

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.

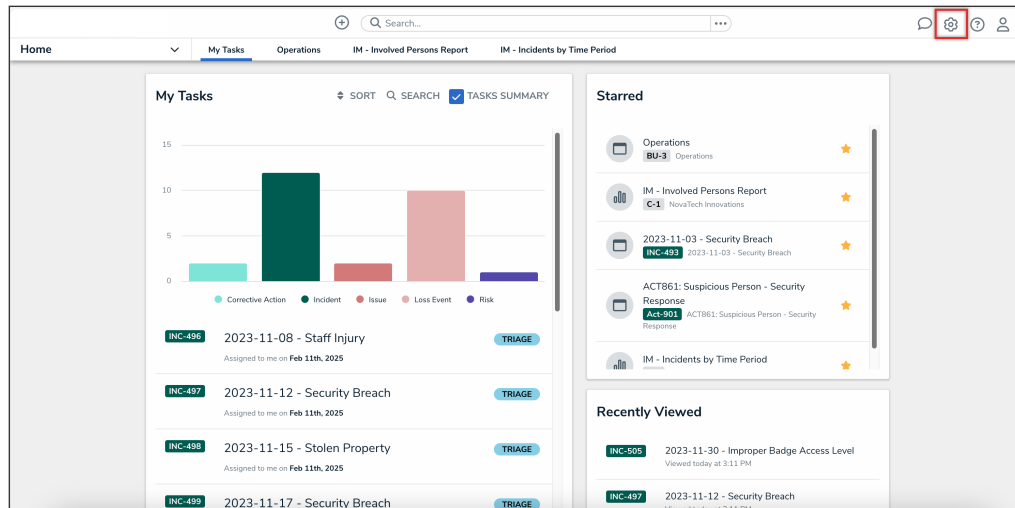
Please refer to the [Delete an Object](#) article to learn more about deleting objects before deleting an object type.

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.

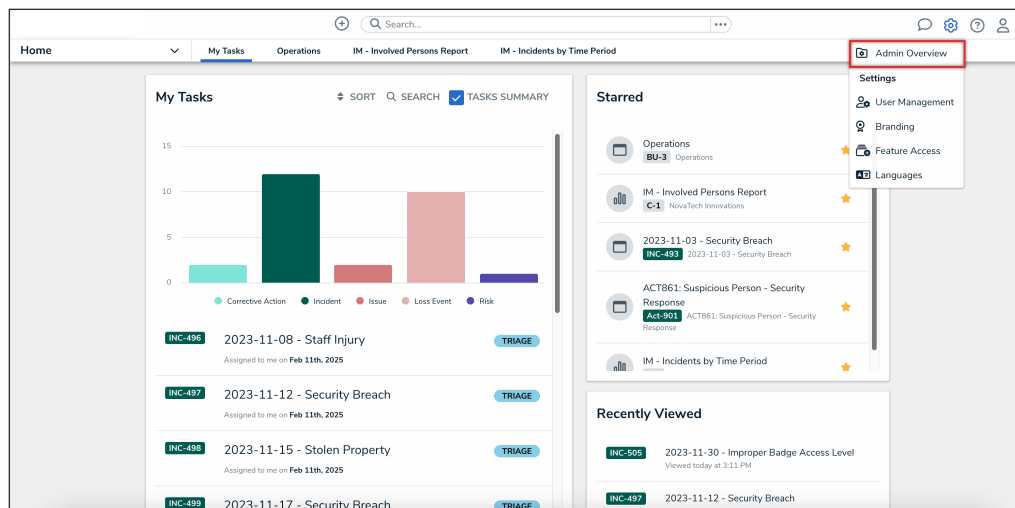
Navigation

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



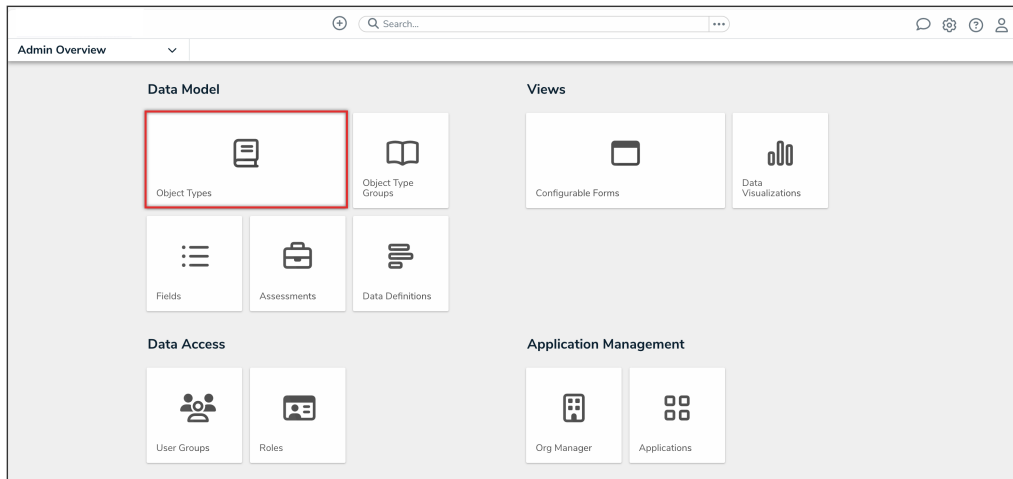
Administration Icon

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



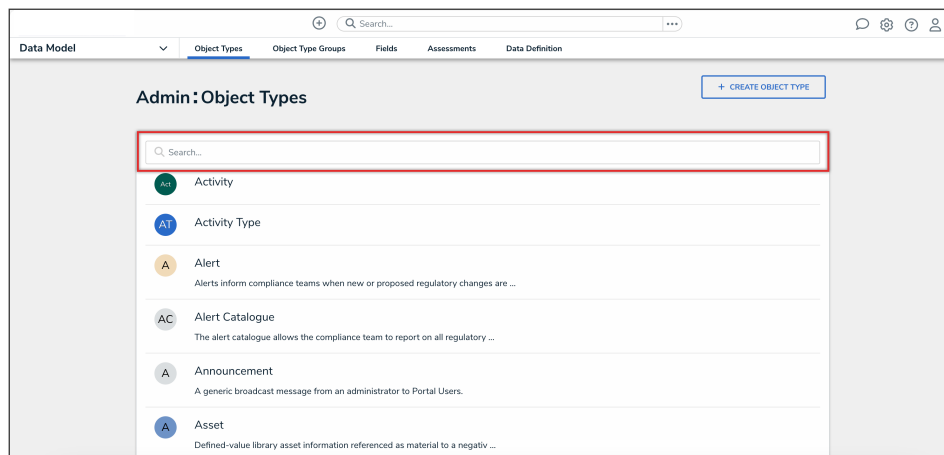
Admin Overview Link

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



Object Types Tile

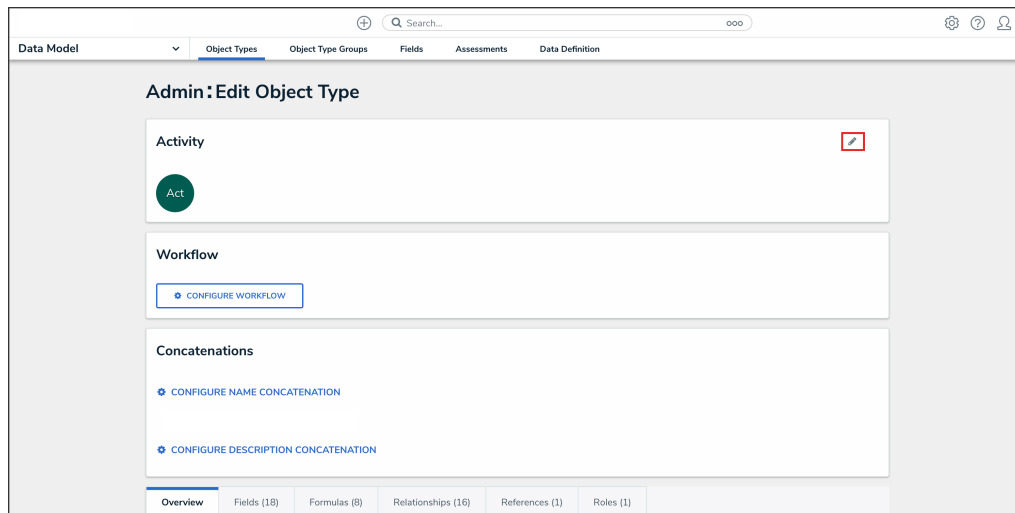
- From the **Admin: Object Types** screen, click the object type that you want to edit or delete.



Object Types

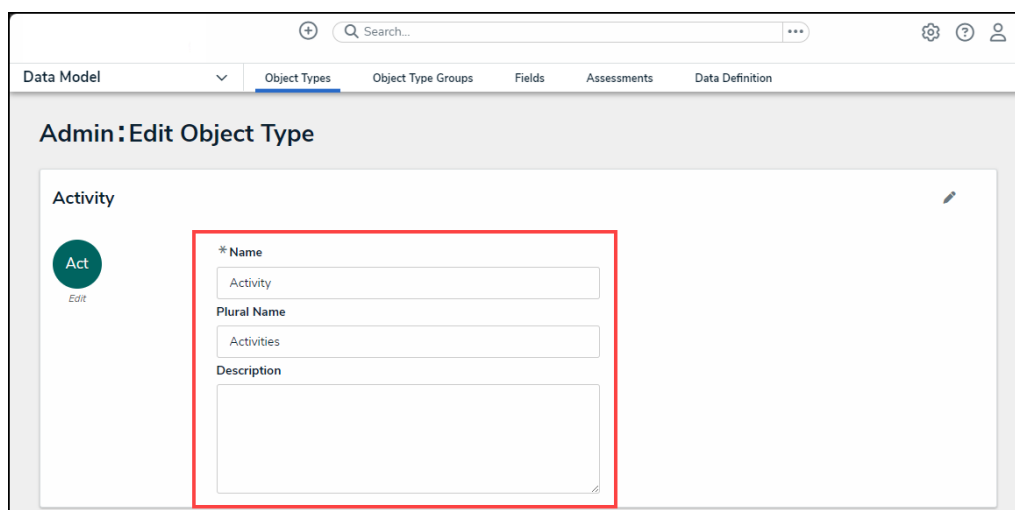
Editing an Object Type

- 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

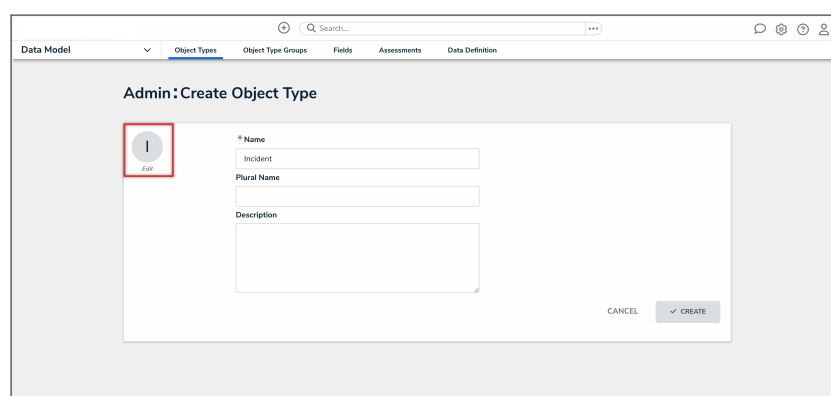
2. Edit the object type's **Name**, **Plural Name**, and **Description** by clicking on a corresponding field and entering a new value.



Edit Name Fields

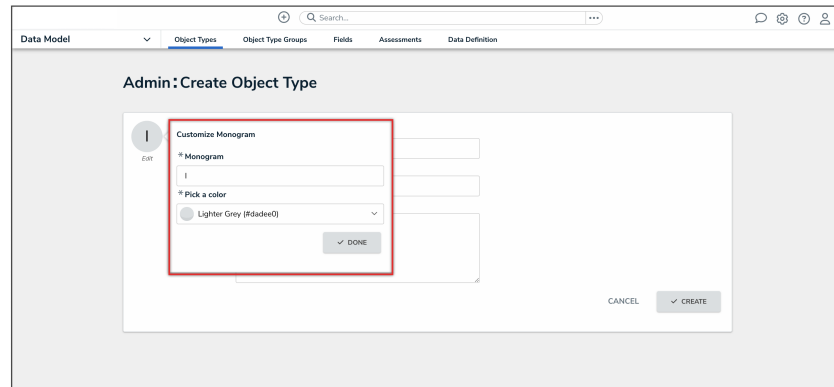
3. **(Optional):** To edit the object type monogram:

- a. Click the monogram icon to the left of the **Name** field.



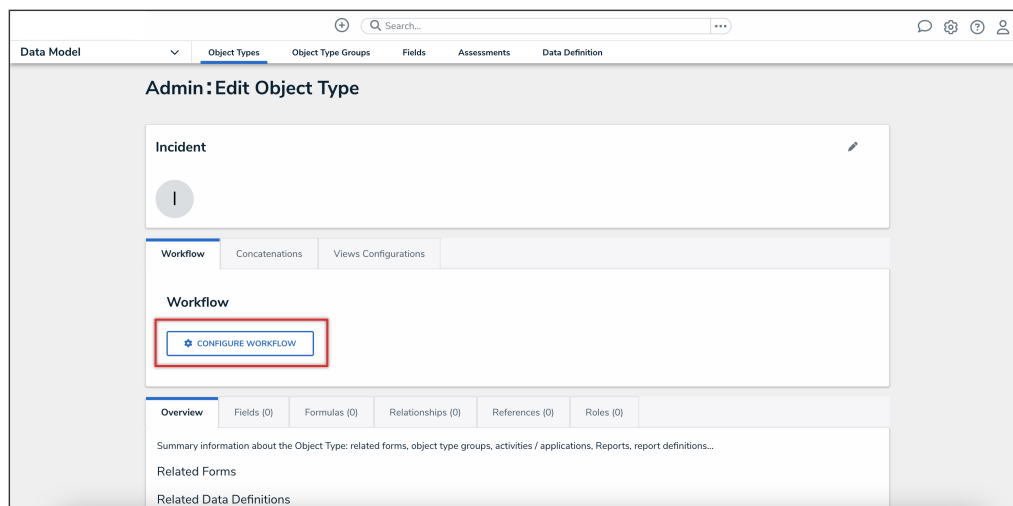
Monogram

- 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.



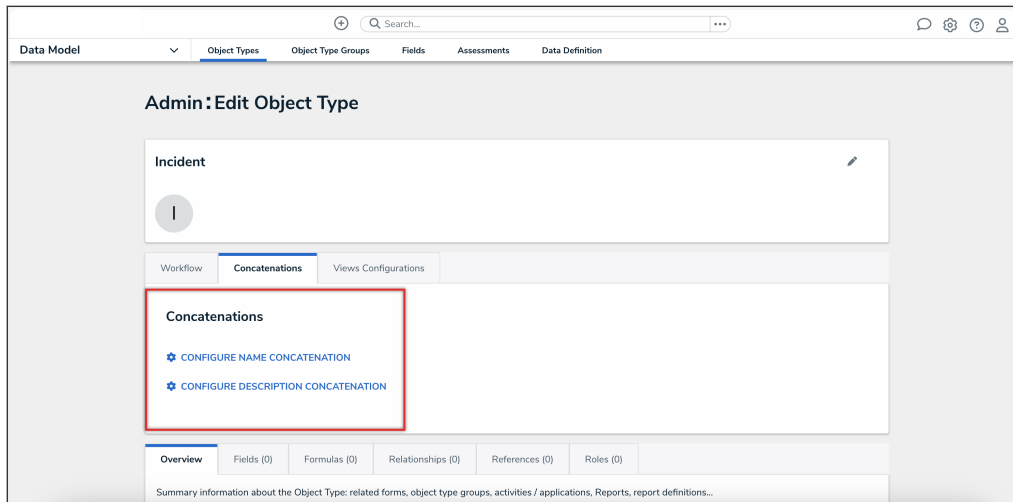
Customize Monogram Pop-Up

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.



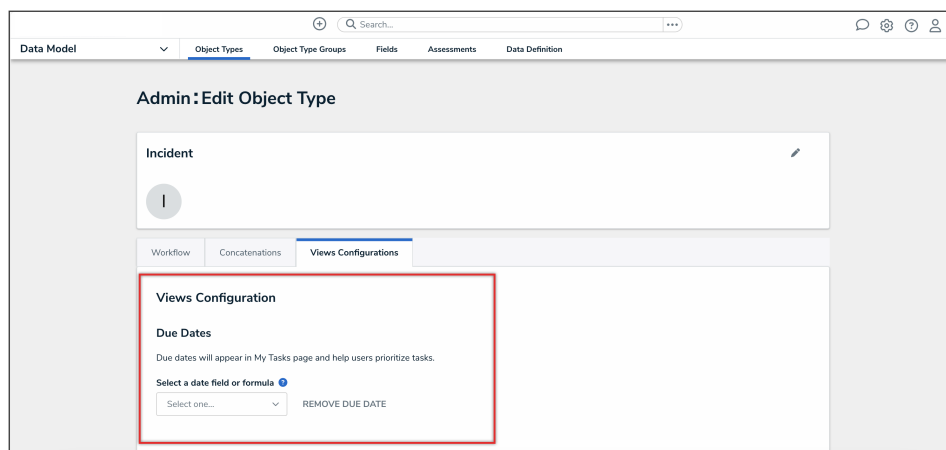
Configure Workflow Button

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

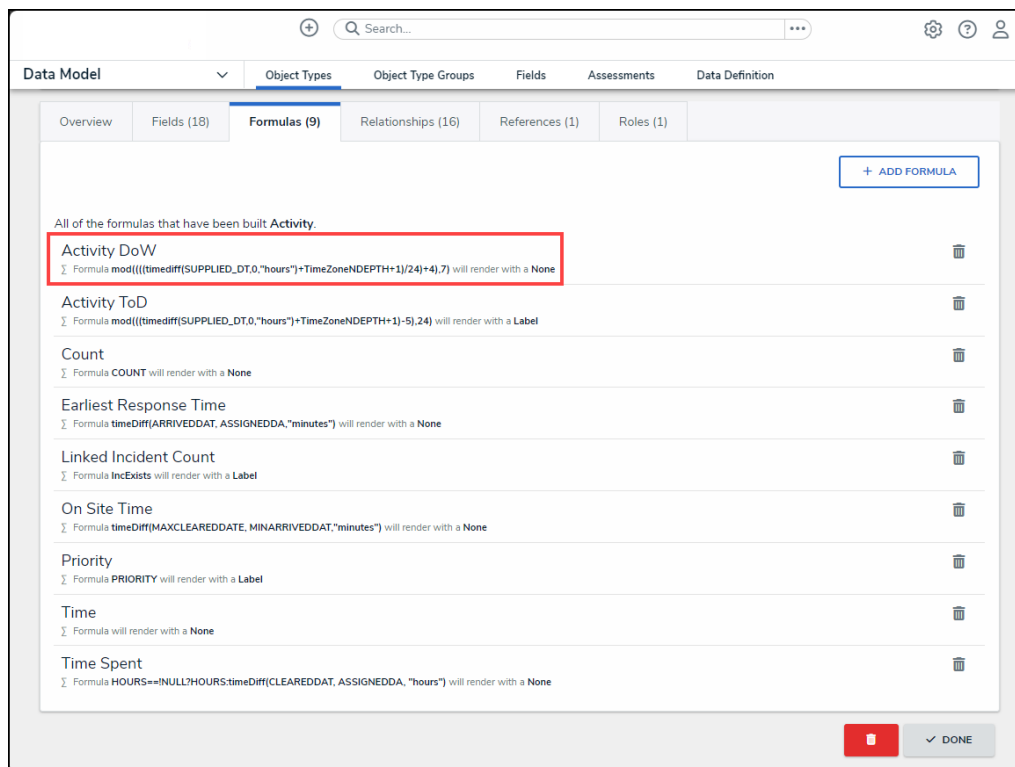
- From the **Views Configuration** tab, you can edit the due date for the object type that is displayed in the **My Tasks** card. See the [Adding a Due Date to an Object Type](#) article for further instruction.



Views Configuration Tab

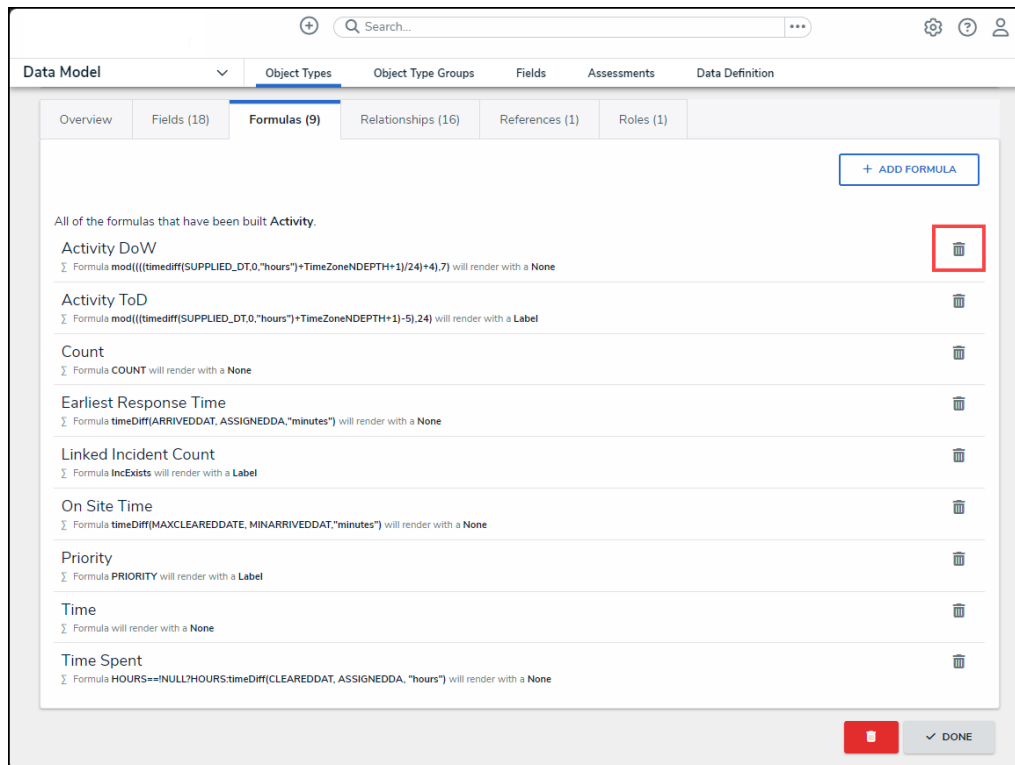
- Click the tabs to edit, add, or delete the components added to the object type.
 - Overview Tab:** The **Overview** tab summarizes the related forms, object type groups, activities, applications, reports, and report definition connected to the object type.
 - Fields Tab:** The **Fields** tab displays 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.



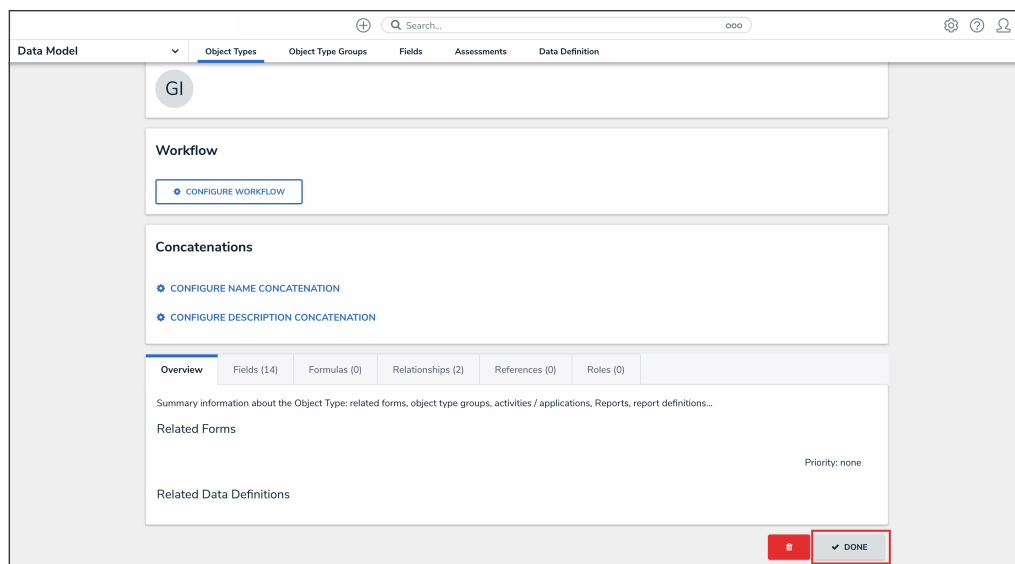
Formula Link

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



Delete Icon

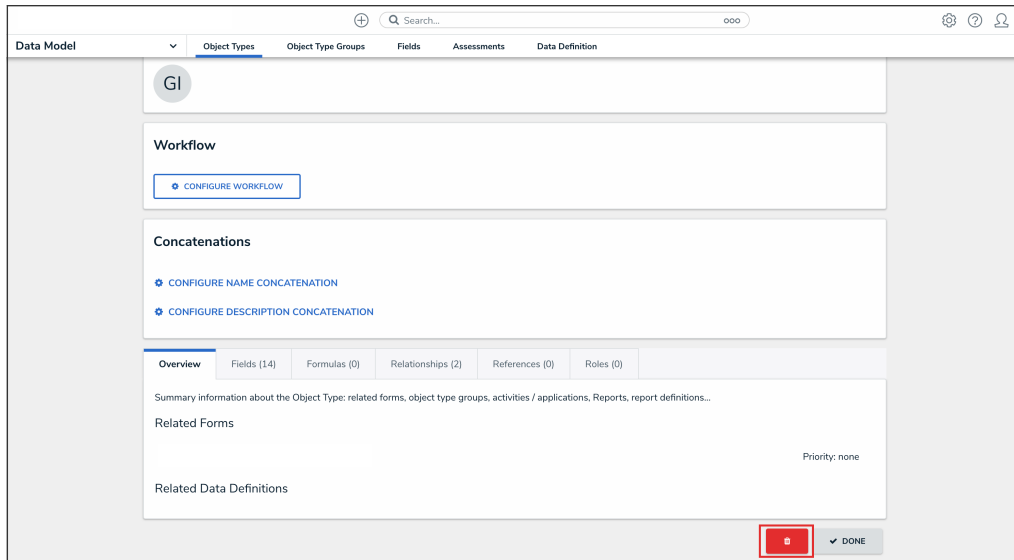
10. Click the **Done** button when you are finished.



Done Button

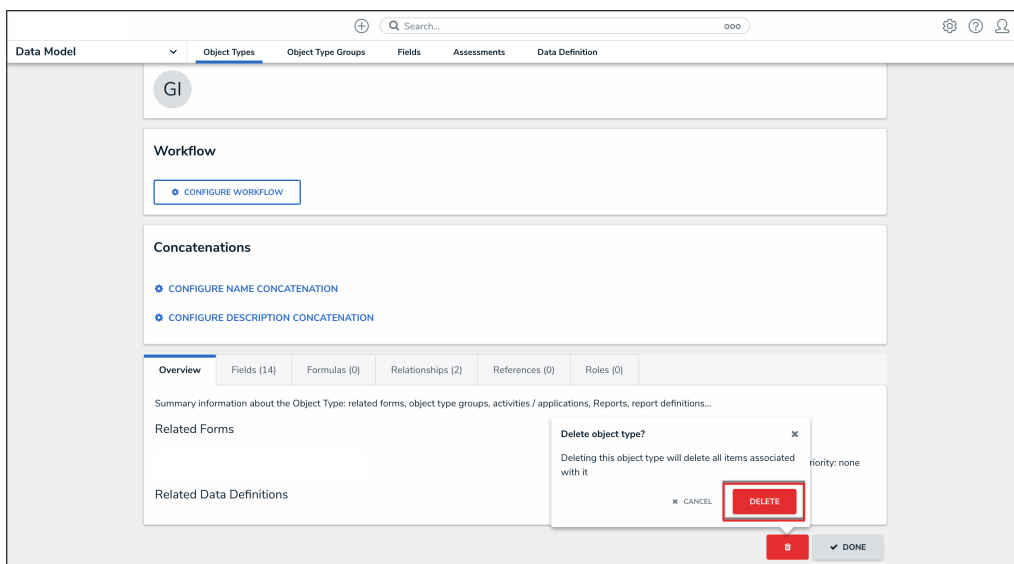
Deleting an Object Type

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