

# Edit or Delete an Object Type

Last Modified on 02/26/2025 9:54 am EST

## Overview

Administrators can edit or delete object types from your org.



**Warning:**

If any data has been saved to or associated with an object type, it's strongly recommended that you **do not** delete it.

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## User Account Requirements

The user must have Administrator permissions in order to access the **Admin Overview** section.

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## Related Information/Setup

Please refer to the [Object Types Overview](#) article for more information on object types.

Please refer to the [Delete an Object](#) article to learn more about deleting objects before deleting an object type.

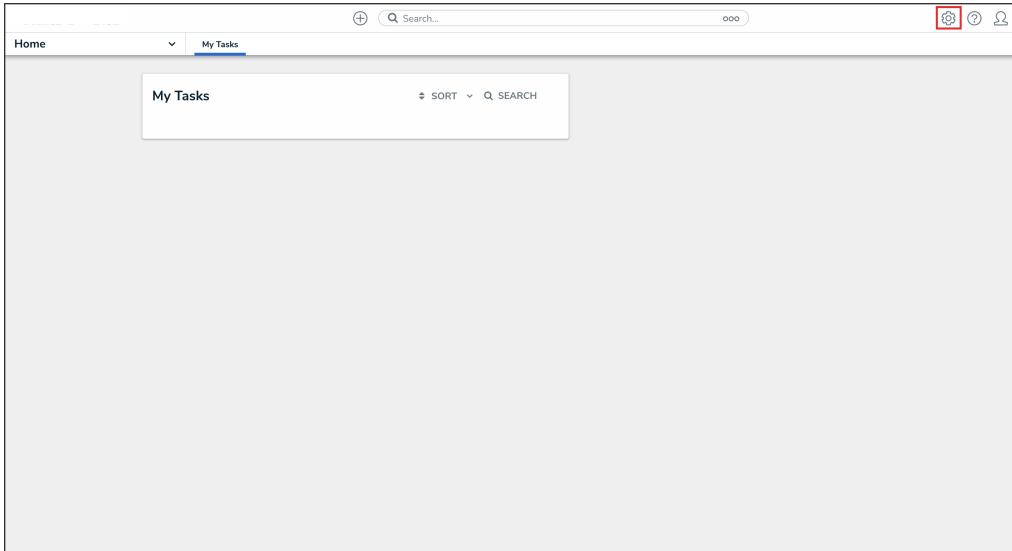
Please see the [Edit or Delete a State](#) article for further information on editing an object type's workflow.

Please refer to the [Add Concatenation to an Object Type](#) article for further information on editing an object type's concatenation.

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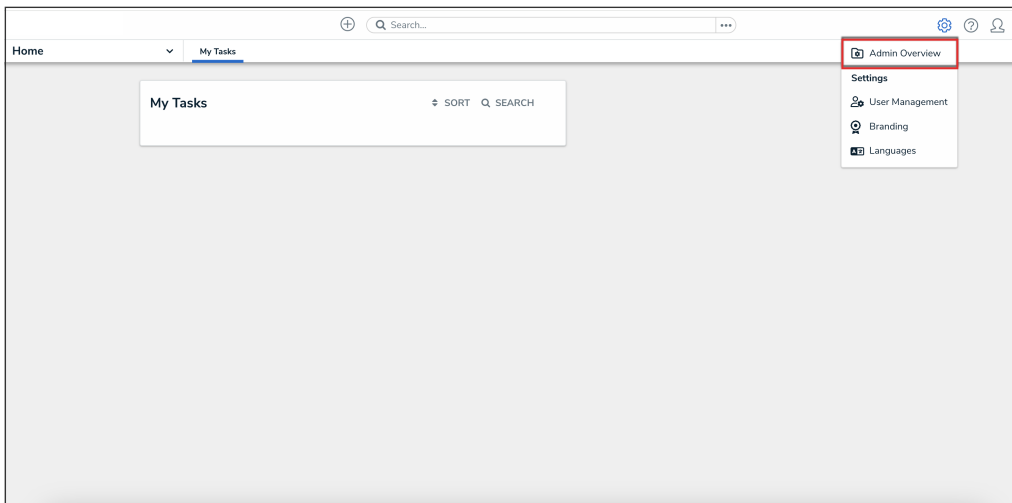
## Navigation

1. From the **Home** screen, click the **Administration** icon.



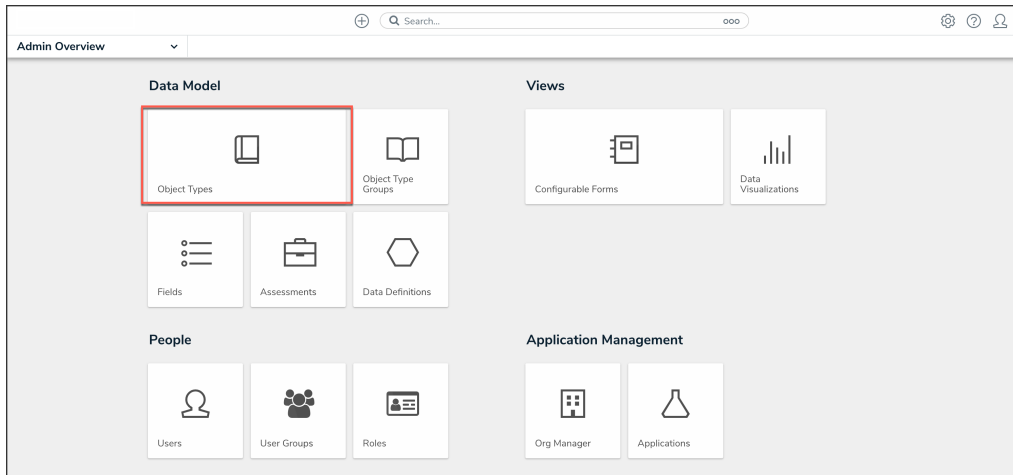
*Administration Icon*

2. From the **Administrator Settings** menu, click **Admin Overview**.



*Administrator Settings Menu*

3. From the **Admin Overview** screen, click the **Object Types** tile under the **Data Model** section.



*Object Types Tile*

4. From the **Admin: Object Types** screen, enter a keyword in the **Search** field to narrow the Object Types list.

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*Search Field*

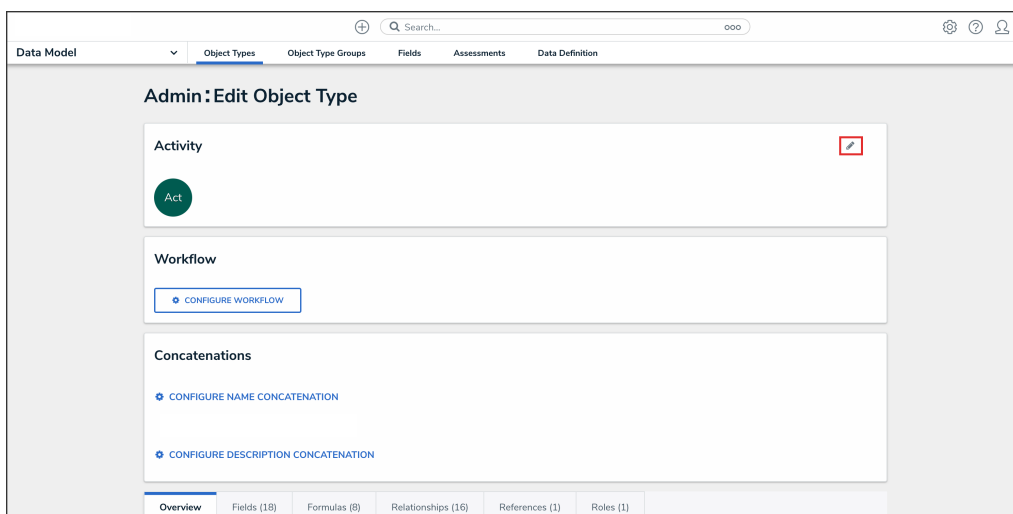
5. Click the **Object Type** you wish to edit or delete.

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*Object Type Name*

## Editing an Object Type

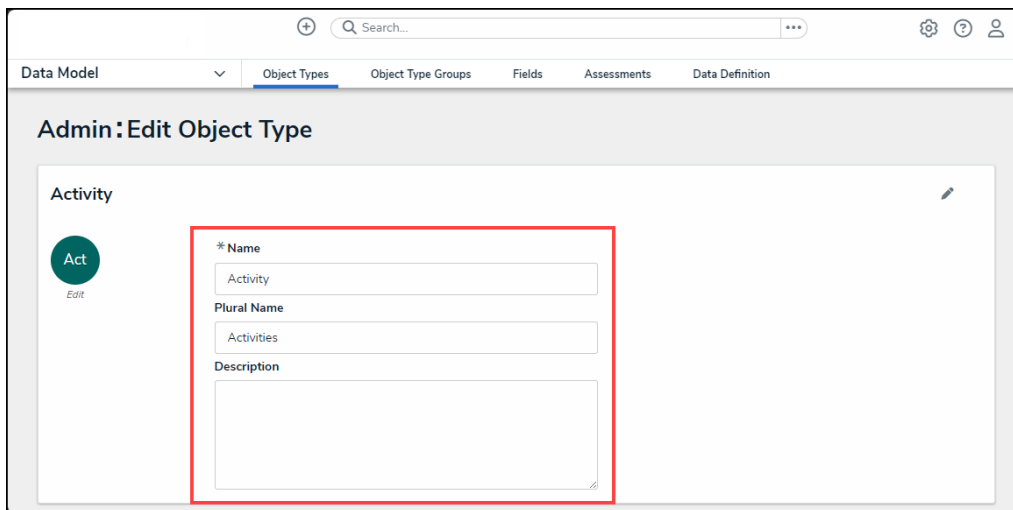
1. From the **Admin: Edit Object Type** screen, click the **Edit** icon beside the object type's name to edit the object type's name, description, or monogram.



*Edit Object Type Icon*

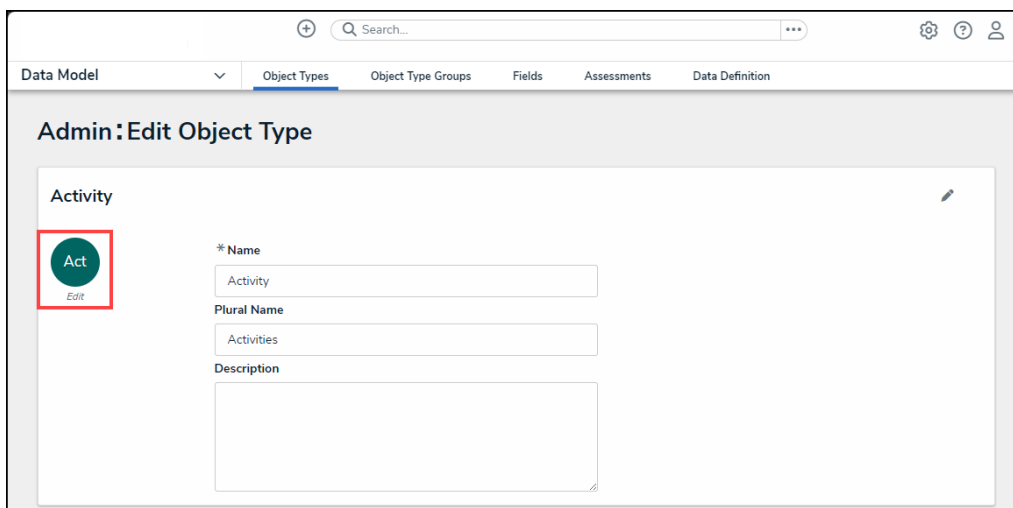
2. Edit the object type's **Name**, **Plural Name**, and **Description** by clicking on a

corresponding field and entering a new value.



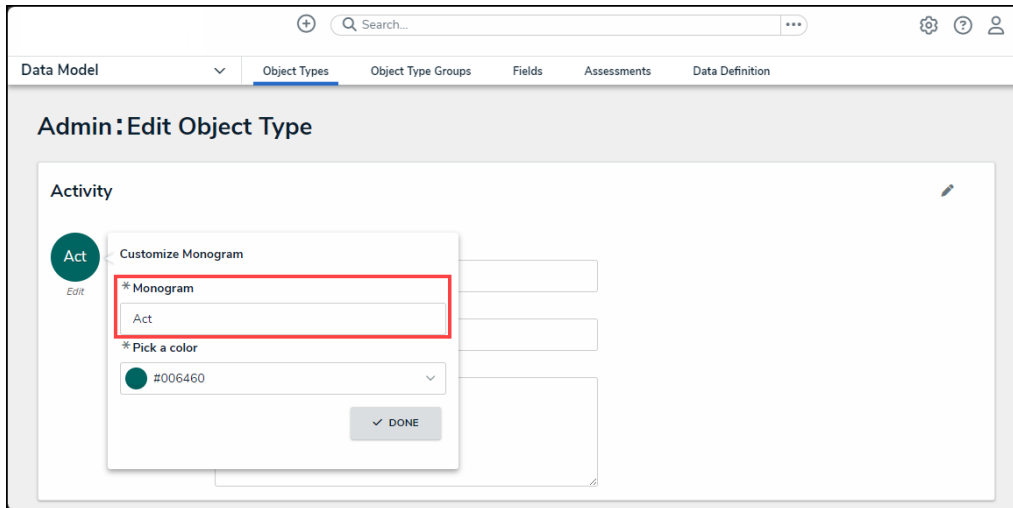
*Edit Name Fields*

3. Click on the object type's **Monogram**.



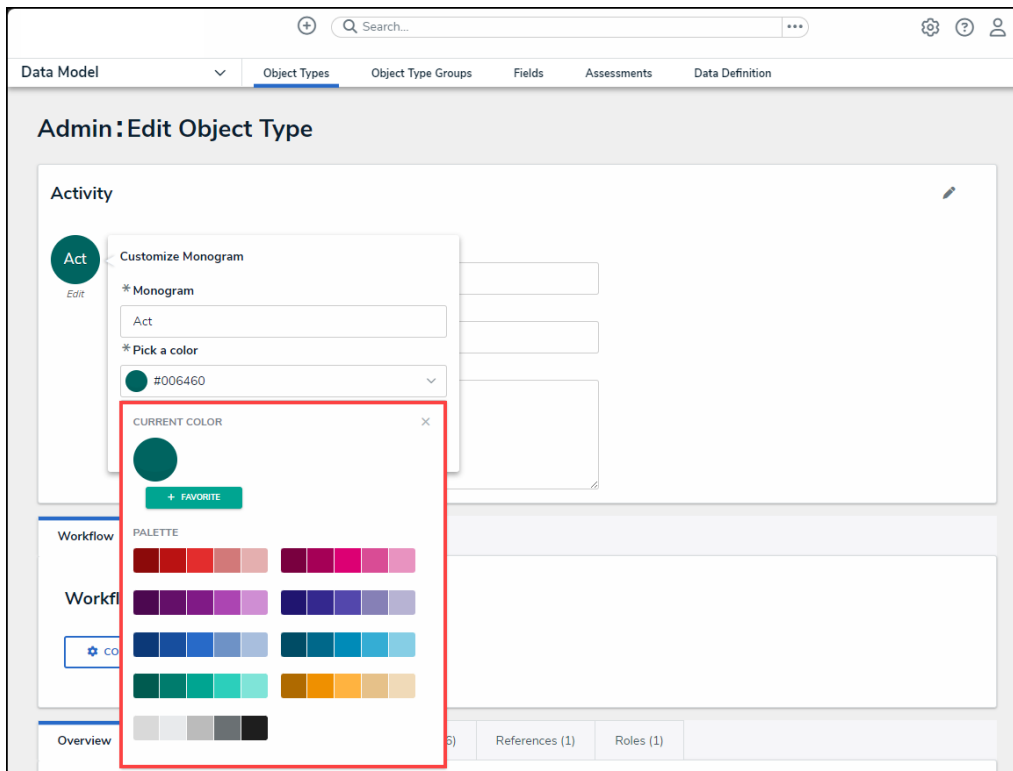
*Monogram*

4. From the **Customize Monogram** pop-up enter a new value in the **Monogram** field.



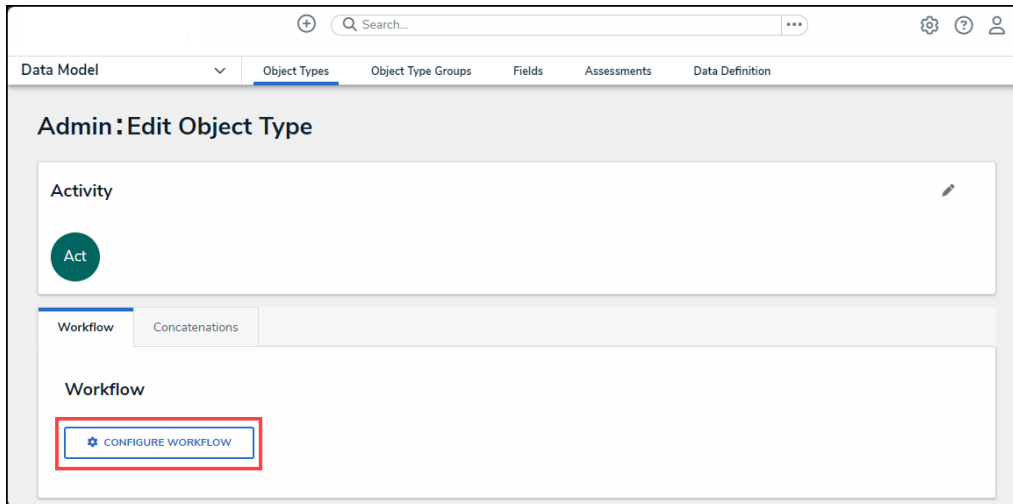
*Monogram Field*

5. Click the **Pick a Color** field and select a different color from the dropdown color picker.



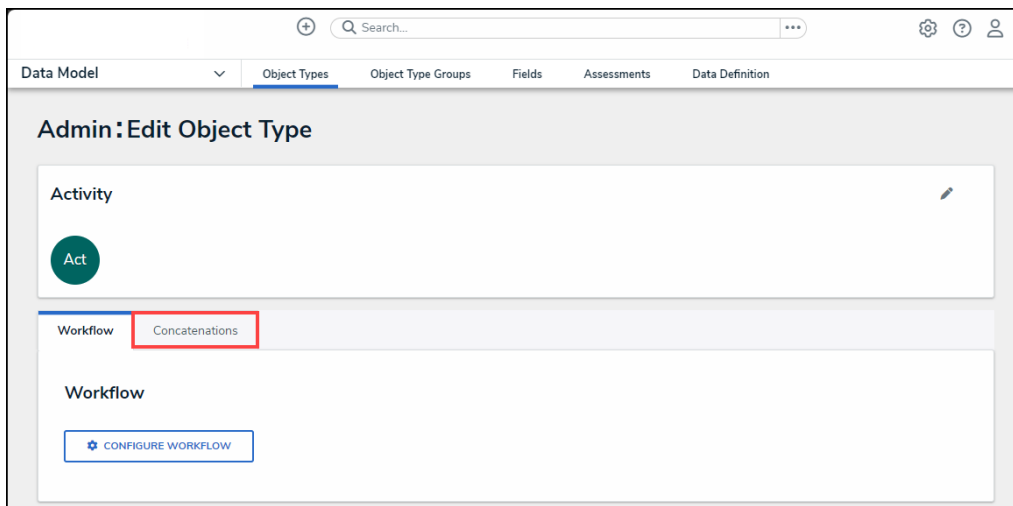
*Pick a Color Field*

6. From the **Workflow** tab, click on the **Configure Workflow** button to edit the object type's workflow. Please see the [Edit or Delete a State](#) article for further information on editing an object type's workflow.



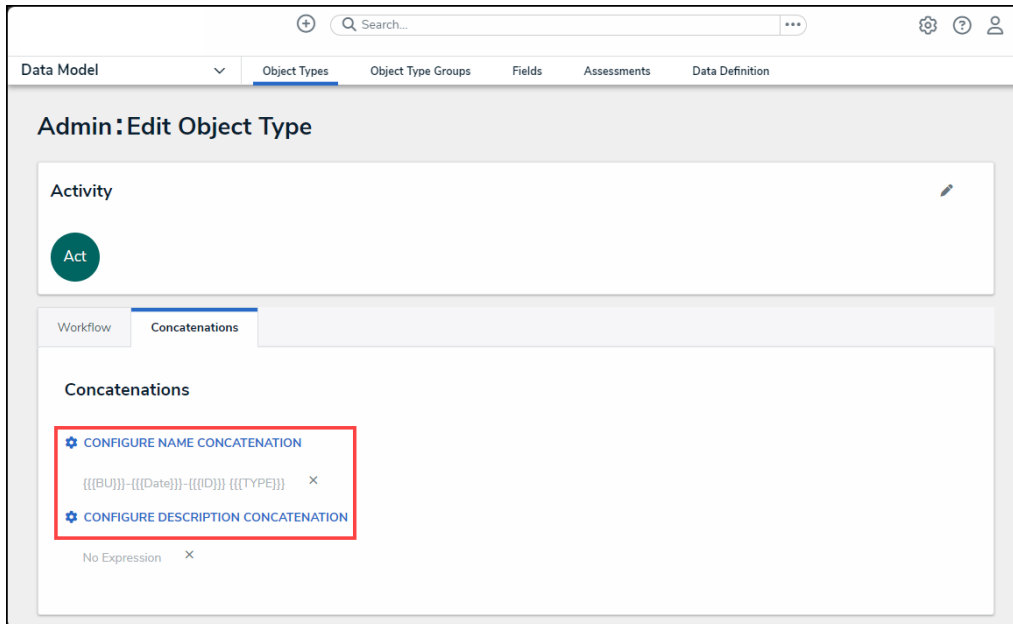
*Configure Workflow Button*

7. Click the **Concatenations** tab.



*Concatenations Tab*

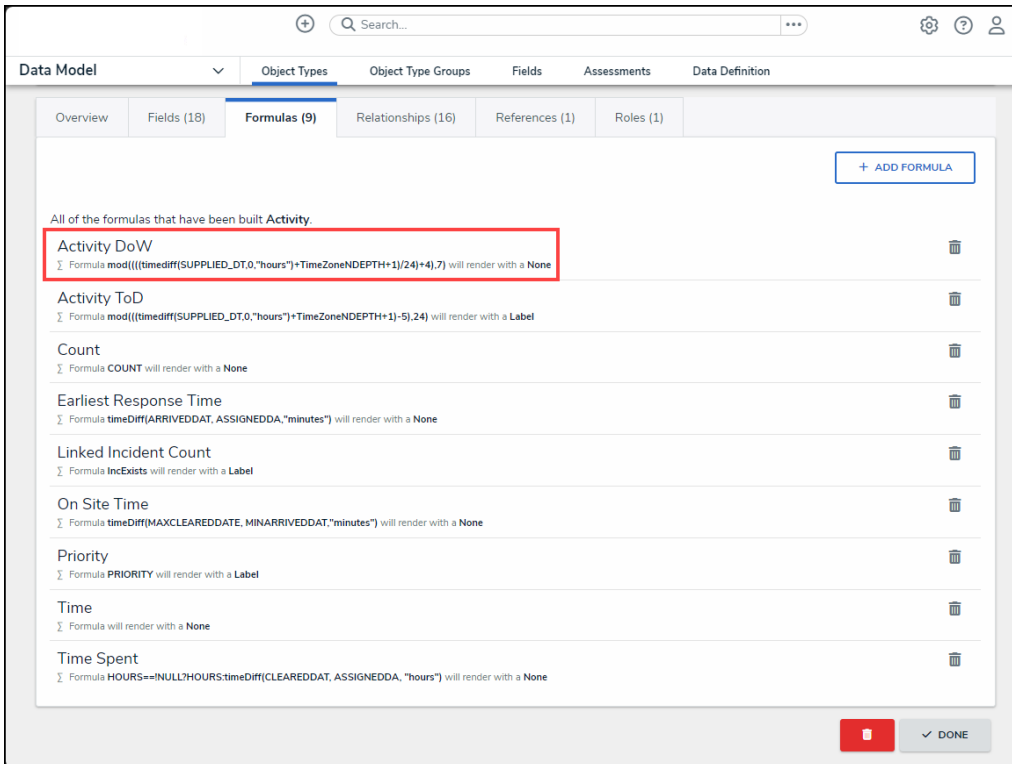
8. From the **Concatenations** tab, click on the **Configure Name Concatenation** or **Configure Description Concatenation** links to edit a concatenation. Please refer to the [Add Concatenation to an Object Type](#) article for further information on editing an object type's concatenation.



*Concatenation Links*

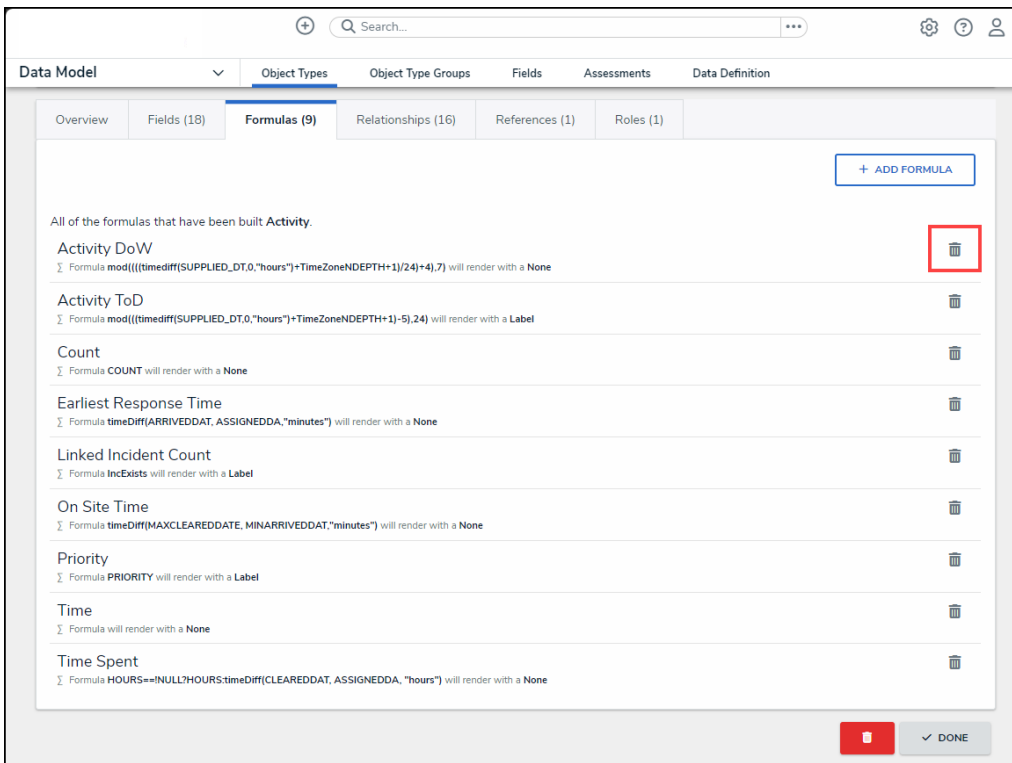
9. Click the tabs to edit, add, or delete the components added to the object type.
  - **Overview Tab:** The **Overview** tab summarizes the related forms, object type groups, activities, applications, reports, and report definition connected to the object type.
  - **Fields Tab:** The **Fields** tab displays the fields that are connected to the object type. The **Fields** tab allows you to add fields to or unlink fields from the object type. Please refer to the [Add Fields to an Object Type](#) article for information on adding a field to an object type.
  - **Formulas Tab:** The **Formulas** tab displays the formulas connected to the object type. The **Formulas** tab allows you to add fields to or delete formulas from the object type. Please refer to the [Create Formulas on an Object Type](#) article for information on adding a formula to an object type.
  - **Relationships Tab:** The **Relationships** tab displays the relationships connected to the object type. The **Relationships** tab allows you to add relationships to or delete relationships from the object type. Please refer to the [Create Relationships on an Object Type](#) article for information on adding a relationship to an object type.
  - **References Tab:** The **References** tab displays the object type's references which indicates that an object is connected to another object through a relationship.
  - **Roles Tab:** The **Roles** tab displays the roles connected to the object type. The **Formulas** tab allows you to add fields to or delete formulas from the object type. Please refer to the [Add Roles to an Object Type](#) article for information on adding a role to an object type.
10. Click on a **Field**, **Formula**, **Relationship**, or **Role** link (under its corresponding tab) to edit

an existing object connected to the object type.



*Formula Link*

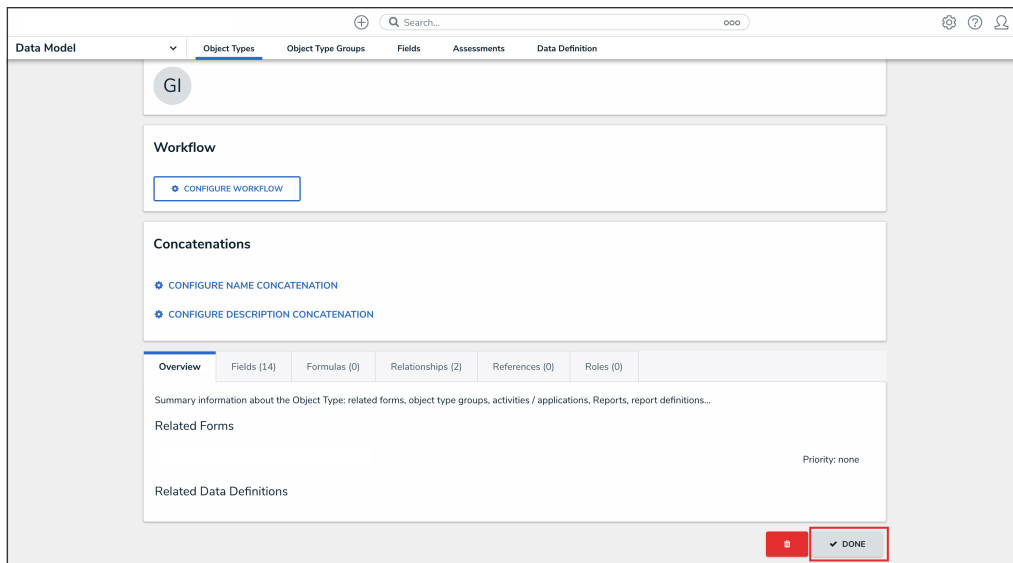
11. Click on the **Delete** or **Unlink** icon to delete or remove the corresponding object from the object type.



*Delete Icon*



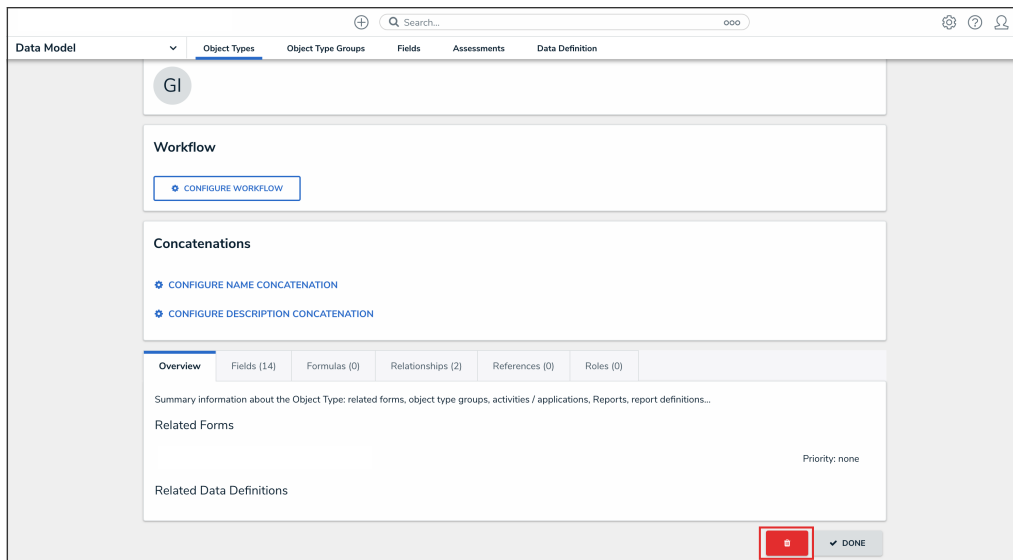
12. Click the **Done** button when you are finished.



*Done Button*

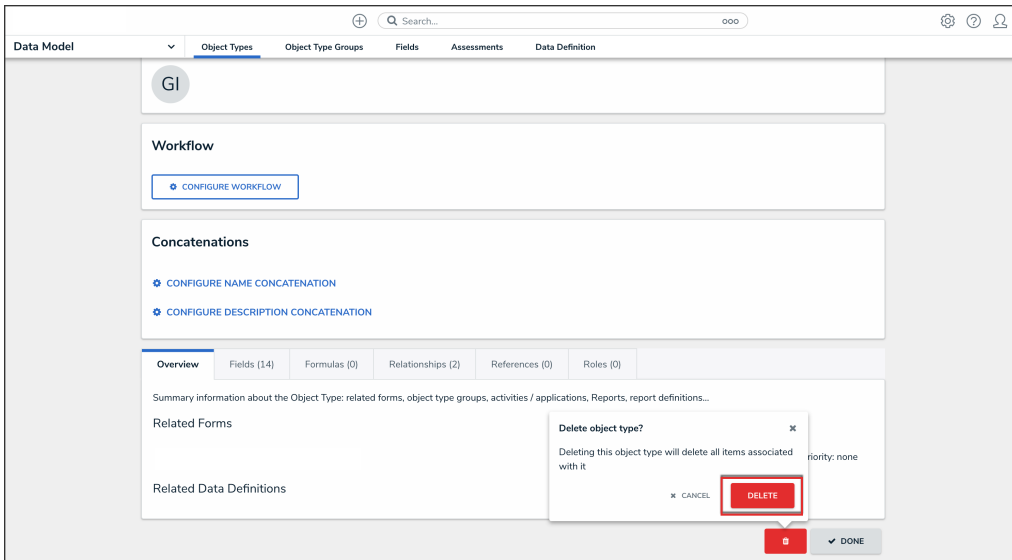
## Deleting an Object Type

1. Before deleting an object type, you must **delete all objects** associated with it.
2. To delete the object type, click the **Delete** icon.



*Delete Icon*

3. Click the **Delete** button to confirm.



*Delete Button*