



cloudnotions

Delete Helper App

Salesforce

Admin Guide

Cloud Notions, LLC

Purpose

This document provides an orientation to the Delete Helper appexchange app, and instructions for installation and configuration. The intended audience is the Salesforce Administrator community.

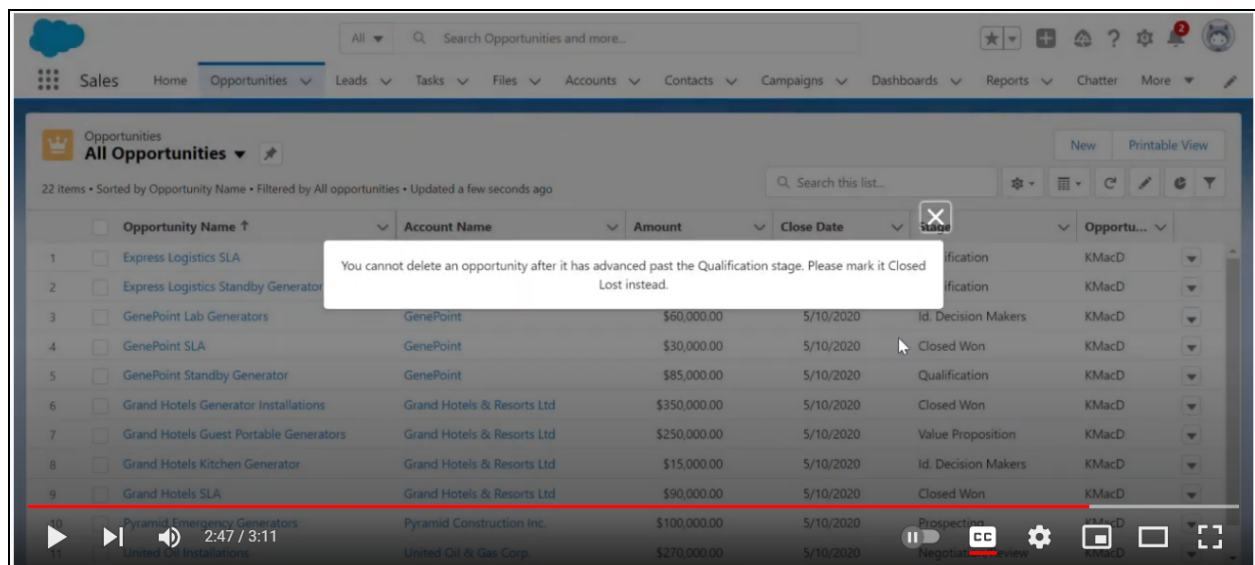
App Overview

Sometimes, system administrators want to allow the deletion of only specific records. For example, newly created Contacts or Opportunities that were created in error. Unfortunately, Salesforce does not include a Delete Validation Rules feature; if delete permissions are granted, any record could be deleted.

The Delete Helper app allows system administrators to define specific rules about when a record can or cannot be deleted. The feature is similar to standard Validation Rules, but it expands the functionality to cover deletion.

Essentially, the app is an Apex trigger. The admin creates specific background formula fields, and if the formula evaluates to "True", the record deletion is stopped.

See here for a video demo:



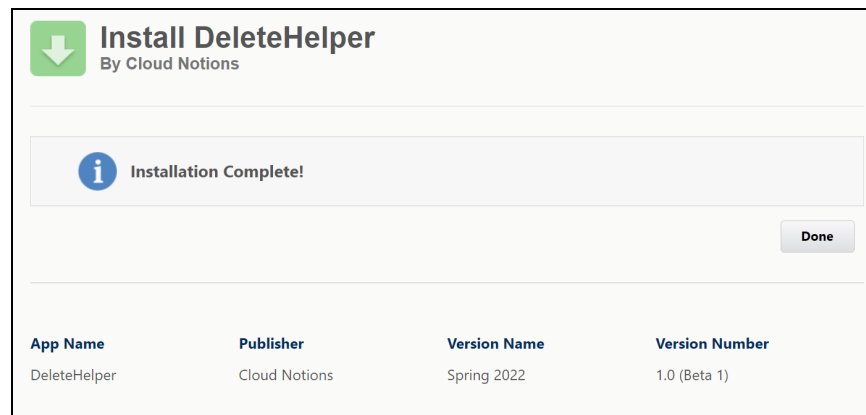
<https://www.youtube.com/watch?v=92Bo9NyhnyM>

Installation

This section outlines the process to install the app.

1. Click "Get it Now" on the appexchange listing.
2. When prompted, click "Install for all users"

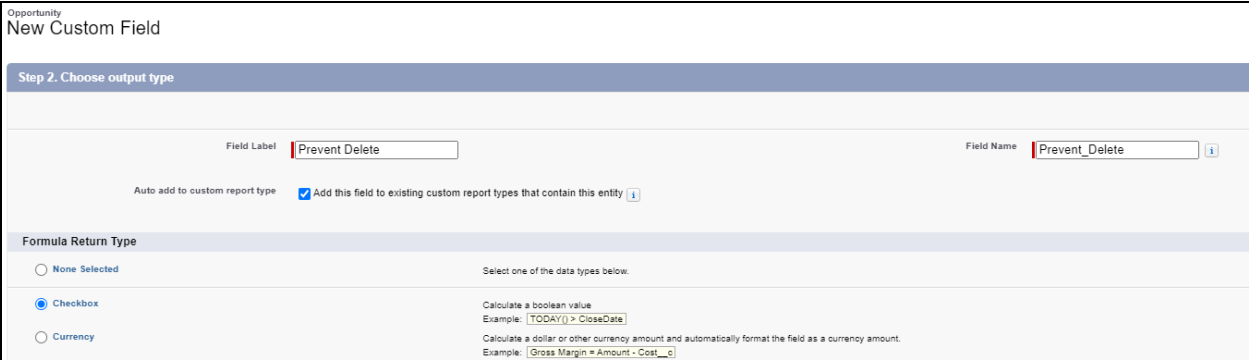
3. After the process completes, this success screen will appear:



Configure Fields

Important: this application will do nothing until fields are properly configured.

1. Determine the object you'd like to prevent the users from deleting selected records on. ***At the moment, this app only supports the standard Opportunity, Account, Lead, Case, and Contact objects.***
2. Add a field on the object named as follows:
 - a. Label: **Prevent Delete**
 - b. API Name: Prevent_Delete__c
 - c. Field Type: formula (checkbox)



Opportunity
New Custom Field

Step 2. Choose output type

Field Label: Prevent Delete

Field Name: Prevent_Delete

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Formula Return Type

☐ None Selected

☒ Checkbox

☐ Currency

Select one of the data types below.

Calculate a boolean value.
Example: `{TODAY()} > CloseDate`

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `{Gross Margin * Amount * Cost__c}`

3. **Prevent Delete** Formula Definition:
 - a. Create a formula field that resolves to "true" when the record meets certain criteria.
 - b. For example, to only allow an Opportunity to be deleted if it is in the first "Qualification" stage, this would be the formula:

```
IF(
/* if the stage is NOT Qualification */
NOT(TEXT(StageName) = "Qualification"),
/* set the "Prevent Delete" field to TRUE, stopping the delete */
true,
false
)
```

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: [More Examples...](#)

Prevent Delete (Checkbox) =

```
IF(
/*if the stage is NOT Qualification*/
NOT(TEXT(StageName) = "Qualification"),
/*set the "Prevent Delete" field to TRUE, stopping the delete*/
true,
false
)
```

- c. Select the checkbox to remove the field from all page layouts.

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☐ Add Field	Page Layout Name
☐	Opportunity (Marketing) Layout
☐	Opportunity (Sales) Layout
☐	Opportunity (Support) Layout
☐	Opportunity Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

- d. Pro-Tip: create a report of records that wouldn't allow deletion. Drop your new **Prevent Delete** checkbox field as a column to confirm that it shows as checked for the desired records.

Report: Opportunities
Prevent Delete Field Check
Checking the accuracy of the Prevent Delete field

Total Records	Total Prevent Delete
31	27

	Account Name	Opportunity Name	Stage ↑	Prevent Delete
1	Pyramid Construction Inc.	Pyramid Emergency Generators	Prospecting	☒
2	Dickenson plc	Dickenson Mobile Generators	Qualification	☐
3	GenePoint	GenePoint Standby Generator	Qualification	☐
4	United Oil & Gas Corp.	United Oil Emergency Generators	Qualification	☐
5	Grand Hotels & Resorts Ltd	Grand Hotels Emergency Generators	Qualification	☐
6	United Oil & Gas Corp.	United Oil Plant Standby Generators	Needs Analysis	☒
7	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Value Proposition	☒
8	Express Logistics and Transport	Express Logistics Portable Truck Generators	Value Proposition	☒
9	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Id. Decision Makers	☒
10	GenePoint	GenePoint Lab Generators	Id. Decision Makers	☒
11	Edge Communications	Edge Emergency Generator	Id. Decision Makers	☒
12	Express Logistics and Transport	Express Logistics SLA	Perception Analysis	☒
13	United Oil & Gas Corp.	United Oil Refinery Generators	Proposal/Price Quote	☒

4. Add a **Prevent Delete Message** formula text field:
 - a. Label: **Prevent Delete Message**
 - b. API Name: Prevent_Delete_Message__c
 - c. Field Type: formula (text)

Opportunity
New Custom Field

Step 2. Choose output type

Field Label: Field Name: ⓘ

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity ⓘ

Formula Return Type

☐ None Selected

☐ Checkbox

☐ Currency

☐ Date

☐ Date/Time

☐ Number

☐ Percent

☒ Text

Select one of the data types below.

Calculate a boolean value.
Example: `TODAY() > CloseDate`

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: `Next = NOW() + 1`

Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius__c + 32`

Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount__c) / Amount`

Create a text string, for example, by concatenating other text fields.
Example: `Full Name = LastName & ", " & FirstName`

5. **Prevent Delete Message** Formula Definition:
 - a. Enter any text that you'd like the app to display when it stops a delete.
 - b. Make sure to include quote marks. For example:

"You cannot delete an opportunity after it has advanced past the Qualification stage. Please mark it Closed Lost instead."

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `Full Name = LastName & ", " & FirstName` [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator ▼

Prevent Delete Message (Text) =

"You cannot delete an opportunity after it has advanced past the Qualification stage. Please mark it Closed Lost instead."

c. Select the checkbox to remove the field from all page layouts.

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☐ Add Field Page Layout Name

☐ Opportunity (Marketing) Layout

☐ Opportunity (Sales) Layout

☐ Opportunity (Support) Layout

☐ Opportunity Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Common Formulas

This section shows typical formulas. Since formula fields follow the same syntax as validation rules, it may be helpful to visit Salesforce's Common Validation Rules page.

Prevent Delete unless mistakenly created today:

```
CreatedDate < TODAY()
```

Prevent Delete if the record is a certain Record Type:

```
IF(
  AND(
    /*if Record Type is Business Support*/
    (RecordType.Name = "Business Support"),
    /*if priority is High*/
    (TEXT(Priority) = "High")),
  true, false)
```

Prevent Delete if the record is above a certain Amount:

```
IF(  
  AND(  
    /*if Amount is above $20,000*/  
    (Amount>20000),  
    /*if stage is NOT Closed Lost*/  
    NOT(TEXT(StageName) = "Closed Lost")),  
  true, false)
```

Prevent Delete if the record is owned by a Manager:

```
IF(  
  /*if user Role is CEO*/  
  Owner.UserRole.Name = "CEO",  
  true, false)
```

FAQs

This section includes common questions.

- **Q:** What happens if I don't set a message or checkbox formula?
- **A:** The app will "fail safe" back to the standard behavior. It will not prevent any deletes if not properly configured.

- **Q:** Can I rename the formula fields to specify for the Object? IE: Prevent_Delete_Opp, etc.
- **A:** No. The trigger needs the exact names listed above in order to work.

- **Q:** Why can't my user see the delete button?
- **A:** The user's profile may not have Delete permissions for the object. Update their profile or grant them a permission set.

- **Q:** How can I allow specific profiles (System Administrator) to be exempt?
- **A:** Add the below to your formula to allow the system admin profile to always delete:

```
NOT($Profile.Name = "System Administrator")
```

- **Q:** Can this be used on any Object or just for Opportunities? How would you configure it for each object or choose which objects it will work on?

- **A:** The app works with Leads, Contacts, Accounts, Cases, and Opportunities. They can be configured the same way as the Opportunity example above: adding the two formula fields.