



BMS Delete Files

User Manual Version 1.0

Blue Merchant Solutions Pvt Ltd

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Introduction

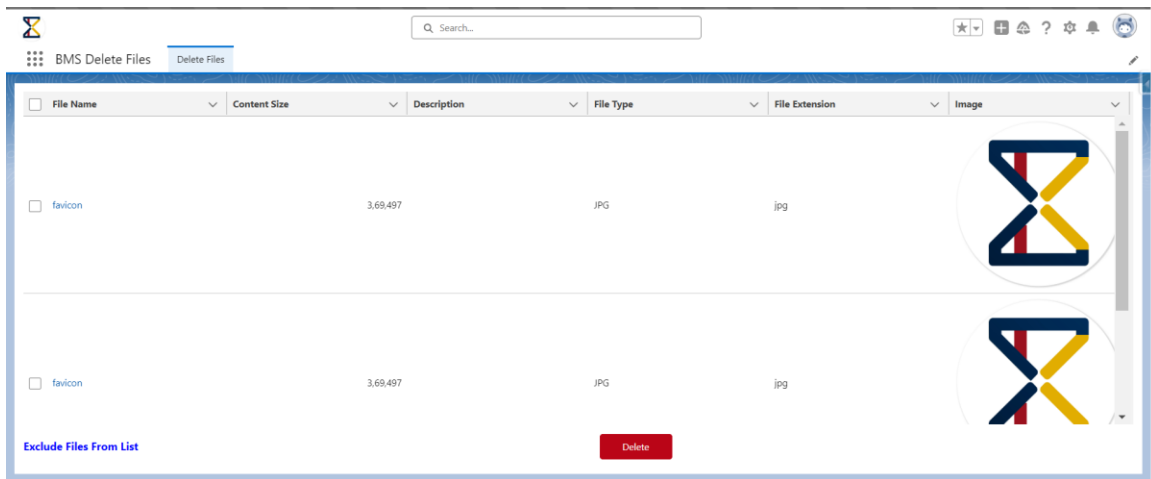
The BMS Delete Files functionality is designed to help administrators and designated users manage files efficiently within the BMS Customer Portal. Through this feature, users can delete unnecessary or outdated files, ensuring that the portal remains organized and relevant. This functionality streamlines file management by allowing easy removal of unwanted content, contributing to a more efficient and user-friendly platform for all employee-related activities.

Who should use this manual

This manual is specific to all Salesforce users who installed the BMS Delete Files application on Salesforce.

Process Overview

The BMS Delete Files functionality allows designated users to delete files uploaded to the BMS Customer Portal. This document provides the necessary post-deployment configuration steps to enable and use this feature.



(BMS Delete Files App)

Post-Deployment Steps

1. Create a Permission Set

- A. Create a permission set named "Query All Files" to allow access to view all files in the system.
 - Go to Setup > Permission Sets, and create a new permission set with the name Query All Files.
 - Under App Permissions, enable the Query All Files permission.

SETUP
Permission Sets

Permission Set
Query All Files Video Tutorial | Help for this Page

Find Settings... | Clone | Edit Properties | Manage Assignments | View Summary

Permission Set Overview

Description	API Name	Query_All_Files
License	Namespace Prefix	BMSS
Session Activation Required	Created By	Sahil Sharma 25/10/2024, 1:14 pm
Permission Set Groups Added To	Last Modified By	Sahil Sharma 30/10/2024, 2:18 pm

Apps

- Assigned Apps**
Settings that specify which apps are visible in the app menu
- Assigned Connected Apps**
Settings that specify which connected apps are visible in the app menu
- Object Settings**
Permissions to access objects and fields, and settings such as tab availability
- App Permissions**
Permissions to perform app-specific actions, such as "Manage Call Centers"
- Apex Class Access**
Permissions to execute Apex classes
- Visualforce Page Access**
Permissions to execute Visualforce pages

(Click on App Permissions)

SETUP
Permission Sets

Manage Visualforce Users | Ensure and update licenses for non-service and Visualforce Portal access.

Manage Entitlements | Enable, create, and update entitlement management items.

Manage Macros Users Can't Undo | Create, update, and run macros that include irreversible instructions.

Manage Published Solutions | Create, edit, and delete publicly accessible solutions.

Run Macros on Multiple Records | Run macros on multiple records at the same time.

Transfer Cases | Change a case's owner.

Content

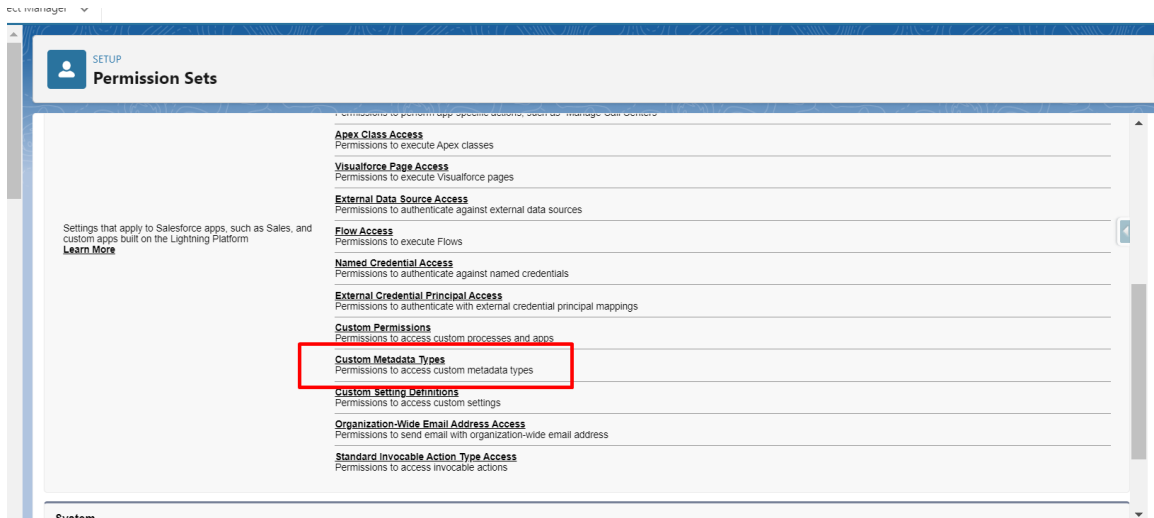
Permission Name	Enabled	Description
Manage Content Permissions	<input type="checkbox"/>	Create, edit, and delete library permissions in Salesforce CRM Content.
Manage Content Properties	<input type="checkbox"/>	Create, edit, and delete custom fields in Salesforce CRM Content.
Manage record types and layouts for Files	<input type="checkbox"/>	Create, edit, and delete content types in Salesforce CRM Content.
Manage Salesforce CRM Content	<input type="checkbox"/>	Create, edit, and delete libraries and library memberships.
Query All Files	<input checked="" type="checkbox"/>	Allows View All Data users to SOQL query all files in the org.
Query Non Vetoesd Files	<input type="checkbox"/>	Allows Data Cloud users to SOQL query all non vetoed files in the org.

Flow and Flow Orchestration

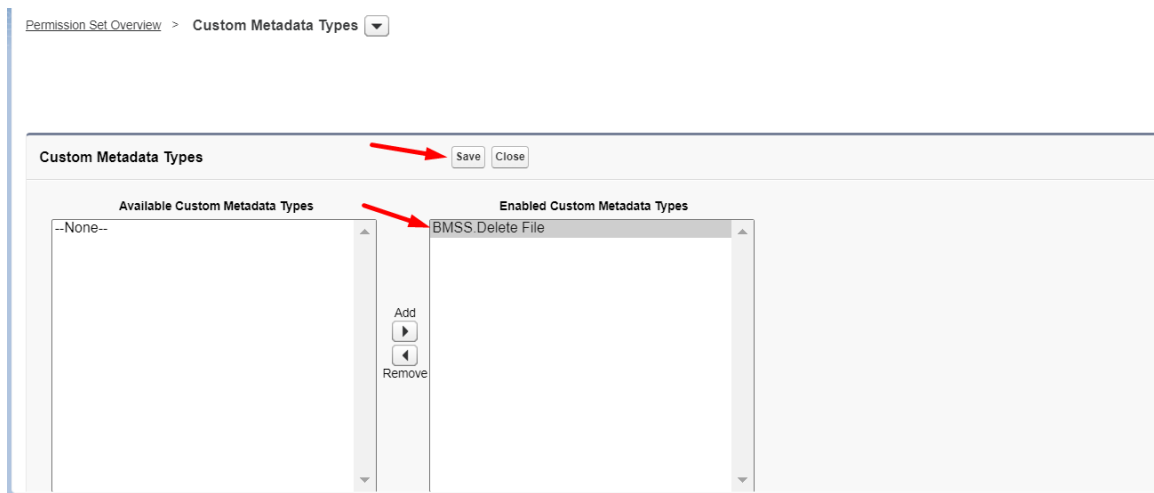
Permission Name	Enabled	Description
Enable System Mode Flow Activation	<input type="checkbox"/>	Allows a user to activate system flows.
Manage Flow	<input type="checkbox"/>	Allow users to view, create, edit, delete, and activate all flows and flow types in Lightning Experience apps and Setup.
Manage Orchestration Runs	<input type="checkbox"/>	Cancel, debug, suspend, and resume orchestration runs.
Manage Orchestration Runs and Work Items	<input type="checkbox"/>	Cancel, debug, suspend, and resume orchestration runs and reassign orchestration work items.

(Enable the 'Query All Files' permission)

B. Under Permission set overview, click on Custom Metadata Types and enable permission for the 'Delete File' metadata.



(Click on Custom Metadata Types)



(Enabled Custom Metadata)

C. Under Permission set overview, click on **System Permissions** and give the **Customize Application** permission to the permission set.

SETUP
Permission Sets

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

Flow Access
 Permissions to execute Flows

Named Credential Access
 Permissions to authenticate against named credentials

External Credential Principal Access
 Permissions to authenticate with external credential principal mappings

Custom Permissions
 Permissions to access custom processes and apps

Custom Metadata Types
 Permissions to access custom metadata types

Custom Setting Definitions
 Permissions to access custom settings

Organization-Wide Email Address Access
 Permissions to send email with organization-wide email address

Standard Invocable Action Type Access
 Permissions to access invocable actions

System

Settings that apply across all apps, such as record and user management
[Learn More](#)

System Permissions
 Permissions to perform actions that apply across apps, such as "Modify All Data"

Service Providers
 Permissions that let users switch to other websites using single sign-on.

(Click on System Permissions)

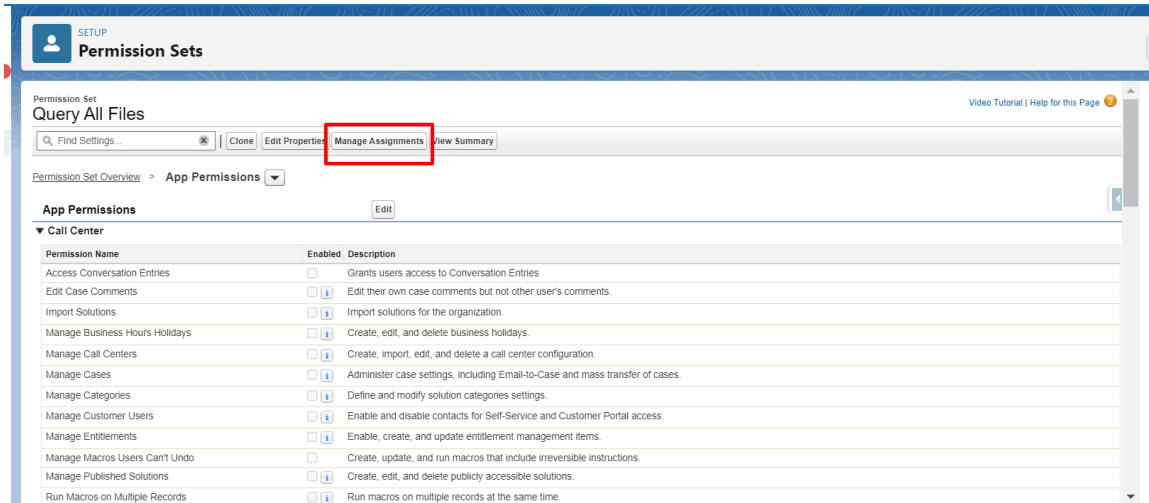
Create and Upload Change Sets	<input type="checkbox"/>	Create, edit, and upload outbound change sets.
Create AppExchange Packages	<input type="checkbox"/>	Create packages that can be distributed through AppExchange.
Create CMS Workspaces and Channels	<input type="checkbox"/>	Create Workspaces and Channels in Salesforce CMS.
Create Content Deliveries	<input type="checkbox"/>	Create content delivery links to share files that aren't managed by a library. To let a user create content deliveries for files in a library, enable Deliver Content for that user in the library.
Create custom Badge Definitions	<input type="checkbox"/>	Create custom badge definitions.
Create Dashboard Folders	<input type="checkbox"/>	Create dashboard folders and manage these folders if sharing rights allow.
Create Folders for Lightning Email Templates	<input type="checkbox"/>	Create Folders for Lightning Email Templates
Create Libraries	<input type="checkbox"/>	Create libraries.
Create Public Links	<input type="checkbox"/>	Let users create links to share files externally. Unlike content deliveries, public links can't be password protected. To let a user create links to files in a library, enable Deliver Content for that user in the library.
Create Report Folders	<input type="checkbox"/>	Create report folders and manage these folders if sharing rights allow.
Create Topics	<input type="checkbox"/>	Create new topics by assigning them to feed items.
Customize Application	<input checked="" type="checkbox"/>	Customize the organization using App Setup menu options.
Delete Second-Generation Packages	<input type="checkbox"/>	Delete packages and package versions.
Delete Topics	<input type="checkbox"/>	Delete topics and remove all corresponding topic assignments from feed items.
Deploy Change Sets	<input type="checkbox"/>	Deploy inbound change sets.
Design and Deliver In-App Guidance	<input type="checkbox"/>	Create, edit, and delete prompts and walkthroughs in Lightning Experience.
Download AppExchange Packages	<input type="checkbox"/>	Install or uninstall AppExchange packages as system administrators.
Download Package Version Zip Files	<input type="checkbox"/>	Download zip files containing metadata for a previously published package version.
Drag-and-Drop Dashboard Builder	<input type="checkbox"/>	Create, edit, and delete dashboards through the drag-and-drop dashboard builder interface.
Exit Slideout	<input type="checkbox"/>	Create, edit, and delete slideouts.

(Enable this permission and save)

2. Assign the Permission Set

After creating the permission set, assign it to the users who need to view and delete files.

- Go to Setup > Users, select the desired user, and assign the Query All Files permission set.



Permission Set: Query All Files

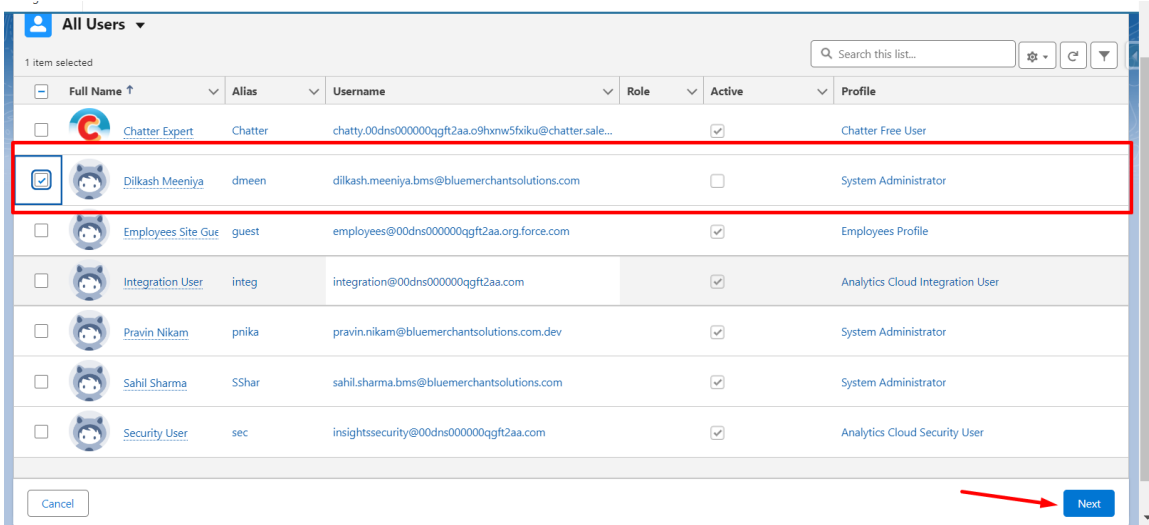
Find Settings... | Clone | Edit Properties | **Manage Assignments** | View Summary

Permission Set Overview > App Permissions

App Permissions

Permission Name	Enabled	Description
Access Conversation Entries	<input type="checkbox"/>	Grants users access to Conversation Entries
Edit Case Comments	<input type="checkbox"/>	Edit their own case comments but not other user's comments.
Import Solutions	<input type="checkbox"/>	Import solutions for the organization.
Manage Business Hours Holidays	<input type="checkbox"/>	Create, edit, and delete business holidays.
Manage Call Centers	<input type="checkbox"/>	Create, import, edit, and delete a call center configuration.
Manage Cases	<input type="checkbox"/>	Administer case settings, including Email-to-Case and mass transfer of cases.
Manage Categories	<input type="checkbox"/>	Define and modify solution categories settings.
Manage Customer Users	<input type="checkbox"/>	Enable and disable contacts for Self-Service and Customer Portal access.
Manage Entitlements	<input type="checkbox"/>	Enable, create, and update entitlement management items.
Manage Macros Users Can't Undo	<input type="checkbox"/>	Create, update, and run macros that include irreversible instructions.
Manage Published Solutions	<input type="checkbox"/>	Create, edit, and delete publicly accessible solutions.
Run Macros on Multiple Records	<input type="checkbox"/>	Run macros on multiple records at the same time.

(Click on Manage Assignments)



All Users

1 item selected

Search this list...

Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00dns00000qgft2aa.o9hxm5fxiku@chatter.sale...		<input checked="" type="checkbox"/>	Chatter Free User
Dilkash Meeniya	dmeen	dilkash.meeniya.bms@bluemerchantsolutions.com		<input type="checkbox"/>	System Administrator
Employees Site Gu	guest	employees@00dns00000qgft2aa.org.force.com		<input checked="" type="checkbox"/>	Employees Profile
Integration User	integ	integration@00dns00000qgft2aa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Pravin Nikam	pnika	pravin.nikam@bluemerchantsolutions.com.dev		<input checked="" type="checkbox"/>	System Administrator
Sahil Sharma	SShar	sahil.sharma.bms@bluemerchantsolutions.com		<input checked="" type="checkbox"/>	System Administrator
Security User	sec	insightssecurity@00dns00000qgft2aa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

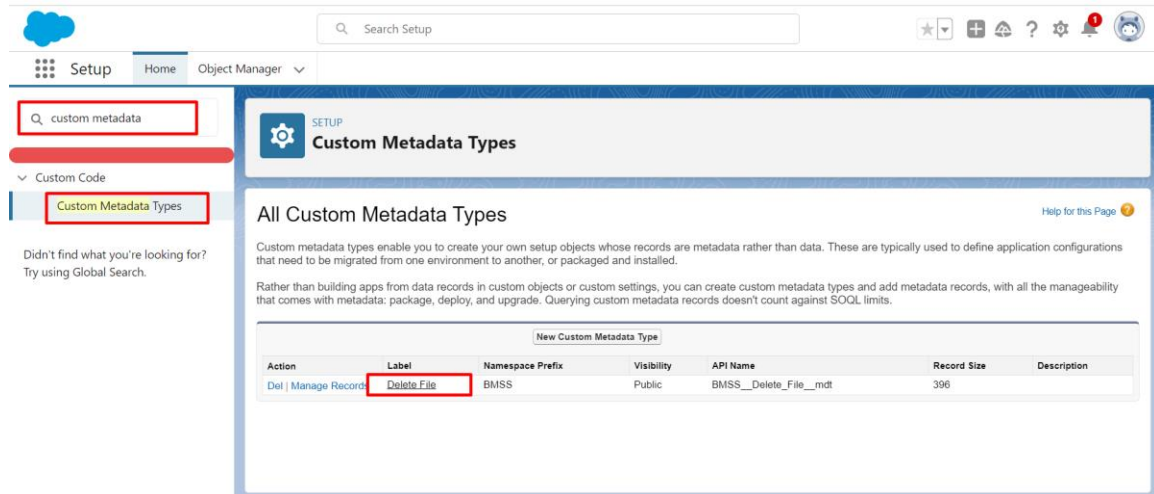
Cancel Next

(Select any user and click on next to assign the permission set)

3. Configure Custom metadata for File Exclusions

Custom Metadata Name – Delete File

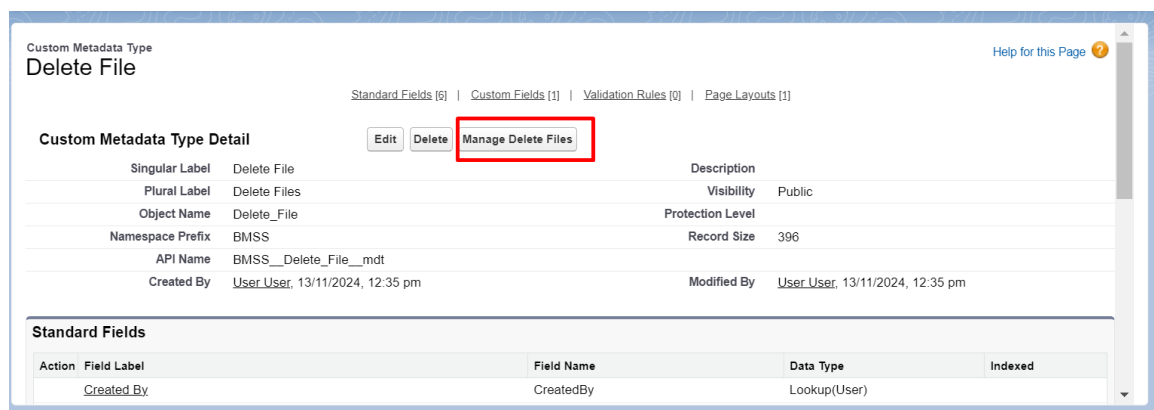
Under Setup, search for custom metadata and click on custom metadata types and then you will see the Delete File metadata.



(Click on Delete Files)

To exclude files from deletion, you'll need to create a record within this metadata named 'Keywords'. In this record, use the Files to Hide field to specify the keywords representing files that should be excluded from deletion, such as system-generated files or any other files that need protection.

To add multiple keywords, separate them by commas. For example, if you want to exclude files with specific names, you can enter keywords in this format: BMS%, Test%.



(Click on Manage Delete Files)

Delete Files Help for this Page ?

View: All [Create New View](#)

Label ↑	Delete File Name	Namespace Prefix
No records to display		

[New](#)

(Click on New)

SETUP Custom Metadata Types

Delete File Help for this Page ?

Delete File Edit Save Save & New Cancel

Information ! = Required Information

Label	<input type="text" value="Keywords"/>	Protected Component	<input type="checkbox"/>
Delete File Name	<input type="text" value="Keywords"/>		
Files To Hide	<input type="text" value="test%,fav%"/>		

Save Save & New Cancel

(Click on save)

Help and Support

Blue Merchant Solutions

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Email : support@bluemerchantsolutions.com