

C Tutorial | New Custom Object | Salesforce

avseengineeringcollege7-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

Search Setup

New Custom Object

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

I = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Details Example: Account

Plural Label: Details Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Details Example: Account

Description:

Context-Sensitive Help Setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name: None

Enter Record Name Label and Format

Windows Search Google WhatsApp Spotify File 01:51 PM 16-10-2023 ENG IN

S | C Tutorial Details | Salesforce

avseengineeringcollege7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002bxY5/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Details

Fields & Relationships

Details

Roll-Up Summary (i) A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship 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.

Master-Detail Relationship 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.

External Lookup Relationship 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.

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

Currency 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.

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

Date/Time 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.

Email (i) 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.

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

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

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

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

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

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

Windows Search Google WhatsApp 2 Spotify File ENG IN 16-10-2023 01:52 PM

S | C Tutorial Details | Salesforce + avsengineeringcollege7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002bxY5/FieldsAndRelationships/new

Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 2 of 4

Step 2. Enter the details

Field Label: Email

Field Name: Email

Description:

Help Text:

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

Unique: Do not allow duplicate values

External ID: Set this field as the unique record identifier from an external system

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_text"), include numbers without quotes (25), show percentages as decimals (.010), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata Type record use: \$CustomMetadataType__not RecordAPIName Field__c

Previous Next Cancel

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Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 4 of 4

Help for this Page

Step 4. Add to page layouts

Field Label Email
Data Type Email
Field Name Email
Description

Previous Save & New Save Cancel

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
 Details Layout

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

Previous Save & New Save Cancel

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C Tutorial | Details | Salesforce

avseengineeringcollege7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002bxY5/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

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 (Encrypted)

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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Setup Home Object Manager

Search Setup

Help for this Page

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label: Phone

Field Name: Phone

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

Auto add to custom report type:

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (.010), 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

Previous Next Cancel

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Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Details New Custom Field Step 3 of 4

Step 3. Establish field-level security

Field Label: Phone
Data Type: Phone
Field Name: Phone
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 | <input type="checkbox"/> Visible | <input type="checkbox"/> Read-Only |
|-----------------------------------|-------------------------------------|------------------------------------|
| Analytics Cloud Integration User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Analytics Cloud Security User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Contract Manager | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Cross Org Data Proxy User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Marketing Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Sales Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Support Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Force.com - App Subscription User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Search ENG IN 01:54 PM 16-10-2023

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Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules

Details
New Custom Field

Step 4. Add to page layouts Step 4 of 4

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
 Details Layout

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

Previous Save & New Save Cancel

01:54 PM 16-10-2023 ENG IN

C Tutorial Details | Salesforce

avseengineeringcollege7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002bxY5/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Details

Fields & Relationships

Details

Date (selected)

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted) i

Time

URL

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.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50 600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Search

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Setup Home Object Manager

Search Setup

Details

SETUP > OBJECT MANAGER

Details

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label: Date

Field Name: Date

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

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), 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

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Triggers
Flow Triggers

S | C Tutorial Details | Salesforce

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Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Details

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers

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

Date/Time 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.

Email 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.

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

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

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

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

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

Picklist (Multi-Select) Allows users to select multiple values from a list you define.

Text Allows users to enter any combination of letters and numbers.

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

Text Area (Long) Allows users to enter up to 131,072 characters on separate lines.

Text Area (Rich) Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

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

Time Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50 600" are all valid times for this field.

URL Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

ENG IN 01:55 PM 16-10-2023

S | C Tutorial Details | Salesforce + avsengineeringcollege7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I5j000002bxY5/FieldsAndRelationships/new

Cloud Setup Home Object Manager Search Setup

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 2 of 4

Step 2. Enter the details

Field Label: Gender

Values:

- 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:

Previous Next Cancel

Windows Search Google WhatsApp Spotify File ENG IN 01:56 PM 16-10-2023

The screenshot shows the Salesforce Object Manager interface for creating a new custom field. The field is named 'Gender' and is defined as a picklist. It has two values: 'Male' and 'Female'. The 'Restrict picklist to the values defined in the value set' checkbox is selected. The interface includes a sidebar with various setup options like Page Layouts, Lightning Record Pages, and Field Sets.

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Cloud Search Setup Object Manager

Setup Home Object Manager

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 3 of 4

Help for this Page

Step 3. Establish field-level security

Previous Next Cancel

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 | Visible | Read-Only |
|-----------------------------------|-------------------------------------|--------------------------|
| Analytics Cloud Integration User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Analytics Cloud Security User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Contract Manager | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Cross Org Data Proxy User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Marketing Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Sales Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Custom: Support Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Force.com - App Subscription User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Search ENG IN 01:56 PM 16-10-2023

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Cloud Search Setup Object Manager

SETUP > OBJECT MANAGER Details

Details New Custom Field Step 4 of 4

Help for this Page

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers

Step 4. Add to page layouts

Field Label: Gender
Data Type: Picklist
Field Name: Gender
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.

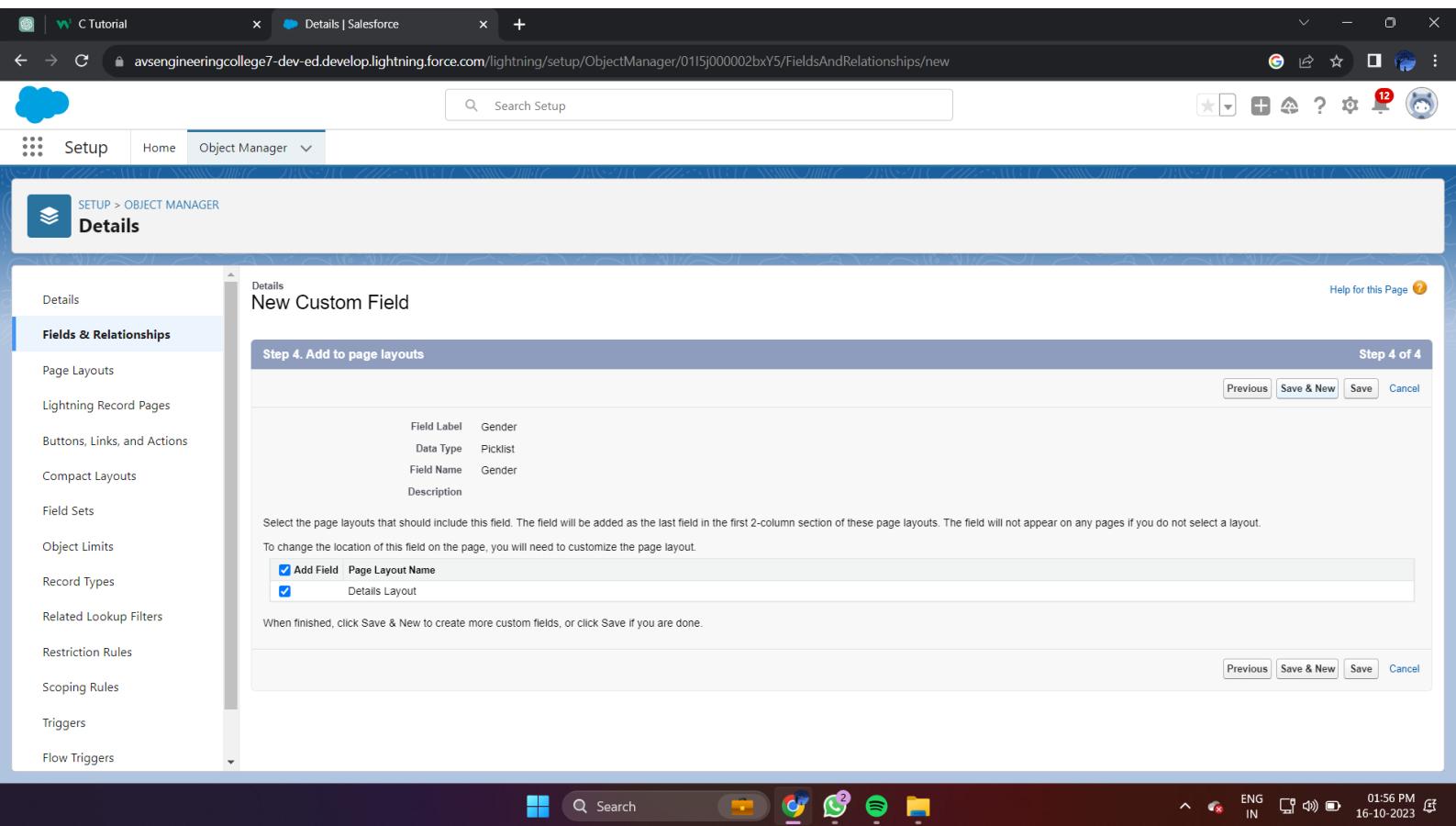
To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name
 Details Layout

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

Previous Save & New Save Cancel

Windows Search Google WhatsApp Spotify File ENG IN 01:56 PM 16-10-2023



C Tutorial | Home | Salesforce

avseengineeringcollege7-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Cloud icon

Setup Home Object Manager

Search Setup

Create

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

Home

SETUP

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Get Started

Learn More

Get Started

Most Recently Used

10 items

| NAME | TYPE | OBJECT |
|---------|--------------------------|---------|
| Email | Custom Field Definition | Details |
| Details | Custom Object Definition | Details |

Search

Cloud, File, Home, App, Chat, Music, Google Sheets, Google Slides, Google Sheets, Google Slides, Google Sheets, Google Slides

ENG IN 01:56 PM 16-10-2023

Salesforce Setup Page

The screenshot shows the Salesforce Setup interface for creating a new custom object tab. The top navigation bar includes tabs for Home, Object Manager, and Setup. The left sidebar is titled "User Interface" and lists "Rename Tabs and Labels" and "Tabs". A search bar at the top right contains the text "Search Setup".

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).
Object:

Tab Style: App Desk

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link:

Enter a short description.
Description:

Buttons at the bottom right: **Next** **Cancel**

System tray icons at the bottom: Search, File Explorer, WhatsApp, Spotify, and a folder icon. System status: ENG IN, 16-10-2023, 01:56 PM.

S | C Tutorial X Tabs | Salesforce +

avseengineeringcollege7-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fu... G 🔍 ⌂ ⌂ ? ⌂ 12 ⌂

Cloud icon

Setup Home Object Manager

Search Setup

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

SETUP Tabs

New Custom Object Tab

Help for this Page

Step 2 of 3

Step 2. Add to Profiles

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Apply one tab visibility to all profiles [Default On] Apply a different tab visibility for each profile

| Profile | Tab Visibility |
|------------------------------------|----------------|
| Analytics Cloud Integration User | Default On |
| Analytics Cloud Security User | Default On |
| Authenticated Website | Default On |
| Authenticated Website | Default On |
| Contract Manager | Default On |
| Cross Org Data Proxy User | Default On |
| Custom: Marketing Profile | Default On |
| Custom: Sales Profile | Default On |
| Custom: Support Profile | Default On |
| Customer Community Login User | Default On |
| Customer Community Plus Login User | Default On |

Windows taskbar: Search, File Explorer, Google Chrome, WhatsApp, Spotify, Microsoft Edge

System tray: ENG IN, 16-10-2023, 01:57 PM

S | C Tutorial X Tabs | Salesforce +

avseengineeringcollege7-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252...

Cloud Search Setup

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

Custom Tabs

Help for this Page

Custom Object Tabs

| Action | Label | Tab Style | Description |
|------------|-------------|-----------|-------------|
| Edit Del | colleges | Jewel | |
| Edit Del | departments | Lightning | |
| Edit Del | Details | Desk | |

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

No Lightning component tabs have been defined

Search

ENG IN 16-10-2023 01:57 PM

S | C Tutorial | Recently Viewed | Details | Sales | Home | Salesforce

avseengineeringcollege7-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home

Cloud icon

Setup Home Object Manager

Search Setup

Create

flow

Apps

- Lightning Bolt
- Flow Category

Process Automation

- Automation Home (Beta)
- Flows

Migrate to Flow

Paused And Failed Flow

Interviews

Process Builder

Workflow Actions

- Email Alerts
- Field Updates
- Outbound Messages
- Send Actions
- Tasks
- Workflow Rules

Environments

Monitoring

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

| NAME | TYPE | OBJECT |
|--------------|-----------------------|--------|
| supportforce | Custom App | |
| Details | Custom Tab Definition | |

Search

Cloud, File, WhatsApp, Spotify, Google Sheets icons

ENG IN 01:59 PM 16-10-2023

S | C Tutorial | Recently Viewed | Details | Sales | Flows | Salesforce

avseengineeringcollege7-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home

Cloud icon

Setup Home Object Manager

Search Setup

Flow Trigger Explorer New Flow

Flow Definitions All Flows

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

| Flow Label ↑ | Process Type | Active | Templ... | Package State | Packa... | Last M... | Last M... |
|--|----------------------------|-------------------------------------|-------------------------------------|-------------------|----------|-----------|-----------|
| 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 | | | |
| Close Change Request & Related Issues | 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 Product Record Flow | Autolaunched Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |

https://avseengineeringcollege7-dev-ed.develop.lightning.force.com/one/one.app#/setup/Flows/home

Windows Taskbar: Search, File Explorer, Google Chrome, WhatsApp, Spotify, File Icons

System Tray: ENG IN, 02:00 PM, 16-10-2023

S | C Tutorial x | Recently Viewed | Details | Sales x | Flows | Salesforce x | Flow Builder x | +

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app

Flow Builder ?

Toolbox

Elements Manager

New Flow

Core All + Templates

Screen Flow

Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and ...

Record-Triggered Flow

Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

Schedule-Triggered Flow

Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

Platform Event—Triggered Flow

Launches when a platform event message is received. This autolaunched flow runs in the background.

Autolaunched Flow (No Trigger)

Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Record-Triggered Orchestration

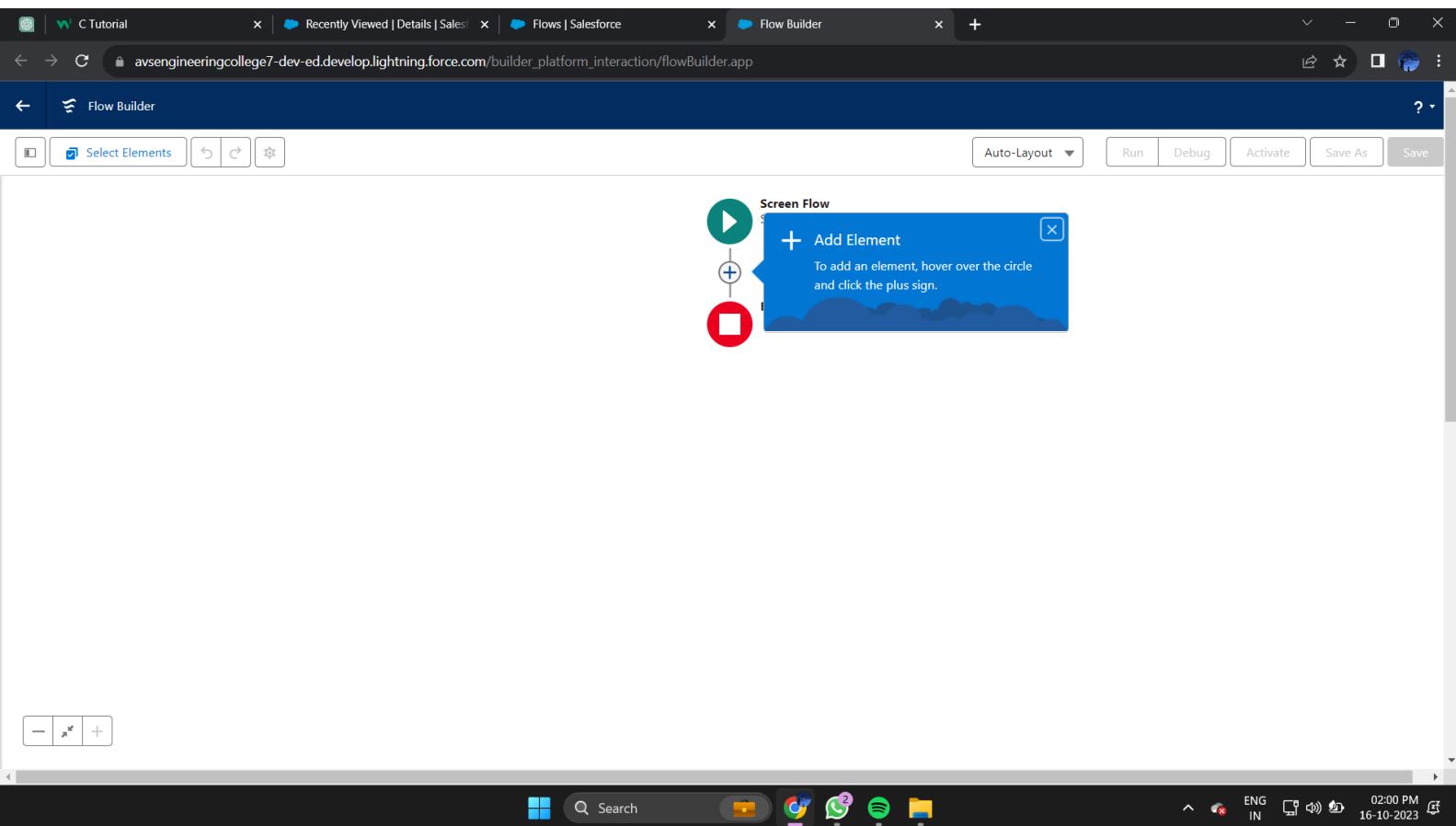
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

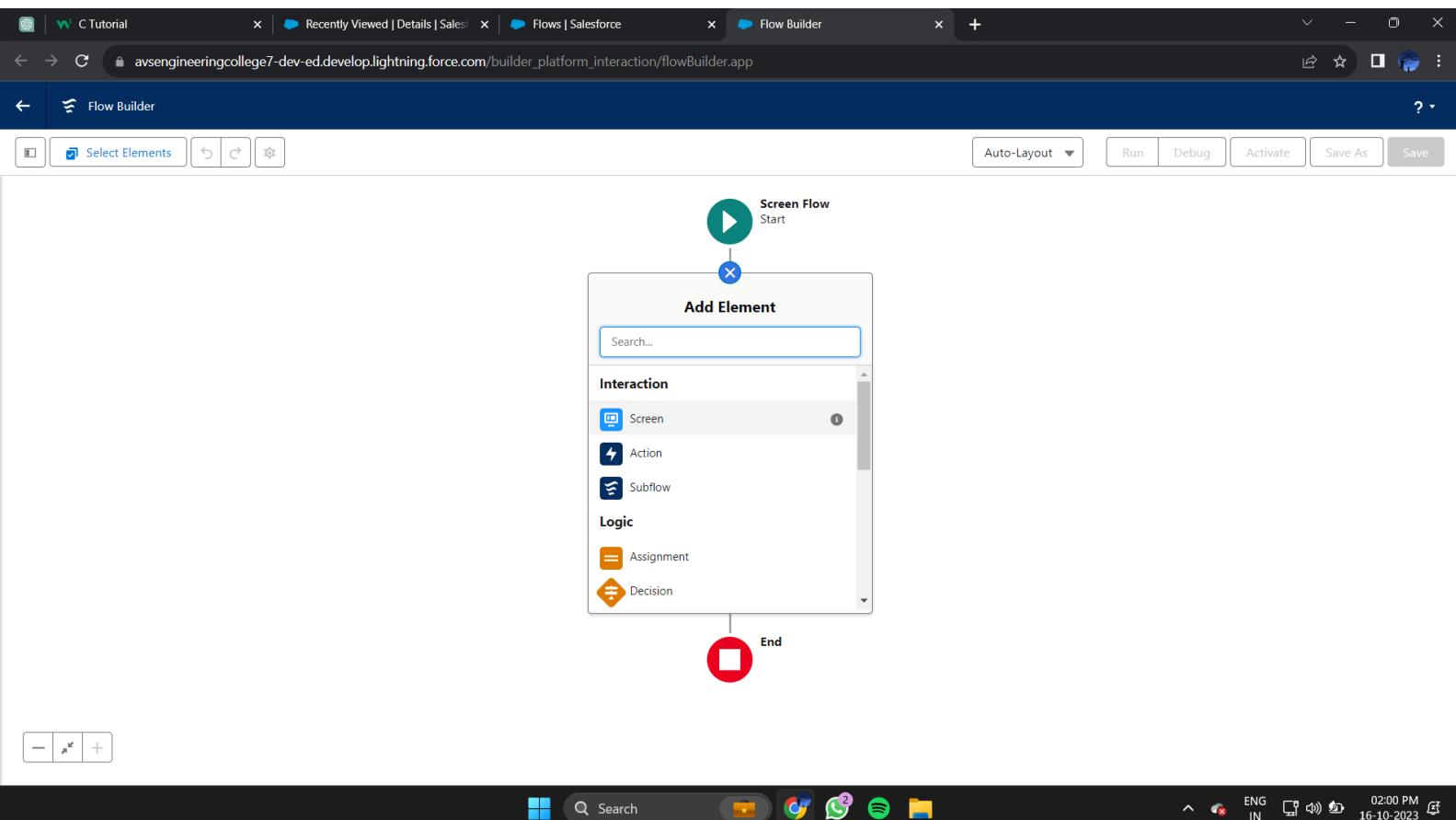
Create

More on the AppExchange javascript:void(0)

Search

ENG IN 16:10:2023





S | C Tutorial x | Recently Viewed | Details | Sales x | Flows | Salesforce x | Flow Builder x +

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app

Flow Builder

New Screen

Components Fields

tex

Input (2)

Long Text Area

Text

Display (1)

Display Text

[Flow Label]

Name

Pause Previous Finish

← Text

Label Name

* API Name Name

Require

Default Value Enter value or search resources...

> Set Component Visibility

> Validate Input

> Provide Help

Cancel Done

Get more on the AppExchange

— +

Search

02:01 PM 16-10-2023 ENG IN

S | C Tutorial x | Recently Viewed | Details | Sales x | Flows | Salesforce x | Flow Builder x +

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app

Flow Builder

Auto-Layout Run Debug Activate Save As X Save

New Screen

Components Fields

ema

Input (1)

Email

[Flow Label]

Name

Email

you@example.com

Pause Previous Finish

Get more on the AppExchange

Email

* API Name Email

* Label Email

Disabled {!\$GlobalConstant.False}

Placeholder Text you@example.com

Read Only {!\$GlobalConstant.False}

Required {!\$GlobalConstant.False}

Cancel Done

— +

Search ENG IN 02:01 PM 16-10-2023

The screenshot shows the Salesforce Flow Builder interface. A new screen is being created with two input fields: 'Name' and 'Email'. The 'Email' field has a value of 'you@example.com'. A modal window titled 'Email' is open, showing configuration details for this component. The configuration includes:

- * API Name: Email
- * Label: Email
- Disabled: {!\$GlobalConstant.False}
- Placeholder Text: you@example.com
- Read Only: {!\$GlobalConstant.False}
- Required: {!\$GlobalConstant.False}

At the bottom of the modal, there are 'Cancel' and 'Done' buttons.

S | C Tutorial x | Recently Viewed | Details | Sales x | Flows | Salesforce x | Flow Builder x +

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app

Flow Builder

Select Elements Auto-Layout Run Debug Activate Save As X Save ?

New Screen

Components Fields

Pho

Input (1)

Phone

[Flow Label]

Name

Email

you@example.com

Phone

Pause Previous Finish

Get more on the AppExchange

← Phone

* API Name Phone

* Label Phone

Pattern Enter value or search resources...

Placeholder text Enter value or search resources...

Read Only Enter value or search resources...

Required Enter value or search resources...

Cancel Done

- ↻ +

Search ENG IN 02:01 PM 16-10-2023

The screenshot shows the Salesforce Flow Builder interface. A new screen is being created with three input fields: Name, Email, and Phone. The Phone field has a modal open for configuration, showing details like API Name (Phone), Label (Phone), and various pattern and placeholder options. The bottom right of the screen shows system status icons and the date/time (02:01 PM, 16-10-2023).

S | C Tutorial x | Recently Viewed | Details | Sales x | Flows | Salesforce x | Flow Builder x +

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app

Flow Builder

Select Elements Auto-Layout Run Debug Activate Save As X Save ?

New Screen

Components Fields

Name

Email

Phone Date

[Date]

Pause Previous Finish

Get more on the AppExchange

Date

Label * API Name
 Require Default Value

> Set Component Visibility
> Validate Input
> Provide Help

Cancel Done

- ↻ +

Search ENG IN 02:02 PM 16-10-2023

The screenshot shows the Salesforce Flow Builder interface. A new screen is being created with the title 'New Screen'. On the left, there's a sidebar with 'Components' selected, showing a list of components including 'Date' (selected), 'Input (2)', 'Date', and 'Date & Time'. The main area contains four input fields: 'Name', 'Email' (with value 'you@example.com'), 'Phone', and '[Date]' (with a date component icon). Below these fields are 'Pause', 'Previous', and 'Finish' buttons. To the right of the screen, a detailed configuration panel for the 'Date' component is open, showing settings like 'Label' (set to 'Date'), 'API Name' (empty), 'Require' (unchecked), 'Default Value' ('dd/MM/yyyy'), and visibility/validation/provide help options. At the bottom, there are 'Cancel' and 'Done' buttons. The system status bar at the bottom shows network connectivity, battery level, and the current date and time.

C Tutorial | Recently Viewed | Details | Sales | Flows | Salesforce | Flow Builder

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app

Flow Builder

New Screen

Components Fields

pick

Name

Email

you@example.com

Phone

Date

Gender

--None--

Picklist

Label

Gender

* API Name

Gender

Require

Data Type

Text

Configure Choices

Let Users Select Multiple Options

Yes

No

Cancel Done

- +

Search

02:02 PM 16-10-2023 ENG IN

S | C Tutorial x | Recently Viewed | Details | Sales x | Flows | Salesforce x | Flow Builder x +

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app

Flow Builder

New Screen

Components Fields

pick

Name

Email

you@example.com

Phone

Date

Gender

--None--

Dependent Picklists

Multi-Select Picklist

Picklist

Get more on the AppExchange

← Picklist

Yes

No

Component Type

Picklist

*Choice

male

+ Create 'male' Choice

+ Add Choice

Set Component Visibility

Provide Help

Advanced

Cancel Done

- ↻ +

Search

02:02 PM 16-10-2023 ENG IN

C Tutorial | Recently Viewed | Details | Sales | Flows | Salesforce | Flow Builder

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app

Flow Builder

New Screen

Components Fields

pick

Name

Email

you@example.com

Phone

Date

Gender

--None--

Dependent Picklists

Multi-Select Picklist

Picklist

← Picklist

Yes

No

Component Type

Picklist

*Choice

{!male}

*Choice

Female

+ Create 'Female' Choice

Default Value

Enter value or search resources...

Auto-Layout Run Debug Activate Save As X Save

Cancel Done

Get more on the AppExchange

— +

Search

02:03 PM 16-10-2023 ENG IN

C Tutorial | Recently Viewed | Details | Sales | Flows | Salesforce | Flow Builder

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app

Flow Builder

New Screen

Components Fields

pick

Input (3)

- Dependent Picklists
- Multi-Select Picklist
- Picklist

Email: you@example.com

Phone:

Date:

Gender: --None--

Pause Previous Finish

Picklist

{!male}

*Choice

{!Female}

+ Add Choice

Default Value

Enter value or search resources...

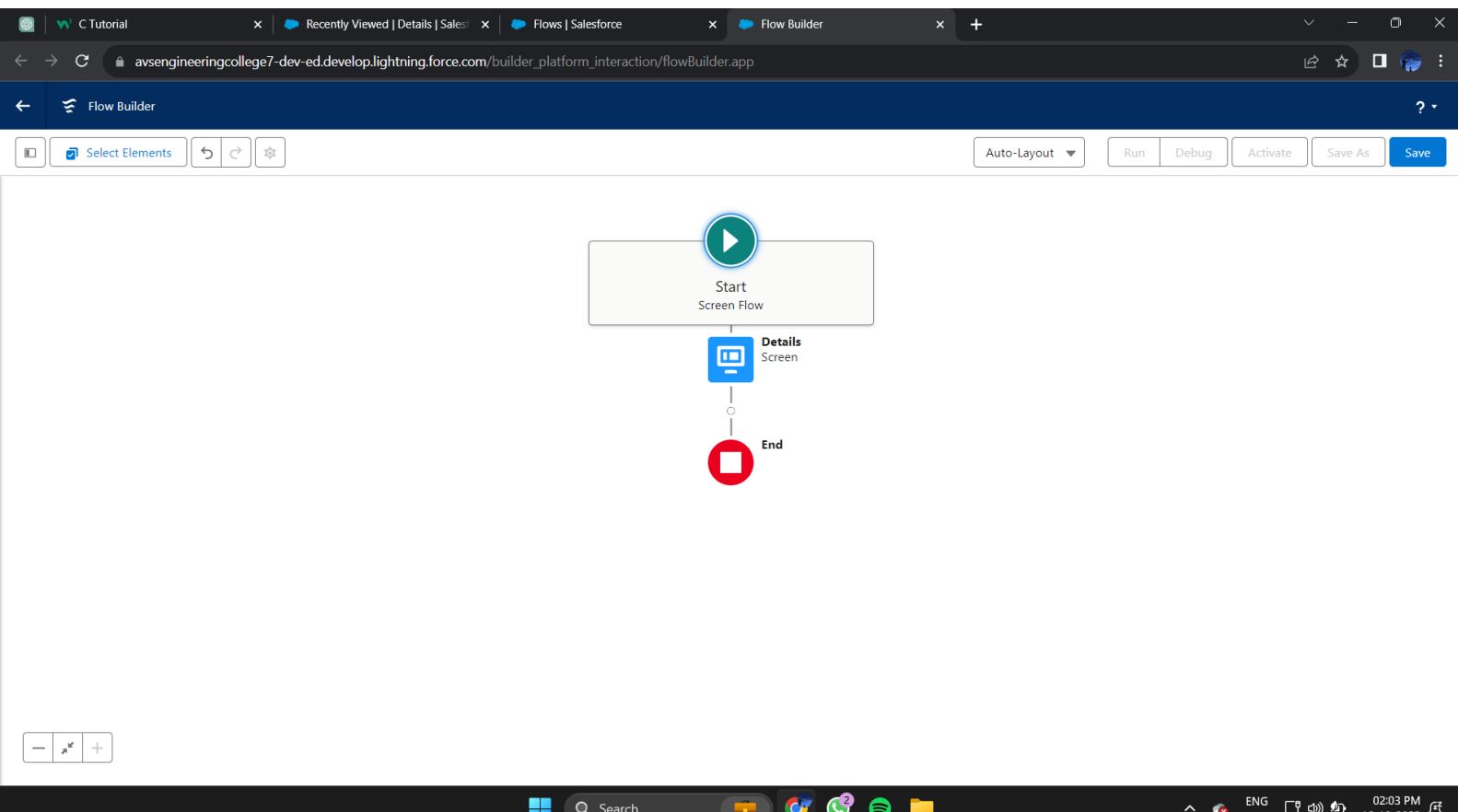
Set Component Visibility

Provide Help

Advanced

Cancel Done

This screenshot shows the Salesforce Flow Builder interface. A new screen is being created with three input fields: Email (containing 'you@example.com'), Phone (empty), and Date (empty). Below these is a Gender picklist with '--None--' selected. On the right, a 'Picklist' configuration panel is open, showing two choices: '{!male}' and '{!Female}'. There are buttons for '+ Add Choice' and 'Default Value'. Below the panel are sections for 'Set Component Visibility', 'Provide Help', and 'Advanced'. At the bottom of the screen are 'Cancel' and 'Done' buttons. The top navigation bar includes tabs for C Tutorial, Recently Viewed, Details, Sales, Flows, and Flow Builder. The URL in the address bar is 'avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app'.



Screenshot of the Salesforce Flow Builder interface showing a Screen Flow named "details".

The flow consists of the following steps:

- Start (Screen Flow Start)
- Details Screen
- details1 Create Records
- End

The "details1 Create Records" step is currently selected.

New Create Records configuration:

- Label:** details1
- API Name:** details1
- Description:** (empty)

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

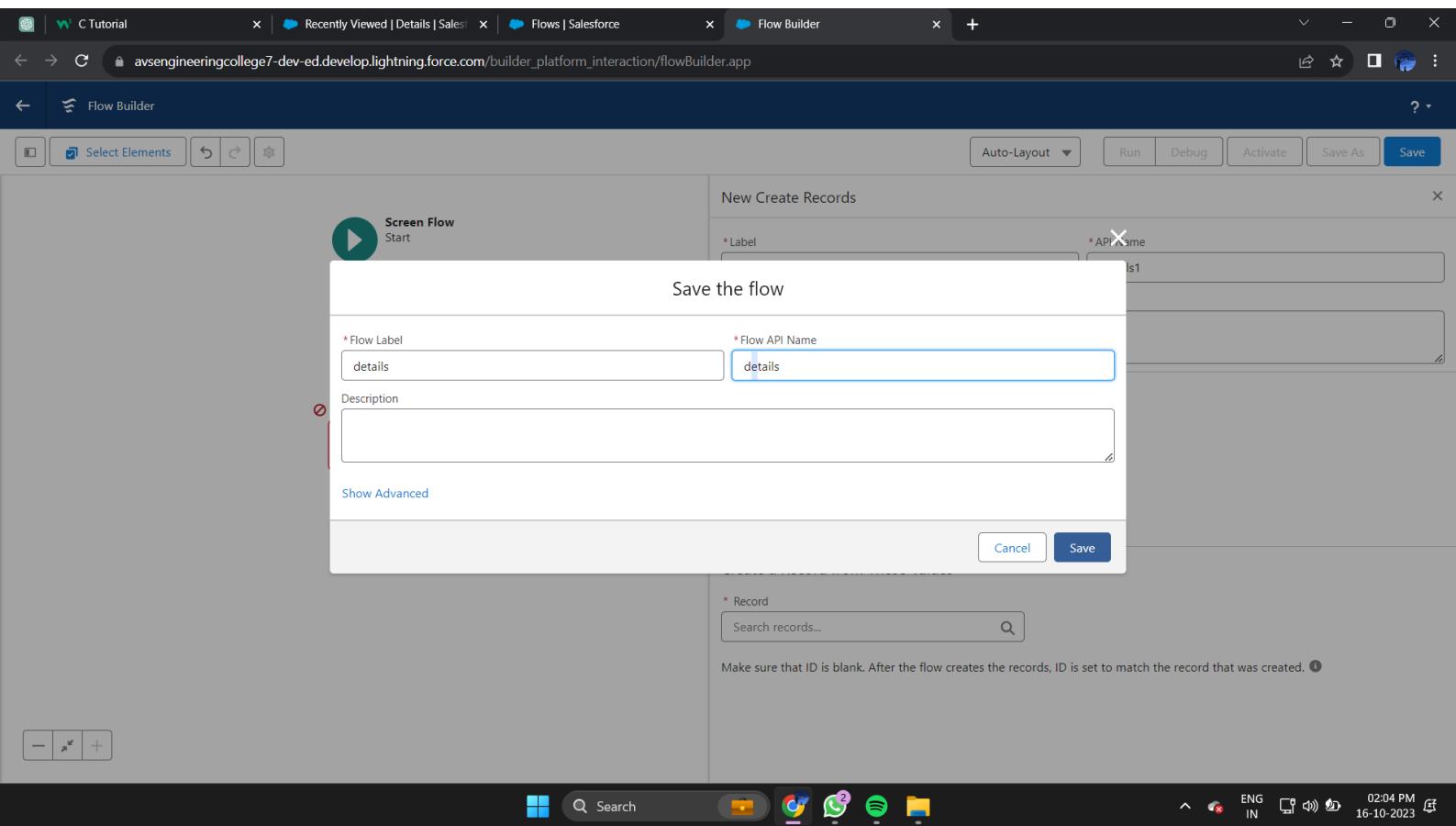
Create a Record from These Values:

- Record:** Search records... (empty)

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

System status bar at the bottom:

- Search bar
- File icon
- Cloud storage icon
- WhatsApp icon (2 notifications)
- Spotify icon
- Folder icon
- ENG IN
- 16-10-2023
- 02:04 PM



Screenshot of the Salesforce Flow Builder interface showing a flow named "details - V1".

The flow consists of the following steps:

- Start (Screen Flow Start)
- Details Screen
- Details12 Create Records (with a red error icon)
- End

A modal window titled "New Create Records" is open, showing the configuration for the "Create Records" step:

- Label: Details12
- API Name: Details12
- Description: (empty)
- How Many Records to Create:
 - One (selected)
 - Multiple
- How to Set the Record Fields:
 - Details
 - Details__c
 - Mobile Application Detail
 - MobileApplicationDetail
 - Share: Details
 - Details__Share
- data (highlighted in blue)

An error message "A value is required." is displayed below the "data" field.

At the bottom of the screen, the taskbar shows various application icons and the system status bar indicates "ENG IN" and the date "16-10-2023".

Salesforce Flow Builder - details - V1

Auto-Layout Version 1: Inactive—Last modified a minute ago

Run Debug Activate Save As Save

Screen Flow Start

Details Screen

Details12 Create Records

End

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: Details

Set Field Values for the Details

Field: Name

SCREEN COMPONENTS

| Name | Text |
|------|------|
| nam | |

+ Add Field

Manually assign variables

Search

02:06 PM 16-10-2023 ENG IN

Sales| Flows | Salesforce

details - V1

Flow Builder

Select Elements

Auto-Layout Version 1: Inactive—Last modified a minute ago

Run Debug Activate Save As Save

Screen Flow Start

Details Screen

Details12 Create Records

End

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

Date_c Date

A_a Email_c Email

:= Gender_c Gender

A_a OwnerId Owner ID

A_a Phone_c Phone

Value A_a Name

Search fields... Enter value or search resources...

Add Field Manually assign variables

02:06 PM 16-10-2023 ENG IN

```
graph TD; Start((Screen Flow Start)) --> Details1[Details Screen]; Details1 --> Create[Details12 Create Records]; Create --> End((End));
```

Screenshot of the Salesforce Flow Builder interface showing a flow named "details - V1".

The flow consists of the following steps:

- Start (Screen Flow Start)
- Details Screen
- Create Records (Details12)
- End

The "Create Records" step is highlighted with a red border.

On the right side, there is a configuration panel for the "Create Records" step:

- Description:** A text input field.
- 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:** Details
- Set Field Values for the Details**

| | | |
|-------|---------|---|
| Field | Name | ← |
| Field | Email_c | ← |

 - Add Field** button
 - Manually assign variables

A context menu is open over the "Email_c" field, listing options such as disabled, label, placeholder, readonly, required, and value.

At the bottom of the screen, there is a taskbar with various icons and system status information.

S | C Tutorial x | Recently Viewed | Details | Sales x | Flows | Salesforce x | details - V1 x +

avseengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app?flowId=3015j0000026uM6AAI

Flow Builder details - V1

Auto-Layout Version 1: Inactive—Last modified 2 minutes ago Run Debug Activate Save As Save

Screen Flow Start

Details Screen

Details12 Create Records

End

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 Details

Set Field Values for the Details

Field Value

Name Aa Name

Email_c {{Email.value}}

+ Add Field

Manually assign variables

— ↻ +

Search

ENG IN 02:06 PM 16-10-2023

```
graph TD; Start((Screen Flow Start)) --> Details[Details Screen]; Details --> Create[Create Records]; Create --> End((End));
```

Screenshot of the Salesforce Flow Builder interface showing a Screen Flow named "details - V1".

The flow consists of the following steps:

- Screen Flow Start
- Details Screen
- Details12 Create Records
- End

Configuration details for the "Create Records" step:

- How Many Records to Create:** One (selected)
- How to Set the Record Fields:** Use separate resources, and literal values (selected)
- Create a Record of This Object:** Object is set to "Details".
- Set Field Values for the Details object:**
 - Name: Value is "Name".
 - Email_c: Value is "Email_c".
 - Phone_c: Value is "Phone_c".
- VARIABLES:** A variable "DetailsId from Details12" is assigned to the "Name" field.

System status and interface elements:

- Auto-Layout button
- Version 1: Inactive—Last modified 2 minutes ago
- Run, Debug, Activate, Save As buttons
- Search bar: avsengineeringcollege7-dev-ed.lightning.force.com/builder_platform.interaction/flowBuilder.app?flowId=3015j0000026uM6AAI
- Minimize, Maximize, Close buttons
- Taskbar icons: Search, File, Home, Recent, Notifications, Spotify, Google Sheets, and a folder icon.
- System status: ENG IN, 02:06 PM, 16-10-2023

Screenshot of the Salesforce Flow Builder interface showing a Screen Flow named "details - V1".

The flow consists of the following steps:

- Screen Flow Start**: The starting point of the flow.
- Details Screen**: A step where the user can view or edit a record.
- Details12 Create Records**: A step where new records are created. This step is highlighted in red.
- End**: The final step of the flow.

On the right side, the configuration pane shows the following settings:

- 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**: Details
- Set Field Values for the Details**:
 - Field**: Name **Value**: Aa Name X
 - Field**: Email_c **Value**: Aa Email > Value X
 - Field**: Phone_c **Value**: Aa Phone > Value X
 - Field**: Date__c **Value**: SCREEN COMPONENTS
Aa Gender Picklist
 - Field**: Gender_c **Value**: ge
- Add Field**: A button to add more fields.
- Manually assign variables**: A checkbox that is unchecked.

At the bottom, there are standard browser controls (Search, Back, Forward, Stop, Refresh) and system status indicators (ENG IN, battery level, signal strength, 16-10-2023, 02:07 PM).

Salesforce Flow Builder - details - V1

Auto-Layout Version 1: Inactive—Last modified 3 minutes ago

Run Debug Activate Save As

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 Details

Set Field Values for the Details

Field Value
Name ← Aa Name X

Field Value
Email_c ← Aa Email > Value X

Field Value
Phone_c ← Aa Phone > Value X

Field Value
Date_c ← Date X

Field Value
Gender_c ← {!Gender}

+ Add Field

Manually assign variables

Screen Flow Start → Details Screen → Details12 Create Records → End

```
graph TD; Start((Screen Flow Start)) --> Details[Details Screen]; Details --> Details12[Details12 Create Records]; Details12 --> End((End))
```

Salesforce Flow Builder - details - V1

Auto-Layout Version 1: Inactive—Last modified a few seconds ago Run Debug Activate Save As

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 Details

Set Field Values for the Details

| Field | Value |
|----------|----------------------|
| Name | ← Aa Name X |
| Email_c | ← Aa Email > Value X |
| Phone_c | ← Aa Phone > Value X |
| Date__c | ← Date X |
| Gender_c | ← Aa Gender X |

+ Add Field

Manually assign variables

Screen Flow Start → Details Screen → Details12 Create Records → End

Flow Elements: Screen Flow Start, Details Screen, Details12 Create Records, End.

Flow Logic:

- Start → Details Screen
- Details Screen → Details12 Create Records
- Details12 Create Records → End

Record Creation:

- Object: Details
- Fields and Values:
 - Name: Aa Name X
 - Email_c: Aa Email > Value X
 - Phone_c: Aa Phone > Value X
 - Date__c: Date X
 - Gender_c: Aa Gender X

Variables:

- Aa Name X
- Aa Email > Value X
- Aa Phone > Value X
- Date X
- Aa Gender X

Sales | Recently Viewed | Details | Sales | Flows | Salesforce | details - V1

Flow Builder | details - V1

Auto-Layout Version 1: Inactive—Last modified a minute ago Run Debug Activate Save As

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 Details

Set Field Values for the Details

| Field | Value |
|----------|----------------------|
| Name | ← Aa Name X |
| Email_c | ← Aa Email > Value X |
| Phone_c | ← Aa Phone > Value X |
| Date__c | ← Date X |
| Gender_c | ← Aa Gender X |

+ Add Field

Manually assign variables

Screen Flow Start → Details Screen → Details12 Create Records → End

```
graph TD; Start((Screen Flow Start)) --> Details1[Details Screen]; Details1 --> Details2[Details12 Create Records]; Details2 --> End((End))
```

Search ENG IN 02:09 PM 16-10-2023

Your flow was activated.

Auto-Layout Version 1: Active—Last modified a few seconds ago Run Debug Deactivate Save As

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 Details

Set Field Values for the Details

| Field | Value |
|----------|----------------------|
| Name | ← Aa Name X |
| Email_c | ← Aa Email > Value X |
| Phone_c | ← Aa Phone > Value X |
| Date__c | ← Date X |
| Gender_c | ← Aa Gender X |

+ Add Field

Manually assign variables

```
graph TD; Start([Screen Flow Start]) --> Details[Details Screen]; Details --> Create[Create Records<br/>Details12]; Create --> End([End]);
```

Salesforce Flow Builder - details - V1

Auto-Layout Version 1: Active—Last modified a few seconds ago

Run Debug Deactivate Save As

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 Details

Set Field Values for the Details

Field Value
Name ← Aa Name X

Field Value
Email_c ← Aa Email > Value X

Field Value
Phone_c ← Aa Phone > Value X

Field Value
Date_c ← Date X

Field Value
Gender_c ← Aa Gender X

+ Add Field

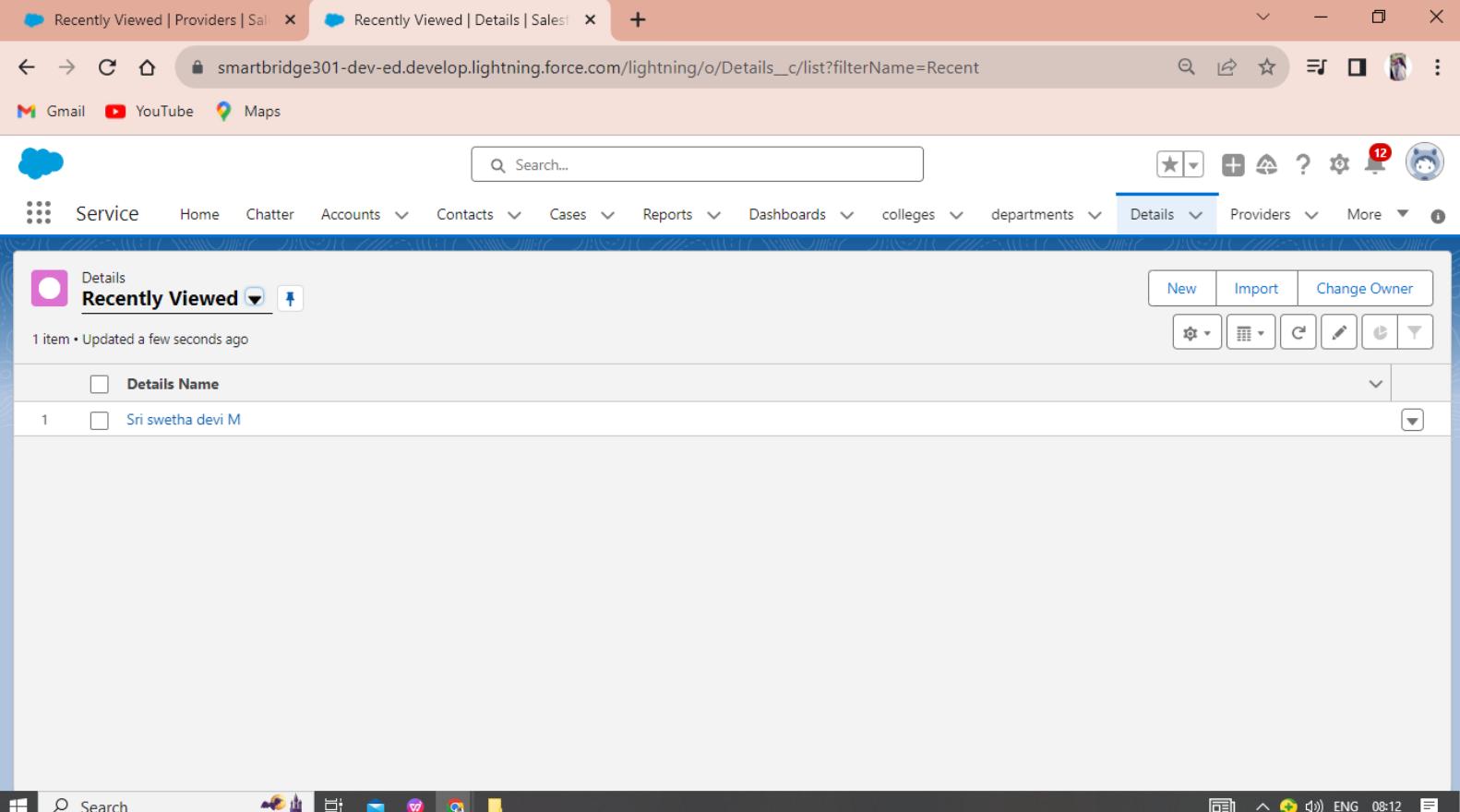
Manually assign variables

Screen Flow Start → Details Screen → Details12 Create Records → End

Search Bar

System Icons

Language: ENG IN Date: 16-10-2023 Time: 02:09 PM



Screenshot of a Salesforce Lightning interface showing the edit screen for a contact record named "Sri swetha devi M".

The contact details are as follows:

- Details Name: Sri swetha devi M
- Owner: Sri Swetha Devi M
- email: swethandccswetha@gmail.com
- Phone: 9344675212
- DOB: 15/08/2005
- Gender: Female

Created By: Sri Swetha Devi M, 17/10/2023, 11:48 am

Last Modified By: Sri Swetha Devi M, 25/10/2023, 3:38 pm

Buttons at the bottom: Cancel, Save & New, Save

Related tab details:

- Details Name: Sri swetha devi M
- email: swethandccswetha@gmail.com
- Phone: 9344675212
- DOB: 15/08/2005
- Gender: Female

Created By: Sri Swetha Devi M, 17/10/2023, 11:48 am

Bottom navigation bar: Type here to search, Live, ENG, 03:41 PM, 25-10-2023.

Screenshot of a Salesforce Lightning interface showing a contact record for "Sri swetha devi M".

The top navigation bar shows several tabs: WhatsApp, ECE | department | Salesforce, Recently Viewed | Providers, Sri swetha devi M | Details, and Profiles | Salesforce.

The URL in the browser is smartbridge301-dev-ed.lightning.force.com/lightning/r/Details__c/a025j00000dJTh9AAG/view.

The main content area displays the contact details:

| Details | Value |
|------------------|---|
| Details Name | Sri swetha devi M |
| Owner | Sri Swetha Devi M |
| email | swethandccswetha@gmail.com |
| Phone | 9344675212 |
| DOB | 15/08/2005 |
| Gender | Female |
| Created By | Sri Swetha Devi M, 17/10/2023, 11:48 am |
| Last Modified By | Sri Swetha Devi M, 25/10/2023, 3:38 pm |

The bottom of the screen shows the Windows taskbar with a search bar, pinned apps (File Explorer, Edge, Mail, Google Chrome, File History), and system status icons (battery level, signal strength, temperature 34°C, weather mostly sunny, date 25-10-2023, time 03:40 PM).