Action Bars

The action bar is a toolbar containing icons and links for important actions like Search, New Records, Delete Records, or Mass Edit Records. Action bars appear above table views, including related tables in other records.

Example action bar

You can configure multiple action bars for one table for use in different contexts or by different users. For example, you may want to show custom actions to one team of users but not others. A team of contract creators, for instance, may see a Convert button that converts a selected contract to a related contract. However, a team of contract reviewers may not see the button because their role doesn't require them to create new contracts.

More commonly, you'll use different action bars when viewing a table directly as opposed to viewing a related table shown in another record. For instance, if you're viewing a related table of contracts within a company record, you might want a different action bar with a custom action that creates a new contract record with company information already included.

Useful to Know

- You can create and customize action bars by adding or removing menu items, changing labels and icons, or creating multiple rows.
- Action bars are applied to Teams of users. You can have different action bars shown to different sets of users. The user's Primary Team determines which action bar they see.
- Some items, like Export, are controlled by group permissions. For instance, if a user doesn't have permission to export records, the export icon is hidden. Similarly, if they do not have permission to print records, the print icon is hidden.
- You can place custom actions in the action bar.
- Many actions, including custom actions, can run on multiple records at once.

Change the Default Action Bar

Action bars are created and edited in the Table wizard, which is typically accessed by clicking Setup [*Table Name*] on the left pane. Every table has a default action bar that cannot be deleted. The default action bar is automatically shown to users who don't have another action bar assigned.

To edit the default action bar for a table:

1. In the Table wizard, click the Action Bar tab.
2. Edit the action bar called Default.
3. In the Action Bar wizard, click the Design tab.

4. Make your desired changes in the editor.
5. Click Finish to save changes.

The wizard for Default action bars does not include the Apply tab. For all other action bars, you must choose which teams use the action bar.

Design an Action Bar Layout

In the Action Bar wizard, the Design tab shows available menu items on the left and the action bar's arrangement in the right pane. Drag and drop items on the right to arrange them how you like. The tab has several buttons in the center for customizing the action bar:

- **Remove**: Removes an action, separator, or row separator from the right pane, which removes it from action bar.
- **Add**: Adds an action to the right pane, which adds it to the action bar. The Type of Action drop-down contains two lists of actions: System Menu Items and Action Button Items. System Menu Items are generic actions available on any table, while Action Button Items are actions associated with action buttons on the current table.
- **Edit**: Edits an action on the right pane and lets you change the action's text, icon, and display mode. You can choose from the available icons or upload your own.
- **Separator**: Adds a separator to the right pane, which adds it to the action bar. You can drag and place the separator among the actions to create space between sections of the action bar.
- **Row Separator**: Adds a row separator to the right pane, which creates a new row on the action bar. You can drag and place the row separator as desired.
- **New Menu Item**: Opens a pop-up window for creating a group, into which you can place actions. Groups appear on the action bar as drop-down menus containing actions. You can change the group's text, icon, and display mode.

Best Practice Tips

If you're adding an Action Button Item to an action bar, we recommend using the following settings when configuring the action button:

- In the "After executing actions" section, it's usually best to select one of these options: Do Nothing, Close Record without Saving, or Save Record. Think carefully before selecting the Save and Open Record for Edit or the Save and Open Record for View options. When executing actions from a table view, users do not typically want to open the record afterwards.
- Do not add a Validate action with the option selected that allows the user to ignore the warning and save the record. The system will not prompt the user with the option to ignore the warning, and any actions after the Validate action will not execute.

Apply Action Bars to Teams

The Apply tab of the Action Bar wizard is where you decide which teams should use the action bar as their default for the current table.

If no teams use the action bar, it doesn't appear anywhere in the system unless it is explicitly used in a related table or linked field. You don't need to apply an action bar to a team for the action bar to appear with a related table or linked field.

To apply an action bar to selected teams:

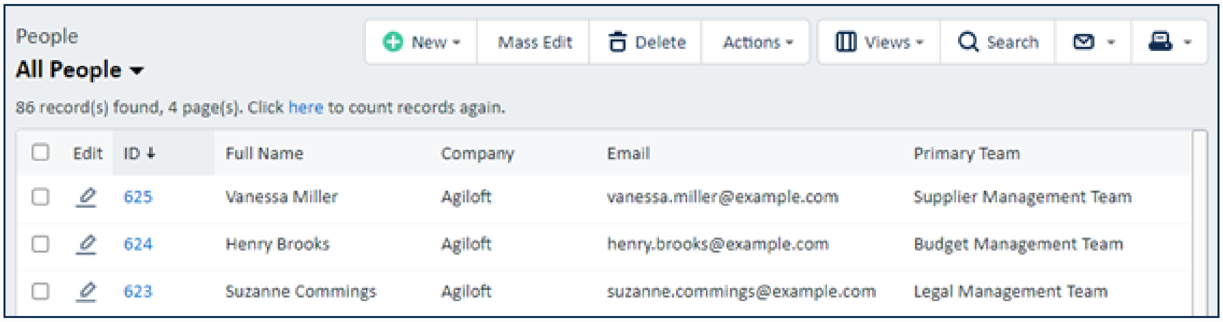
1. In the Apply tab, select Change settings, and then select the "Action Bar is the default for teams" checkbox.
2. Choose one or several teams. Use Ctrl to select multiple teams.
3. Optionally, choose whether subteams of the selected teams, and any new teams, will use this action bar.
4. Click Finish to save the changes.

Apply Action Bars to Linked Fields and Related Tables

Several Data Types are shown within records as embedded tables, in particular the Related Table, Link to Selected Fields with Multiple Values Enabled (MVE), and Embedded Search Result data types. Each of these can be shown with a specific action bar, the user's default action bar, or no action bar. Additionally, you can choose whether the full action bar is shown in the record in view and edit mode, or edit mode only.

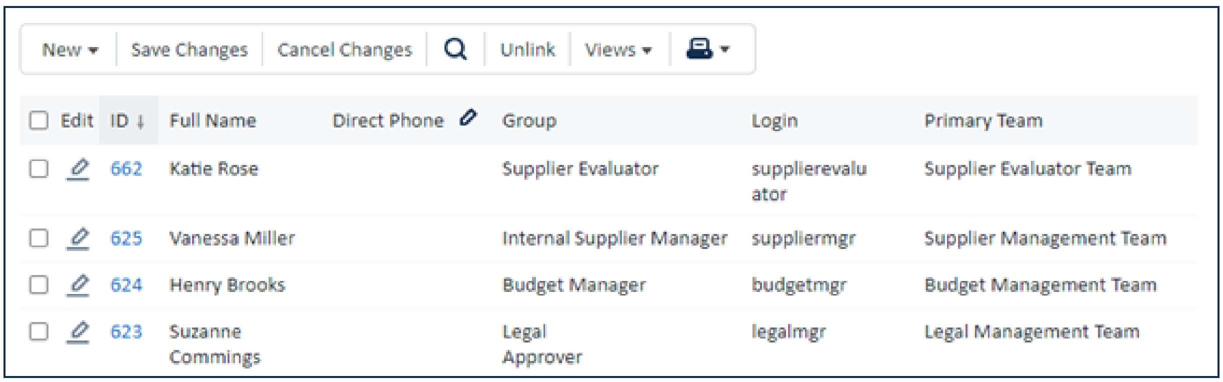
Example

For example, consider the Default action bar on the People table:



Action bar in People table

Compare it to the focused Related Table Action Bar used for People table data in the Companies table:



Action bar in related table

The action bar settings appear on the Display tab of the field wizards for related tables, links to selected fields with MVE, and embedded search results. You can select an existing action bar from the drop-down menu, choose to display the user's default action bar for the source table, or choose not to show an action bar at all.

The best practices differ between data types. For embedded search results, it's usually best not to show an action bar at all, since these fields are designed to show a list of records calculated by the system without any interaction from the user.

Both related tables and links to selected fields with MVE tend to work best with limited action bars that reduce the number of options. For these, Delete, Export, Import, and Copy are commonly excluded. Delete, for example, can be misleading in embedded tables, where users might expect Delete to refer to deleting the link between records, rather than deleting the record itself. Related table action bars typically also choose the option to "Allow all actions in Action Bar only when editing the main record," to make sure options like Unlink or New function as expected. In cases where the field holds only a few records that are shown at all times, it's typically unnecessary to include the Search option.

Action Bar Menus, Permissions, and Controls

This table summarizes the actions available in action bars, as well as which group permissions and system settings control those actions. Depending on a group's permission setting, an action may or may not be available on an action bar for a specific user. For example, if none of a user’s groups is allowed to create records in a table, they don't see the New button. If they are not allowed to print records, they don't see the Print icon. If the Actions drop-down menu only includes Import and Export, but a user isn't allowed to use either option, they don't see the Actions drop-down menu at all. For more information on group permissions, see Creating New Groups.

Action	Description	Permission and System Controls
New	Creates a new record in the table.	Permission to create records.
Edit	Edits the selected record(s).	Permission to edit records. This menu item only appears in related tables and multi-value linked fields.
Copy	Copies the selected record(s). See Copying Records .	Permission to copy records.
Delete	Deletes the selected record(s). This removes the records from the database, and it cannot be undone except by restoring the knowledgebase from a backup file. See Deleting Records.	Permission to delete records.
Search	The Search menu lets users switch between available published searches. Clicking the link opens the search block for ad hoc searching. Additionally, the Search menu includes options to create, edit, and manage saved searches. See Using Saved Searches to Work Efficiently.	Search is visible to all users. The New, Edit, and Manage menus in the Search drop-down are enabled by the permission to create/edit saved searches.
Views	The View menu lets users switch between available published table views and to create, edit, and manage views. See Views.	Visible to all users. The New, Edit, and Manage menus in the Search drop-down are enabled by the permission to create/edit views.
Click to search records	This item appears as a magnifying glass icon. It only appears in action bars displayed above related tables and linked fields with multiple values. It is used to search for a record and link it to the current record in the multi-value enabled field.	Visible with related tables and multi-value linked fields. Requires that the setting "Allow users to unlink records" is selected in the Field wizard.
Convert	The Convert action runs all conversions defined in the table on the selected record. It is more common to create an action button that runs a specific conversion action and add that to the action bar, rather than show the default Convert button.	Requires that the "Show conversion button on menu action bar" permission is selected. It also requires that conversion mappings have been defined for the table.

Export / Import	Import can create new records or update existing records with new data. Export is used to create a file that includes data from the selected records.	Permission to export or import records, respectively. Each permission is set independently.
Unlink	Removes a record from a multi-value linked field set.	This item only appears in action bars applied to linked fields with multiple values enabled. It is used to remove a record from the list in the linked field.
Mass Edit	Edit multiple records at once using a dialog that offers plain text or formula-based updates. See Mass Editing Records.	Permission to mass edit records.
New Email	Open the new email dialog and manage email templates. See Implementing Outbound Email.	Access to the Emails subtable in the Communications table, as well as permission to create emails. Additional options are enabled by the permission to create/edit, manage, and send email templates.
New SMS	Open the new SMS/text message dialog.	Permission to use SMS templates, or to create/edit SMS templates.
Print Records	Print selected records. See Printing a Set of Records.	Permission to print records using the Print icon. Additional options are enabled by the permission to create/edit print templates and the permission to use print templates. Note that "Print files to zip" is controlled by export permissions as well.
Add Note	Create a Note linked to the selected record or records. This action is disabled by default in most systems.	Permission to create Notes in the Communications table.
Custom Actions	Any action button field can be added to the action bar.	Requires that the user has permission to view the action button in the table. Note that visibility or edit dependencies are not enforced when action buttons are added to the action bar.
Save Changes / Cancel Changes	These items appear when looking at a Quick Edit view. Save multiple changes at once, or cancel all changes in the current table view.	Users must have permission to use quick edit views, and be using a view with Quick Edit enabled.