

Troubleshooting & Recovery

First steps for any problem

1. **Is it just you?** Try another browser or an incognito window, or ask a second user.
2. **Which environment?** Confirm you're in Production vs. Sandbox.
3. **Recent change?** If the problem began right after a change, that change is the prime suspect — and structural changes should have been Sandbox-tested first.

Common problems

Symptom	Likely cause / first fix
A user can't sign in	Account inactive or wrong password — check the user and reset it (Managing Users).
Reset / notification emails not arriving	Outbound email or the Google connection — see Chapter 5 — Integrations .
Calendar / Gmail not syncing	Google authorization expired — re-authorize (Google, Email & Website Integrations).
Someone sees too much or too little	Role or team misconfigured — Roles, Teams & Permissions .
Records "missing"	Usually a filter or permission, not deletion — clear filters and check the user's role; if truly deleted, act fast (below).
Certificate warning in the browser	Flag it — see Backups & Updates .
CRM slow or unreachable	May be the server — escalate (below).

If data was deleted or badly changed

Stop making changes. The fix is usually to **restore from backup** — a technical, time-sensitive operation. The sooner you raise it, the more recoverable it is. See [Getting Help and Next Steps](#).

Recovery operations (technical — usually not you)

The deployment tooling can perform powerful recovery actions, listed here just so you know they exist:

- **Admin credential reset** — regain admin access if locked out.
- **Full reset / rebuild** — tears the instance down and rebuilds it. **This destroys data and is only safe with a good, recent backup.**

“△ These are **destructive, technical operations** run via the CRM Builder tool by whoever maintains the deployment — **not** routine admin tasks. Never run a "full reset" to fix an everyday problem. If you think recovery is needed, **escalate**

When you escalate

Note **exactly** what you did, what you expected, what happened, the **time**, and the **environment**. Technical logs (server and API) are available to whoever maintains the deployment.

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