# Table Wizard

The Table wizard is used to create, edit, and delete tables. You can create any number of new tables and completely delete tables not relevant to your system. When editing a table, you can customize it in a variety of ways, such as its permissions, fields, actions, rules, and more. To edit a single table, expand it in the Left Pane and click Setup [*Table Name*]. If you plan to create or delete a table, or want to edit multiple tables, go to **Setup > Tables** to see the full table tree.
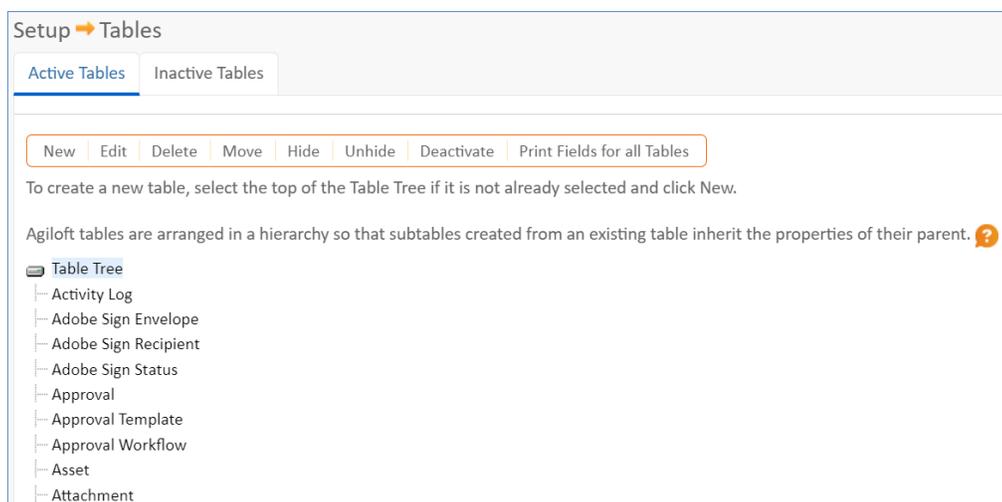
From **Setup > Tables**, you can also Hide or Unhide a table from all users, Deactivate existing tables to completely disable them in the system, and Print Fields for all Tables to quickly create an Excel reference sheet of all fields in all tables.

Creating New Tables

To create a new table or subtable:

1. Navigate to **Setup > Tables**.
2. In the table tree, select:
   - Table Tree to create a new table
   - An existing table to create a new subtable
3. Click New. The table wizard opens.
4. Complete any basic configuration and click Finish. Note that the table isn't added to the left pane unless you configure it on the Left Pane tab.

> **Best Practice Tips**
>
> - When creating a new table, save the table before adding too many new fields. This can prevent problems when the system generates the table.
> - Before making too many adjustments to a new table, set only a few basic settings, add the table to the left pane, and save the table. This is another way to prevent problems when the system generates the table. In general, follow this process in the Table wizard when creating a new table:
>   1. Complete the configuration on the General tab.
>   2. Complete the configuration on the Graphics tab.
>   3. Use the Left Pane tab to add the table to the left pane.
>   4. Click Finish to create the table.
>   5. Click Setup [*Table Name*] on the left pane and complete further configuration.

Editing Default Table Settings

To edit the default table settings for new tables:

1. Navigate to **Setup > Tables**.
2. In the table tree, select Table Tree**.**
3. Click Edit. The Table wizard opens.
4. Make any desired adjustments to the default table settings.

Changes to the default table settings do not affect existing tables. Only new tables inherit the new settings. The exception is adding new fields. When you add new default fields, they're added to all existing tables. However, this can take quite a while in a live system. Adding fields in this way also locks the tables, preventing users from saving and creating records. This can be a concern if you add new fields during working hours.

Editing Existing Tables

To edit a table or subtable:

1. If the table is included in the Left Pane, expand it and click Setup [*Table Name*]. If the table isn't in the Left Pane:
    a. Go to **Setup > Tables** and select the table in the tree.
    b. Click Edit. The Table wizard opens.

Using the Table Wizard

Use the following tabs on the Table Wizard when you create or edit a table or subtable.

General

The General tab allows you to configure several settings:

- Set the table's label and plural label
- Choose a table name
- Choose whether the table is deletable or not
- Apply a saved search automatically when the table is opened from the left pane
- Create linked communications
- Hide the table label from certain groups

Graphics

The Graphics tab is where you can select the icon used to represent the table and set certain icon properties, such as how the icon displays in the left pane. This tab also shows icons currently used in other tables, provides a selection of icons, and offers a way to upload additional custom icons.

> ✓ It usually looks best to choose Default Unselected Icon for the "Icon When Table is Unselected" and "Last Opened Icon" options.

Fields

The Fields tab provides a full list of all fields in the table, regardless of whether they appear on the record form. Fields are listed alphabetically by label and may be deleted from this screen. You can also launch the Field wizard from this screen to edit existing fields or create new fields. The Data Type column identifies fields by type, such as linked field, related table, or other data type. You can see a full list of available data types by mousing over New.

You can select multiple fields and click Set Field Properties to configure field visibility, edit dependence, and more. To view information about fields in the table, such as admin notes, date updated, history entries, and other attributes, select the desired field(s) and click Print Field Documentation.

> ✅ When you create a new field, it won't appear on any forms until you add the field to the layout and grant permission for groups to view it.


Layout

The Layout tab allows you to create custom layouts for power and end users. Each table field is displayed as a separate block, which you can drag and drop into the appropriate location. If fields are in the Available Fields section or the Hidden tab, they are not displayed on the layout.

For more information, see Layouts.

Action Bar

The Action Bar tab allows you to view existing action bars for the table. You can click New to launch a wizard and create a new action bar, or you can click one of the Edit icons to configure an existing action bar. You can also copy or delete actions bars from this screen. Action bars, which allow you to perform a variety of actions, may be used in the current table and when records from the current table appear in other tables. They appear above the table view and above tables embedded within records.
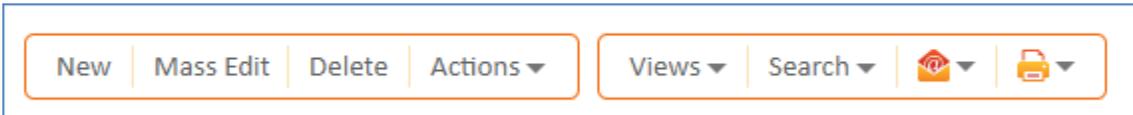
For more information, see Action Bars.

Left Pane

The Left Pane tab lets table admins add or remove tables from their own or other users' left panes, depending on the default left pane setup for a user's team.

For example, if a user's team contains the Incidents table in their default left pane setup, but a user has removed the Incidents table from their own left pane, a table admin can use this tab to add the Incidents table back to the user's left pane by selecting the "Add the table to all user personalized left panes as well" option. If the table admin adds a table that is not a part of the default left pane setup for a user's team, or if the table is already on the user's left pane, nothing changes on the user's left pane and they do not receive a notification.

Actions

The Actions tab allows you to create, edit, and delete all table actions. You can delete actions directly from this tab, or you can click one of the "Create..." action type buttons to launch a wizard to create a new action. You can also select an existing action and click Edit to launch a wizard to configure the action. This tab functions identically to the action wizards in rules or actions buttons.

For more information, see Actions.

Rules

The Rules tab allows you to create, edit, and delete all table rules. This tab functions identically to the rules wizard accessed elsewhere. For more information, see Rules.

Workflow

The Workflow tab allows you to create or edit the table workflow. For more information, see Workflow Wizard.

Permissions

Record Ownership is defined on the Permissions tab, which determines whether a user "owns" the record or not. These settings have a significant impact on record-level permissions, since view and edit permissions are separate for "my own" and "other people's" records.

This tab also contains shortcuts for basic group permission settings which are otherwise set in the Table Permissions Wizard.

Indexes

The Indexes tab allows you to create indexes that work on specific fields to improve saved or advanced ad-hoc search speed. However, the process is resource intensive and should be turned off for tables where it is unnecessary. For more information, see Indexing.

Conversion

The Conversion tab allows you to set up conversion mappings to automatically create new records in one or more other tables, mapping values from fields in the current table. The maximum number of possible conversion mappings is 99 per table.

> ⓘ **Examples**
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> Conversions have many uses:
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> - Convert leads into contacts, companies, and opportunities.
> - Generate new records from a set of base records on a regular basis such as monthly to do's from a set of scheduled recurring tasks.
> - Reassign records from the wrong table to the right table, such as if customers submit an issue to the wrong table.
> - Collect information in one table and then populate it to several other tables automatically.
>
> For more examples, explore some of the existing conversion mappings in the out-of-the-box setup.

For more information on conversion permissions, actions, and setup, see Data Conversion.

History

The History tab displays a list of history entries for the table, with each entry providing the user, a timestamp, and a description of the history event.

API

The API tab allows you manage REST services and SOAP Web Services for the table. For more information, see SOAP and REST API Web Services.