values not populated or incorrectly referenced.
- Incorrect API names or syntax.

Solution:

1. Ensure custom labels are created and populated under `Setup → Custom Labels`.
2. Verify correct API name and syntax are used in custom components.
3. Test custom labels in sandbox to confirm they display correctly.

"Unable to Modify Read-Only Fields"

Problem: Users cannot edit fields marked as read-only.
Causes:

- Field-level security or page layouts configured incorrectly.

Solution:

1. Ensure the field-level security is set to "Read/Write" under `Setup → Profiles`.
2. Check page layouts to confirm read-only fields are editable if necessary.
3. Verify permissions to ensure users can modify the fields.

"Error Sending Reports via Email"

Problem: Error occurs when sending reports via email.
Causes:

- Insufficient email delivery settings or permissions.
- Report attachment size exceeds limits.

Solution:

1. Ensure email settings and delivery options are correctly configured.
2. Reduce attachment size or use external storage for large reports.
3. Verify report recipients have proper permissions.

"Quick Actions Not Available"

Problem: Quick actions are not available on record pages.
Causes:

- Quick actions not added to page layouts or profiles.
- Incorrect field or object permissions.

Solution:

1. Ensure quick actions are added to page layouts under `Setup → Objects & Fields → [Object] → Page Layouts`.
2. Verify user profiles have permissions to view quick actions.
3. Test quick actions in sandbox before deploying to production.

"Report Chart Rendering Issues"

Problem: Reports with charts fail to render properly or display errors.
Causes:

- Insufficient data or excessive chart complexity.
- SOQL queries in the report may be too complex.

Solution:

1. Optimize the SOQL queries to reduce data volume.
2. Limit the number of chart components in reports.
3. Test reports in sandbox to ensure chart data renders correctly.

"Custom Settings Not Reflecting"

Problem: Custom settings do not reflect in the application or API calls.
Causes:

- Custom settings configuration errors.
- Incorrect API name or field references.

Solution:

1. Ensure custom settings are configured and published under `Setup → Custom Settings`.
2. Verify field references are correctly used in API calls and components.
3. Test in sandbox before deploying to production.

"Unable to Delete Records"

Problem: Users are unable to delete specific records.
Causes:

- Insufficient user permissions or sharing rules.
- Record is referenced by another object, creating a dependency.

Solution:

1. Check user profile and permission sets for delete rights on the object.
2. Review dependencies and delete associated records first.
3. Use `Setup → Sharing Settings` to adjust sharing rules if necessary.

"Duplicate Rules Not Working"

Problem: Duplicate management rules fail to prevent duplicate records.
Causes:

- Duplicate rules are inactive or misconfigured.
- Matching rules are not properly defined.

Solution:

1. Ensure duplicate and matching rules are active under `Setup → Duplicate Management`.
2. Review and update matching criteria for accuracy.
3. Test duplicate detection with sample records.

"Data Import Wizard Errors"

Problem: Errors occur during data import using the Data Import Wizard.
Causes:

- Incorrect field mappings or data format.
- Missing required fields in the dataset.

Solution:

1. Validate field mappings during the import process.
2. Ensure the dataset includes all required fields and matches the expected format.
3. Correct errors listed in the import error log and retry.

"Permission Set Assignments Not Working"

Problem: Users do not gain the expected access after assigning a permission set.
Causes:

- Permission set does not include the required permissions.
- Conflicts with existing profile settings.

Solution:

1. Review the permission set to ensure all necessary permissions are granted.
2. Check for conflicting restrictions in the user's profile.
3. Assign the permission set again and verify access.

"Validation Rules Triggering Unexpectedly"

Problem: Validation rules trigger even when criteria are not met.
Causes:

- Incorrect or overly broad validation rule logic.
- Dependency on other fields not accounted for in the rule.

Solution:

1. Review the validation rule logic for accuracy.
2. Add conditions to narrow the scope of the rule.
3. Test the rule with sample data to ensure it only triggers as expected.

"Field History Tracking Not Working"

Problem: Changes to fields are not recorded in the field history tracking.
Causes:

- Field history tracking is not enabled for the field.
- Field changes occur outside of Salesforce (e.g., via API) without tracking.

Solution:

1. Enable field history tracking under `Setup → Object Manager → [Object] → Fields & Relationships → Set History Tracking`.
2. Verify changes are made within Salesforce where tracking applies.
3. Check field accessibility and permissions.

"Chatter Groups Not Visible"

Problem: Users cannot see specific Chatter groups.
Causes:

- Chatter group privacy settings restrict access.
- User is not a member of the group.

Solution:

1. Check Chatter group settings for visibility and privacy restrictions.
2. Add the user to the group or adjust group privacy settings.
3. Verify the user's profile includes permissions for Chatter access.

"Email Templates Not Loading"

Problem: Email templates fail to load when composing emails.
Causes:

- Template folder permissions restrict access.
- Templates are not properly associated with the object.

Solution:

1. Check template folder sharing settings to ensure user access.
2. Verify the template is related to the correct object type.
3. Reload or recreate the template if necessary.

"Custom Metadata Not Updating"

Problem: Changes to custom metadata are not reflected in the application.
Causes:

- Metadata cache delay or incorrect configuration.
- Incorrect API reference to custom metadata.

Solution:

1. Clear the Salesforce cache to refresh metadata updates.
2. Verify the API reference matches the custom metadata name.
3. Re-deploy the metadata changes if necessary.

"Mobile App Not Syncing"

Problem: Salesforce mobile app fails to sync updates.
Causes:

- Mobile offline mode not enabled.
- Poor network connectivity or app cache issues.

Solution:

1. Ensure mobile offline mode is enabled for relevant objects.
2. Check the mobile device’s network connection and clear the app cache.
3. Update the Salesforce mobile app to the latest version.

"Mass Email Limit Exceeded"

Problem: Cannot send mass emails due to exceeding daily limits.
Causes:

- Organization has hit its daily mass email limit.
- User profile lacks mass email permissions.

Solution:

1. Wait for the daily email limit to reset.
2. Check user permissions and assign the “Send Mass Emails” permission if missing.
3. Consider segmenting email campaigns to reduce volume.

"Sandbox Refresh Failing"

Problem: Sandbox refresh fails or does not complete successfully.
Causes:

- Large data volume or dependencies on deleted records.
- Active processes interfering with the refresh.

Solution:

1. Reduce data volume by excluding unnecessary data during refresh.
2. Deactivate workflows and triggers before starting the refresh.
3. Retry the refresh and monitor for errors.

"User Deactivation Errors"

Problem: Unable to deactivate a user account.
Causes:

- User is the owner of records or associated with active processes.
- User is part of scheduled jobs or automation.

Solution:

1. Reassign ownership of records and deactivate scheduled jobs.
2. Update automation rules to remove the user’s association.
3. Deactivate the user once dependencies are cleared.

"Page Performance Issues"

Problem: Lightning Experience pages load slowly or lag.
Causes:

- Excessive components or large datasets on the page.
- Browser cache issues or unsupported browser version.

Solution:

1. Simplify page layouts by removing unnecessary components.
2. Clear the browser cache and ensure you’re using a supported browser version.
3. Optimize list views and reduce displayed record counts.

"Data Export Timing Out"

Problem: Data export fails to complete or times out.
Causes:

- Large data volume or complex export filters.
- Network interruptions during export.

Solution:

1. Break the export into smaller chunks using filters.
2. Use a faster and stable network connection.
3. Utilize a scheduled export job for large datasets.

"Error Sending Email from Salesforce"

Problem: Emails are not being sent from Salesforce.
Causes:

- Email deliverability settings are restricted.
- User email address is not verified.
- Organization-wide email address is not configured.

Solution:

1. Go to `Setup → Email Deliverability` and ensure it is set to "All Emails."
2. Verify the user email address under `Setup → My Settings → Email → Verify Email Address`.

3. Configure organization-wide email addresses under `Setup → Organization-Wide Addresses`.

"List Views Not Loading"

Problem: Custom or standard list views fail to load.
Causes:

- Filters are too complex or retrieving too many records.
- Browser cache or compatibility issues.

Solution:

1. Simplify the filters or reduce the number of records displayed.
2. Clear browser cache and check for browser compatibility.
3. Use the Lightning Experience list view enhancements for better performance.

"Workflow Rule Not Triggering"

Problem: Workflow rules do not execute as expected.
Causes:

- Rule criteria are not met.
- Workflow rule is inactive or misconfigured.

Solution:

1. Verify the criteria and conditions for the workflow rule under `Setup → Workflow Rules`.
2. Activate the rule and ensure it applies to the correct object.
3. Test the rule with sample data to confirm execution.

"Reports Not Generating Correct Data"

Problem: Reports are missing data or show incorrect information.
Causes:

- Filters or grouping settings are incorrect.
- User does not have access to the data.

Solution:

1. Review and adjust report filters, groupings, and criteria.
2. Check user permissions for accessing the relevant objects and fields.
3. Refresh the report to ensure it reflects recent updates.

"Error During Record Update"

Problem: Errors occur while updating records in Salesforce.
Causes:

- Validation rules or triggers prevent updates.
- Required fields are missing or contain invalid data.

Solution:

1. Check validation rules and triggers associated with the object.
2. Ensure all required fields have valid values before updating.
3. Review error messages for specific causes and correct them.

"Dashboard Components Not Loading"

Problem: Some dashboard components fail to load or display errors.
Causes:

- Source report has been deleted or modified.
- Dashboard filters conflict with the component's data.

Solution:

1. Verify the source report is still active and correctly configured.
2. Adjust dashboard filters to align with the data being displayed.
3. Recreate the affected component if necessary.

"Error Importing Large Files"

Problem: Errors occur while importing large data files into Salesforce.
Causes:

- File size exceeds the allowable limit.
- Data import contains invalid or missing information.

Solution:

1. Split the file into smaller chunks and retry the import.
2. Validate the file format and ensure all required fields are present.
3. Use Data Loader for importing larger files.

"Custom Button Not Working"

Problem: Custom buttons or links do not perform the expected action.
Causes:

- Incorrect URL or JavaScript in the button setup.
- Permissions do not allow the action.

Solution:

1. Check the button or link configuration for accuracy.
2. Ensure the user has permissions to execute the action.
3. Test the button on different profiles to confirm functionality.

"Approval Process Not Moving Forward"

Problem: Approval processes get stuck or do not proceed.
Causes:

- Approval criteria not met.
- Approver is not assigned or available.

Solution:

1. Review the approval criteria and ensure it matches the record conditions.
2. Assign an alternative approver if the primary approver is unavailable.
3. Check for active workflow automation or triggers that might interfere.

"Custom Object Tabs Not Visible"

Problem: Custom object tabs do not appear in the app.
Causes:

- Tab is not added to the app or profile visibility settings.
- User permissions do not include access to the custom object.

Solution:

1. Add the custom object tab to the app under `Setup → App Manager`.
2. Ensure the user profile includes access to the object and tab.
3. Verify the tab is not hidden in the app settings.

"Picklist Values Not Updating"

Problem: Updates to picklist values are not reflected in records.
Causes:

- Record type is not associated with the updated picklist values.
- Picklist values are inactive or restricted.

Solution:

1. Associate the record type with the updated picklist values.
2. Ensure the picklist values are active and not restricted.
3. Refresh the page or record after making changes.

"Sharing Rules Not Applied"

Problem: Users cannot access records despite sharing rules.
Causes:

- Sharing rules are not active.
- User's profile does not meet sharing rule criteria.

Solution:

1. Activate the sharing rules under `Setup → Sharing Settings`.
2. Verify that user profiles meet the criteria for the sharing rule.
3. Test the sharing rule with a sample user account.

"Error in Formula Fields"

Problem: Formula fields display errors or incorrect results.
Causes:

- Syntax errors in the formula.
- Referenced fields contain invalid or null values.

Solution:

1. Review and correct the formula syntax under `Setup → Object Manager → Fields & Relationships`.
2. Ensure referenced fields have valid data.
3. Test the formula on multiple records to validate accuracy.

"Tasks and Events Not Syncing"

Problem: Tasks and events do not sync with external calendars.
Causes:

- Sync settings are not configured.
- Integration with the calendar app is not active.

Solution:

1. Configure sync settings under `Setup → Einstein Activity Capture`.
2. Reauthorize the connection with the external calendar app.
3. Ensure the user's calendar permissions allow syncing.

"Custom Labels Not Updating in UI"

Problem: Updated custom labels do not appear in the user interface.
Causes:

- Cache delay or hardcoded values in the component.
- Missing references to the updated custom label.

Solution:

1. Clear the Salesforce cache and refresh the page.
2. Verify that components correctly reference the updated label.
3. Deploy the updated custom labels to the correct environment.