

Dynamic Data Table

Simplify the process of accessing, analyzing, and exporting records across multiple Salesforce objects

Introduction

The Dynamic Data Table (DDT) app consolidates all relevant data within a unified interface. It significantly reduces the time spent on repetitive record checks while ensuring comprehensive visibility tailored to specific requirements.

Users can effortlessly generate Dynamic Data Tables (DDTs) for individual objects and view them in a tabular format directly from their homepage – now enhanced with chart visualization and export functionality.

Why is it important?

The Dynamic Data Table is essential because it:

- **Saves time:** No more switching across multiple object views.
- **Improves visibility:** Unified table for standard and custom objects.
- **Adds insights:** Visualize records with charts.
- **Enables portability:** Export data and charts as a single PDF.

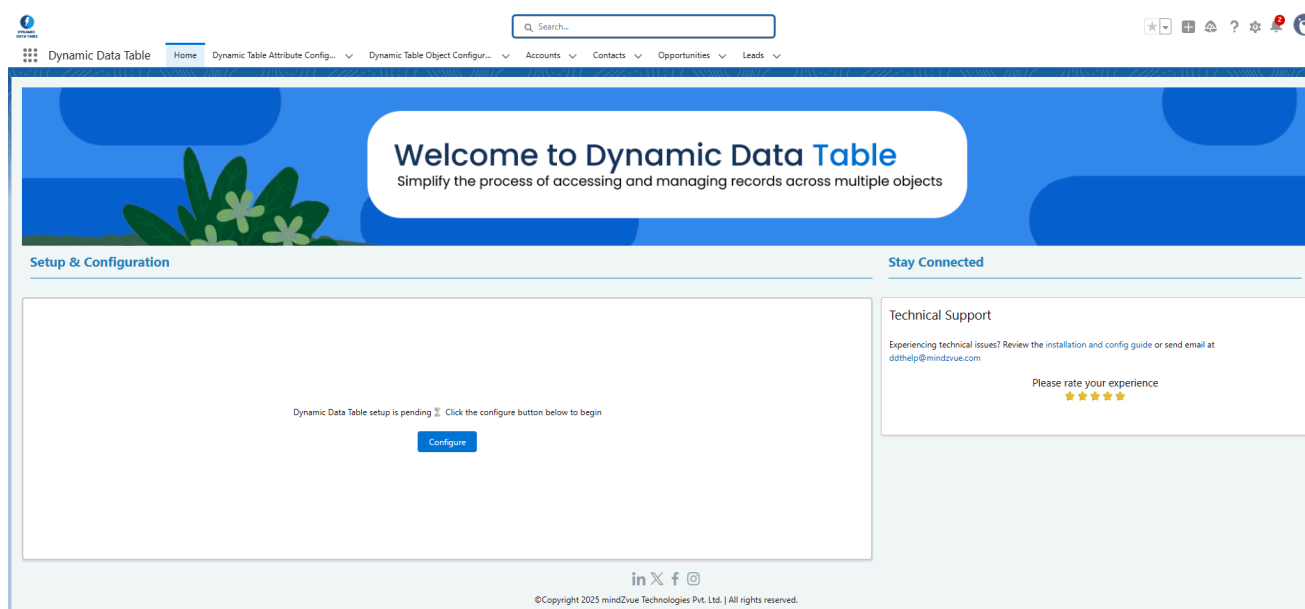
In short, DDT is a life-saver for admins and users who need fast, customizable, and exportable data views.

key Features

Centralized Record Access	Access records from multiple objects in one central location
Customizable Tables	Create customized tables displaying records from any object with simple steps and drag-and-drop functionality.
Customizable Charts	Generate charts directly from the selected table and fields. Supported chart types include Pie, Bar, and more. Chart data is dynamically fetched based on configuration.
Export to PDF	Export the data table and chart together as a PDF , either manually or on a scheduled basis. You can also receive the PDF via email.

Get Started with Dynamic Data Table (DDT)

Home Page:



In order to establish the DDT, the preliminary step involves creating the Dynamic Table Object Configuration (DTOC) and Dynamic Table Attribute Configuration (DTAC).

1. Initiating the Configuration of Dynamic Table Object (DTOC)

- a. Navigate to the **DTOC** tab / Click on **Configure** button, a pop-up window will be displayed as depicted below.
- b. The Dynamic Table Object Configuration Name must be **unique**.
- c. Define the configuration for the object, including:
 - i. Primary Object Name
 - ii. Parent Field API (optional)
 - iii. Table Configuration Name (DTOC Name)
 - iv. Pagination (optional)
 - v. Records per Page (required if Pagination is set to True)
 - vi. Search (optional)
 - vii. Inline Editing (optional)
 - viii. Serverside Searching (optional)
- d. Ensure the configuration aligns with specific requirements.

The screenshot shows a web application interface with a top navigation bar containing tabs: 'Table Attribute Config...', 'Dynamic Table Object Configur...', 'Accounts', 'Contacts', 'Opportunities', and 'Leads'. A 'Configure' button is located below the 'Dynamic Table Object Configur...' tab. A modal dialog titled 'New Table Configuration' is open, displaying the following configuration options:

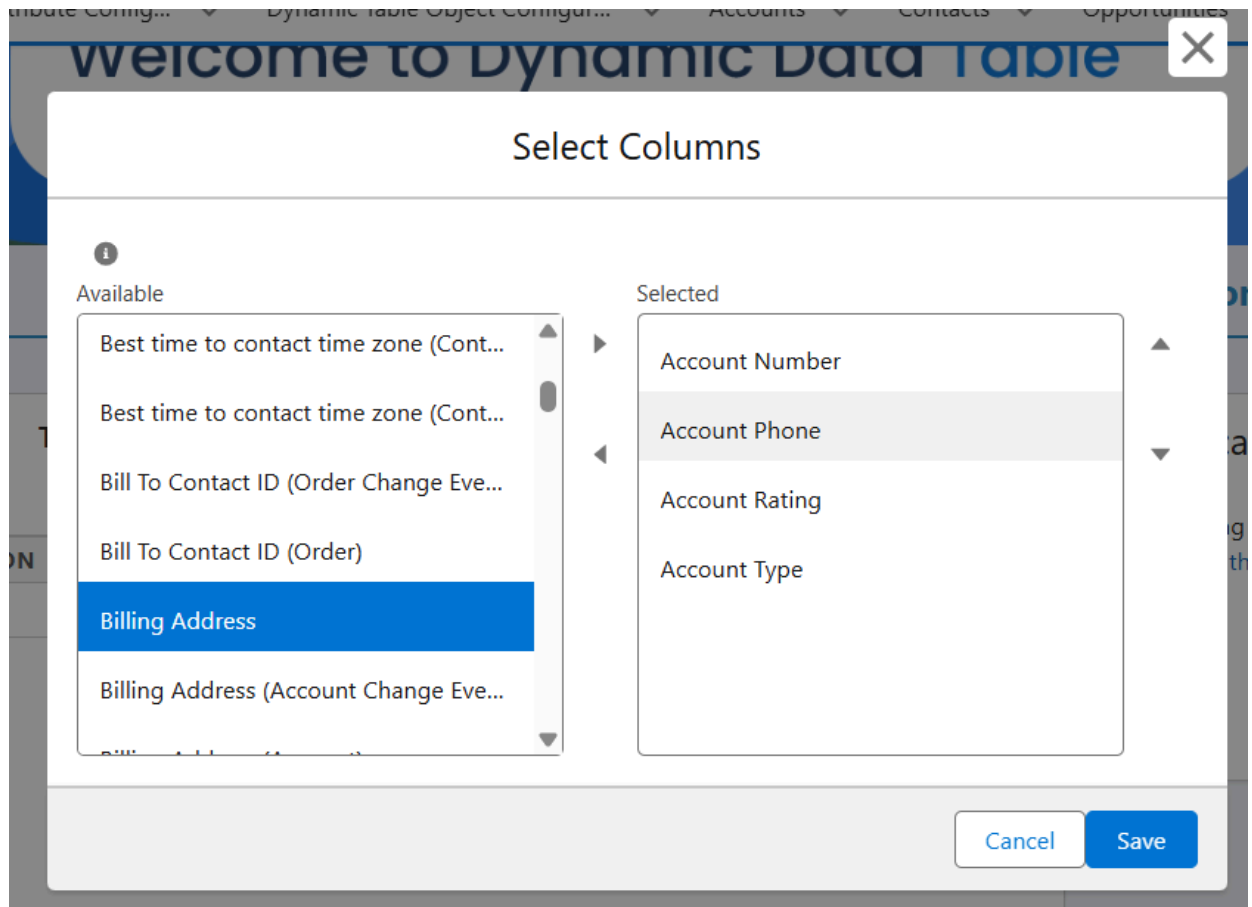
- Primary Object:** Account (dropdown)
- Parent Field API:** Select a Parent Field (dropdown)
- * Name:** Account Data (text input)
- Pagination:** ☒ (checked)
- Records per Page:** 10 (dropdown)
- Search:** ☒ (checked)
- Inline Editing:** ☒ (checked)
- Serverside Searching:** ☐ (unchecked)

At the bottom right of the dialog are 'Cancel' and 'Next' buttons. A 'Configure' button is visible in the background below the dialog.

2. Configuring Table Attributes with DTAC (Dynamic Table Attribute Configuration)

- a. After clicking **Next**

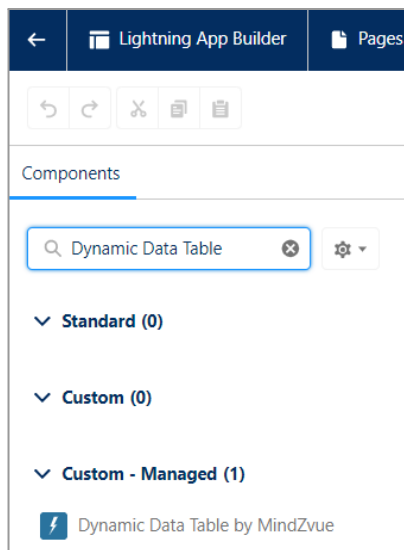
- b. Choose 'Column' according to the specified requirements.



Note: This shows all the fields label name to the Primary object (without bracket) you have selected and the bracket shows its lookup object field to that object.

3. **Adding Application Component to Page Layout.**

- a. After creating the object and attributes, proceed by dragging the application component from the list onto the page.
- b. Navigate to the **Edit Page** and drag the component from the custom list located on the left side of the page.
- c. The appearance post-dragging would be as follows:



4. Specify Names for Configuration and Table

- Enter configuration name: This is where you'll specify the name for the configuration, typically representing the DTOC.
- Heading for the table: Here, you can give the table a name or heading of your choice.

5. Visual Representation of the Table

NAME ▼	ACCOUNT NUMBER ▼	ACCOUNT PHONE ▼	ACCOUNT RATING ▼	ACCOUNT TYPE ▼	EDIT	CHILD RECORD
Burlington Textiles Corp of America	CD656092	(336) 222-7000	Warm	Customer - Direct		▼
Edge Communications	CD451796	(512) 757-6000	Hot	Customer - Direct		▼
Express Logistics and Transport	CC947211	(503) 421-7800	Cold	Customer - Channel		▼
GenePoint	CC978213	(650) 867-3450	Cold	Customer - Channel		▼
Grand Hotels & Resorts Ltd	CD439877	(312) 596-1000	Warm	Customer - Direct		▼
Sample Account for Entitlements						▼
United Oil & Gas Corp.	CD355118	(212) 842-5500	Hot	Customer - Direct		▼
United Oil & Gas, Singapore	CD355120-B	(650) 450-8810		Customer - Direct		▼

6. Configuring Chart Attributes with DTCC (Dynamic Table Chart Configuration)

- a. Click on the **Configure Chart** button available on the Table, a pop-up window will be displayed as depicted below.

Chart Configuration

Dynamic Table Chart Configuration Name
Account With Type

*Aggregate Field ⓘ
Name

*Aggregate Type ⓘ
Count

*Chart Type ⓘ
Horizontal Bar Chart

*Display ⓘ
Above Table

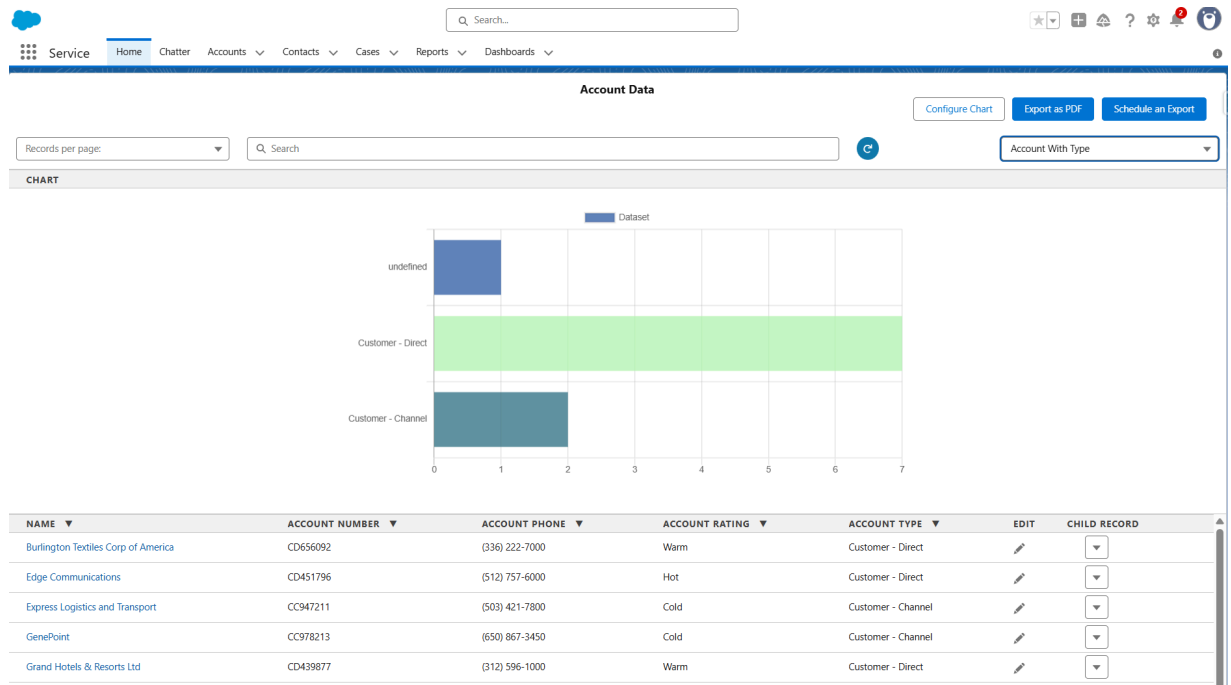
*Grouping Field ⓘ
Type

*Dynamic Table Object Configuration ⓘ
Account Data

Cancel Save

- b. Define the configuration for the chart, including:
- Dynamic Table Chart Configuration Name
 - Aggregate Field
 - Aggregate Type
 - Chart Type
 - Display
 - Grouping Field
 - Dynamic Table Object Configuration
- c. Ensure the configuration aligns with specific requirements.
- d. Refresh your page and click on the dropdown available on the top right corner of the table (below CONfigure chart button) and Select your chart config. you will be able to see your chart as depicted

below.



7. Export your data in PDF format

- If you want to download the data of the table in a PDF format with/without a chart, click on the **Export as PDF** button available on the top right corner of the table.
- Columns visible on the PDF will be limited to the first 6 columns.

8. Schedule an export

- If you want to schedule an export based on your preference, you'll receive an email containing the data in pdf format attached to that email.
- Click on **Schedule an Export** button on the top right corner of the table, a pop-up window will be displayed as depicted below.

The screenshot shows the 'Schedule Export' pop-up window. The window has a title bar with 'Schedule Export' and a close button (X). Inside the window, there is a label 'Export Frequency' above a dropdown menu. The dropdown menu is currently set to 'Select frequency'. At the bottom of the window, there are two buttons: 'Cancel' and 'Save Schedule'. The background of the screenshot shows the 'Account Data' dashboard with the table and buttons from the previous screenshot.

- c. You need to select the frequency of the export, Daily, Weekly or Monthly.
 - d. Once you select any one of the frequencies, you'll get the Time/Day/Date field to fill as per the selection.
 - e. Time will be as per your org time zone.
 - f. Important point to note, it will be scheduled as user specific, only the user will receive an email whose user saves this schedule.
 - g. scheduled data will be similar to what you currently configured the table/chart on the page.
9. Once you schedule a particular Table/Chart configuration, you want to see/edit/delete the existing schedules, you need to click on **Schedule an Export** button, if you have scheduled that particular DTOC/Table configuration you will see an Existing schedule section at the bottom of a pop up as depicted below.

Schedule Export [Close]

Export Frequency

Select frequency ▼

Existing Schedules

Existing Scheduled Exports

Frequency	Time	Date	Day of Week
Daily	00:30		

Edit
Delete

Cancel Save Schedule

Also you have a dropdown to each row to edit/delete existing schedules.

10. The search option located at the top provides users with the flexibility to search for specific records within the table

11. The 'Records per page' feature offers flexibility in displaying the desired number of records on a single page. Users can select their preferred option from the drop-down menu.
12. If the pagination option is disabled within the DTOC, the table will be displayed in the following manner:

FIRSTNAME	OWNER NAME	EMAIL	DEPARTMENT
Rajat	ADARSH SINGH	tech@gmail.com	Technology
Smriti	ADARSH SINGH	test@gmail.com	Technology
Edna	ADARSH SINGH	edna@geneapoint.com	Technology
Avi	ADARSH SINGH	agreen@uig.com	Finance
Siddhartha	ADARSH SINGH		
Jake	ADARSH SINGH		
Rose	ADARSH SINGH	rose@edge.com	Procurement
Sean	ADARSH SINGH	sean@edge.com	Finance
Jack	ADARSH SINGH	jrogers@burlington.com	
Rat	ADARSH SINGH	rat@pyramis.net	Finance

Quarterly Performance
CLOSED \$695,000 OPEN (+70%) \$270,000 GOAL As of Mar 13, 2020 4:37:06 AM

13. If you wish to view all the data pertaining to a particular record, they can do so with a simple click, which will prompt a modal popup displaying the details of the record as follows:

Contact

Owner ID
sumit verma

Business Phone
(312) 596-1000

Full Name
Mr. Tim Barr

Home Phone

Account ID
Grand Hotels & Resorts Ltd

Mobile Phone
(312) 596-1230

Title
SVP, Administration and Finance

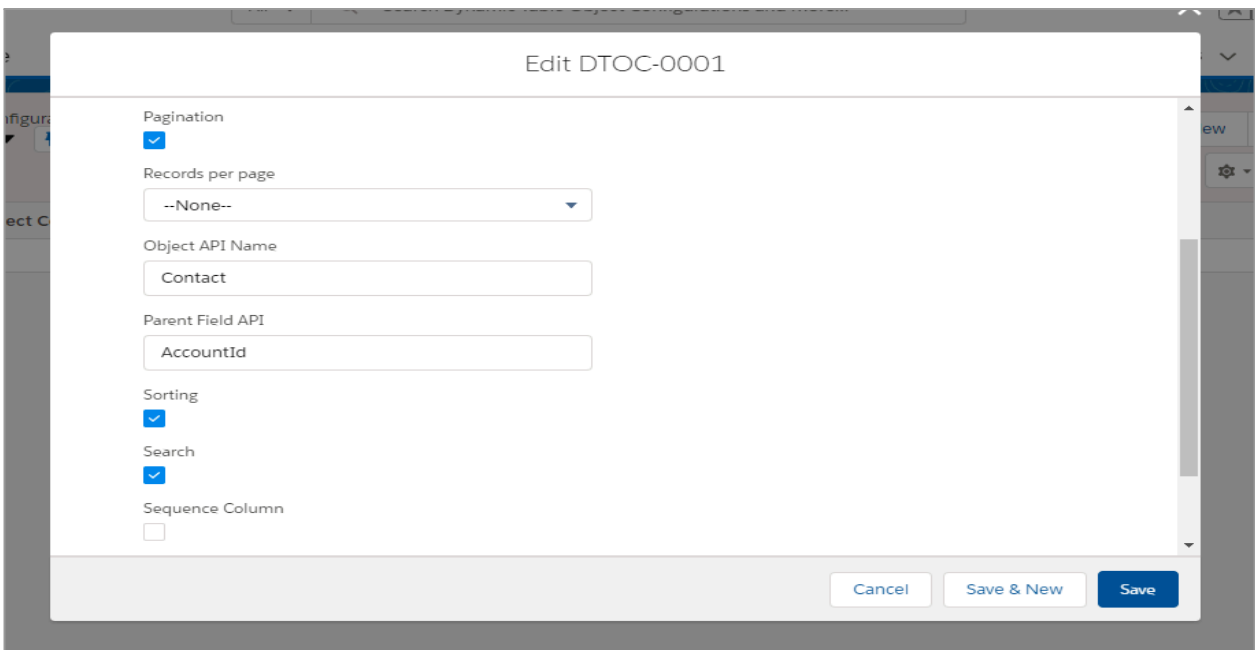
Other Phone

Department
Finance

FIRSTNAME
Tim

14. When viewing different types of data, we've tailored the text format accordingly to match the attribute's data type.

15. The Parent Field API allows you to add a parent field on the DTOC page. Once added, it will display the respective fields on the parent layout. Here's how you can add it:

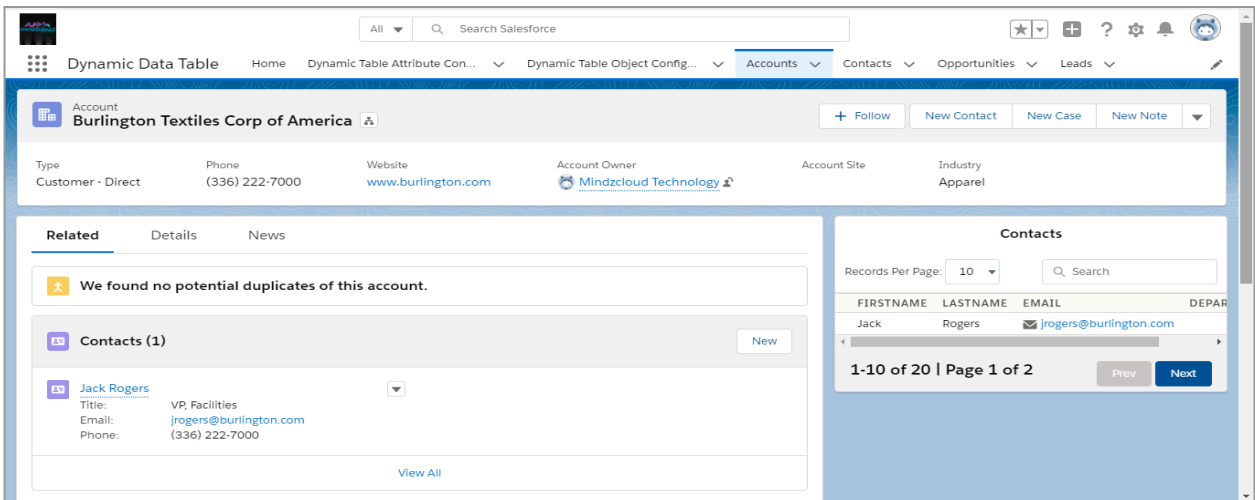


The screenshot shows the 'Edit DTOC-0001' configuration window. It contains the following fields and options:

- Pagination:** A checked checkbox.
- Records per page:** A dropdown menu currently set to '--None--'.
- Object API Name:** A text input field containing 'Contact'.
- Parent Field API:** A text input field containing 'AccountId'.
- Sorting:** A checked checkbox.
- Search:** A checked checkbox.
- Sequence Column:** An unchecked checkbox.

At the bottom right, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

16. After addition, it will appear as follows:



The screenshot shows the Salesforce account page for 'Burlington Textiles Corp of America'. The page includes the following elements:

- Account Header:** Account name, 'Follow' button, and actions like 'New Contact', 'New Case', and 'New Note'.
- Account Details:** Type (Customer - Direct), Phone ((336) 222-7000), Website (www.burlington.com), Account Owner (Mindzcloud Technology), Account Site, and Industry (Apparel).
- Related Section:** A message stating 'We found no potential duplicates of this account.' and a 'Contacts (1)' section with a 'New' button.
- Contact Details:** A card for 'Jack Rogers', VP, Facilities, with email jrogers@burlington.com and phone (336) 222-7000.
- Contacts Table:** A table with columns FIRSTNAME, LASTNAME, EMAIL, and DEPARTMENT. It shows one record: Jack Rogers, jrogers@burlington.com. The table has pagination: '1-10 of 20 | Page 1 of 2' with 'Prev' and 'Next' buttons.

17. To create a DDT, one should first configure the Dynamic Table Object Configuration (DTOC), followed by configuring the Dynamic Table Attribute Configuration (DTAC).

Schema Diagram

- The diagram showcases a one-to-many relationship between:
 - Dynamic Table Object Configuration (DTOC) and Dynamic Table Attribute Configuration (DTAC)
 - Dynamic Table Object Configuration (DTOC) and Dynamic Table Chart Configuration (DTCC)
 - Dynamic Table Object Configuration (DTOC) and Dynamic Table Schedule Configuration (DTSC).
- Users have the capability to select one object (DTOC) and configure multiple columns (DTAC), multiple charts (DTCC), multiple schedules (DTSC) simultaneously.
- For instance, users can choose the Account object as DTOC and its corresponding fields as DTAC.
- This allows users to configure as many fields as needed within the selected object.

