



Dynamic Data Table

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Introduction

Welcome to Your Dynamic Data Table (DDT). Think of this tool as your ultimate data organizer. It helps you turn messy lists of information into clean, easy-to-read tables. Whether you are building the table (Admin) or just using it to find answers (End User), this guide will help you get started in minutes.

User Personas

- **Admins:** Responsible for configuration, defining fields, and deploying tables to pages.
 - **End Users:** Interact with the configured tables to view, filter, edit, and export data.
-

1. Installation & Setup (Admin Focused)

Step-by-Step Installation

1. Navigate to the **Dynamic Data Table (V2)** listing on the Salesforce AppExchange.
2. Click the **[Get It Now]** (or **[Try It]**) button, and log in to your Salesforce Trailblazer account when prompted.
3. Choose your target environment.
4. Select your preferred security settings. For the easiest setup process, choose **Install for All Users**, and then click **[Install]**.
5. **Success!** Depending on your org's size, the installation may take a few minutes. Once the process finishes, you will receive an email confirmation

from Salesforce letting you know the application is installed and ready to configure.


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Dynamic Data Table

By mindZvue

Dynamic Data Table (DDT)




4.5 Average Rating (6 Reviews)

[Get It Now](#)

[Try It](#)


Free
Never requires payment
[Pricing Details](#)

Requires

[Sales Cloud](#)
[Service Cloud](#)

[Marketing Cloud Engagement](#)

Dynamic Data Tables (DDTs) let you build custom tables from any Salesforce object—no code needed. Visualize data with charts, export to PDF, and schedule automatic email exports. All with simple drag-and-drop configuration from one place.




Navigate to the Dynamic Data Table



All set! The solution is ready to install.

Package	Version
MV Dynamic Data Table (1.9 / 1.9.0)	1.9 / 1.9.0
Duration	Number of Subscribers
Does Not Expire	Site-Wide

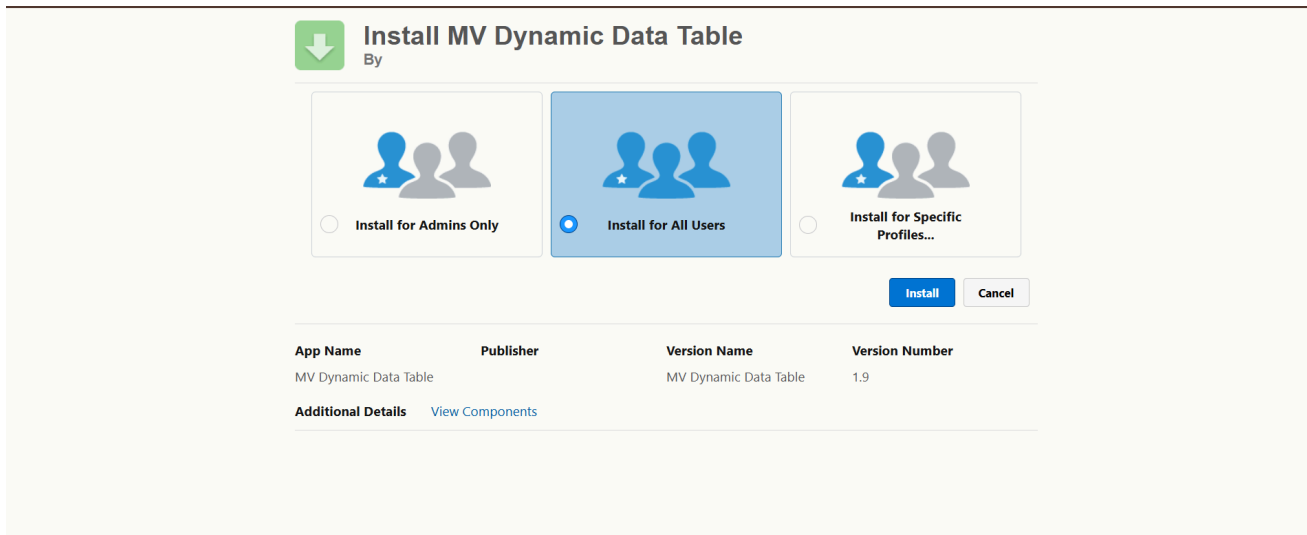
To start the installation, log in to your sandbox. After the installation finishes, the solution is ready to explore.

[Log In & Install](#)



Salesforce mobile app

Click 'Log In & Install' to begin

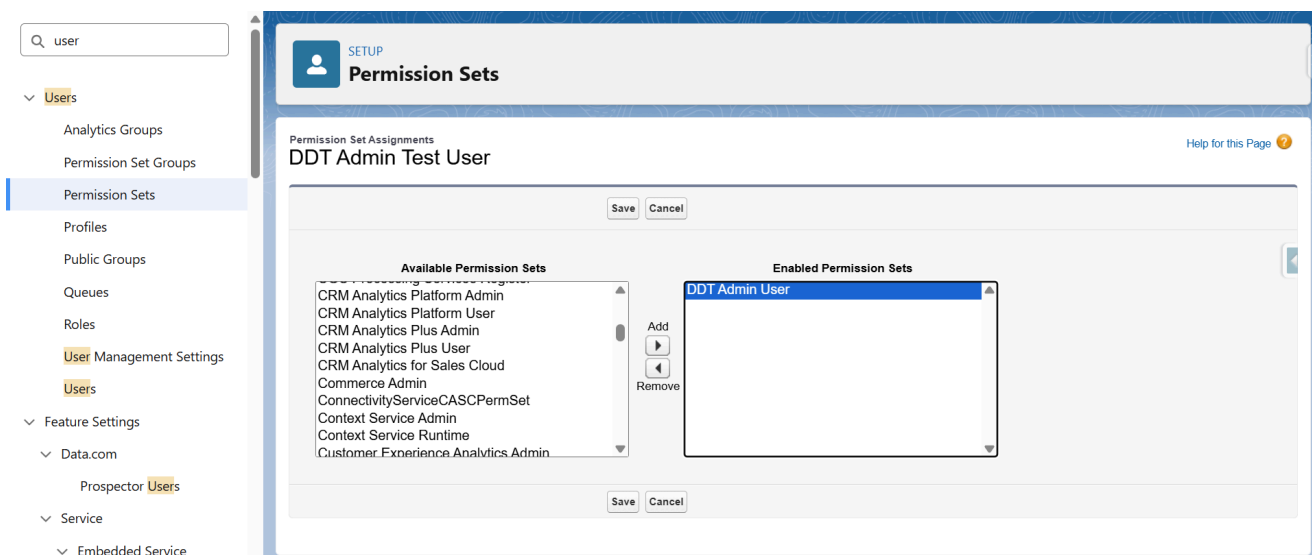


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2. Admin Configuration Steps

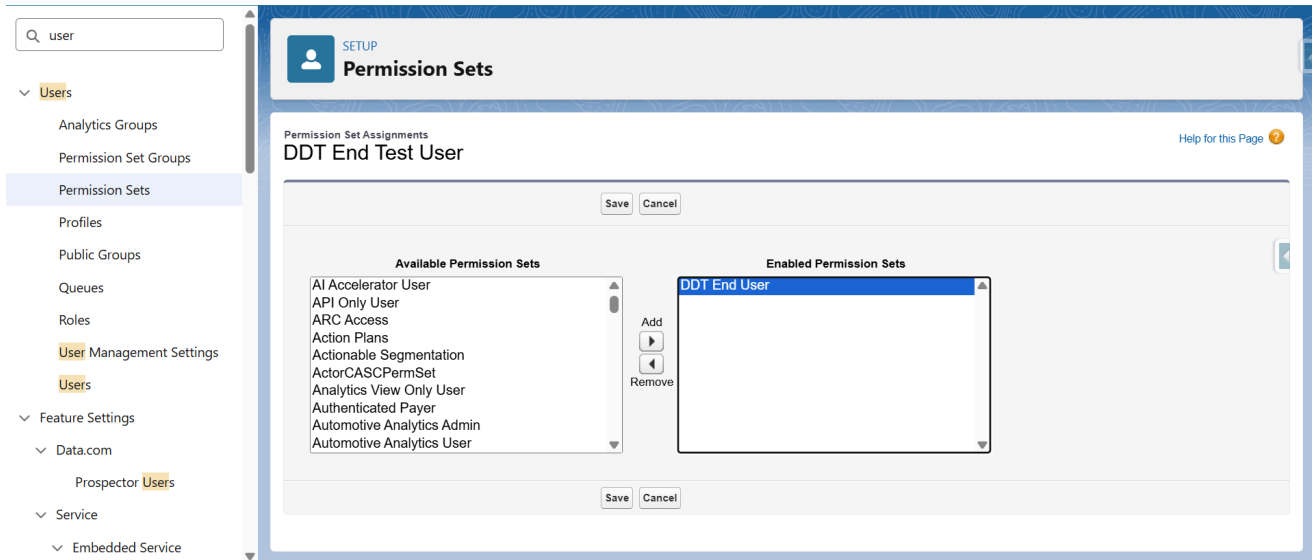
Post installation Checklist

- Ensure you are checking into a target environment where the DDT Application is installed.
- **Required Permission Set (Admin):** DDT Admin User. This permission set should *only* be assigned to your Admin users. It grants full access to the Dynamic Data Table app, meaning these users can access both the **Admin Dashboard** (to create, edit, and manage tables) and the **DDT User View** (to interact with the final tables).



Assign the 'DDT Admin User' permission set to your administrators so they can build and manage tables

- **Required Permission Set (End User):** Assign this to your general end users. It strictly limits their access so they can *only* see and interact with the **DDT User View** component on the pages where you place it. They will not be able to access or see the backend Admin Dashboard.



Assign the 'DDT End User' permission set to standard users who will view and interact with the tables.

Step 1: Navigate to the Dashboard

1. Open the **App Launcher** and search for the **Dynamic Data Table (V2)**.
2. Upon accessing the application, you will see the DDT Admin Dashboard. This is your command center for managing data presentations.

Dynamic Data Tables
Manage your custom table configurations

Total Configurations: 22 Active Tables: 16 Inactive Tables: 4 Draft Configurations: 2

Save New Configuration

Search by Name

Name	Objects and Fields	Status	Last Modified	Actions
Customer 360 Relationship View Displays a unified view of customers by group. (Read More)	Case: 10 Fields Contact: 8 Fields Account: 10 Fields Total: 28 Fields	Active	2025-12-12	Edit Delete Duplicate
Opportunity Renewal & Expansion Tracker Tracks existing customers' renewal opportunities. (Read More)	Opportunity/Leadtime: 9 Fields Opportunity: 9 Fields Account: 10 Fields Total: 28 Fields	Active	2025-12-12	Edit Delete Duplicate
LD Account Contact Cases Tracks existing customers' renewal opportunities. (Read More)	Case: 4 Fields Contact: 3 Fields Account: 4 Fields Total: 11 Fields	Inactive	2025-12-12	Edit Delete Duplicate
Account Contact Case Tracks existing customers' renewal opportunities. (Read More)	Case: 7 Fields Contact: 3 Fields Account: 4 Fields Total: 14 Fields	Inactive	2025-12-12	Edit Delete Duplicate
Opportunity Product Allocation Shows how product quantities are distributed. (Read More)	Total: 0 Fields	Draft	2025-12-12	Edit Delete Duplicate
Product Mix Analysis Highlights which products each account is buying. (Read More)	Account: 10 Fields Opportunity: 9 Fields Opportunity/Leadtime: 9 Fields Total: 28 Fields	Draft	2025-12-12	Edit Delete Duplicate
Opportunity Pricing and Discount Tracker Displays Accounts - Opportunities - DSD prices. (Read More)	Opportunity/Leadtime: 10 Fields Opportunity: 10 Fields Account: 11 Fields Total: 31 Fields	Active	2025-12-12	Edit Delete Duplicate
Key Account Growth Overview Shows growth trends by listing an account's... (Read More)	Opportunity/Leadtime: 9 Fields Opportunity: 11 Fields Account: 9 Fields Total: 29 Fields	Active	2025-12-12	Edit Delete Duplicate
Dynamic Data Table for Account Contact and cases This table shows the account contact and case	Case: 5 Fields Contact: 7 Fields Account: 4 Fields Total: 16 Fields	Inactive	2025-12-12	Edit Delete Duplicate
Account Health & Support History Provides a full history of support cases com... (Read More)	Case: 11 Fields Contact: 8 Fields Account: 9 Fields Total: 28 Fields	Active	2025-12-12	Edit Delete Duplicate

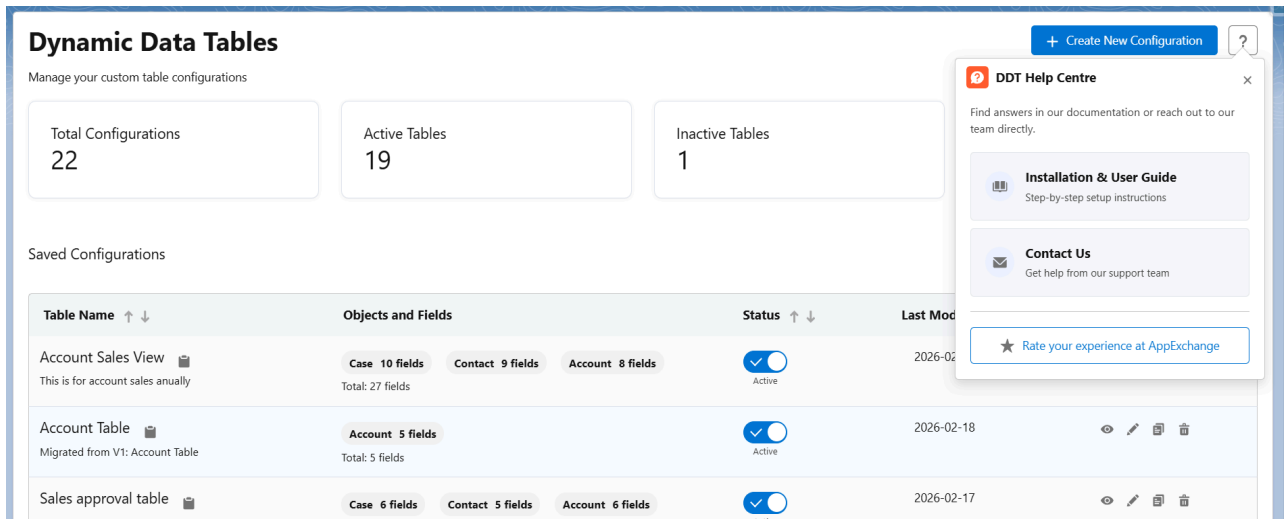
Showing 1-10 of 22 (Page 1 of 3)

Previous Next

The Admin Dashboard provides a bird's-eye view of your configuration.

Dashboard Overview:

- **Quick Stats Board:** View a quick summary of your environment , including Total Configurations , Active Tables , Inactive Tables , and Draft Configurations.
- **Active vs. Inactive:** See which tables are currently live for users and which are hidden.
- **DDT Help Centre:** Need a hand? Use the Help Centre located in the dashboard to quickly reference the installation guide, contact our support team, or drop us a rating on the AppExchange.



DDT Help Centre: Quick Support & Resources

Step 2: Create Your Table (The Guided Setup)

Creating the Configuration:

1. Click the **[+ Create New Configuration]** button. Here, you will fill in the basic details, tweak your display settings, and turn on the specific features you want.
2. Click **Next** and select the Objects you want to pull your records from.
3. Click **Next** and select the exact fields you want to display as columns in your table.
4. Click **Next** to customize your columns. Here, you get to decide which specific columns your users are allowed to **Sort** and **Filter**.
5. Click **Next** to see a live preview of your configuration. If everything looks perfect, click **[Go Live]**.
6. You will land on a success screen confirming your table is ready. Just click **[Return to Configuration]** to head right back to your Admin Dashboard.

DDT Configuration

Table Configuration

Set up your table's basic properties and features. You can save as draft at any time and continue later.

Basic Information

*Table Name
Sales Pipeline View

Description
Optional description of what this table displays.

Banner Title

Salesforce Sales
12
B
I
U
S
L
F
H
P
M
A
T

Optional banner title to display to users.

Display Settings

*Records per Page
10
Default Sort Direction
Ascending

Feature Settings

Enable Search
Enable Filter
Enable Export

Back to List
Save Draft
Back
Next

Step 1: Define the basic information, display settings, and feature toggles for your new table.

DDT Configuration

Object Selection

Choose Salesforce objects for your table (1 required, 2 optional).

Object Selection

* Primary Object
Account

Object related to Account
Contact

Object related to Contact
Case

Object Hierarchy Preview

Primary
Account - Main data section

Secondary
Contact - Related to Account

Tertiary
Case - Related to Contact

Back to List
Save Draft
Back
Next

Step 2 : Select your primary Salesforce object and define the hierarchy for your child and grandchild records.

DDT Configuration

Select Fields

Choose up to 12 fields per object to display in the table.

Account Contact Case

Notes: The order of fields in the "Selected" list determines the column order. The first field will be the main column used to expand rows.

0/12 selected

Select Fields

Available Fields

- Account Currency (CurrencyIsoCode)
- Account Description (Description)
- Account Fax (Fax)
- Account ID (Id)
- Account Name (Name)
- Account Number (AccountNumber)

Selected Fields

Field Selection Summary

Account (0/12 fields)

Contact (0/12 fields)

Case (0/12 fields)

[Back to List](#) [Save Draft](#) [Back](#) [Next](#)

Step 3: Choose the exact fields to display as columns.

DDT Configuration

Column Configuration

Configure individual column properties and data types.

Table Settings Summary

Table Name: null

Records per Page: 10

Table Columns: Search Filter Export

Account Contact Case

Account Column Configuration

Account Name

Account Number

Account Description

Account Name

Account Fax

Account ID

Account Source

Account Type

Column Options

Column Options

Column Options

Column Options

Column Options

Column Options

Column Options

Column Options

Default Sorting for Account

Default Sort Field: Account Name

Sort Direction: Ascending

Column Configuration Summary

Table Columns: 10

Number Columns: 7

[Back to List](#) [Save Draft](#) [Back](#) [Next](#)

Step 4: customize your sort and filter permissions.

DDT Configuration

Preview and Save

Review your table configuration before saving.

Table Details

Name	asdf
Records per Page	10
Total Fields	20

Features Enabled

Search	✓
Filter	✓
Export	✓
Default Sort	Ascending

Selected Objects and Fields

Account Fields: Account Number, Account Name, Account Status, Account Rating, Account Size, Account Sector, Account Type

Case Fields: Case ID, Case Number, Case Status, Case Name, Case Type, Case Date

Preview

The preview shows sample data. The actual table will display real operations records.

ACCOUNT NAME	ACCOUNT NUMBER	ACCOUNT PHONE	ACCOUNT RATING	ACCOUNT SIZE	ACCOUNT SECTOR	ACCOUNT TYPE
Account 1	Account 1	(555) 555-1234	Option A	Account Size 1	Account 1	Option A
Account 2	Account 2	(555) 555-1234	Option A	Account Size 2	Account 2	Option A

Step 5: Review the live preview of your configured data table before going live.

Return to Configurations

Configuration Saved Successfully!

Your dynamic data table has been created and is ready to use.

✓ "asdf" Created Successfully

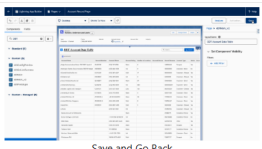
Your table configuration has been saved and is now available in your configurations list.

View Table

Edit Configuration

Export Data

How to Access Your Dynamic Data Table?



Save and Go Back

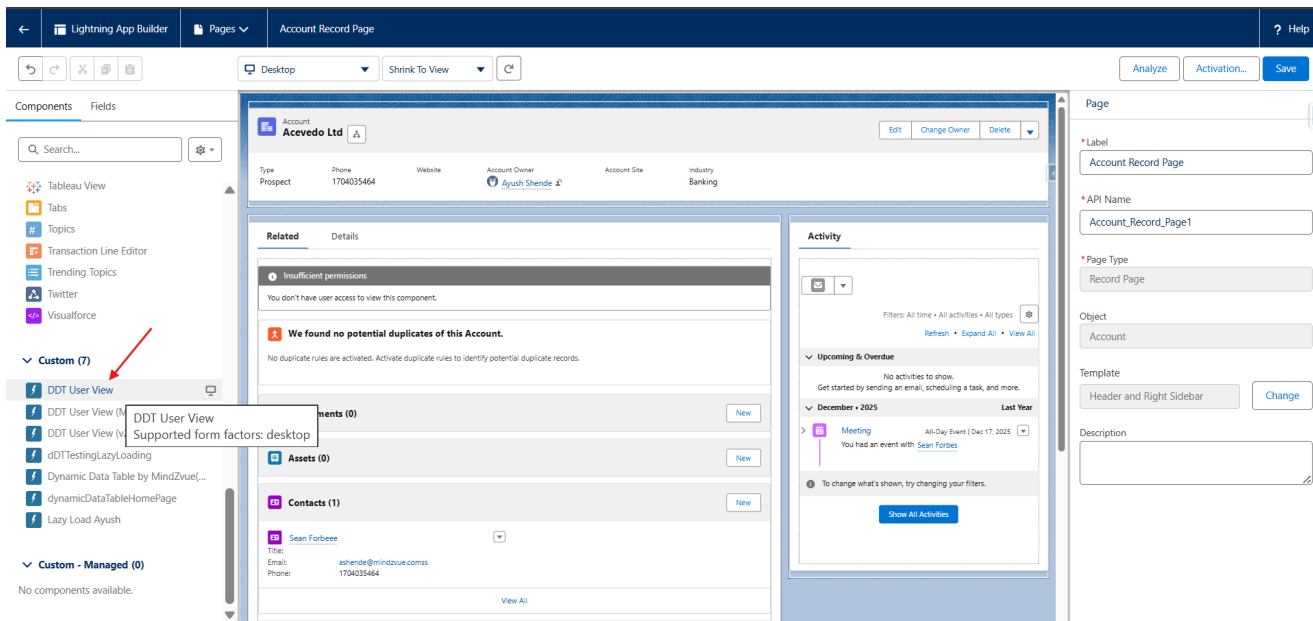
Save the layout, Activate and go back to the record page

Step 4 of 5

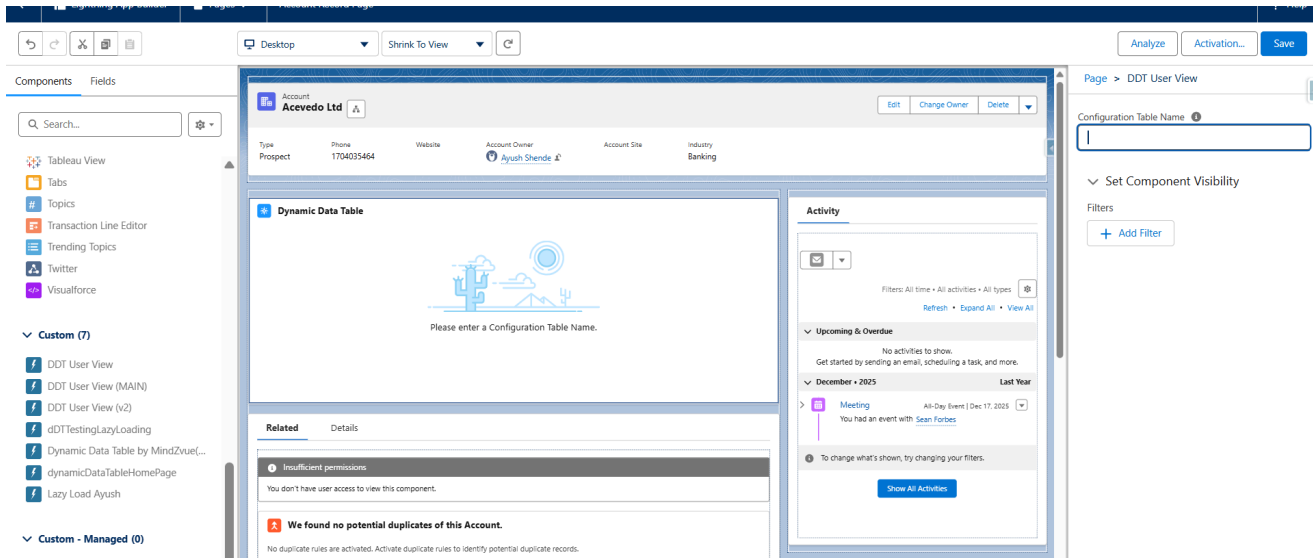
Success! Your configuration is saved. You can now return to the dashboard or deploy the table.

Displaying the Table for Users:

1. Navigate to the page where you want the table to appear.
2. Drag the **DDT User View Component** onto the page.
3. Paste the Table Name. We highly recommend using the copy feature, as writing an invalid name will cause the table to not load.
4. Activate the component and click **Save**.



In the Lightning App Builder, drag the 'DDT User View' custom component onto your desired page.



Account: Acevedo Ltd

Type: Prospect Phone: 1704035464 Website: Account Owner: Ayush Shende Account Site: Industry: Banking

Dynamic Data Table

Please enter a Configuration Table Name.

Related

Details

Insufficient permissions
You don't have user access to view this component.

We found no potential duplicates of this Account.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

December • 2025 Last Year

Meeting
You had an event with Sean Forbes

To change what's shown, try changing your filters.

Show All Activities

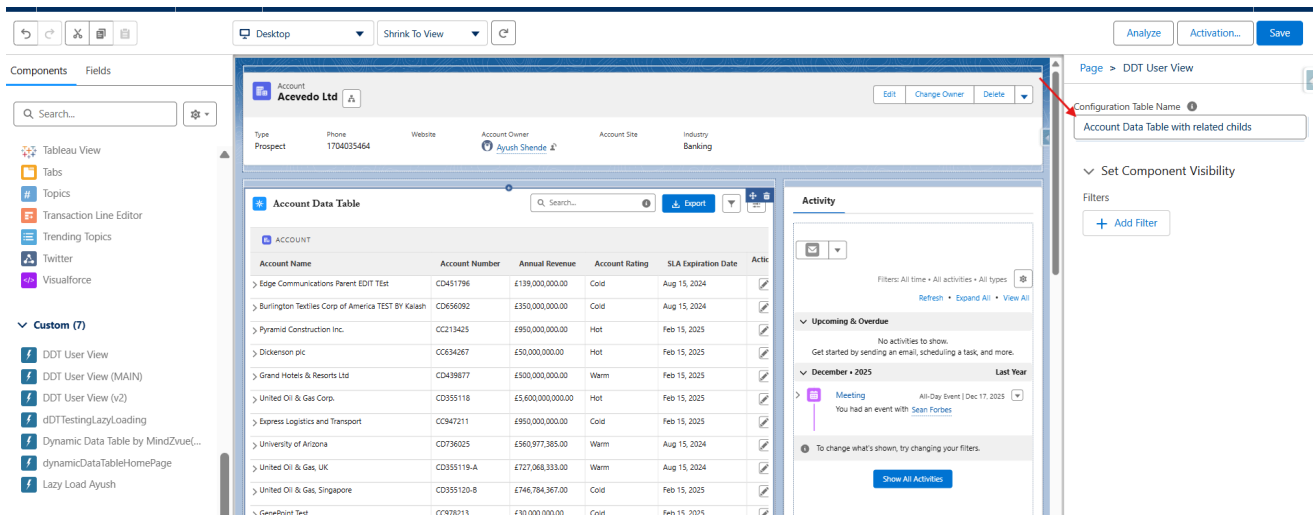
Page > DDT User View

Configuration Table Name

Set Component Visibility

Filters

+ Add Filter



Account: Acevedo Ltd

Type: Prospect Phone: 1704035464 Website: Account Owner: Ayush Shende Account Site: Industry: Banking

Account Data Table

Q Search...

Export

ACCOUNT

Account Name	Account Number	Annual Revenue	Account Rating	SLA Expiration Date	Action
> Edge Communications Parent EDIT Test	CD451796	£139,000,000.00	Cold	Aug 15, 2024	
> Burlington Textiles Corp of America TEST BY Kaish	CD656092	£350,000,000.00	Cold	Aug 15, 2024	
> Pyramid Construction Inc.	CC213425	£950,000,000.00	Hot	Feb 15, 2025	
> Dickenson plc	CC634267	£50,000,000.00	Hot	Feb 15, 2025	
> Grand Hotels & Resorts Ltd	CD439877	£500,000,000.00	Warm	Feb 15, 2025	
> United Oil & Gas Corp.	CD355118	£5,600,000,000.00	Hot	Feb 15, 2025	
> Express Logistics and Transport	CC947211	£950,000,000.00	Cold	Feb 15, 2025	
> University of Arizona	CD736025	£509,977,365.00	Warm	Aug 15, 2024	
> United Oil & Gas, UK	CD355119-A	£727,068,333.00	Warm	Aug 15, 2024	
> United Oil & Gas, Singapore	CD355120-B	£746,784,367.00	Cold	Feb 15, 2025	
> GenePoint Test	CC978213	£30,000,000.00	Cold	Feb 15, 2025	

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

December • 2025 Last Year

Meeting
You had an event with Sean Forbes

To change what's shown, try changing your filters.

Show All Activities

Page > DDT User View

Configuration Table Name

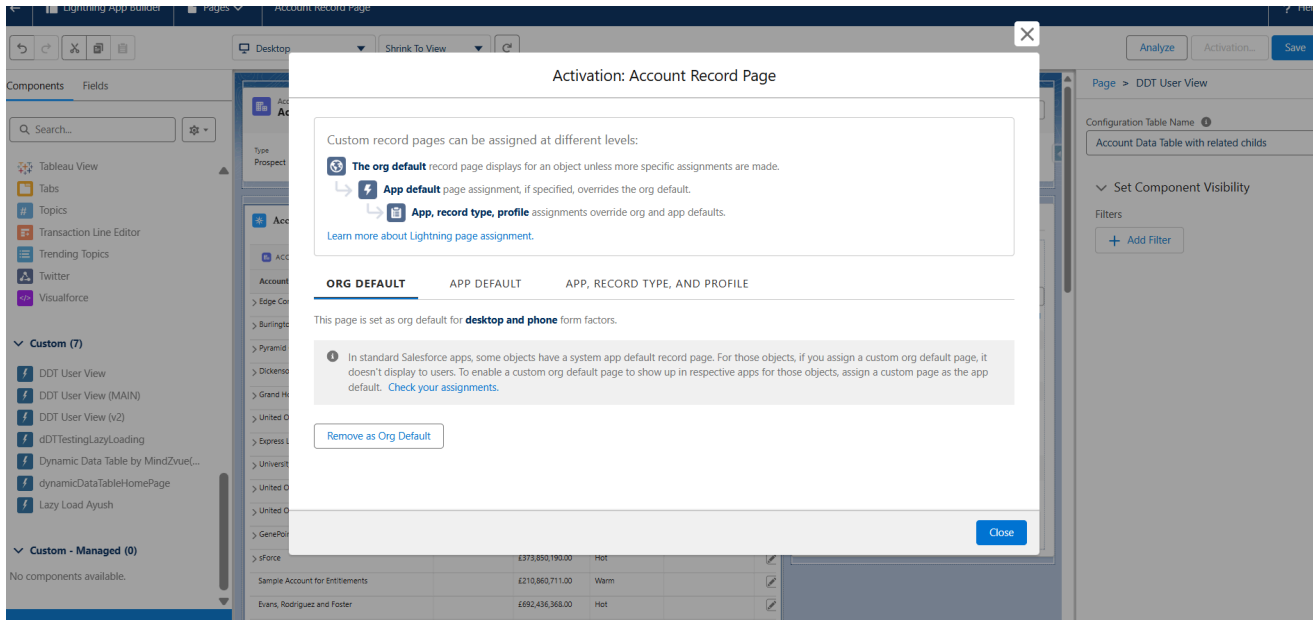
Account Data Table with related childs

Set Component Visibility

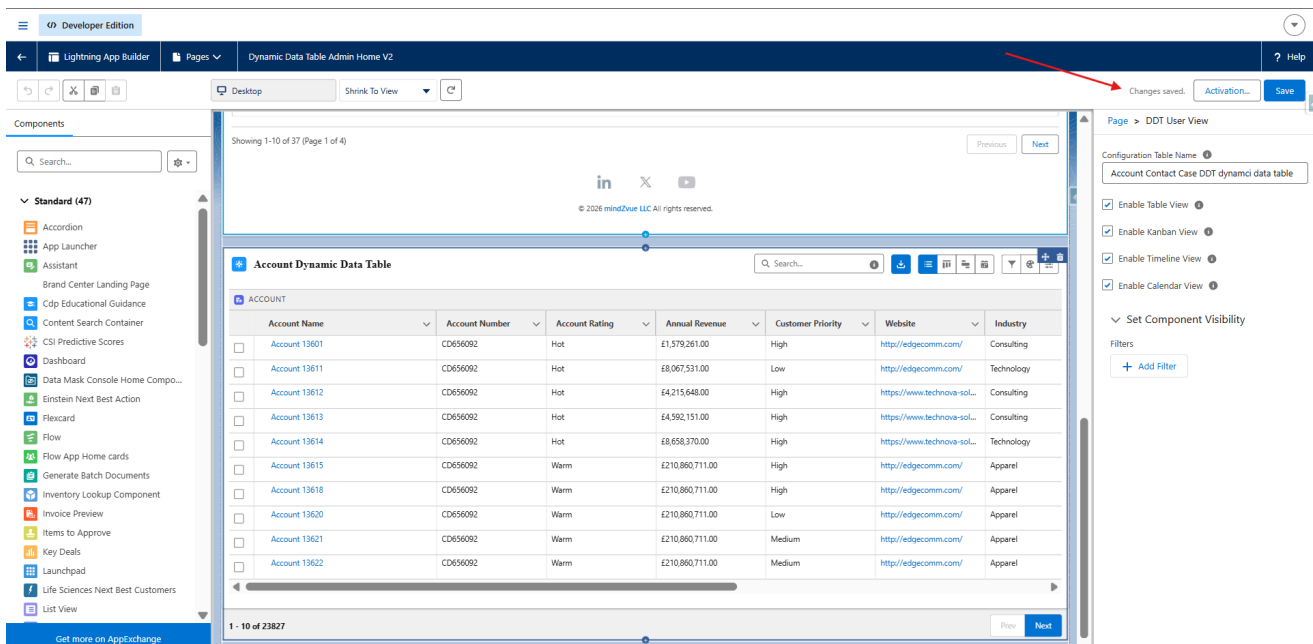
Filters

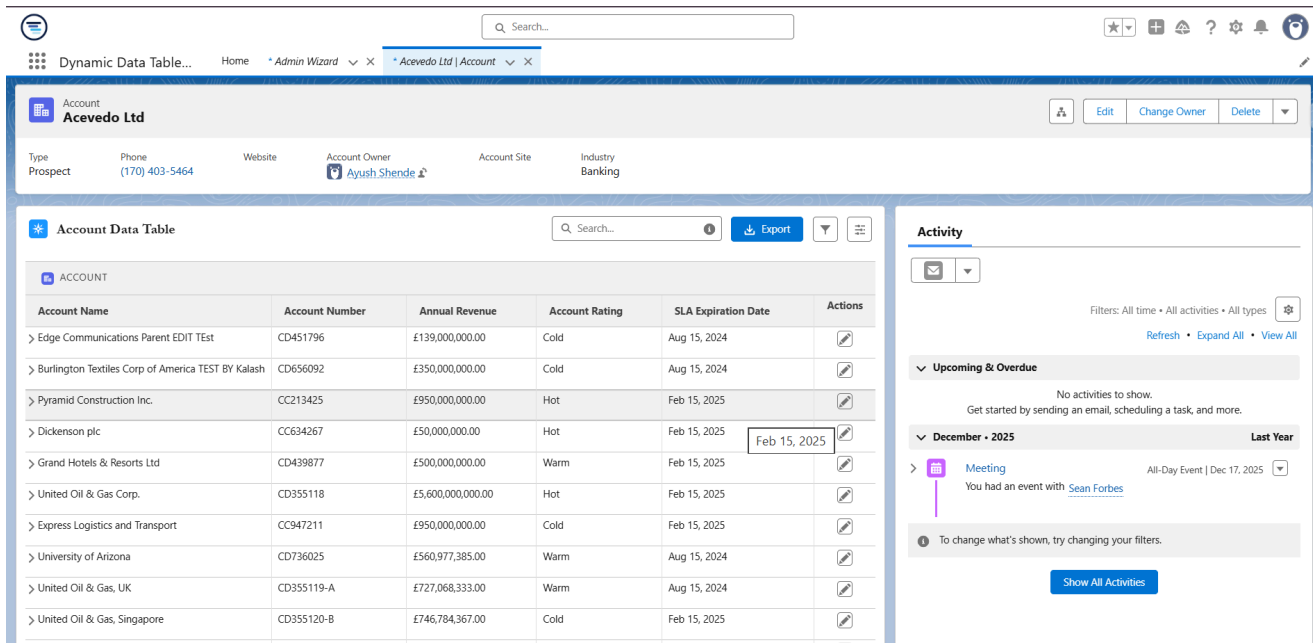
+ Add Filter

Paste the exact copied Table Name into the 'Configuration Table Name' field in the right-hand panel.



Save and activate the Lightning page to make the table visible to your organization.





The screenshot displays the 'Dynamic Data Table' interface for 'Acevedo Ltd'. The table lists various accounts with their details, including account numbers, annual revenue, ratings, and SLA expiration dates. The right sidebar shows an 'Activity' section with a calendar view for December 2025, indicating no activities are currently shown.

Account Name	Account Number	Annual Revenue	Account Rating	SLA Expiration Date	Actions
Edge Communications Parent EDIT TEST	CD451796	£139,000,000.00	Cold	Aug 15, 2024	[Edit]
Burlington Textiles Corp of America TEST BY Kalash	CD656092	£350,000,000.00	Cold	Aug 15, 2024	[Edit]
Pyramid Construction Inc.	CC213425	£950,000,000.00	Hot	Feb 15, 2025	[Edit]
Dickenson plc	CC634267	£50,000,000.00	Hot	Feb 15, 2025	[Edit]
Grand Hotels & Resorts Ltd	CD439877	£500,000,000.00	Warm	Feb 15, 2025	[Edit]
United Oil & Gas Corp.	CD355118	£5,600,000,000.00	Hot	Feb 15, 2025	[Edit]
Express Logistics and Transport	CC947211	£950,000,000.00	Cold	Feb 15, 2025	[Edit]
University of Arizona	CD736025	£560,977,385.00	Warm	Aug 15, 2024	[Edit]
United Oil & Gas, UK	CD355119-A	£727,068,333.00	Warm	Aug 15, 2024	[Edit]
United Oil & Gas, Singapore	CD355120-B	£746,784,367.00	Cold	Feb 15, 2025	[Edit]

The successfully deployed Dynamic Data Table as it appears to end users on the live record page.

Step 3: Manage Existing Configurations

In the Saved Configurations list, you have several powerful tools. We added shortcuts right in the list view:

Feature	What it does for you
Search	Find what you need, fast. Just type the table's name in the search box to filter your list instantly.

Sort	Organize your view. Click the Table Name or Status column headers to arrange your list alphabetically or group them by active/inactive states.
Quick Status Toggle	Turn tables on or off. Click the switch to make a table "Active" (visible to users) or "Inactive" (hidden) without having to open the setup page.
Copy Table Name	Easily grab the exact name to see the end user view. Click this to instantly copy the table's name to your clipboard. You will need this exact name later when putting the table on a page.

Use the dashboard shortcuts to quickly search by name, copy the exact Configuration Name, or toggle the table's active status.

Dynamic Data Tables

Manage your custom table configurations

Total Configurations
13

Active Tables
11

Inactive Tables
1

Draft Configurations
1

Saved Configurations

Table Name	Objects and Fields	Status	Last Modified	Actions
Account Data Table with related childs This is the account ddat table	Copy Configuration Name Case 5 fields Contact 5 fields Account 5 fields Total: 15 fields	☒ Active	2026-02-13	☐ ☐ ☐ ☐
Opportunity Renewal & Expansion Tracker Tracks existing customers' renewal opportunit... (Read More)	OpportunityLineItem 9 fields Opportunity 9 fields Account 9 fields Total: 27 fields	☒ Active	2026-02-04	☐ ☐ ☐ ☐
Account Health & Support History Provides a full history of support cases conn... (Read More)	Case 11 fields Contact 9 fields Account 9 fields Total: 29 fields	☒ Active	2026-02-02	☐ ☐ ☐ ☐

Use the dashboard shortcuts to quickly search by name, copy the exact Configuration Name, or toggle the table's active status.

The Actions Menu: For every configuration, you have specific actions available:

- **Preview Configuration:** Opens a single-page view to see how the table looks with analytics.
- **Edit Configuration:** Modify settings. Note: Once created, the Table Name and Objects cannot be changed.
- **Clone Configuration:** Creates a duplicate of the setup with "-clone" appended to the name, saving you time on similar builds. Perfect for when you want to try a new setup without breaking your old one.
- **Delete:** Permanently removes the configuration.
- **Export All:** Download the table configuration data in CSV or PDF format.

Dynamic Data Tables				
Manage your custom table configurations				
Total Configurations 22	Active Tables 16	Inactive Tables 4	Draft Configurations 2	+ Create New Configuration
Saved Configurations				
Search by Name				
Name	Objects and Fields	Status	Last Modified	Actions
Customer 360 Relationship View Displays a unified view of customers by group. (Read More)	Case: 10 Fields Contact: 8 Fields Account: 10 Fields Total: 28 Fields	☒	2025-12-12	Preview Edit Clone Delete
Opportunity Renewal & Expansion Tracker Tracks existing customers' renewal opportunities. (Read More)	Opportunity/Leadtime: 9 Fields Opportunity: 9 Fields Account: 10 Fields Total: 28 Fields	☒	2025-12-12	Preview Edit Clone Delete
LD Account Contact Cases	Case: 4 Fields Contact: 7 Fields Account: 4 Fields Total: 15 Fields	☐	2025-12-12	Preview Edit Clone Delete
Account Contact Case	Case: 7 Fields Contact: 3 Fields Account: 4 Fields Total: 14 Fields	☐	2025-12-12	Preview Edit Clone Delete
Opportunity Product Allocation Shows how product quantities are distributed. (Read More)	Total: 0 Fields	Draft	2025-12-12	Preview Edit Clone Delete
Product Mix Analysis Highlights which products each account is top. (Read More)	Account: 10 Fields Opportunity: 9 Fields Opportunity/Leadtime: 9 Fields Total: 28 Fields	Draft	2025-12-12	Preview Edit Clone Delete
Opportunity Pricing and Discount Tracker Displays Accounts - Opportunities - CUI prices. (Read More)	Opportunity/Leadtime: 10 Fields Opportunity: 10 Fields Account: 11 Fields Total: 31 Fields	☒	2025-12-12	Preview Edit Clone Delete
Key Account Growth Overview Shows growth trends by listing an account's. (Read More)	Opportunity/Leadtime: 9 Fields Opportunity: 11 Fields Account: 9 Fields Total: 29 Fields	☒	2025-12-12	Preview Edit Clone Delete
Dynamic Data Table for Account Contact and cases This table shows the account contact and case	Case: 5 Fields Contact: 7 Fields Account: 4 Fields Total: 16 Fields	☐	2025-12-12	Preview Edit Clone Delete
Account Health & Support History Provides a full history of support cases. (Read More)	Case: 11 Fields Contact: 8 Fields Account: 9 Fields Total: 28 Fields	☒	2025-12-12	Preview Edit Clone Delete
Showing 1-10 of 22 (Page 1 of 3)				

Use the Actions column to preview, modify, clone and delete existing configurations.

3. End-User Workflow (Using the Table)

Exploring the Data (Hierarchical Tree Grid)

Your data isn't just a boring flat list anymore. We have organized it into layers kind of like folders on your computer.

Opportunity Renewal & Expansion Tracker

Q Search...

Export

ACCOUNT

Account Name	Account Number	Account Phone	Account Rating	Account Type	Active	Annual Revenue	Billing City		Actions
Edge Communications Parent TT TEST EDIT Ajush 2	CD451796	(512) 757-6789	Warm	Prospect	Yes	139000000	Austin		<a>

OPPORTUNITY

Name	Account ID	Amount	Campaign ID	Close Date	Closed	Current Generator(s)	Stage	Order Number	Actions
Edge SLA TEST	001fo000003zAKSAAM	300000		2023-07-01	false		Id. Decision Makers	847564	<a>

OPPORTUNITYLINEITEM

Opportunity Product Name	List Price	Sort Order	System Modstamp	Total Price	Price Book Entry ID	Product Code	Product ID	Quantity	Actions
Edge SLA TEST GenWatt Diesel 1000kW	100000		2025-10-29T11:32:45.000Z	300000	01ufo00000040zxAEE	GC1060	011fo0000016ZyVAAM	1	<a>
Edge Emergency Generator	001fo000003zAKSAAM	75000		2023-07-01	true	John Deere	Closed Won	731645	<a>
Edge Emergency Generator	001fo000003zAKSAAM	35000		2023-07-01	true		Closed Won		<a>
Edge Installation	001fo000003zAKSAAM	50000		2023-07-01	true		Closed Won	835178	<a>

Click the chevron icon to drill down into related data.

1. **Expand/Collapse:** You can click the "Chevron"(>) icon to expand rows to see "Child" items, and even expand those to see "Grandchild" items.
2. You can go up to three levels deep (Level 1: Parent , Level 2: Child , Level 3: Grandchild).

Navigating & Viewing Records

- **Smart Loading:** To keep the application fast, we don't load thousands of records at once. Simply scroll to the bottom and click "Load More" to grab the next batch of data.
- **Records Per Page:** Use the control menu to decide how much data you want to see at once (Options: 10, 20, 30, or 40 records).

- **Smart Formatting:** Dates and Currency symbols will automatically adjust to display correctly based on your overall Company Information settings and your regional settings (Locale).
- **Clickable Record Links:** By default, the first column in your table will act as a clickable link, allowing you to easily jump to that specific parent, child, or grandchild record.
- **Live URL Links:** Any field with a URL data type will automatically render as a live, clickable link, allowing you to navigate to external websites straight from the table.
- **Email Mailto Links:** Email fields now render as clickable mailto links. Click any email address in the table to open your email client directly – no copying needed.
- **Lookup Field Redirect:** Lookup fields are now clickable and redirect you directly to the related child or master record. A visual indicator distinguishes whether the field is a Lookup (child record) or a Master record reference, so you always know where you're navigating.

Account Contact Cases DDT

Q Search...

Export

ACCOUNT

Account Name	Account Number	Account Rating	Active	Industry	Number of Locations	Website	Actions
Edge Communications	CD656092	Hot	No	Communications	8	http://edgecomm.com/	
> Burlington Textiles Corp of America	CD656092	Hot	No	Apparel	6	https://www.burlington.com/	
> Pyramid Construction Inc.	CC213425	Warm	Yes	Chemicals	17	https://www.pyramid.com/	
> Dickenson plc	CC634267	Warm	Yes	Consulting	2	https://dickenson-consulting.com/	
> Grand Hotels & Resorts Ltd	CD439877	Cold	Yes	Hospitality	57	https://www.grandhotels.com/	
> United Oil & Gas Corp.	CD355118	Cold	Yes	Energy	955	http://www.uos.com/	
> Express Logistics and Transport	CC947211	Cold	No	Transportation	150	https://www.expressl&t.net/	
> University of Arizona	CD736025	Warm	Yes	Education	3	https://www.universityofarizona.com/	
> United Oil & Gas, UK	CD355119-A	Warm	No	Energy	34	http://www.uos.com/	
> United Oil & Gas, Singapore	CD355120-B	Cold	Yes	Energy	6	http://www.uos.com/	

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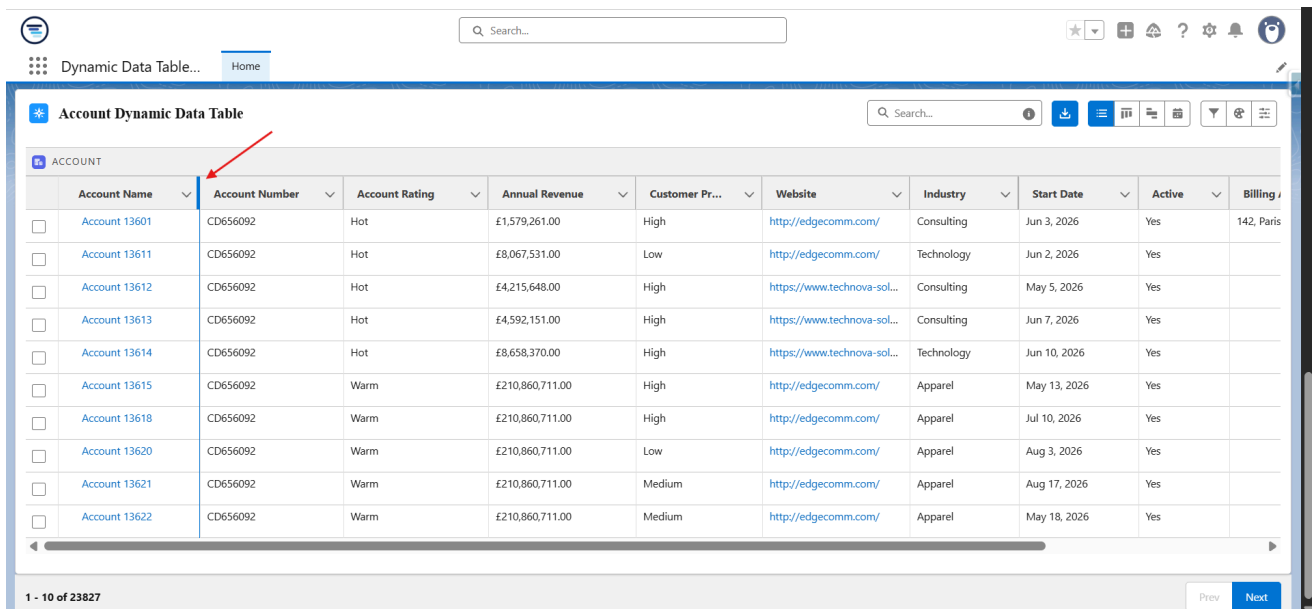
Next

Interactive with record Links & URLs directly from the table

Column Display Options

You now have more control over how data appears within the table columns.

- **Column Expansion:** Columns can be manually expanded within the table view, giving you more control over how data is presented across wider or narrower fields.
- **Wrap Text:** Displays the full cell content across multiple lines within the cell, so nothing is hidden.
- **Clip Text:** Keeps the row height fixed and truncates overflowing text, keeping the table compact and scannable.
- **Rich Text Fields:** Rich text fields are now rendered inside the table view with formatting preserved. Long content is truncated to a configurable character length to keep the table readable, with the full content accessible on record open.



	Account Name	Account Number	Account Rating	Annual Revenue	Customer Pr...	Website	Industry	Start Date	Active	Billing
☐	Account 13601	CD656092	Hot	£1,579,261.00	High	http://edgecomm.com/	Consulting	Jun 3, 2026	Yes	142, Paris
☐	Account 13611	CD656092	Hot	£8,067,531.00	Low	http://edgecomm.com/	Technology	Jun 2, 2026	Yes	
☐	Account 13612	CD656092	Hot	£4,215,648.00	High	https://www.technova-sol...	Consulting	May 5, 2026	Yes	
☐	Account 13613	CD656092	Hot	£4,592,151.00	High	https://www.technova-sol...	Consulting	Jun 7, 2026	Yes	
☐	Account 13614	CD656092	Hot	£8,658,370.00	High	https://www.technova-sol...	Technology	Jun 10, 2026	Yes	
☐	Account 13615	CD656092	Warm	£210,860,711.00	High	http://edgecomm.com/	Apparel	May 13, 2026	Yes	
☐	Account 13618	CD656092	Warm	£210,860,711.00	High	http://edgecomm.com/	Apparel	Jul 10, 2026	Yes	
☐	Account 13620	CD656092	Warm	£210,860,711.00	Low	http://edgecomm.com/	Apparel	Aug 3, 2026	Yes	
☐	Account 13621	CD656092	Warm	£210,860,711.00	Medium	http://edgecomm.com/	Apparel	Aug 17, 2026	Yes	
☐	Account 13622	CD656092	Warm	£210,860,711.00	Medium	http://edgecomm.com/	Apparel	May 18, 2026	Yes	

Dynamic Data Table... Home

Account Dynamic Data Table

ACCOUNT

	Account N...	Account Number	Account Rating	Annual Revenue	Customer Pr...	Website	Industry	Start Date	Active	Billing Add
☐	Account 136...	CD656092	Hot	£1,579,261.00	High	http://edgecomm.com/	Consulting	Jun 3, 2026	Yes	142, Paris, Mi
☐	Account 136...	CD656092	Hot	£8,067,531.00	Low	http://edgecomm.com/	Technology	Jun 2, 2026	Yes	
☐	Account 136...	CD656092	Hot	£4,215,648.00	High	https://www.technova-sol...	Consulting	May 5, 2026	Yes	
☐	Account 136...	CD656092	Hot	£4,592,151.00	High	https://www.technova-sol...	Consulting	Jun 7, 2026	Yes	
☐	Account 136...	CD656092	Hot	£8,658,370.00	High	https://www.technova-sol...	Technology	Jun 10, 2026	Yes	
☐	Account 136...	CD656092	Warm	£210,860,711.00	High	http://edgecomm.com/	Apparel	May 13, 2026	Yes	
☐	Account 136...	CD656092	Warm	£210,860,711.00	High	http://edgecomm.com/	Apparel	Jul 10, 2026	Yes	
☐	Account 136...	CD656092	Warm	£210,860,711.00	Low	http://edgecomm.com/	Apparel	Aug 3, 2026	Yes	
☐	Account 136...	CD656092	Warm	£210,860,711.00	Medium	http://edgecomm.com/	Apparel	Aug 17, 2026	Yes	
☐	Account 136...	CD656092	Warm	£210,860,711.00	Medium	http://edgecomm.com/	Apparel	May 18, 2026	Yes	

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Prev Next

Manually resize columns and toggle Wrap or Clip Text to control how content displays.

Colored Cells (Conditional Formatting)

You can now apply colour highlights to cells based on field values, making it easy to visually identify priority records, overdue dates, or specific statuses at a glance — directly within the table.

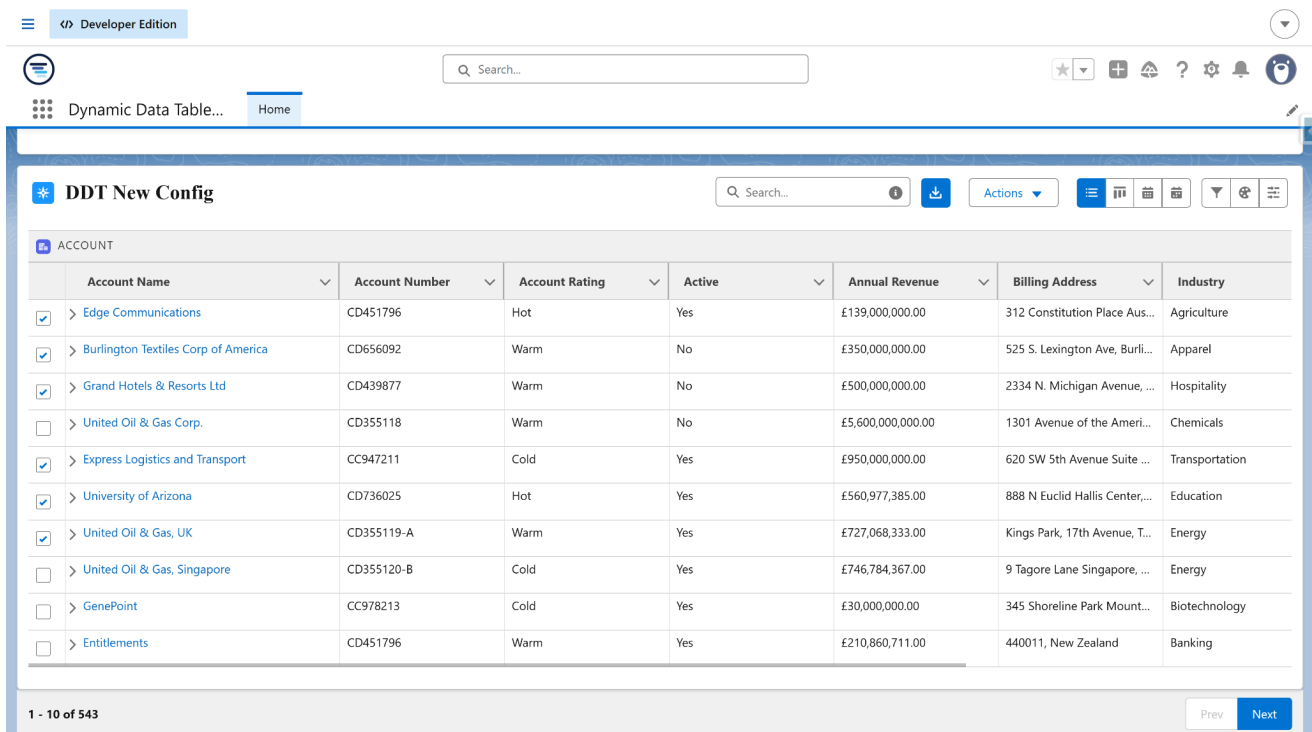
- Click the **Conditional Formatting** icon in the toolbar.
- Select the field or column you want to evaluate.
- Define the condition (e.g., equals, contains, greater than).
- Choose the highlight colour.
- Click **Apply**. Matching cells will be highlighted immediately.

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- Choose the field you want to update and enter the new value.
- Click **Apply**. All selected records are updated instantly.

Bulk Delete

- Tick the checkboxes next to the records you want to remove.
- Click **Bulk Delete** in the action bar.
- Confirm the deletion when prompted. The selected records are permanently removed.



The screenshot shows the 'DDT New Config' interface in the mindzvue application. It features a table with columns: Account Name, Account Number, Account Rating, Active, Annual Revenue, Billing Address, and Industry. Several rows are visible, each with a checkbox in the first column. The 'Actions' bar at the top right includes options for Bulk Edit and Bulk Delete. The bottom of the table shows pagination: '1 - 10 of 543'.

	Account Name	Account Number	Account Rating	Active	Annual Revenue	Billing Address	Industry
☒	> Edge Communications	CD451796	Hot	Yes	£139,000,000.00	312 Constitution Place Aus...	Agriculture
☒	> Burlington Textiles Corp of America	CD656092	Warm	No	£350,000,000.00	525 S. Lexington Ave, Burli...	Apparel
☒	> Grand Hotels & Resorts Ltd	CD439877	Warm	No	£500,000,000.00	2334 N. Michigan Avenue, ...	Hospitality
☐	> United Oil & Gas Corp.	CD355118	Warm	No	£5,600,000,000.00	1301 Avenue of the Ameri...	Chemicals
☒	> Express Logistics and Transport	CC947211	Cold	Yes	£950,000,000.00	620 SW 5th Avenue Suite ...	Transportation
☒	> University of Arizona	CD736025	Hot	Yes	£560,977,385.00	888 N Euclid Hallis Center,...	Education
☒	> United Oil & Gas, UK	CD355119-A	Warm	Yes	£727,068,333.00	Kings Park, 17th Avenue, T...	Energy
☐	> United Oil & Gas, Singapore	CD355120-B	Cold	Yes	£746,784,367.00	9 Tagore Lane Singapore, ...	Energy
☐	> GenePoint	CC978213	Cold	Yes	£30,000,000.00	345 Shoreline Park Mount...	Biotechnology
☐	> Entitlements	CD451796	Warm	Yes	£210,860,711.00	440011, New Zealand	Banking

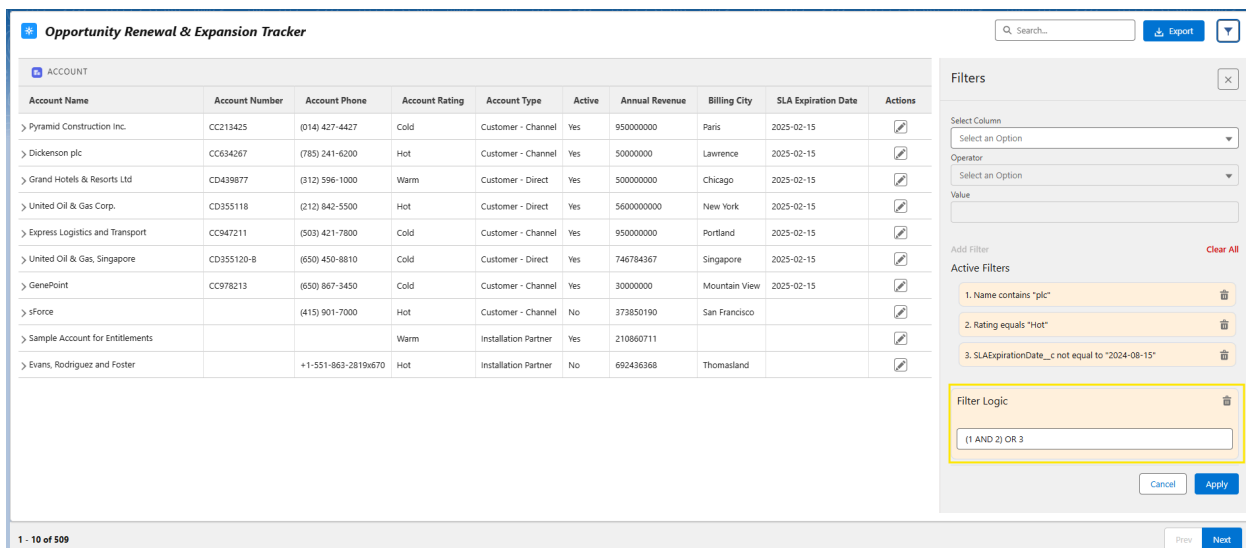
Select records with checkboxes, then choose Bulk Edit or Bulk Delete from the action bar.

Step-by-Step: Finding & Refining Data

While the general search bar is great for finding quick text records, use the Advanced Filter for Dates, Currency, or Text Areas.

Caption: Combine rules to find exactly what you are looking for.

1. Select the **Column**.
2. Choose the **Operator** (e.g., equals, contains).
3. Enter the **Value**.
4. Click **Add Filter**.
5. (Optional) **Advanced Logic**: Need to be specific? You can combine rules.
For example, tell the system: "Show me records that match Rule 1 AND Rule 2".
6. To clear your search, click **Reset Filters** to reload the default view.



The screenshot displays the 'Opportunity Renewal & Expansion Tracker' interface. It features a table with columns: Account Name, Account Number, Account Phone, Account Rating, Account Type, Active, Annual Revenue, Billing City, SLA Expiration Date, and Actions. The table lists several accounts, including Pyramid Construction Inc., Dickenson plc, Grand Hotels & Resorts Ltd, United Oil & Gas Corp., Express Logistics and Transport, United Oil & Gas, Singapore, GenePoint, sforce, Sample Account for Entitlements, and Evans, Rodriguez and Foster.

On the right side, there is a 'Filters' panel. It includes a search bar, a 'Select Column' dropdown, an 'Operator' dropdown, and a 'Value' input field. Below these are 'Add Filter' and 'Clear All' buttons. The 'Active Filters' section shows three rules: '1. Name contains "plc"', '2. Rating equals "Hot"', and '3. SLAExpirationDate_c not equal to "2024-08-15"'. The 'Filter Logic' section shows the logic '(1 AND 2) OR 3'. At the bottom of the filters panel are 'Cancel' and 'Apply' buttons.

Open the Filters panel to combine specific rules, use advanced logic (e.g., 1 AND 2), and refine your data view.

Filter and Search at child and grandchild levels

Filter and Search are now available at Child and Grandchild record levels not just at the Parent level. Expand any parent row and use the same filter and search controls to refine the records shown at that child or grandchild level.

Account Dynamic Data Table

Search: 00001090

ACCOUNT								
Account Name	Account Number	Account Rating	Annual Revenue	Customer Priority	Website	Industry	Start Date	
Pyramid Construction Inc.	CC213425	Warm	£950,000,000.00	Medium	https://www.pyramid.com/	Education	May 4, 2026	

CONTACT								
Full Name	Email	Birthdate	Business Fax	Business Phone	Contact Currency	Account Lookup Test	Contact ID	
Steve Johnson	st@gmail.com	Apr 10, 2026			GBP		003fo00005TK4g	

CASE								
Product	Case Number	Case Origin	Case Reason	Case Type	Priority	Closed Date	Created Date	
GC5060	00001090	Phone	Feedback	Electrical	Low		2025-12-17T04:35	

1 - 1 of 1

Account Dynamic Data Table

Search:

ACCOUNT							
Account Name	Account Number	Account Rating	Annual Revenue	Customer Priority	Website	Industry	
Pyramid Construction Inc.	CC213425	Warm	£950,000,000.00	Medium	https://www.pyramid.com/	Education	

CONTACT							
Full Name	Email	Birthdate	Business Fax	Business Phone	Contact Currency	Account Lookup Test	
Steve Johnson	st@gmail.com	Apr 10, 2026			GBP		

CASE							
Product	Case Number	Case Origin	Case Reason	Case Type	Priority	Closed Date	
GC5060	00001090	Phone	Feedback	Electrical	Low		

1 - 1 of 1

Filters

Saved Filters
Select or clear a saved filter...

Select Object
Select an Object...

- Account
- Contact
- Case

Value

Add Filter Reset Filters

Active Filters
1. [Case] CaseNumber equals "00001090"

Add Filter Logic

Cancel Save Filter Apply

Filter and search now work at every level Parent, Child, and Grandchild.

Step-by-Step: Saving Filters

Frequently used filter combinations can now be saved so you can re-apply them instantly without rebuilding them each time.

- Apply your desired filters using the **Filters** panel.
- Click **Save Filter** and give it a name.
- The saved filter appears in your Saved Filters list. Click it at any time to apply it instantly.
- **Limit:** Up to 5 saved filters are supported per user.
- **Delete and default a Saved Filter:** To free up a slot when you have reached the 5-filter limit, click the delete icon next to any saved filter name in the Saved Filters list. This removes it immediately and lets you save a new filter in its place. Saved filters can be deleted by either the user who created them or by an administrator. The default filter will be automatically applied whenever you open the Filters panel.

Step-by-Step: Deleting a Saved Filter

1. Click **Saved Filters** from the dropdown.
2. Click the **Delete** icon next to the saved filter you want to remove.
3. Confirm the deletion.

Account Dynamic Data Table

ACCOUNT	Account Name	Account Number	Account Rating	Annual Revenue	Customer Priority	Website	Industry	Start Date
☐	Account 13601	CD656092	Hot	£1,579,261.00	High	http://edgecomm.com/	Consulting	Jun 3, 2026
☐	Account 13611	CD656092	Hot	£8,067,531.00	Low	http://edgecomm.com/	Technology	Jun 2, 2026
☐	Account 13612	CD656092	Hot	£4,215,648.00	High	https://www.technova-sol...	Consulting	May 5, 2026
☐	Account 13613	CD656092	Hot	£4,592,151.00	High	https://www.technova-sol...	Consulting	Jun 7, 2026
☐	Account 13614	CD656092	Hot	£8,658,370.00	High	https://www.technova-sol...	Technology	Jun 8, 2026
☐	Account 13615	CD656092	Warm	£210,860,711.00	High	http://edgecomm.com/	Apparel	May 13, 2026
☐	Account 13618	CD656092	Warm	£210,860,711.00	High	http://edgecomm.com/	Apparel	Jul 10, 2026
☐	Account 13620	CD656092	Warm	£210,860,711.00	Low	http://edgecomm.com/	Apparel	Jun 1, 2026
☐	Account 13621	CD656092	Warm	£210,860,711.00	Medium	http://edgecomm.com/	Apparel	Jun 9, 2026
☐	Account 13622	CD656092	Warm	£210,860,711.00	Medium	http://edgecomm.com/	Apparel	May 18, 2026

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Search...

Filters

Saved Filters: Case Number equals 00001090

Select Object: Select an Object...

Select Column: Select an Option

Operator: Select an Option

Value:

Add Filter

Active Filters: 1. (Case) CaseNumber equals "00001090"

Add Filter Logic

Cancel Save Filter Apply

Delete and default a saved filter

Search...

Limit Reached
You can only save up to 5 filters. Please delete an existing filter before creating a new one.

Account Number	Account Rating	Annual Revenue	Customer Priority	Website	Industry
CC213425	Warm	£950,000,000.00	Medium	https://www.pyramid.com/	Education

Save Filter View

* Filter Name
Case origin Phone

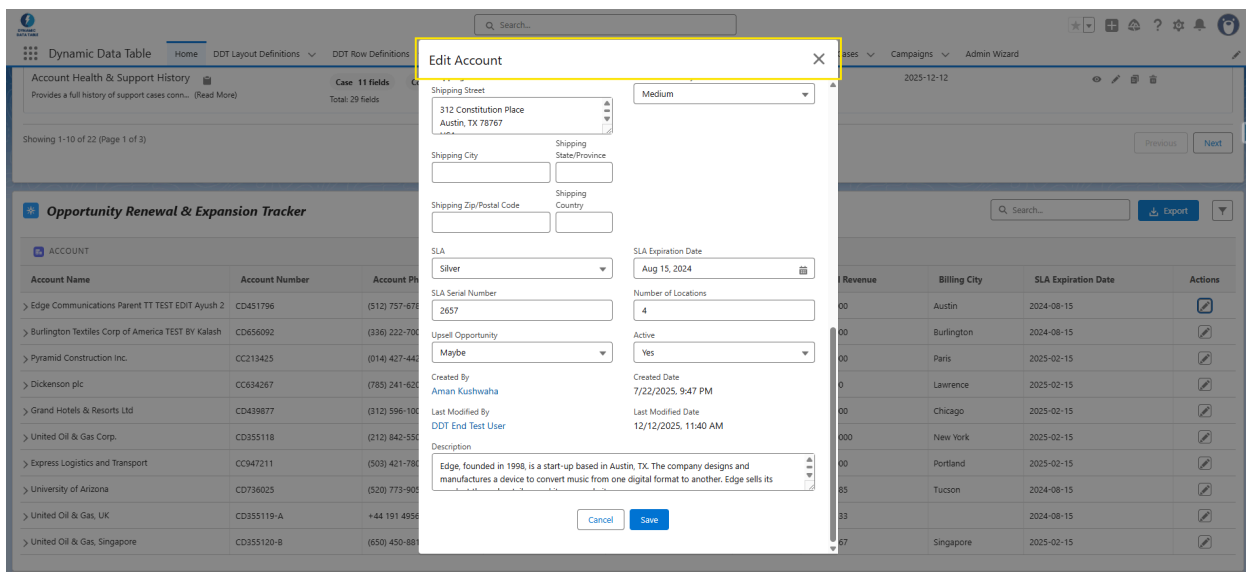
☐ Share with all users

Cancel Save as New Update Existing

Save up to 5 filters per user for quick one-click reuse

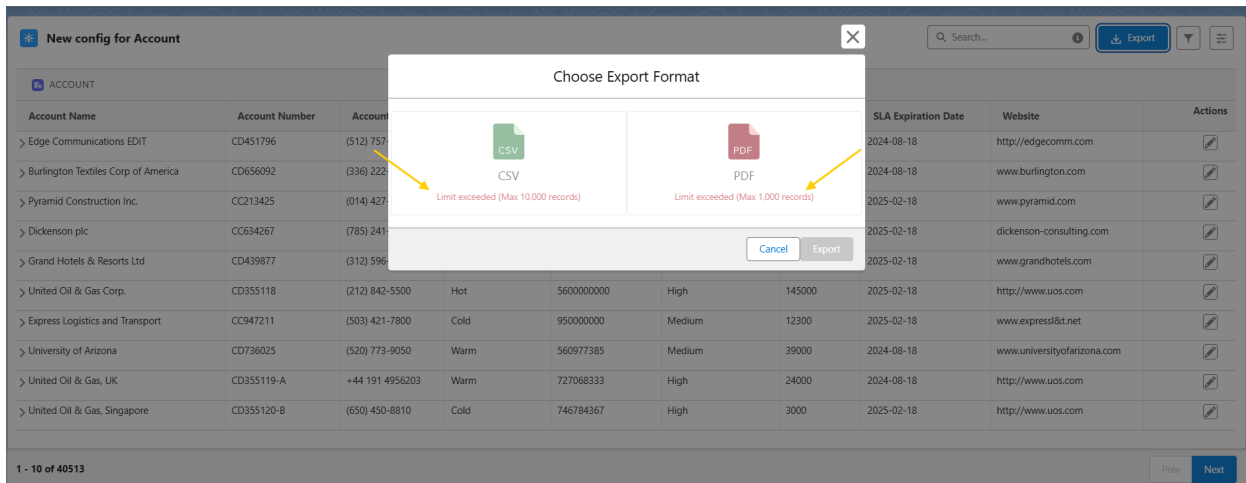
Step-by-Step: Editing & Exporting

- **To Edit:** Click the pencil icon in the action column. *Note: The inline editor will only show the specific fields you selected to display in this table configuration, making editing fast and focused.*
- **To Export:** Click the Export button to take data offline.
- **Filtered Export:** If you have used the search bar or advanced filters, clicking export will only download your refined, filtered list!
 - **CSV:** Supports up to 10,000 records.
 - **PDF:** Supports up to 1,000 records. *Enhancement: You can now select and reorder up to 5 specific columns for your PDF. The PDF will also automatically feature your table name as the header and an upgraded footer.*

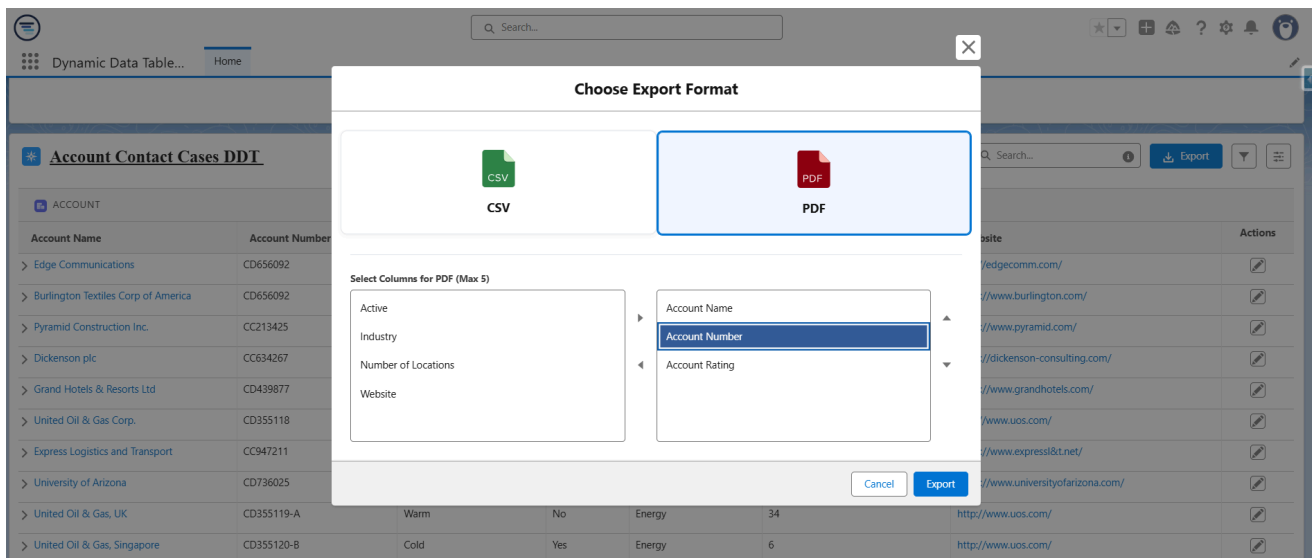


The screenshot shows the Mindzvue application interface. In the background, there is a table titled 'Opportunity Renewal & Expansion Tracker' with columns for Account Name, Account Number, and Account Phone. The table lists several accounts, including Edge Communications Parent, Burlington Textiles Corp, Pyramid Construction Inc., and others. Overlaid on this table is a modal window titled 'Edit Account'. This modal contains various input fields for account details, including Shipping Street (312 Constitution Place, Austin, TX 78767), Shipping City, Shipping State/Province, Shipping Zip/Postal Code, Shipping Country, SLA (Silver), SLA Expiration Date (Aug 15, 2024), SLA Serial Number (2657), Number of Locations (4), Upsell Opportunity (Maybe), and Active status (Yes). It also includes fields for Created By (Aman Kushwaha), Created Date (7/22/2025, 9:47 PM), Last Modified By (DDT End Test User), Last Modified Date (12/12/2025, 11:40 AM), and a Description field. At the bottom of the modal are 'Cancel' and 'Save' buttons.

Click the pencil icon to open the inline editor, update the record details, and save directly from the table.



Click the Export button to take your data offline, supporting up to 10,000 records via CSV or 1,000 records via PDF.



In PDF format you can select and reorder up to 5 columns

Switching Views

Beyond the standard table grid, DDT offers three additional views you can switch between at any time using the view selector in the toolbar.

Developer Edition

Dynamic Data Table... Home

Account Dynamic Data Table

Search...

ACCOUNT

	Account Name	Account Number	Account Rating	Annual Revenue	Customer Priority	Website	Industry	Start Date
☐	Account 13601	CD656092	Hot	£1,579,261.00	High	http://edgecomm.com/	Consulting	Jun 3, 2026
☐	Account 13611	CD656092	Hot	£8,067,531.00	Low	http://edgecomm.com/	Technology	Jun 2, 2026
☐	Account 13612	CD656092	Hot	£4,215,648.00	High	https://www.technova-sol...	Consulting	May 5, 2026
☐	Account 13613	CD656092	Hot	£4,592,151.00	High	https://www.technova-sol...	Consulting	Jun 7, 2026
☐	Account 13614	CD656092	Hot	£8,658,370.00	High	https://www.technova-sol...	Technology	Jun 10, 2026
☐	Account 13615	CD656092	Warm	£210,860,711.00	High	http://edgecomm.com/	Apparel	May 13, 2026
☐	Account 13618	CD656092	Warm	£210,860,711.00	High	http://edgecomm.com/	Apparel	Jul 10, 2026
☐	Account 13620	CD656092	Warm	£210,860,711.00	Low	http://edgecomm.com/	Apparel	Jun 1, 2026
☐	Account 13621	CD656092	Warm	£210,860,711.00	Medium	http://edgecomm.com/	Apparel	Jun 9, 2026
☐	Account 13622	CD656092	Warm	£210,860,711.00	Medium	http://edgecomm.com/	Apparel	May 18, 2026

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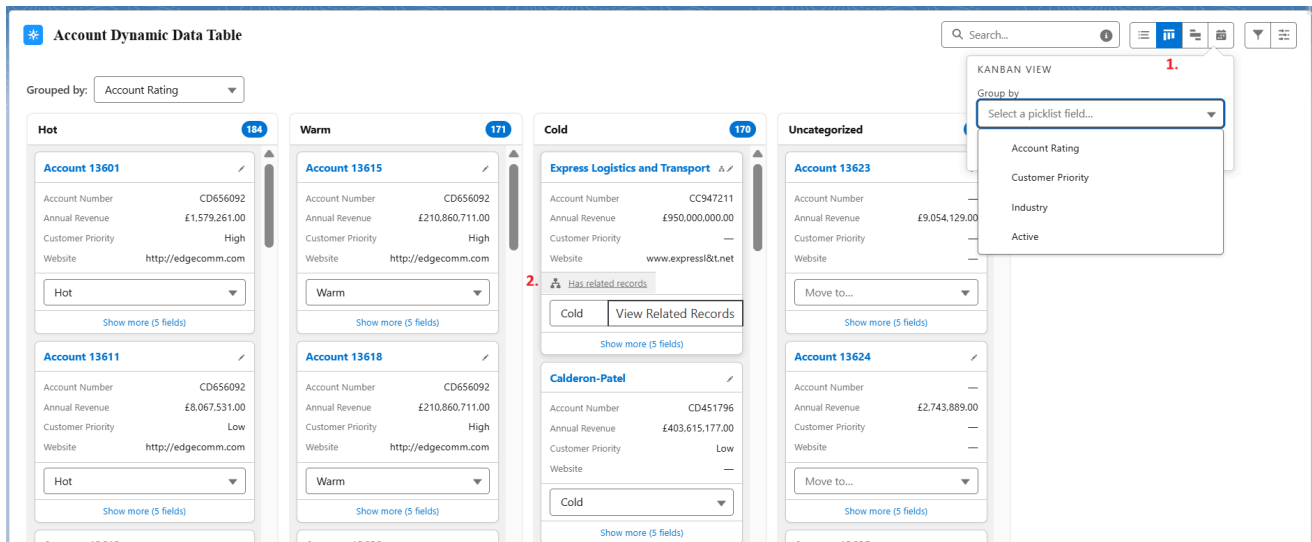
Prev Next

Use the view selector in the toolbar to switch between Table, Kanban, timeline and calendar views.

Kanban View

Users can switch from the standard Table view to a Kanban view with a single click. Cards are grouped by a picklist field, making it easy to segment and visualise records across different stages or categories.

1. **Picklist Filter:** Filter Kanban columns to focus on specific statuses or categories.
2. **Child & Grandchild Support:** Kanban view now supports Child and Grandchild level records and fields — it is no longer limited to Parent records only.



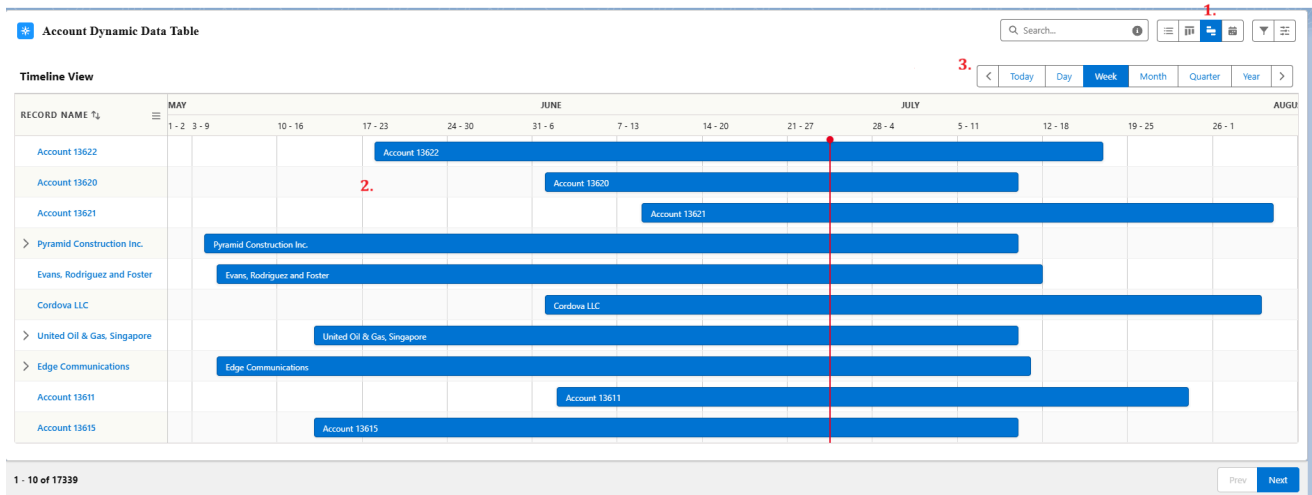
Switch to Kanban view with a single click. Child and Grandchild records now appear.

Timeline View

Users can switch from the standard Table view to a Kanban view with a single click. Cards are grouped by a picklist field, making it easy to segment and visualise records across different stages or categories.

A new Timeline view is available for any object with a configured start date and end date field. It gives you a Gantt-style overview of all selected records across Parent, Child, and Grandchild levels in a single unified view.

1. Click the **Timeline** icon in the view toolbar to switch to Timeline mode.
2. All records with valid start and end date values appear as bars on the timeline.
3. Use the date range selector to switch the view between: **Today | Day | Week | Month | Quarter | Year**.



Click the date range buttons to switch between Day, Week, Month, Quarter, and Year views.

Calendar View

A new Calendar view is available for any object that has a date field configured. Records appear as events on the calendar across all hierarchy levels.

1. **Reschedule by dragging:** Move and reschedule records directly from the calendar by changing their date within the view.
2. **Jump to any date:** Navigate straight to any specific date instead of scrolling manually.
3. **Hide levels independently:** Show or hide Parent, Child, or Grandchild records independently when they are not needed on screen.
4. **Smooth scrolling:** Scroll between months seamlessly for quick navigation.

- **Support Contact:** Reach out to our team at ddthelp@mindzvue.com for further assistance.

5. Release History & Versioning

To help you track new features and improvements, DDT follows a structured release framework. Major yearly releases carry a constellation code name to give each version a memorable identity. Our current active series is the Lyra release. For the full release notes, visit the DDT listing on AppExchange: [DDT on AppExchange](#)

- **Lyra v2.3.0** – Current (June 2026): Timeline View (Parent / Child / Grandchild), Calendar View (Parent / Child / Grandchild), Bulk Edit & Delete, Save Filters (up to 5), Kanban Child & Grandchild Support, Colored Cells (Conditional Formatting), Child & Grandchild Level Filter and Search.
- **Lyra v2.2.0** – April 2026: Column Expansion, Wrap / Clip Text, Rich Text Formatter, Mailto Links, Lookup Redirect, Action Confirmation Controls, Kanban View with Picklist Filter, Child-level Sorting.
- **Lyra v2.1.0** – Current: Added DDT Help Centre, Filtered Data Exports, Enhanced PDF formatting (up to 5 ordered columns), restricted inline editing to visible columns, active URL links, and default clickable record links for the first column. Added MindZvue dashboard footer.
- **MV.DDT v2.0.0** : Official launch of the Lyra series. Overhauled Dynamic Data Table with hierarchical tree grid, advanced filtering, and Admin Dashboard.

(Note: Pre-2026 releases, such as MV-DynamicDataTableV1.x, are deprecated and will not be supported in future releases. These versions follow legacy naming conventions.)