

Step 2: Enter the details

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Field Label

Date

Field Name

Date

Description

Help Text

Required

☐

Always require a value in this field in order to save a record

Auto add to custom report type

☒

Add this field to existing custom report types that contain this entity

Default value

[Show Formula Editor](#)

Use formula syntax. Enclose text and picklist value API names in double quotes. ("The lead") include numbers without quotes (20%). Show percentages as decimals (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

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details

Name

First Name

Bhuvaneshwari

Last Name

Vaiyapuri

Email

bhuvanarishi98@gmail.com

Phone

9876543210

Date

06-Dec-2003



Next



How Many Records to Create

- ☒ One
- ☐ Multiple

How to Set the Record Fields

- ☐ Use all values from a record
- ☒ Use separate resources, and literal values

Create a Record of This Object

* Object

Detail

Set Field Values for the Detail

Field	Value
Name	<input type="text" value="Name > First Name"/>
Email__c	<input type="text" value="Email > Value"/>
Phone__c	<input type="text" value="Phone > Value"/>
Date__c	<input type="text" value="Date"/>
Gender__c	<input type="text" value="Female"/>

+ Add Field

☐ Manually assign variables

Components

Fields



Name

Number

Order Management Enter...

Order Management Enter...

Order Management Orde...

Order Management Prod...

Order Management Progr...

Order Management Selec...

Order Management Selec...

Password

Phone

Picklist

Radio Buttons

[Flow Label]

Name

First Name

Last Name

Email

Phone



Phone

Phone

← Phone

* API Name

* Label

Pattern

Placeholder text

Read Only

Required

Value



Screen Flow
Start



Add Element

Interaction



Screen



Action



Subflow

Logic



Assignment



Decision



End



Details

New Custom Field

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Field Label Gender

Value
☐ Use global picklist value set
☒ Enter values, with each value separated by a new line

Male
Female

☐ Display values alphabetically, not in the order entered
☐ Use first value as default value
☒ Restrict picklist to the values defined in the value set

Field Name Gender

Description

Help Text

Required
☐ Always require a value in this field in order to save a record
☒ Add this field to existing custom report types that contain this entity

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

[New](#) [What Is This?](#)

Action	Label	Tab Style	Description
Edit Del	Colleges	 Jewel	
Edit Del	Consumers	 Credit card	
Edit Del	Departments	 Lightning	
Edit Del	Details	 Gears	
Edit Del	Managements	 Globe	
Edit Del	Providers	 Box	

Web Tabs

[New](#) [What Is This?](#)

No Web Tabs have been defined

Visualforce Tabs

[New](#) [What Is This?](#)

No Visualforce Tabs have been defined

Lightning Component Tabs

[New](#) [What Is This?](#)

No Lightning component tabs have been defined



Flow Definitions

All Flows ▾ ⚡

35 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago



Flow Label ↑ ▾	Process Type ▾	Active ▾	Template ▾	Package State ▾	Package Na... ▾	Last Modifi... ▾	Last Modifi... ▾	
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
<u>Close Change Request & Related Issues</u>	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
CMS: Check Whether Any Step is Completed	Evaluation Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
CMS: Notify Content Author	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
CMS: Review Content	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
CMS: Submit Content for Review	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
CMS: Withdraw Review Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Create Waitlist	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Discount Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Even Exchange Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾
Find Contact Associated with Messaging Session	Individual-Object Linking Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed				▾

Step 2: Enter the details

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Field Label

Date



Field Name

Date



Description

Help Text

Required

☐

Always require a value in this field in order to save a record

Auto add to custom report type

☒

Add this field to existing custom report types that contain this entity



Default value

[Show Formula Editor](#)

Use formula syntax. Enclose text and picklist value API names in double quotes. ("The lead"), include numbers without quotes (20), show percentages as decimals (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

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☐ Lookup Relationship

☐ Master-Detail Relationship

☐ External Lookup Relationship

☐ Checkbox

☐ Currency

☐ Date

☐ Date/Time

☐ Email

☐ Geolocation

☐ Number

☐ Percent

☐ Phone

☒ Picklist

☐ Picklist (Multi-Select)

☐ Text

☐ Text Area

☐ Text Area (Long)

☐ Text Area (Rich)

☐ Text (Formatted)

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

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New Custom Field

Help for this Page

Step 3. Establish field-level security

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Field Label	Email
Data Type	Email
Field Name	Email
Description	

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile

Analytics Cloud Integration User

Analytics Cloud Security User

Contract Manager

Cross Org Data Proxy User

Custom: Marketing Profile

Custom: Sales Profile

Custom: Support Profile

Force.com - App Subscription User

Force.com - Free User

Gold Partner User

Identity User

Marketing User

☐ Visible

☐ Read-Only


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☐ Lookup Relationship

☐ Master-Detail Relationship

☐ External Lookup Relationship

☐ Checkbox

☐ Currency

☐ Date

☐ DateTime

☒ Email

☐ Geolocation

☐ Number

☐ Percent

☐ Phone

☐ Picklist

☐ Picklist (Multi-Select)

☐ Text

☐ Text Area

☐ Text Area (Long)

☐ Text Area (Rich)

☐ Text (Encrypted)

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

☐ Lookup Relationship☐ Master-Detail Relationship☐ External Lookup Relationship☐ Checkbox☐ Currency☐ Date☐ DateTime☐ Email☐ Geolocation☐ Number☐ Percent☒ Phone☐ Picklist☐ Picklist (Multi-Select)☐ Text☐ Text Area☐ Text Area (Long)☐ Text Area (Rich)☐ Text (Encrypted)

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a **True** (checked) or **False** (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

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Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Step 4: Add to page layouts

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[Previous](#) [Save & New](#) [Save](#) [Cancel](#)

Field Label Phone

Data Type Phone

Field Name Phone

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field Page Layout Name☒ Detail Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

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Step 3. Establish field-level security

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Field Label Gender

Data Type Picklist

Field Name Gender

Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile

Analytics Cloud Integration User

Analytics Cloud Security User

Contract Manager

Cross Org Data Proxy User

Custom: Marketing Profile

Custom: Sales Profile

Custom: Support Profile

Force.com - App Subscription User

Force.com - Free User

Gold Partner User

Identity User

Marketing User

☐ Visible

☐ Read-Only




New Create Records

* Label	* API Name
<input type="text" value="details1"/>	<input type="text" value="details1"/>

Description

How Many Records to Create

- ☒ One
- ☐ Multiple

How to Set the Record Fields

- ☒ Use all values from a record
- ☐ Use separate resources, and literal values

Create a Record from These Values

* Record

Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created. ⓘ

Edit Screen

Name

First Name

Last Name

Email

Phone

Phone

 Date

[Date]



Pause

Previous

Finish



New Create Records

* Label details12 * API Name details12

Description

How Many Records to Create

- ☒ One
- ☐ Multiple

How to Enter the Record Fields

Detail
Detail__c
Mobile Application Detail
MobileApplicationDetail
Share: Detail
Detail__Share

Detail

A value is required.



New Create Records

* Label details12 * API Name details12

Description

How Many Records to Create

- ☒ One
- ☐ Multiple

How to Set the Record Fields

- ☐ Use all values from a record
- ☒ Use separate resources, and literal values

Create a Record of This Object

* Object Detail

Set Field Values for the Detail

Field Name

Field Email__c

disabled Disabled

A₃ label Label

A₃ placeholder Placeholder Text

readonly Read Only

required Required

A₃ value Value

[Email]

+ Add Field

☐ Manually assign variables