

Edit or Delete an Object Type

Last Modified on 08/20/2025 11:01 am EDT

Overview

Administrators can edit or delete object types from their Orgs.



Warning:

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

User Account Requirements

The user must have Administrator permissions in order to edit or delete an object type.

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.

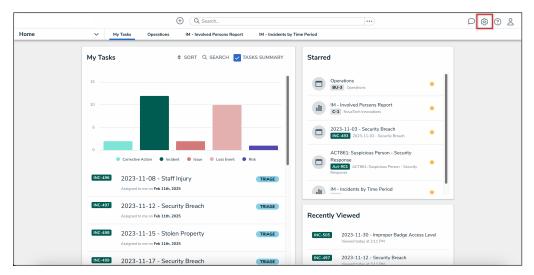
Please see the Edit or Delete a State article for further information on editing an object type's workflow.

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

Navigation

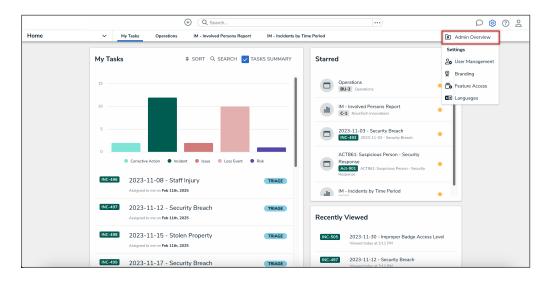
1. From the *Home* screen, click the **Administration** icon.





Administration Icon

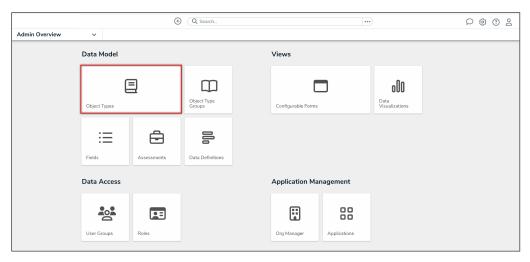
2. From the **Administrator settings** menu, click the **Admin Overview** link.



Admin Overview Link

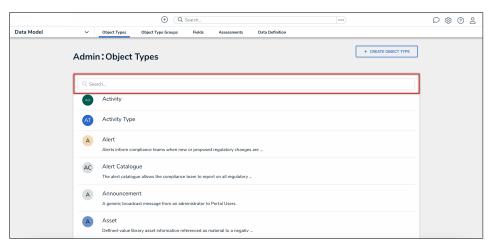
3. From the *Admin Overview* screen, click the **Object Types** tile under the **Data Model** section.





Object Types Tile

4. From the *Admin: Object Types* screen, click the object type that you want to edit or delete.

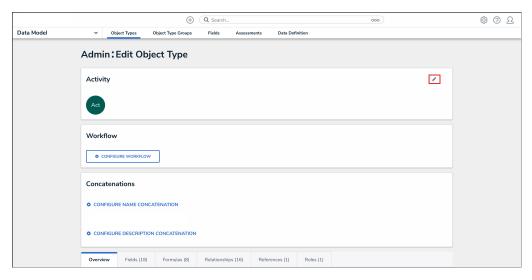


Object Types

Editing an Object Type

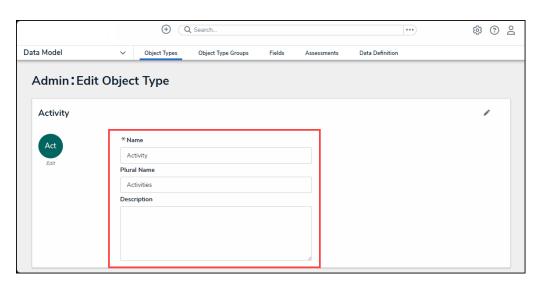
1. From the *Admin: Edit Object Type* screen, click the **Edit** icon beside the object type's name to edit the object type's name, description, or monogram.





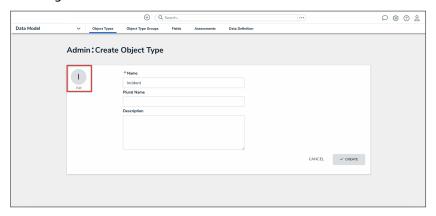
Edit Object Type Icon

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

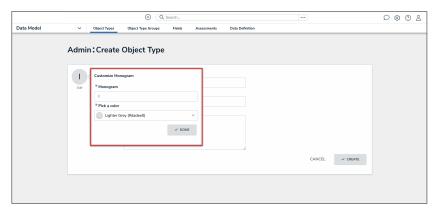
- 3. **(Optional):** To edit the object type monogram:
 - a. Click the monogram icon to the left of the **Name** field.





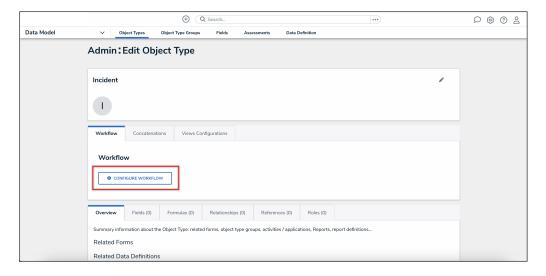
Monogram

- b. In the *Customize Monogram* pop-up, enter 1 to 3 characters in the Monogram field.
- c. Click the **Pick a color** dropdown menu to reveal the color picker. You can also type a hex color into this field to select a color.
- d. Click the **Done** button.



Customize Monogram Pop-Up

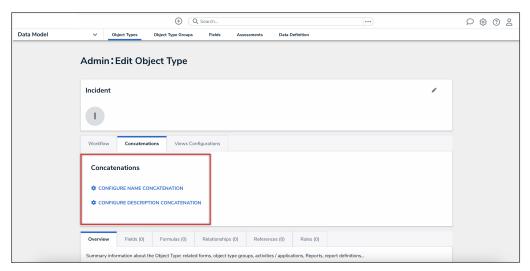
4. From the **Workflow** tab, click the **Configure Workflow** button to edit the object type's workflow. Please see the Edit or Delete a State article for further instruction.



Configure Workflow Button

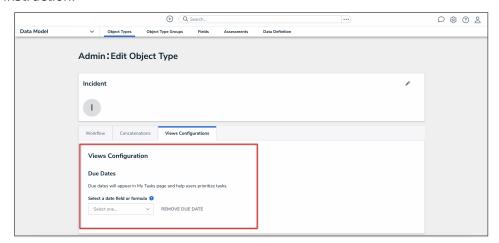
5. From the Concatenations tab, click the Configure Name Concatenation or Configure Description Concatenation links to edit a concatenation. Please refer to the Add Concatenation to an Object Type article for further information on editing an object type's concatenation.





Concatenation Links

6. From the **Views Configuration** tab, you can edit the due date for the object type that is displayed in the **My Tasks** card. See the Adding a Due Date to an Object Type article for further instruction.

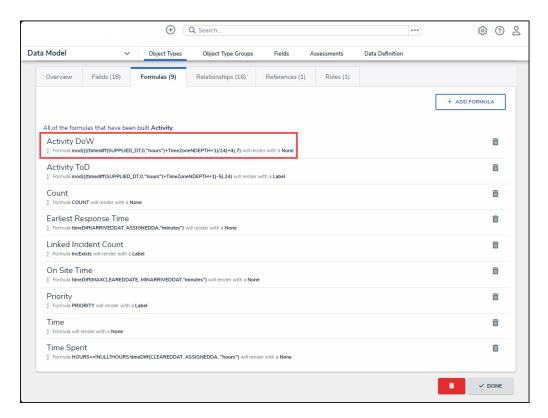


Views Configuration Tab

- 7. 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.



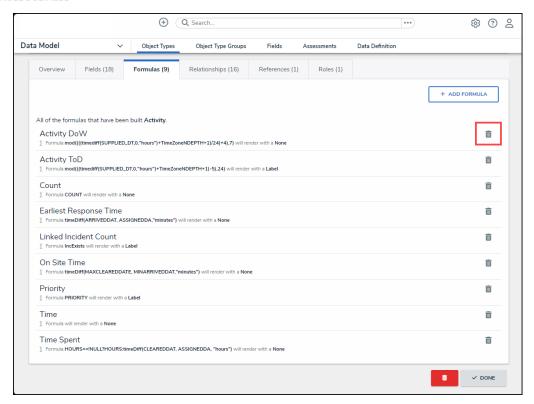
- Relationships Tab: The Relationships tab displays the relationships connected to
 the object type. The Relationships tab allows you to add relationships to or delete
 relationships from the object type. Please refer to the Create Relationships on an
 Object Type article for information on adding a 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
 Roles 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.
- 8. Click a **Field**, **Formula**, **Relationship**, or **Role** link (under its corresponding tab) to edit an existing object connected to the object type.



Formula Link

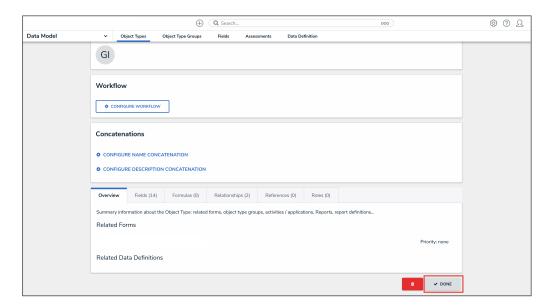
Click the **Delete** or **Unlink** icon to delete or remove the corresponding object from the object type.





Delete Icon

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

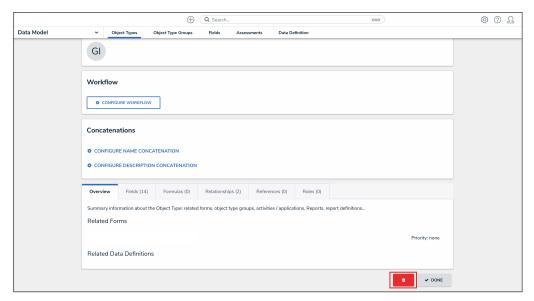


Done Button

Deleting an Object Type

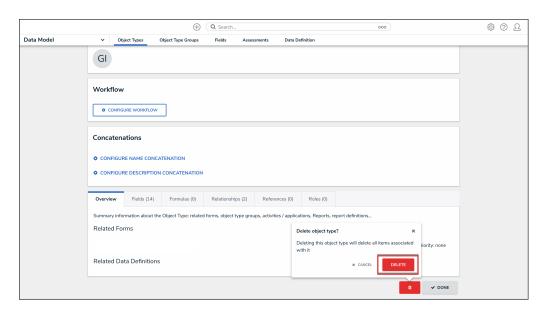
- 1. Before deleting an object type, you must delete all objects associated with it.
- 2. To delete the object type, click the **Delete** icon.





Delete Icon

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



Delete Button