



Business Intelligence Plus:

Troubleshooting Guide



PARTNER





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Authentication error message in Classic runtime

Why am I getting the following authentication error message when I try to sign in with Creditsafe?

“We can’t display component CS_APP: authFlowFrame’ because it isn’t supported in Classic runtime. Ask your Salesforce admin to distribute this flow in Lightning runtime instead.”

Start Authentication

Finish

We can't display component 'CS_APP:authFlowFrame', because it isn't supported in Classic runtime. Ask your Salesforce admin to distribute this flow in Lightning runtime instead.

Finish

Flows launched from a URL or from Setup use the Lightning runtime experience instead of the Classic runtime experience. Only Lightning runtime supports two-column flow screens, custom screen components, and local actions. Ask your Salesforce admin to enable the lightning runtime feature 'Enable Lightning runtime for flows' by going to:

Setup > Process Automation Settings > Enable Lightning runtime for flows

Process Automation

Process Automation Settings

Didn't find what you're looking for?
Try using Global Search.

SETUP

Process Automation Settings

Let users resume interviews that are shared with them, either directly or via the role hierarchy. flow admin who has view access.

Let users resume shared flow interviews ☒

Flows launched from a URL or from Setup use the Lightning runtime experience instead of the custom screen components, and local actions.

Enable Lightning runtime for flows ☒

Change the required permission to view all charts on the Automation Home page in Setup. By this setting is enabled, users with View Setup and Configuration can view only the Total Started

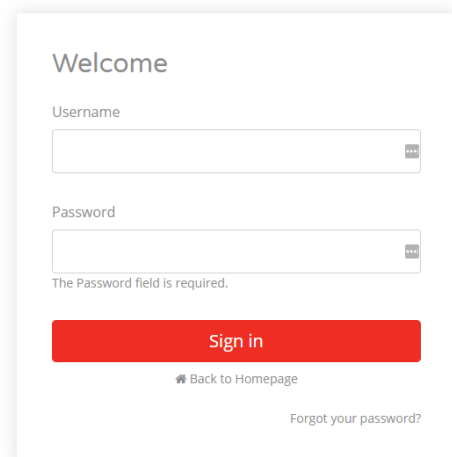
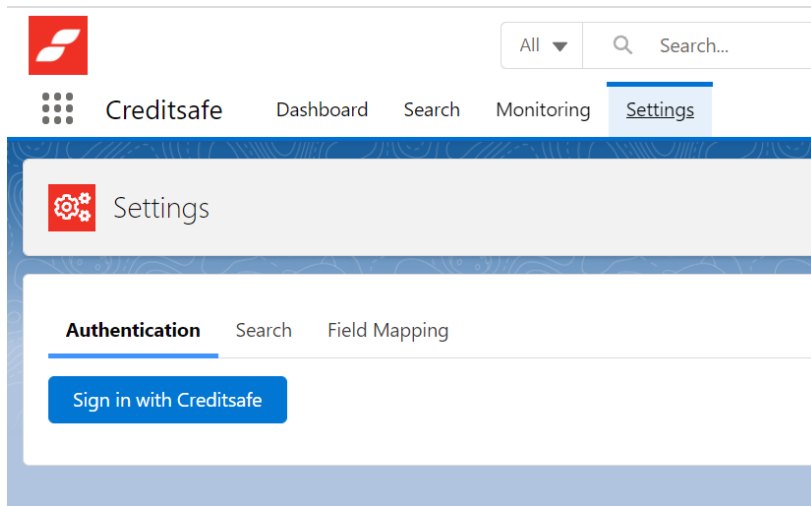
Require the Manage Flow permission to view all Automation Home charts ☐

This setting affects Lightning Experience only. On the Flows page in Setup, users can select...

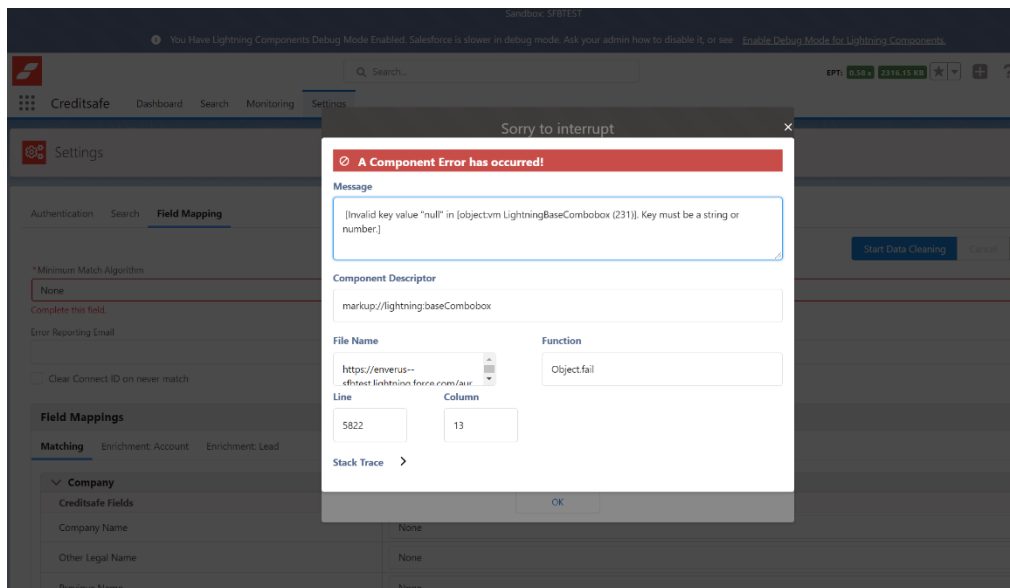
Why have I been logged out?

To use Creditsafe services within Salesforce, you are required to Authenticate. The application uses OAuth 2.0, which allows Salesforce to request data from Creditsafe securely. It also means we do not store your user credentials anywhere within your Salesforce Org.

To help protect you and your data, if you have have not interacted with the Creditsafe application for 15 days, you would need to re-authenticate manually. Additionally, after 12-months, you will also need to do a re-authenticate. You can do this by via selecting the Sign In with Creditsafe button on the Settings.



Debug Mode Enabled for Lightning Components



To disable debug mode for a user in your org:

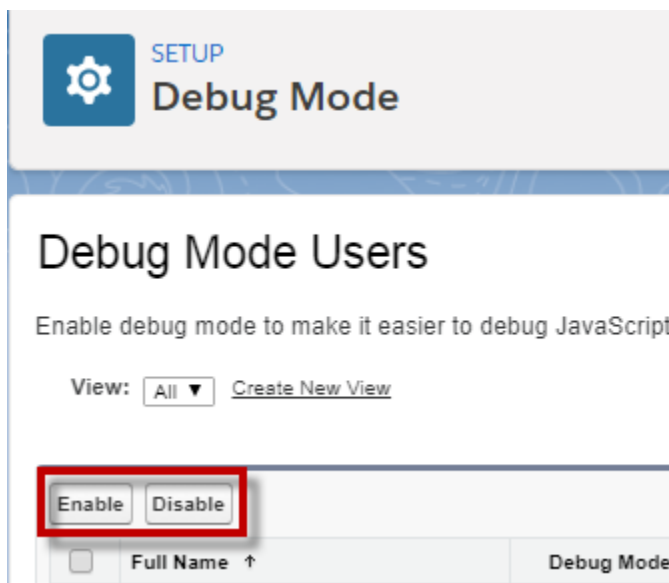
Setup > Debug Mode > Debug Mode Users

Users with debug mode enabled have a check mark in the Debug Mode column.

In the user list, locate any users who need debug mode enabled. If necessary, use the standard list view controls to filter your org's users.

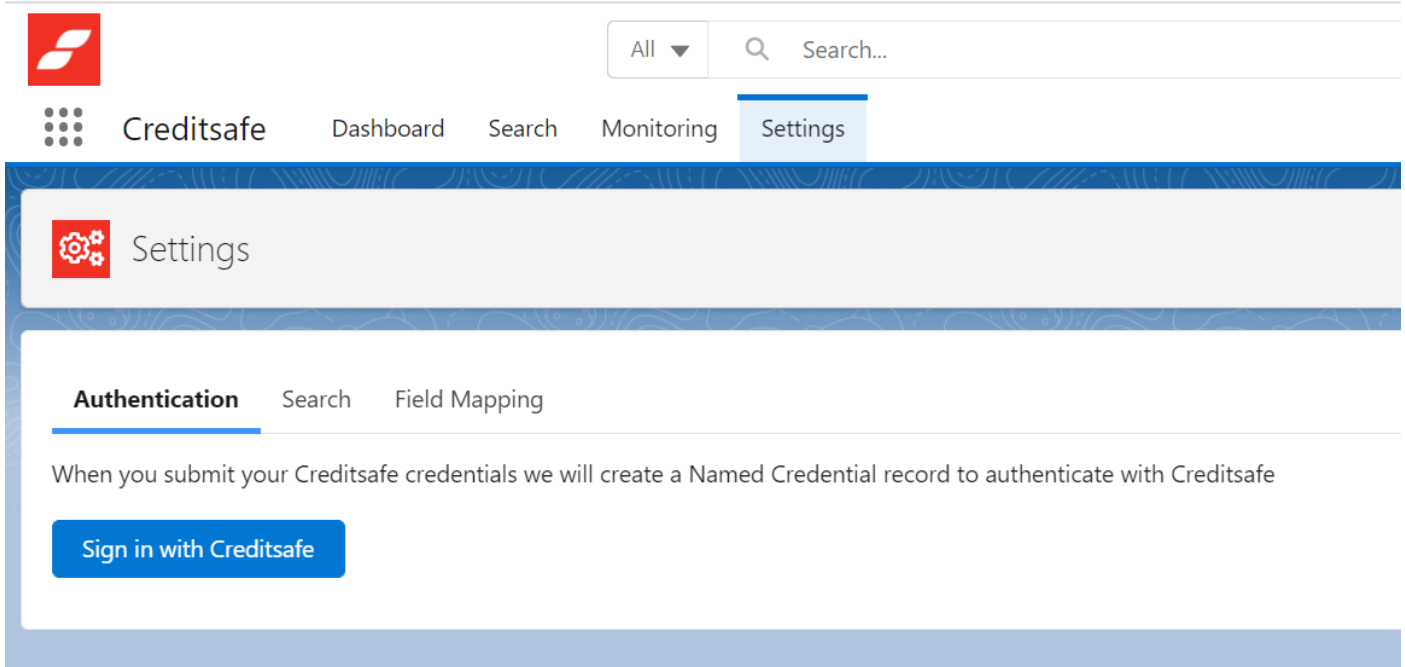
Enable the selection checkbox next to users for whom you want to enable debug mode.

Click Disable



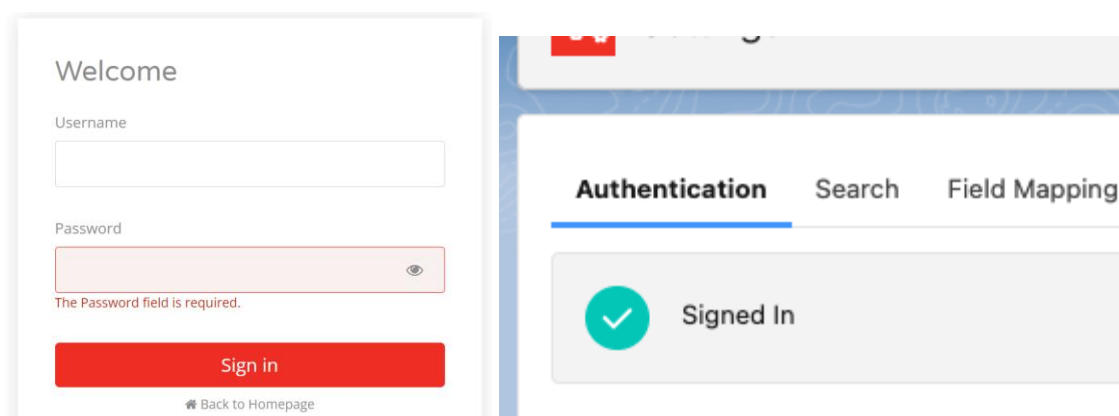
How to Authenticate with Creditsafe

Select the Settings tab and click on on the Authentication tab, 'Sign in with Creditsafe'.



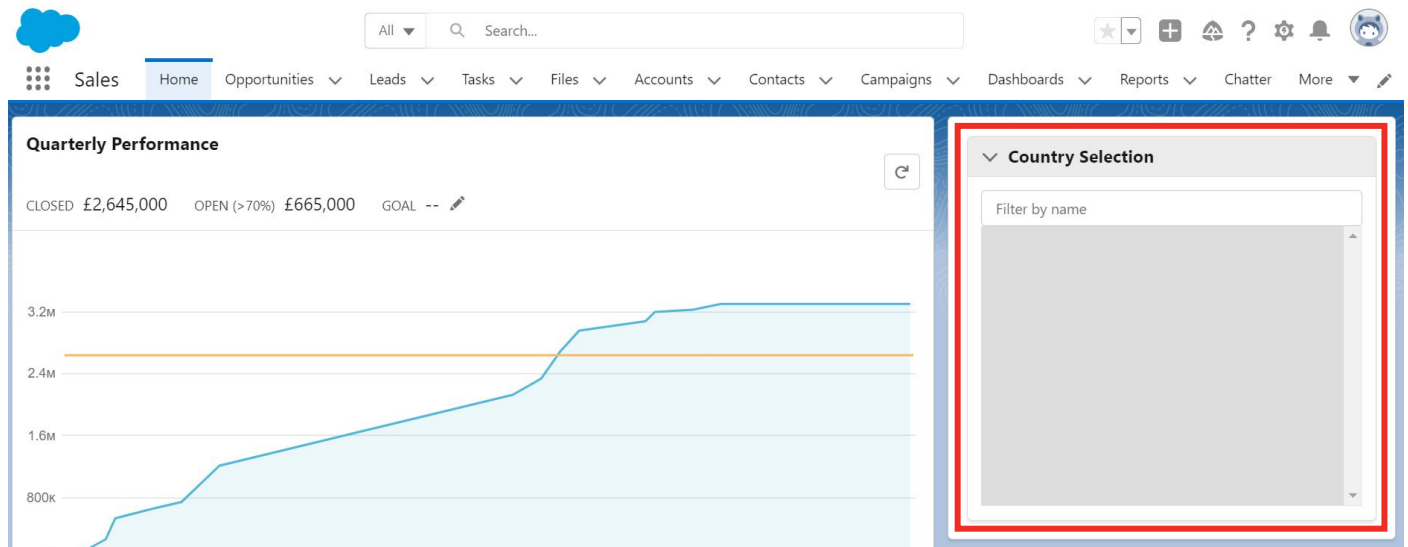
This will open a new browser window. Enter the username and password. Once these have been entered press Sign In.

Navigate back to the Creditsafe app Settings. You will see the Authentication has changed to Signed In. If you then try to Search for a Company, you should see a list of countries available based on your package with Creditsafe.



Country Selection missing on Search

When attempting to search for a Company, if the country picklist is blank, this may mean you have signed into the Creditsafe Business Intelligence Plus app using the incorrect Creditsafe API credentials.



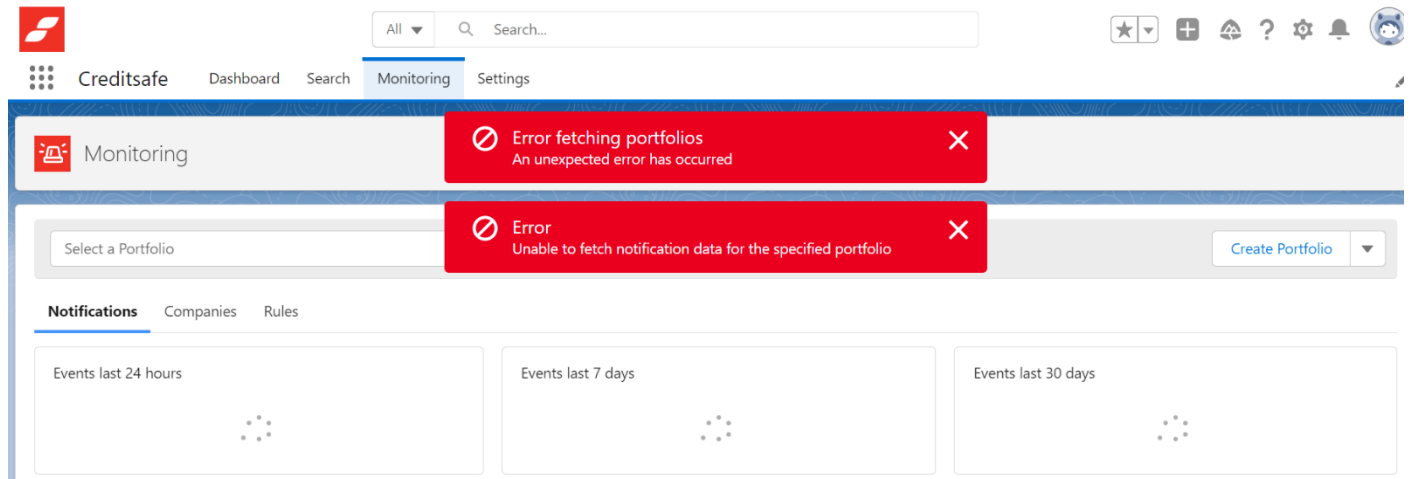
To resolve, please follow the steps:

- Navigate to Setup | Security | Named Credentials and delete the Named Credential
- In the same browser window, paste this URL <https://mylogin.creditsafe.com/connect/endsession>
- Go back to the Creditsafe Salesforce Application and refresh the browser page.
- Click Sign in with Creditsafe – this will redirect the customer to the mylogin page, and they'll need to enter the correct Connect username and password

Error fetching portfolios

If you go to the Monitoring Tab or have the Monitoring Component on your Home or Account pages and get the message ‘Error fetching portfolios’, this means you need to sign into the Creditsafe Business Intelligence Plus app via the Settings tab

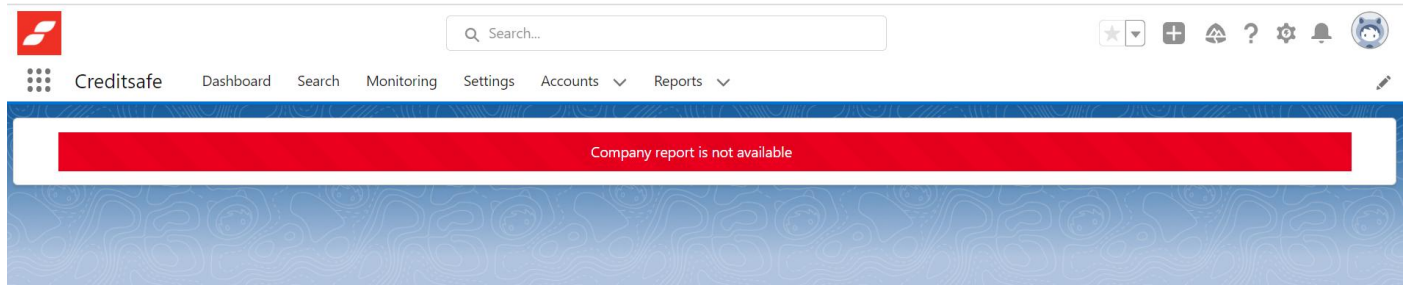
Please follow the steps on How to Authenticate with Creditsafe.



The screenshot shows the Creditsafe web interface. At the top, there is a navigation bar with the Creditsafe logo, a search bar, and several utility icons. Below the navigation bar, there are tabs for 'Creditsafe', 'Dashboard', 'Search', 'Monitoring' (which is active), and 'Settings'. The main content area is titled 'Monitoring' and contains a 'Select a Portfolio' dropdown menu. Two red error banners are displayed: the top one says 'Error fetching portfolios: An unexpected error has occurred', and the bottom one says 'Error: Unable to fetch notification data for the specified portfolio'. Below the errors, there are three panels for 'Events last 24 hours', 'Events last 7 days', and 'Events last 30 days', each showing a loading spinner. A 'Create Portfolio' button is visible on the right side of the main content area.

Company report not available

If you have searched for a Company and when selecting the report get the error message, company report is not available. Check whether you have the correct access to view the report. Contact Support for Administrator for further assistance.





Components displaying error message

When viewing an Account and you have the Monitoring Component added to the page layout, you may see an error that says “An unexpected error occurred. Please try again later.” This means you need to sign into the Creditsafe Business Intelligence Plus app via the Settings tab.

Please follow the steps on How to Authenticate with Creditsafe.

GB-1-7627056

Match

Refresh

Credit Score

58

International Score

B

Credit Limit

£17,000

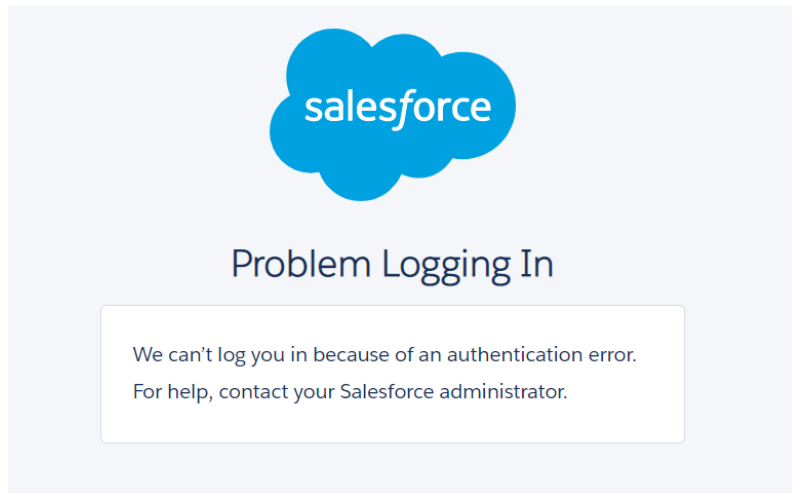
Last Updated: 20 hours ago

[View](#)

An unexpected error occurred. Please try again later.

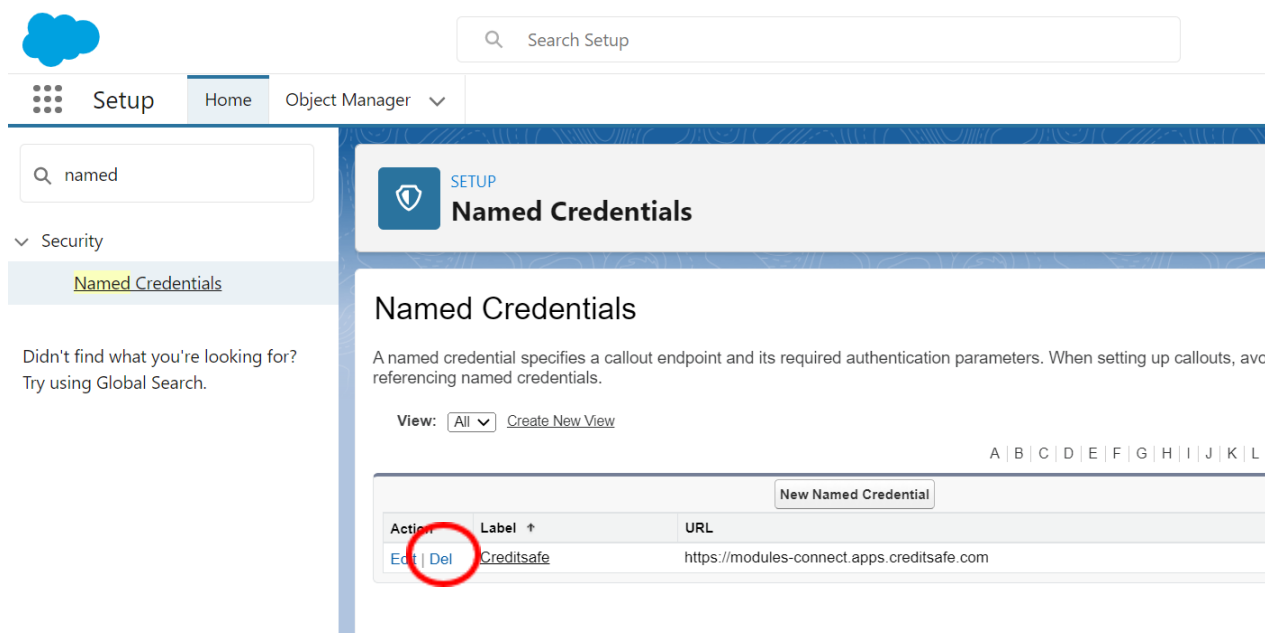
Problem Logging In – Authentication Error

When you login, we create a Named Credential in Salesforce that accesses the refresh/access tokens from Creditsafe via mylogin. If you have logged out and the same browser tries to login, an error occurs as the Named Credentials we're trying to create (in Salesforce) already exists.



To resolve follow these steps. Go to Salesforce Setup:

- Setup > Security > Named Credentials
- Delete the existing named Credentials with the label Creditsafe
- Once credentials have been deleted, please go back to the settings and log back in

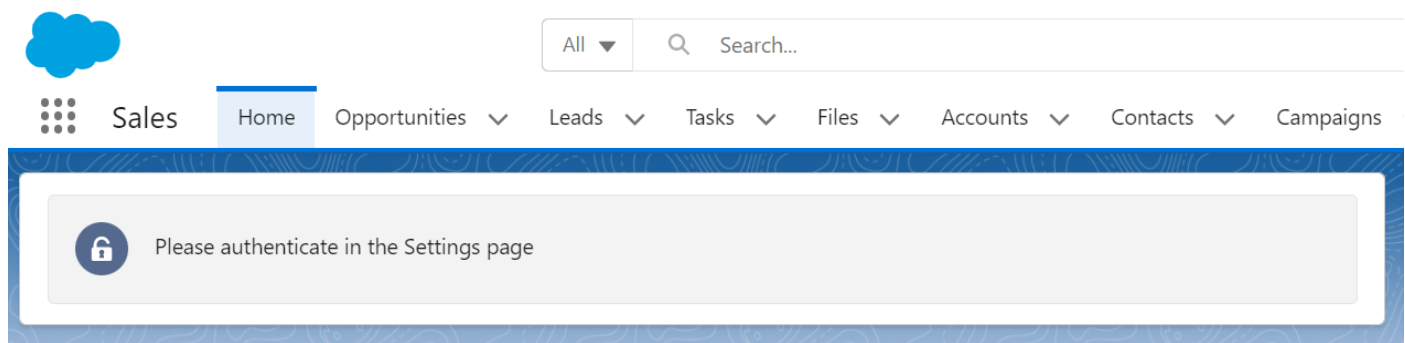
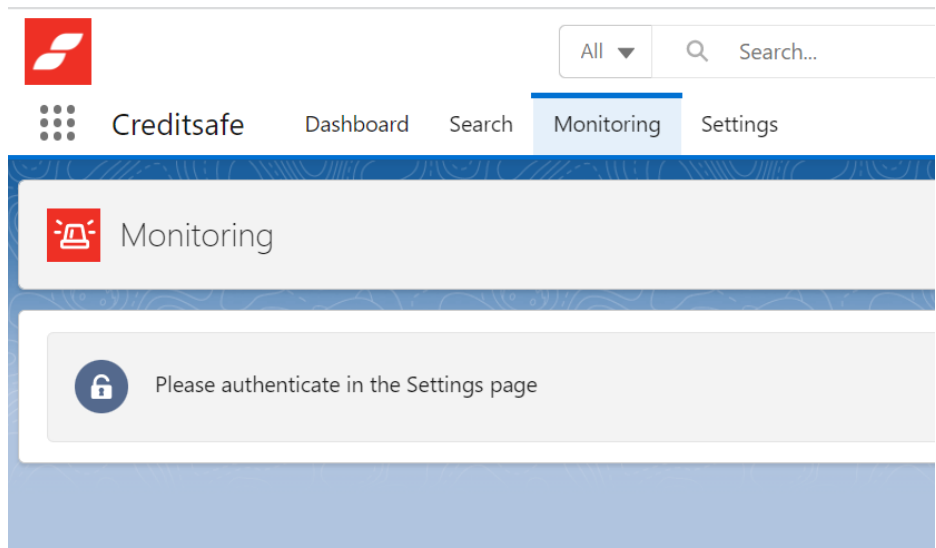


The screenshot shows the Salesforce Setup interface. On the left sidebar, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. Under 'Setup', the 'Security' section is expanded, and 'Named Credentials' is selected. The main content area displays the 'Named Credentials' page. At the top, there's a search bar and a 'Search Setup' button. Below that, the 'Named Credentials' section is titled, followed by a description: 'A named credential specifies a callout endpoint and its required authentication parameters. When setting up callouts, avoid referencing named credentials.' There's a 'View' dropdown set to 'All' and a 'Create New View' link. A table lists the existing named credentials. The table has columns for 'Action', 'Label', and 'URL'. One entry is shown with the label 'Creditsafe' and the URL 'https://modules-connect.apps.creditsafe.com'. The 'Del' button in the 'Action' column for this entry is circled in red. A 'New Named Credential' button is also visible at the top right of the table.

Action	Label ↑	URL
Edit Del	Creditsafe	https://modules-connect.apps.creditsafe.com

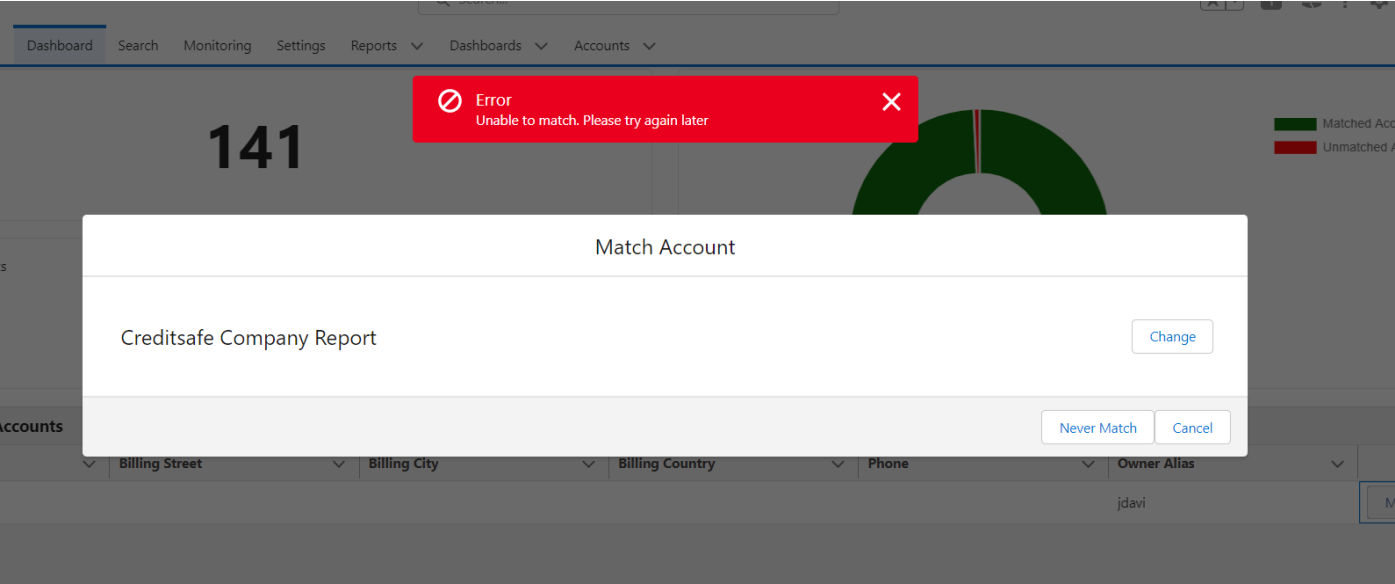
Please authenticate in the Settings page message

When using the Creditsafe Application, in order to make use of features like Search for reports or Monitoring, you're required to authenticate with Creditsafe. If on any of the pages or components, you're presented with the message "Please authenticate in the Settings page", please follow the steps on How to Authenticate with Creditsafe.



Records not matching

If you are manually matching a record (either via the Unmatched table on the Dashboard or via the Component on the Account record) and you get a red toast banner displaying 'Error Unable to match. Please try again later', this is likely due to the Mappings within the Search Field Mappings in the Settings tab.



Navigate to the Search Field Mappings and check whether you have any field being populated in two mapping fields as this is likely causing the error.

Search Field Mappings	
Account Lead	
Contact	
Creditsafe Fields	Account Fields
Name	Account Name
Address Line 1	Billing Street
Street	Billing Street
City	None
Country	Billing Country
Postcode	None
Phone Number	None
Registration Number	None
VAT Number	None

Removing one of the duplicate mapping fields will result in the search populating the list of companies that meet the criteria you have provided. Selecting a company report will provide the match.

Match Account

> United Kingdom

> Search Criteria

Search Results

Company Name	Company No.	Connect ID	Reason Code	Status
CREDITSAFE LIMITED	07941364	GB-0-07941364	CASPIAN POINT ONE, PIERHEAD STREET, CARDIFF,	
CREDITSAFE (INSURA...	02332544	GB-0-02332544	BRITANNIA HOUSE, 1 PAREWAY, LONDON, NW1 7PG	
CREDITSAFE INFORM...	07941640	GB-0-07941640	CASPIAN POINT ONE, PIERHEAD STREET, CARDIFF,	
CREDITSAFE UK LIMIT...	07941342	GB-0-07941342	CASPIAN POINT ONE, PIERHEAD STREET, CARDIFF,	
CREDITSAFE UK HOLD...	12314045	GB-0-12314045	CASPIAN POINT ONE,, CARDIFF, CF10 4DQ	
CREDITSAFE IRELAND ...	FC035438	GB-0-FC035438	BRANCH REGISTRATION, REFER TO PARENT REGISTRY	
CREDITSAFE FIRST LI...	07941488	GB-0-07941488	CASPIAN POINT ONE, PIERHEAD STREET, CARDIFF,	

Never Match

Cancel

Success

The data has refreshed successfully

Match Account

GB-0-07941364

Change

Credit Score

No credit score

International Score

E

Credit Limit

No limit

Last Updated: a few seconds ago

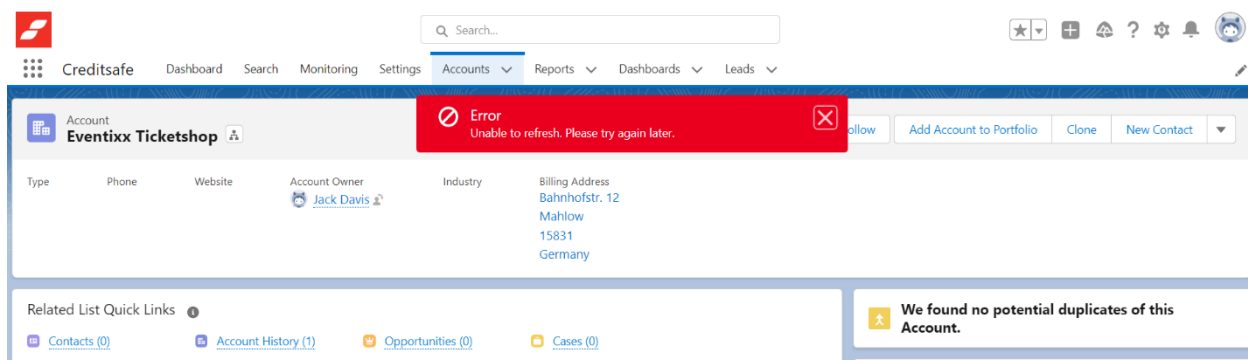
View

Never Match

Done

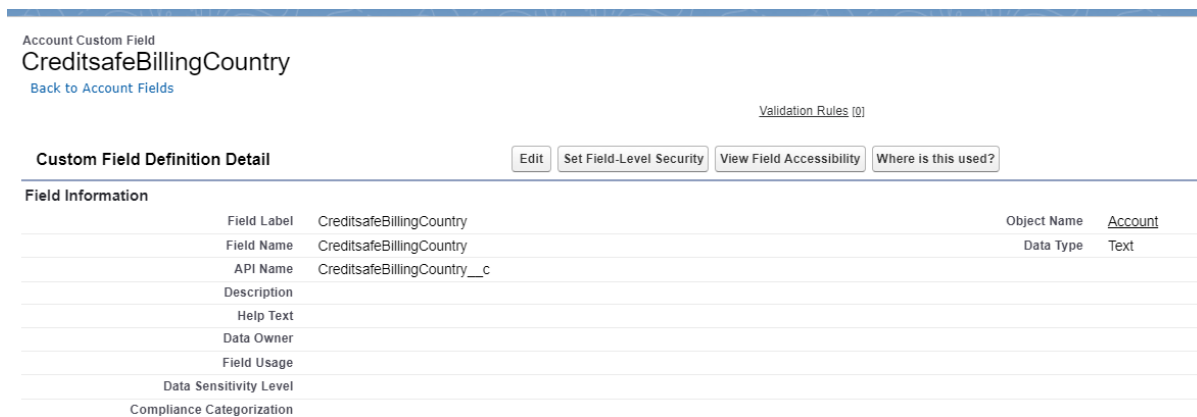
State and Country/Territory Picklists

When performing a match either manually or via the automated data cleaning process match, Creditsafe uses the standard two-digit country ISO codes (GB, US, DE). If you have State and Country/Territory Picklist enabled, you'll likely get the Error Message 'Unable to refresh. Please try again later. As we're trying to pass two digit string field into a Picklist.



The screenshot shows the Creditsafe Accounts page. At the top, there's a search bar and navigation tabs: Creditsafe, Dashboard, Search, Monitoring, Settings, Accounts (selected), Reports, Dashboards, and Leads. Below the navigation, the account details for 'Eventixx Ticketshop' are displayed. A red error banner at the top of the account details reads: 'Error Unable to refresh. Please try again later.' Below the error, the account information is shown: Type, Phone, Website, Account Owner (Jack Davis), Industry, and Billing Address (Bahnhofstr. 12, Mahlow, 15831, Germany). At the bottom, there are 'Related List Quick Links' for Contacts (0), Account History (1), Opportunities (0), and Cases (0). A yellow message box on the right states: 'We found no potential duplicates of this Account.'

To resolve, create a new text field on the Account e.g. 'Creditsafe Billing Country' (similar to below).



The screenshot shows the 'Account Custom Field' page for 'CreditsafeBillingCountry'. It includes a 'Back to Account Fields' link and a 'Validation Rules (0)' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table is as follows:

Field Label	CreditsafeBillingCountry	Object Name	Account
Field Name	CreditsafeBillingCountry	Data Type	Text
API Name	CreditsafeBillingCountry__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

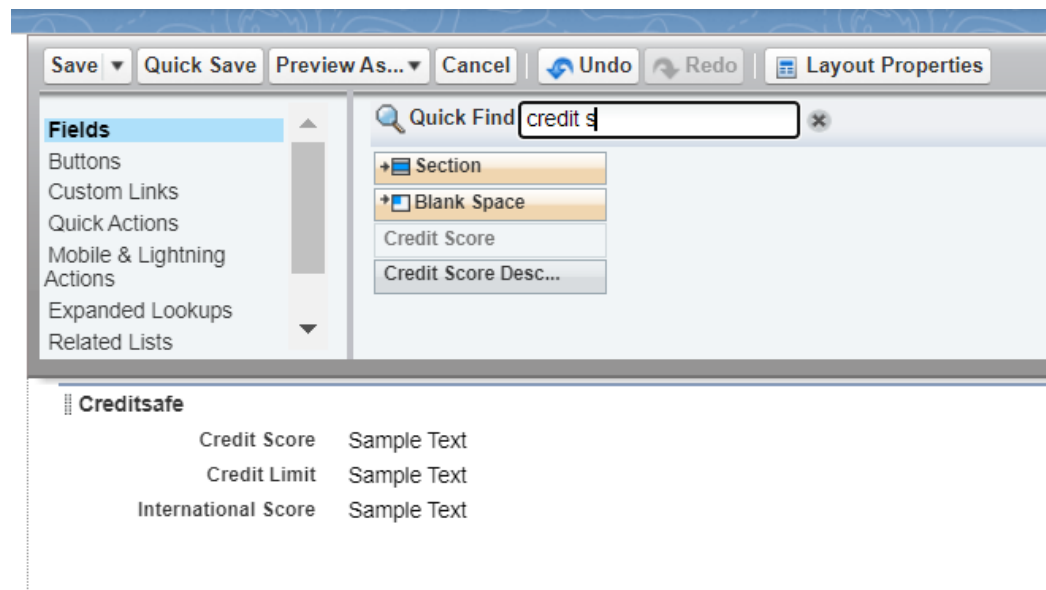
Once the new field has been created you will need to update the Field Mappings, Enrichment: Account to map the Country to the new field created and then click Save. In this example, Creditsafe Billing Country.

You can also create a Flow, Process Builder or Workflow that would update the Billing Country to the relevant Picklist value e.g. United Kingdom, United States, Germany based on the two-digit ISO code that gets populated in the custom field you have created.

Credit Score fields missing from mapping

When setting your field mappings you will notice that Credit Score, Credit Limit, International Score and Credit Description don't appear on the list of Creditsafe Fields. The reason for this is because when you install the package, we automatically create these fields for you. They can then be added to a page layout. This can be done using the following steps and editing the relevant page layout:

Setup > Object Manager > Account > Page Layouts



Alternatively, adding the Company Match Component to your Account Page Layout will also display those fields.

Company Match Component

GB-0-03836192

Match

Refresh

Credit Score

90

International Score

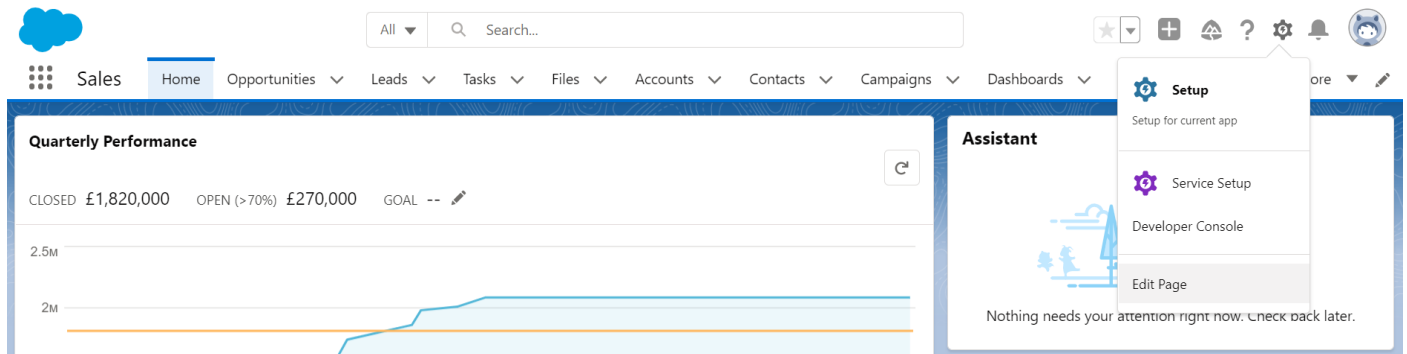
A

Credit Limit

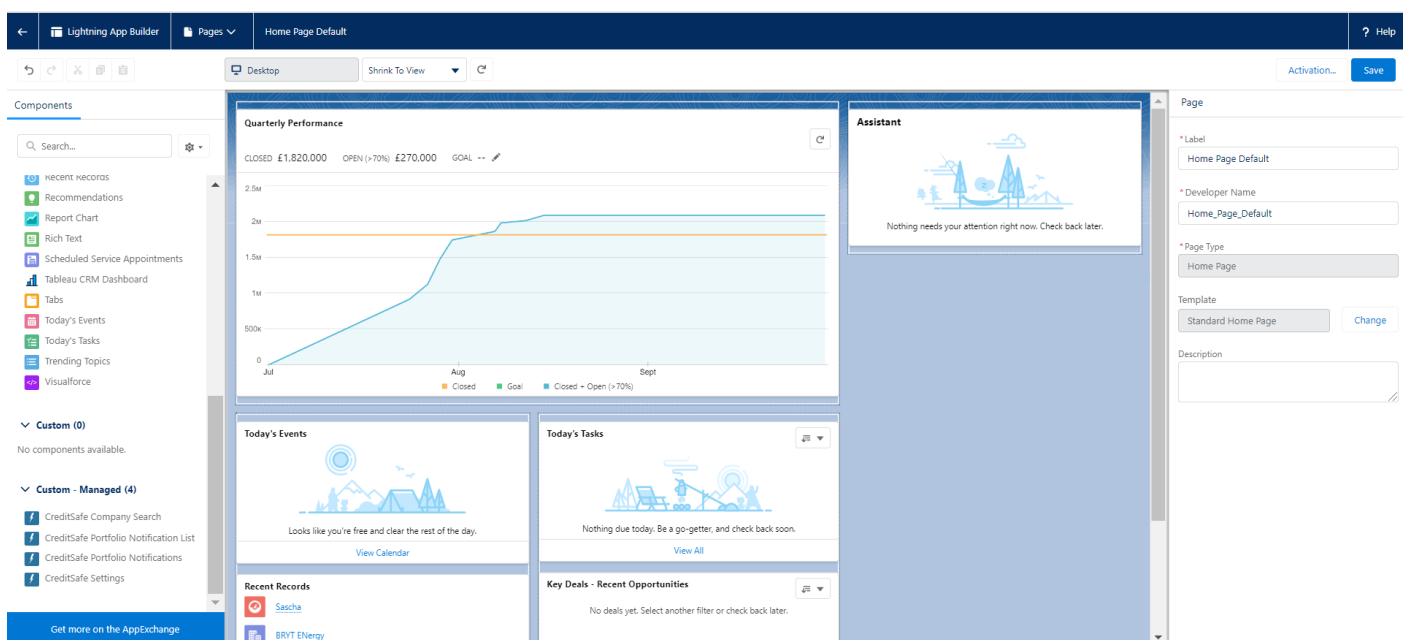
£1,700,000

Adding Components to a page

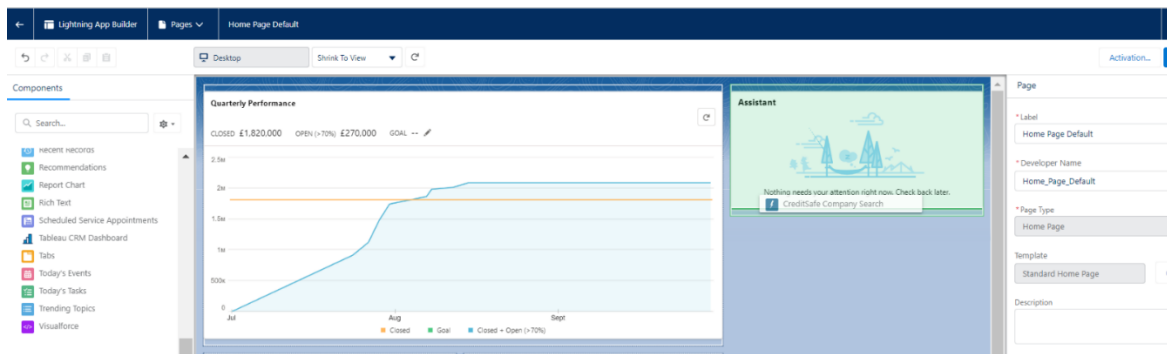
To edit an existing page, you can click Setup from the Home page, and then select Edit Page to create a copy of the current page to edit.



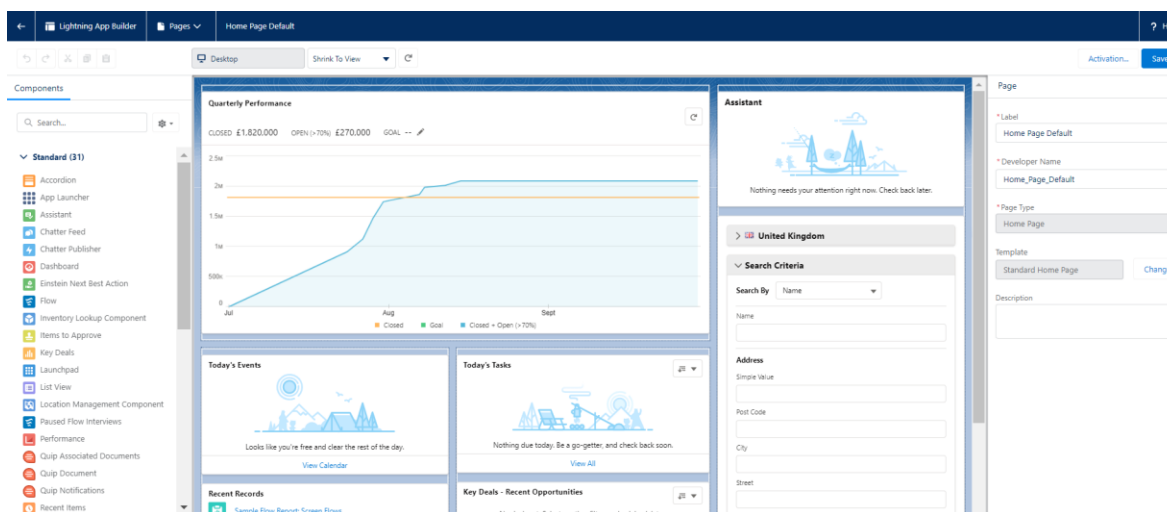
The left-side pane will display Lightning components that you can use, including both Standard and Custom Lightning components. The Creditsafe components are located under the Custom components.



To add any of the components to the page, drag the chosen component onto the page layout where any green highlighted area. This can be added to any Salesforce page.

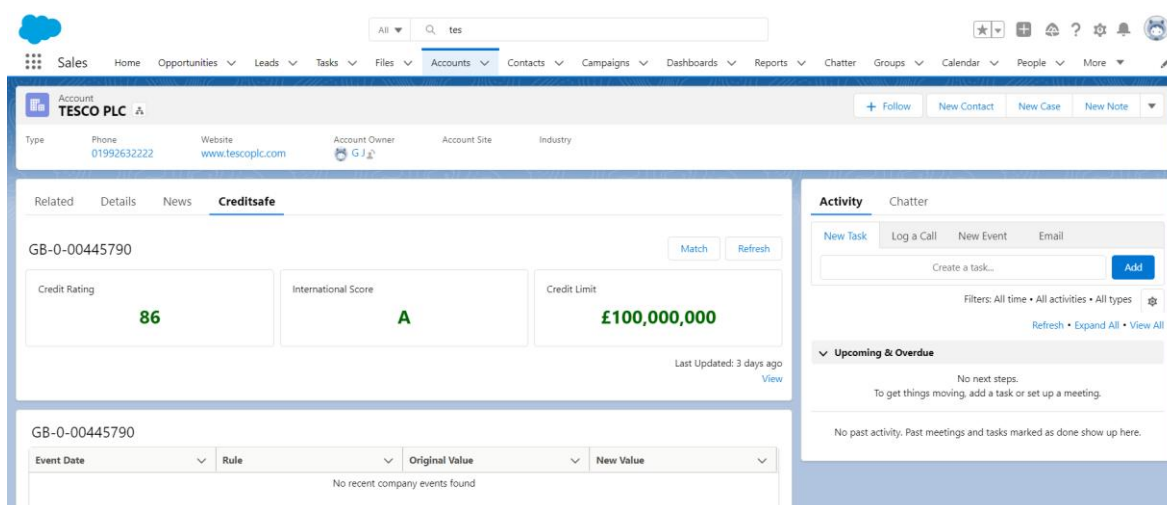


You can move the component to anywhere you wish on the page layout.



Click save and Activate the new page.

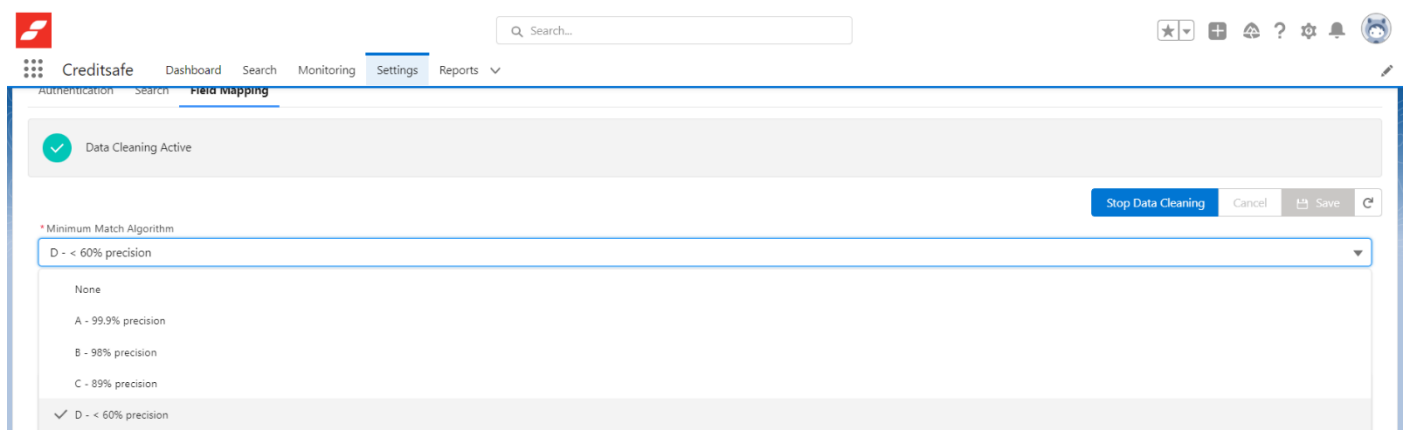
You can also add Components to custom tabs where you can view Credit Reports and Events



Records not matching in Creditsafe Data Cleaning

Creditsafe Data Cleaning enables businesses to overcome data decay and restore faith in their database. Using our matching algorithm, we match your Salesforce information provided against the Creditsafe database. You can then choose to append up to 32 data fields of up-to-date trusted company information to your Salesforce record [Account or Lead]. We offer data cleaning for businesses across 18 countries, with 32 data points available to append globally.

If you have enabled Data Cleaning and are not seeing records being updated, check the matching algorithm within the Settings. We have patterns ranging from strong exact matches to loose matches as we understand customers have different use cases. You may need to reduce the Matching Algorithm to a lower category.



The screenshot shows the Creditsafe web interface. At the top, there is a navigation bar with the Creditsafe logo, a search bar, and tabs for Authentication, Search, Field mapping, Monitoring, Settings, and Reports. The 'Settings' tab is active. Below the navigation bar, there is a status bar indicating 'Data Cleaning Active' with a green checkmark. To the right of this status bar are buttons for 'Stop Data Cleaning', 'Cancel', 'Save', and a refresh icon. Below the status bar, there is a section titled '* Minimum Match Algorithm'. It contains a dropdown menu currently set to 'D - < 60% precision'. Below the dropdown, there is a list of options: 'None', 'A - 99.9% precision', 'B - 98% precision', 'C - 89% precision', and 'D - < 60% precision'. The 'D - < 60% precision' option is selected and highlighted with a checkmark.

Grant Login Access

Sometimes you may have queries or issues with the Creditsafe Salesforce Business Intelligence Plus application you have installed in your salesforce org. In order to assist you with the issue, Creditsafe Support may ask you to Grant Login Access in order to assist you with a question, issue, or request. You can grant account login access to the Creditsafe support team for a specific time period by an administrator.

Grant login access can be set for the following time periods.

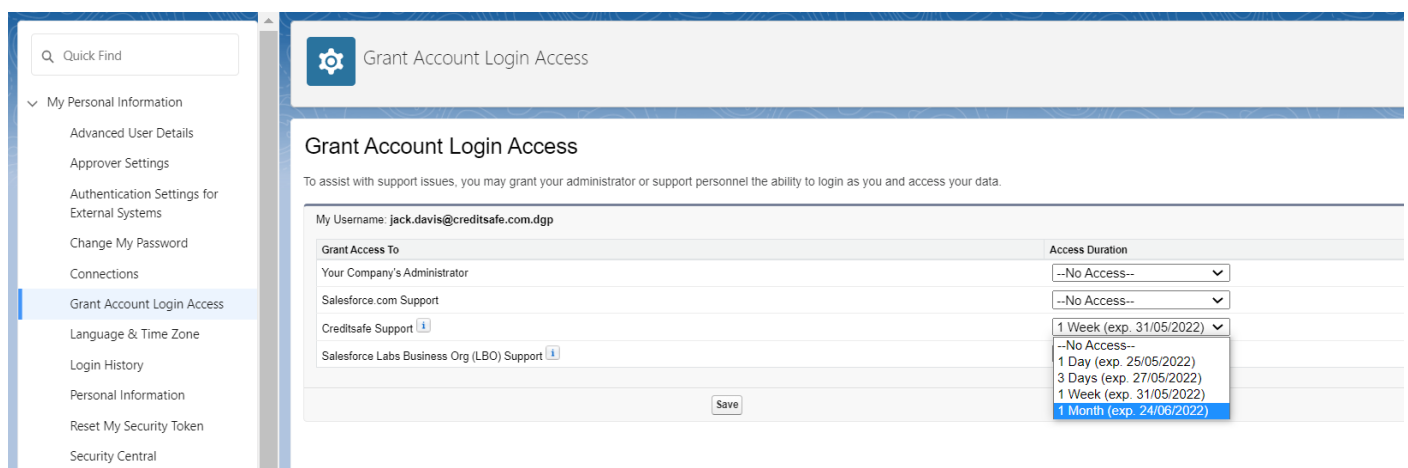
- 1 day
- 3 days
- 1 week
- 1 month

Once you have granted access, Creditsafe Support can access your Org to help you resolve problems.

How to Grant Login Access

Salesforce Lightning

- Log in to Salesforce.
- In the upper right, click your image (avatar) and then click Settings.
- In "Quick Find" search field, enter "Grant" and click Grant Account Login Access.
- Set the Access Duration option to Creditsafe Support. Note: Access for technical escalations must be set for a minimum of one month.
- Click Save.



Quick Find

My Personal Information

- Advanced User Details
- Approver Settings
- Authentication Settings for External Systems
- Change My Password
- Connections
- Grant Account Login Access
- Language & Time Zone
- Login History
- Personal Information
- Reset My Security Token
- Security Central

Grant Account Login Access

To assist with support issues, you may grant your administrator or support personnel the ability to login as you and access your data.

My Username: jack.davis@creditsafe.com.dgp

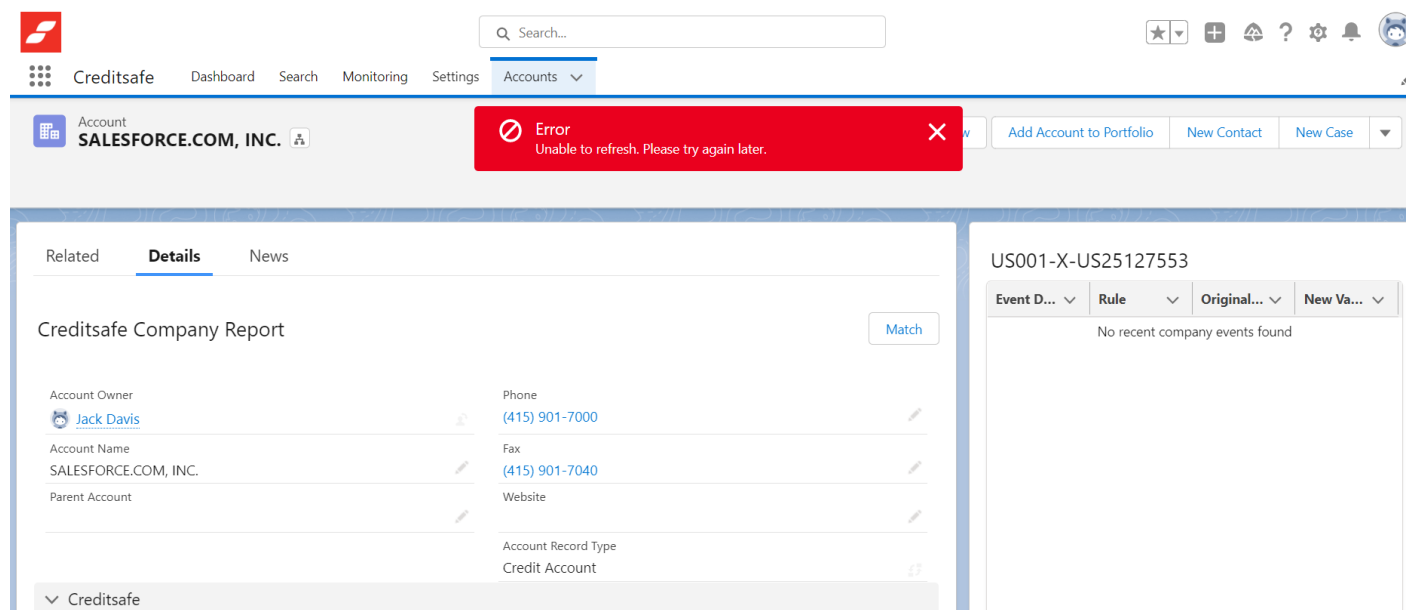
Grant Access To	Access Duration
Your Company's Administrator	--No Access--
Salesforce.com Support	--No Access--
Creditsafe Support	1 Week (exp. 31/05/2022)
Salesforce Labs Business Org (LBO) Support	--No Access--

Save

States and Country/Territory Picklists

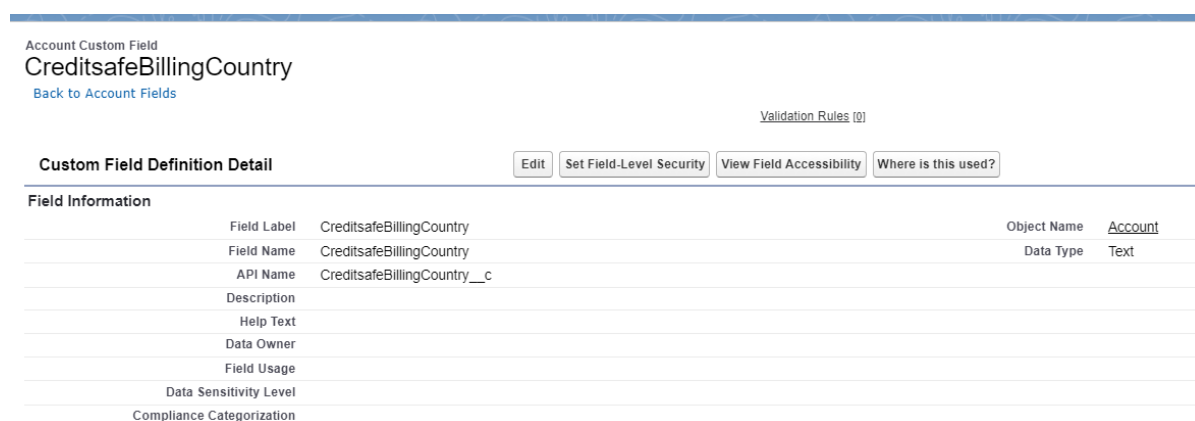
State and country/territory picklists are available in the shipping, billing, mailing, and “other” address fields in the account, lead standard objects.

When performing a match either manually or via the automated data cleaning process match, Creditsafe uses the standard two-digit country ISO codes (GB, US, FR, IT, DE etc). If you have State and Country/Territory Picklist enabled, you may get the Error Message ‘Unable to refresh. Please try again later.’ When trying to match some countries. This is because we’re trying to pass two digit string field into a Picklist.



The screenshot shows the Creditsafe interface. At the top, there's a search bar and navigation tabs: Creditsafe, Dashboard, Search, Monitoring, Settings, and Accounts. Below the navigation, there's a red error banner that says "Error: Unable to refresh. Please try again later." The main content area shows the "Details" tab for the account "SALESFORCE.COM, INC.". It lists account information such as Account Owner (Jack Davis), Account Name (SALESFORCE.COM, INC.), Parent Account, Phone ((415) 901-7000), Fax ((415) 901-7040), Website, and Account Record Type (Credit Account). There's also a "Match" button and a "Creditsafe" dropdown menu.

To resolve, create a new text field on the Account e.g. ‘Creditsafe Billing Country’ (similar to below).



The screenshot shows the "Custom Field Definition Detail" page for the field "CreditsafeBillingCountry". The page includes a "Field Information" table with the following details:

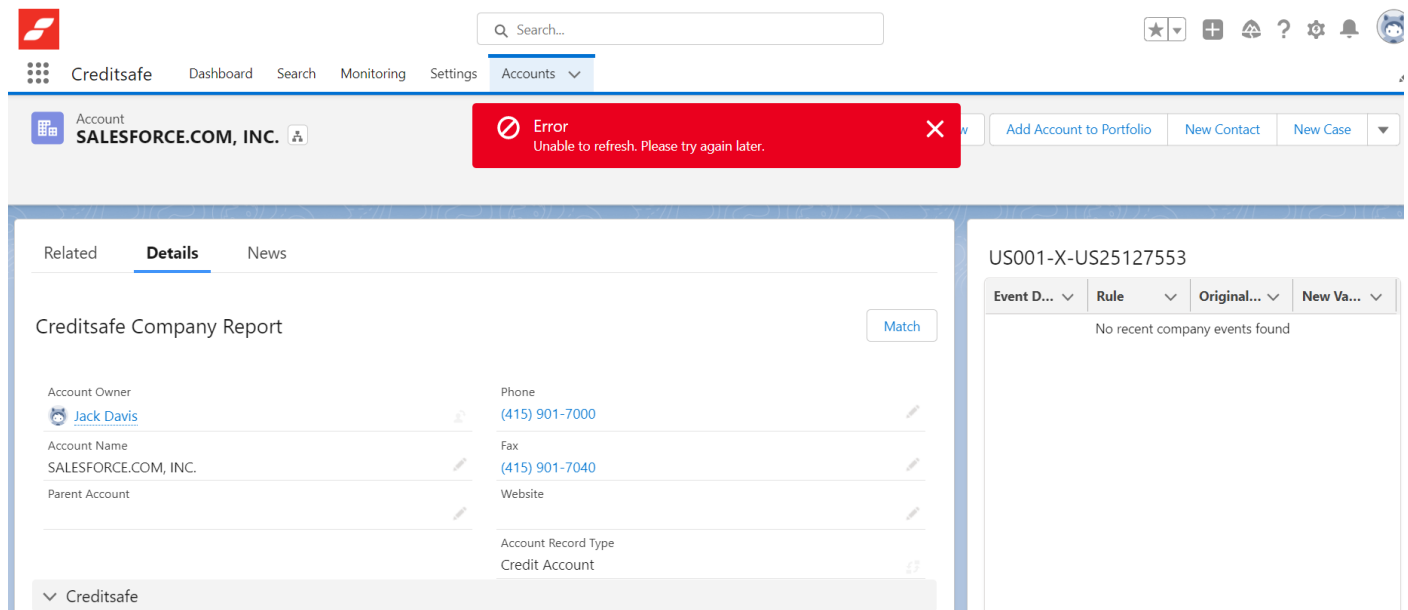
Field Label	CreditsafeBillingCountry	Object Name	Account
Field Name	CreditsafeBillingCountry	Data Type	Text
API Name	CreditsafeBillingCountry__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

At the top of the page, there's a "CreditsafeBillingCountry" header with a "Back to Account Fields" link. Below the header, there's a "Validation Rules (0)" section and a "Custom Field Definition Detail" section with buttons for "Edit", "Set Field-Level Security", "View Field Accessibility", and "Where is this used?".

Once the new field has been created you will need to update the Field Mappings, Enrichment: Account to map the Country to the new field created and then click Save. In this example, Creditsafe Billing Country. You can use one of the standard workflow automation tools to set the Billing Country picklist to ‘United Kingdom, United States, France etc’ based on the two-digit ISO code. Speak to your Salesforce Administrator on how to do this.

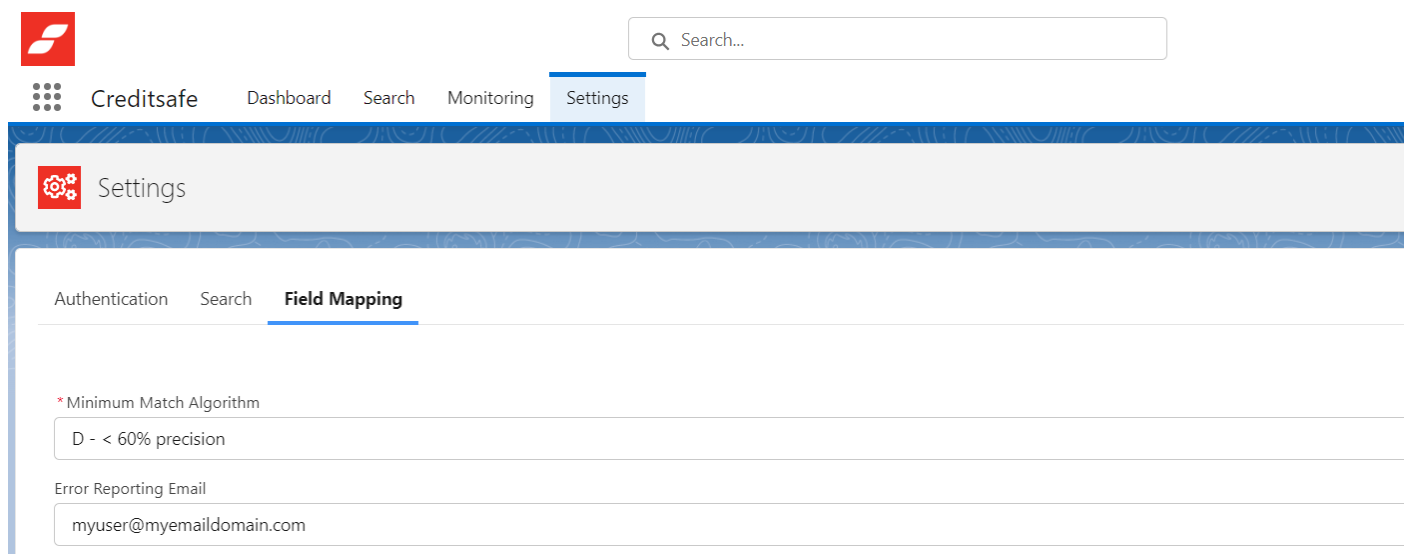
Error Reporting Email

Data Cleaning jobs may encounter errors when trying to trying to enrich your Account records. If there are error messages that the app is trying to send and you don't have an email in the 'Error Reporting Email', you will receive the 'Unable to Refresh. Please try again later' message.



The screenshot shows the Creditsafe Accounts page. At the top, there is a search bar and navigation links: Creditsafe, Dashboard, Search, Monitoring, Settings, and Accounts. A red error banner at the top right states: "Error: Unable to refresh. Please try again later." Below the banner, the account details for "SALESFORCE.COM, INC." are displayed. The details include Account Owner (Jack Davis), Account Name (SALESFORCE.COM, INC.), Parent Account, Phone ((415) 901-7000), Fax ((415) 901-7040), Website, and Account Record Type (Credit Account). A "Match" button is visible next to the account name. On the right side, there is a section for "US001-X-US25127553" with tabs for Event D..., Rule, Original..., and New Va... The content area below these tabs states "No recent company events found".

To resolve navigate to the Creditsafe settings | Field Mapping and enter an email address, so that email address can receive error reporting notifications from any of the matching processes that are executed.



The screenshot shows the Creditsafe Settings page. At the top, there is a search bar and navigation links: Creditsafe, Dashboard, Search, Monitoring, and Settings. The Settings page has a sidebar with a gear icon and the word "Settings". The main content area has tabs for Authentication, Search, and Field Mapping. The Field Mapping tab is selected. Below the tabs, there is a section for "Minimum Match Algorithm" with a dropdown menu set to "D - < 60% precision". Below this, there is a section for "Error Reporting Email" with a text input field containing "myuser@myemaildomain.com".

Unhandled Fault

When encountering an 'unhandled fault' error within Salesforce flows, you will need to check whether the users Profile or Permission Sets has the 'Manage Auth. Providers' permission enabled. This will allow the user to create and manage authentication providers.

- If you use Enhanced Profile User Interface this can be found in System Permissions > Manage Auth. Providers.
- If you don't use Enhanced Profile User Interface this can be found in Administrative Permissions > Manage Auth. Providers.

Start Authentication

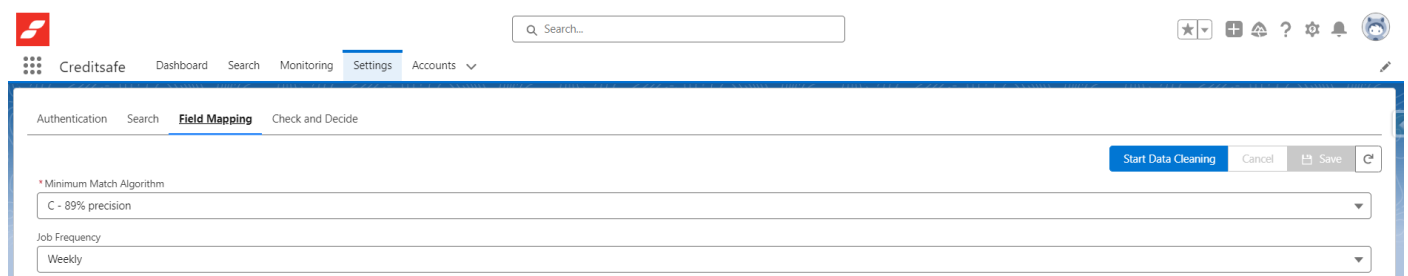
An unhandled fault has occurred in this flow

An unhandled fault has occurred while processing the flow. Please contact your system administrator for more information.

Unable to Save Settings

When users are unable to save settings in Business Intelligence Plus, it's crucial to check the 'Customize Application' setting in their profile or permission set.

The location of this setting varies: for those using the Enhanced Profile User Interface, it's under System Permissions > Customize Application. Without the Enhanced Profile User Interface, you'll find it under Administrative Permissions > Customize Application. If your organization's default sharing rules limit access, creating a custom permission set with 'Customize Application' enabled may be necessary to grant users the required capabilities.



Attempt to de-reference a null object

If you are seeing repeated Data Cleaning jobs running every hour, it is likely that the application is unable to save the Last Cleansed Date on one or more Account records. Because the date is not updated successfully, the same Accounts continue to be selected for future data cleaning jobs.

You can confirm this by navigating to:

Setup | Apex Jobs

Locate the SubmitDataCleaningBatch job. If the job has failed, you may see the following error:

Attempt to de-reference a null object

WHAT DOES THIS ERROR MEAN?

This error occurs when Apex code (Salesforce's programming language) attempts to access a value or object that does not exist (is null).

For example, Salesforce expects a field or related record to contain a value, but the value is blank. When the code attempts to use that value, Salesforce throws an "Attempt to de-reference a null object" exception.

Although this error originates from Apex code, the Account update may also be prevented by other Salesforce automation, such as:

- Validation Rules
- Apex Triggers
- Record-Triggered Flows
- Required Lookup fields
- Custom automation from managed packages
- How the Data Cleaning batch updates records

The Data Cleaning batch updates Account records using the following Apex method:

```
Database.update(accounts, false);
```

The false parameter sets allOrNone = false, which means Salesforce attempts to update each Account individually.

If one Account fails to update, Salesforce continues processing the remaining Accounts rather than stopping the entire batch.

During the update, Salesforce performs all normal validation, including Validation Rules, Triggers and Flows. If any of these processes fail, the Account is not updated and the Last Cleansed Date is not saved.

The batch only updates the CS_APP__Last_Cleansed_Date__c field on existing Account records. Standard required fields are not revalidated unless another process prevents the record from being saved.

	Submitted Date	Job Type	Apex Class	Status	Status Detail	Total Batches	Apex Method	Batches Processed	Failures
	28/03/2024 16:00	Batch Apex	EnrichDataCleaningBatch	Completed		0		0	0
	28/03/2024 16:00	Batch Apex	SubmitDataCleaningBatch	Completed	First error: Attempt to de-reference a null object	4		4	3
	28/03/2024 15:30	Batch Apex	EnrichDataCleaningBatch	Completed		0		0	0
	28/03/2024 15:00	Batch Apex	SubmitDataCleaningBatch	Completed	First error: Attempt to de-reference a null object	3		3	3
	28/03/2024 15:00	Batch Apex	EnrichDataCleaningBatch	Completed		0		0	0
	28/03/2024 14:30	Batch Apex	EnrichDataCleaningBatch	Completed		0		0	0
	28/03/2024 14:00	Batch Apex	SubmitDataCleaningBatch	Completed	First error: Attempt to de-reference a null object	3		3	3
	28/03/2024 14:00	Batch Apex	EnrichDataCleaningBatch	Completed		0		0	0
	28/03/2024 13:30	Batch Apex	EnrichDataCleaningBatch	Completed		0		0	0
	28/03/2024 13:00	Batch Apex	EnrichDataCleaningBatch	Completed		0		0	0
	28/03/2024 13:00	Batch Apex	SubmitDataCleaningBatch	Completed	First error: Attempt to de-reference a null object	3		3	3
	28/03/2024 12:30	Batch Apex	EnrichDataCleaningBatch	Completed		0		0	0
	28/03/2024 12:00	Batch Apex	SubmitDataCleaningBatch	Completed	First error: Attempt to de-reference a null object	3		3	3
	28/03/2024 12:00	Batch Apex	EnrichDataCleaningBatch	Completed		0		0	0

WHAT SHOULD YOU CHECK?

If the batch reports errors, review the following:

Validation Rules on the Account object.

Before-update Apex Triggers that may be attempting to access a null value.

Record-Triggered Flows that execute when an Account is updated.

Required Lookup fields or custom fields that may be missing values.

Custom automation that assumes a field or related record always contains data.

The error messages returned from the Apex Job, as these can help identify the failing records.

IDENTIFY THE RECORDS CAUSING THE FAILURE

The easiest way to identify the Accounts causing the problem is to manually update the Last Cleansed Date using a Salesforce List View. Salesforce will display the same error that is preventing the Data Cleaning batch from updating the record.

Step 1 - Create a new List View

Navigate to the Accounts tab.

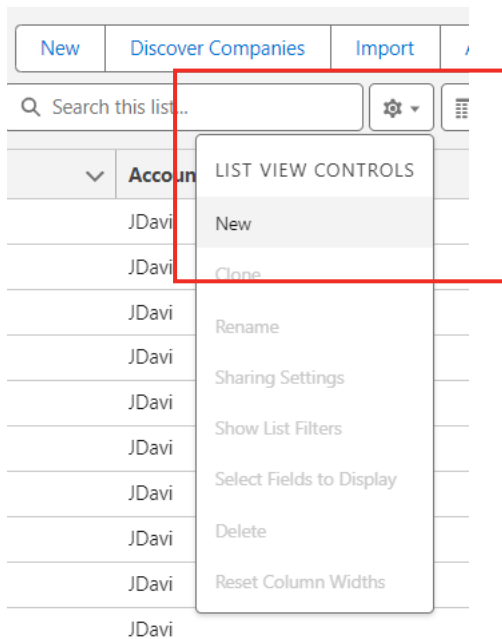
Click the List View Controls icon (⚙) next to Search this list...

Select New.

Enter a name for the List View (for example, Creditsafe Troubleshooting).

Select Only I can see this list view.

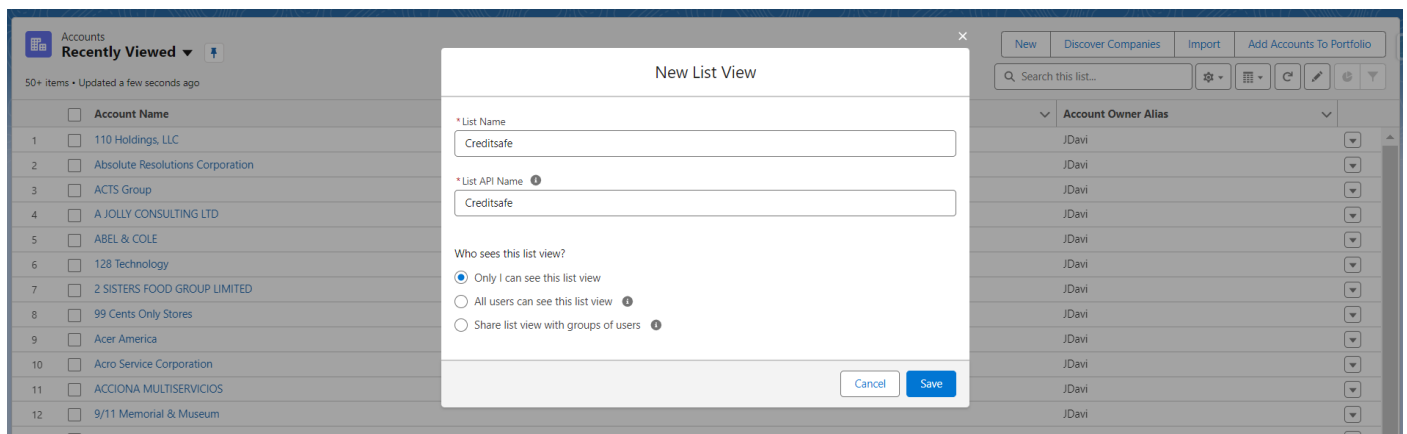
Click Save.



Add a name for the list. For instance, you can name the list 'Creditsafe'.

You get an option to decide who can view the list. Here, we're selecting the option 'Only I can see this list view'.

Click 'Save'.



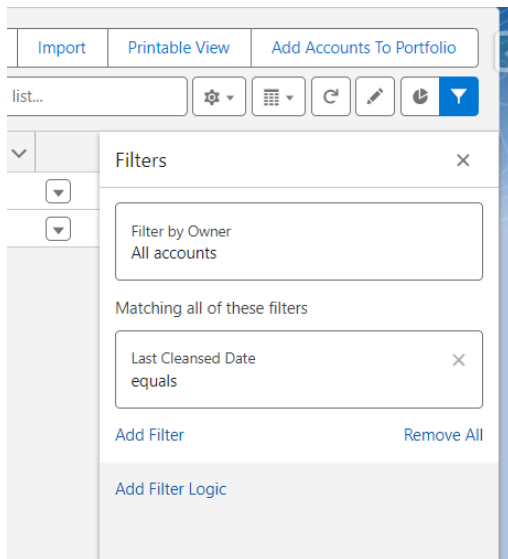
Initially, the list view will show all the accounts without any filters.

To add filters and narrow down the list data, click the filter icon to open or collapse the filter pane.

Go to the Field dropdown menu and select the field you want to filter, for instance, type.

Select the desired operator and value you want to filter for. For example, we want to filter records that equal the type 'Last Cleansed equals blank'.

Then, click Done.



To change and reorder the columns displayed in a list view, select **Select Fields to Display**. Fields correspond to columns in the final list view.

Select the fields that you want to show in your list view.

Navigate to your new list view.

Click **List View Controls** icon, then click **Select Fields to Display**.

Set the **Account Name**, **Last Cleansed Date**, **Last Updated**, **Connect Id** and **Billing Country** fields from the **Available Fields** to the **Visible Fields**. You can also add/remove items from the **Visible Fields** as needed.

	Account Name ↑	Last Cleansed Date	Last Updated	Connect Id	Billing Country
1	CREDITSafe BUSINESS SOLUTIONS LIMITED	13/05/2024	13/05/2024, 04:00	GB-0-03836192	UK
2	Creditsafe Services Ltd	10/05/2024			
3	CREDITSafe USA INC.	13/05/2024	13/05/2024, 04:00	US-X-US169150640	US

From the list, select all the rows and hover over the **Last Cleansed** to edit, and then click **Pencil** icon. Or, double-click the cell.

Make your change in the editable cell or cells. Set the **Last Cleansed Date** to a date in the future e.g., 31-12-2024. Check the box that says **Update selected items**. Click **Apply** to make this change.

The screenshot shows the 'Accounts' section of the Creditsafe interface. Three accounts are selected: CREDITSafe BUSINESS SOLUTIONS LIMITED, Creditsafe Services Ltd, and CREDITSafe USA INC. A modal is open for updating the 'Last Cleansed Date' for these three items. The date '31/12/2024' is entered in the date picker. The modal has 'Cancel' and 'Apply' buttons.

	Account Name ↑	Last Cleansed Date	Last Updated	Connect Id	Billing Country
1	☒ CREDITSafe BUSINESS SOLUTIONS LIMITED	31/12/2024	12/04/2024, 04:00	GB-0-03836192	UK
2	☒ Creditsafe Services Ltd	☒ Update 3 selected items	12/04/2024, 04:00		
3	☒ CREDITSafe USA INC.		12/04/2024, 04:00	US-X-US169150640	US

A Save button appears at the bottom of the list view.

Click Save.

The screenshot shows the 'Accounts' section of the Creditsafe interface. The three accounts are still selected. The 'Last Cleansed Date' for all three accounts is now '31/12/2024'. The 'Last Updated' date is '13/05/2024, 04:00'. The 'Connect Id' and 'Billing Country' are also visible. At the bottom of the list view, there are 'Cancel' and 'Save' buttons.

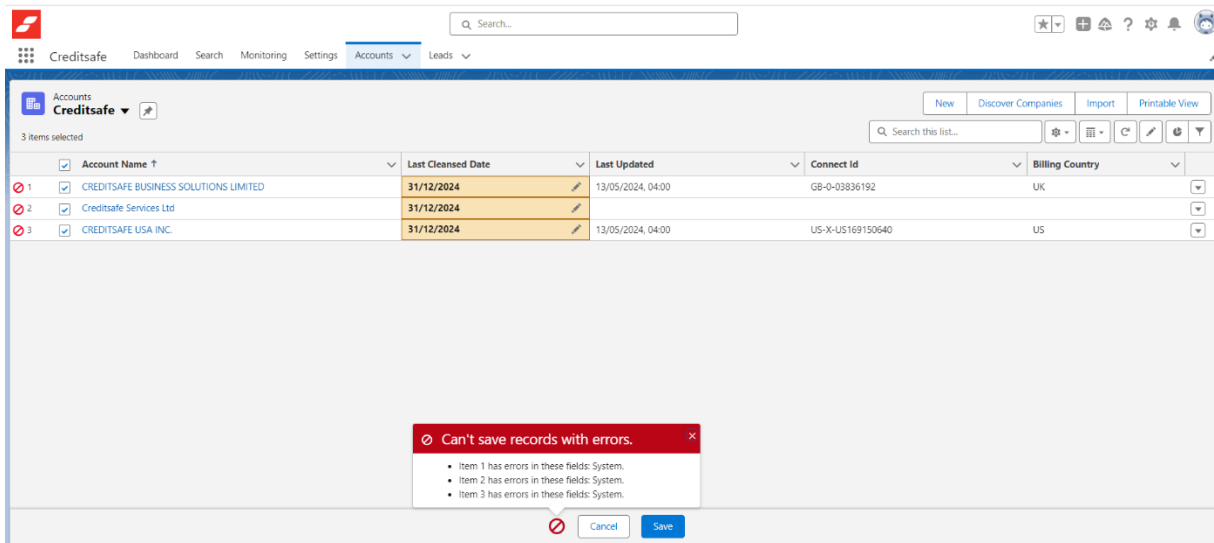
	Account Name ↑	Last Cleansed Date	Last Updated	Connect Id	Billing Country
1	☒ CREDITSafe BUSINESS SOLUTIONS LIMITED	31/12/2024	13/05/2024, 04:00	GB-0-03836192	UK
2	☒ Creditsafe Services Ltd	31/12/2024	13/05/2024, 04:00		
3	☒ CREDITSafe USA INC.	31/12/2024	13/05/2024, 04:00	US-X-US169150640	US

Error Notification: A red error message box appears at the bottom of the screen indicating that records cannot be saved due to errors. In the example, the message specifies that each of the three Accounts has errors in the "System" field. To resolve the example issue:

Check the "System" field for each of the selected Accounts and correct any issues. This might involve ensuring the field values are not Required.

Validation Rules: Ensure there are no custom validation rules or triggers that are causing the error.

Permissions: Verify that you have the necessary permission to edit the "System" field for these records. Once the issues in the "System" field are addressed, you should be able to save the records without errors.



Once the error message has been identified:

Correct the issue on the affected Account(s). Save the Account successfully. Verify that the Last Cleansed Date has been populated. Allow the next scheduled Data Cleaning job to run or manually rerun the batch if appropriate.

Once the Last Cleansed Date can be saved successfully, the Account will no longer be repeatedly selected for Data Cleaning, and the batch should complete without further errors.

Unable to Refresh, Please Try Again

The message "Unable to refresh, please try again" is one of the most common errors encountered during Account Matching, Enrichment and Refresh. Although the error displayed in Salesforce is generic, it is almost never the root cause. Instead, it indicates that Salesforce was unable to complete the update after attempting to write data back to the Account or Lead. The underlying cause almost always exists elsewhere within the customer's Salesforce configuration. This section should explain that the error is simply the symptom rather than the problem itself.

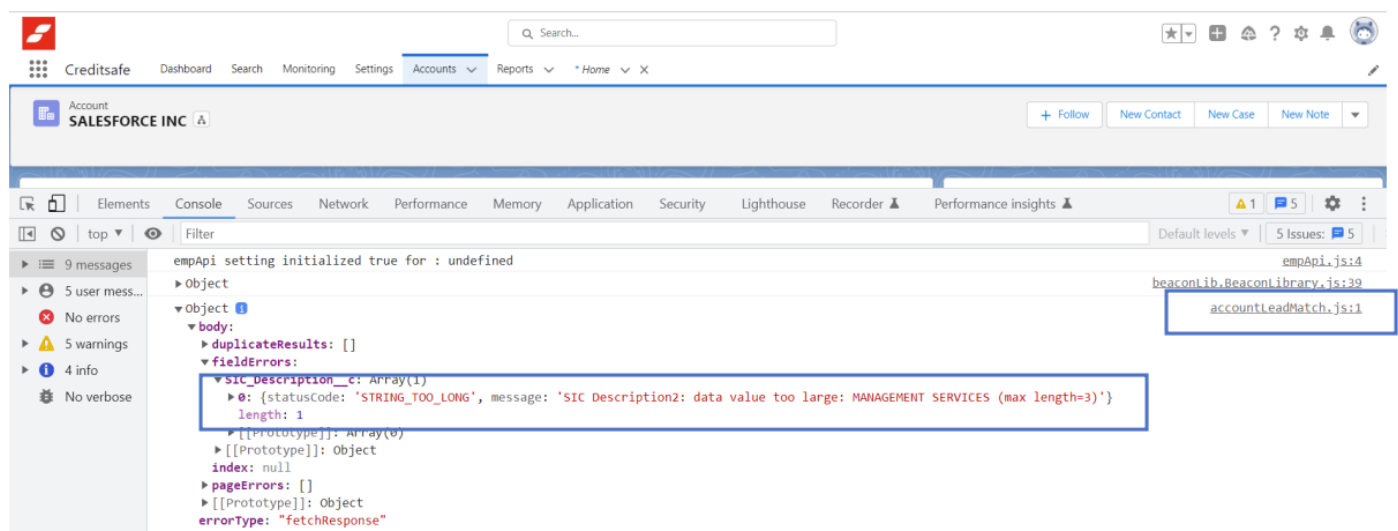
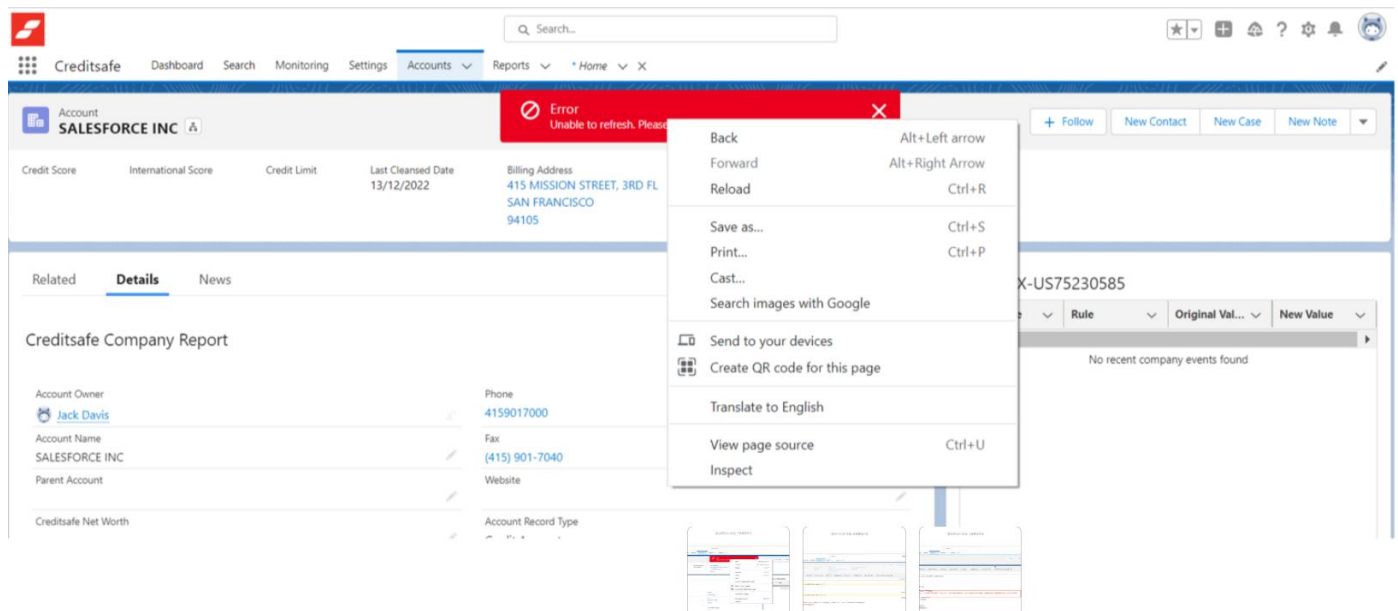
Common Causes

The failure is commonly caused by:

- Validation Rules preventing updates
- Required fields missing
- Custom Apex Triggers
- Record Triggered Flows
- Duplicate field mappings
- Field length restrictions
- Read-only fields
- Restricted picklists
- Insufficient field permissions
- Unexpected automation within Salesforce

How to resolve

The next step should be opening the browser Developer Tools by pressing F12 or right clicking and choosing the inspect element, selecting the Console tab and reproducing the error.



If an error object is displayed, expanding the Body section will often reveal the exact error returned.