

Data Sync Pro

#UI: Data List & Action Button

Turn any Lightning page into an operational workspace — composed declaratively from Data Lists and Action Buttons.



The #UI Challenges

1

Rigid Related Lists

Out of the box, related lists are read-only, locked to a direct relationship, with no pagination, inline or mass edits, mass deletes, or row actions like view, edit, clone, or delete.

2

Actions Disconnected From Data

Each action belongs with the data it operates on—a record-level action with the record, a list-level action with the list. In practice they end up where they don't belong.

3

Fragmented Workflows

To complete one task users jump between record pages, list views, reports, and quick actions—losing context every step.

4

Heavy Custom Builds

Editable tables and action buttons each need a custom LWC plus Apex—and every tweak triggers a full dev, QA, and deploy cycle before users see it.

5

Business Logic Locked with Code

Bringing a meaningful action to life often depends on a lengthy development process—leaving the business with limited room to shape and refine the idea hands-on.

6

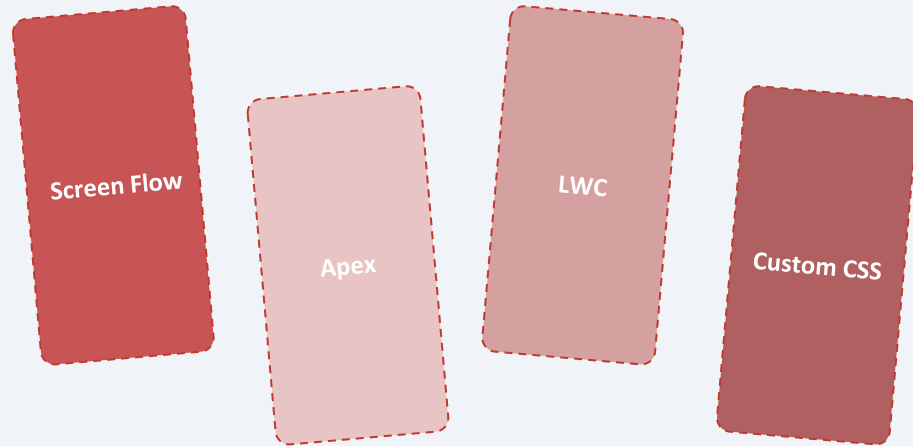
Tech Debt Compounds

Custom UI—whether LWC + Apex or Screen Flow—is hand-built with its own design choices, and these components tend to accumulate across the org over time, a common path to growing technical debt as Salesforce orgs mature.

Turn Any Lightning Page into a Cohesive Workspace

Rich Lightning workspaces usually mean custom LWCs, Apex and Screen Flows. DSP composes the same experience from declarative, rules-driven components.

Heavy to build, heavy to maintain — scattered components



↑ Every UI change means another deploy

Modular Executables, composed into one workspace

A screenshot of a Salesforce workspace for 'Account: Acme Corp'. The workspace has a green header bar. Below the header, there are three buttons: 'Mark for Review' (orange), 'Change Owner' (blue), and 'Snapshot' (dark blue). The main content area is divided into two sections: 'Open Opps' and 'Active Cases'. The 'Open Opps' section has tabs for 'Won (YTD)' and 'All', and buttons for 'New' (blue), 'Close Won' (green), and 'Close Lost' (red). The 'Active Cases' section has tabs for 'Escalated' and 'Closed', and buttons for 'Escalate' (orange), 'Close' (blue), and 'Transfer' (purple). Both sections have a table with three rows of data.

↑ Every block is a rule record, not code

Orchestrated Modules. Powerful Workspaces.

1

Declarative, Interactive Lists

Render a fully editable list from just a SOQL query, with flexible settings: inline and mass edits, mass deletes, new record creation, column filters, pagination with exact counts, and row actions (view, edit, clone, delete).

2

Right Action, Right Place

Each Action Button is placed where it belongs—on the Lightning record for record-level actions, within a Data List for actions on selected rows—so the right actions stay with the right data.

3

All on One Lightning Page

Users complete an entire workflow on one page—view the record, scan related Data Lists, and act on selected rows or the record itself, all without navigating away.

4

Rules-Driven, Not Hand-Built

No LWC, no Apex controller, no per-page rebuild. DSP renders ready-to-use UI components from Executable records—built declaratively and reused across the org.

5

Working Prototype in Minutes

Each Executable goes from idea to a fully functional Data List or Action Button in minutes—giving the business hands-on iteration before any code is written.

6

Self-Contained Modules

Every list and button is its own Executable—reusable across pages, governed independently, and swapped without touching the rest of the org.

#UI Features

Replace custom LWCs, Apex, and Screen Flows with declarative, rules-driven UI components, configured as records in minutes.

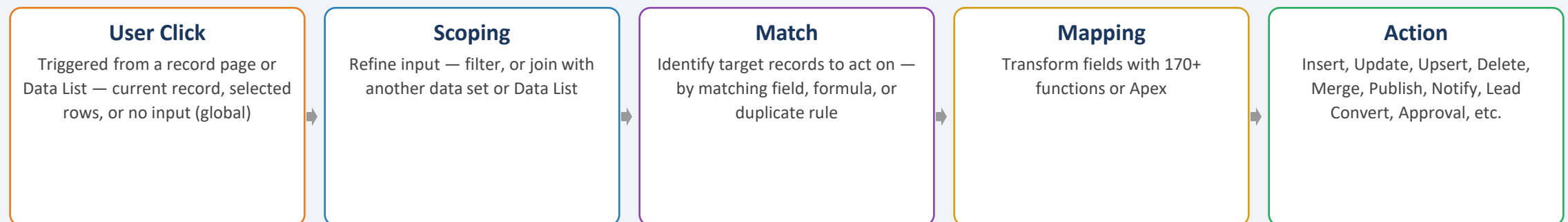
What Admins Build, Not Developers

- **Power Beyond a Datatable** — One Data List delivers inline edit, mass update, clone, delete, export, pagination, column filters, and a built-in query builder — a true data app in a single component.
- **Action Buttons with Review** — Take any source records, transform, and act on the target. Optionally chain with Data Lists for mid-flow selection, and let users review or edit transformed values in a single-record or line editor before commit (Pre-Action Review Screen).
- **Tailored Lens, Tailored Actions** — Compose multiple Data Lists per object through different lenses — each with its own filters, sorts, and actions, adapting to the current record or user in context.
- **Lightning App Builder Native** — Drop Data Lists and Action Buttons onto any record, app, or home page — admins compose the workspace, no developer required.

Other Features

- **Schema-Aware, SOQL Free Query Builder**
- **Dynamic Filters**
- **Fine-Grained Behavior Controls**
- **Chain Data Lists into Flows**
- **Row Related Lists**
- **Cross-Org Data Lists**
- **Multi-List Layout Variants**
- **Data List Quick Links**
- **File Management per Row**
- **Data Loader from Data List**
- **Embed in Custom LWCs & Screen Flows**

One Click, Five Declarative Stages — Every Action Button packages input, transform, and action into a single Executable record



Common Use Cases

Common workspace patterns built from Data Lists and Action Buttons

1

Embedded Operational Pages

Replace standard related lists across record pages with action-rich, perspective-driven Data Lists for any business object.

2

360° Customer Workspace

Bring Open Opps, Active Cases, Recent Orders, and Key Contacts onto the Account page — local or from another Salesforce org, each a filtered Data List with its own actions.

3

Case Management Console

Side-by-side Case lists — My Open, Team Queue, Escalated — with Action Buttons to claim, close, or reassign selected cases inline.

4

Project & Resource Hub

Project page showing Tasks, Risks, Milestones, and Team Members—each list filtered, editable, with role-specific actions.

5

Data Stewardship Page

Surface duplicates, missing fields, and stale records as separate Data Lists with merge, enrich, and archive buttons.

6

Approval & Review Hub

Pending records grouped by status with approve/reject/request-info Action Buttons that trigger downstream rules.

Why #UI

360°

Data & Actions in View

See the relevant data and act on it in one place

One Workspace

Browse, filter, edit, and act on records side-by-side. Users complete work in one view — no tab-hopping, no exports, no context loss.

95%

Less Build Effort

Configured records replace LWC + Apex / Screen Flow

Accelerate Delivery

Stand up record list views, action buttons, and dashboards in minutes by configuring records — no LWC, no Apex controllers, no Screen Flows.

0

Code Skills Required

Admins configure entire UIs — no developer dependency

Admin-Owned

Build, change, and govern UI in a Setup-style interface. Admins own the page lifecycle — visibility, permissions, and updates included.

→ 0

Tech Debt

Drive tech debt toward zero with declarative, modular rules

Modularity Enforced

Every Executable is a bounded record with clear input, logic, and output. Tech debt stops compounding — by design, not discipline.

Actionable Data List

Delivered in minutes — auto-generated from a SOQL query with pagination, filters, sorting, inline & mass edits, download, new, delete, query builder; extend with custom list and row actions

The screenshot displays a web-based data list interface for 'My Team's Open Cases (150)'. The interface includes a header with a title and record count, a table of data rows, and a bottom pagination control. Several callout boxes highlight specific features: 'Icon, Title & Record Count' points to the header; 'Field Label & Sorting' points to a 'Case Type' dropdown; 'Column Filter' points to a 'Priority' dropdown; 'Built-in Actions' points to a toolbar with icons for edit, delete, download, upload, and refresh; 'Custom List Actions' points to 'Accept' and 'Assign' buttons; 'Inline Editing' points to an edit icon in a row; 'Pagination' points to the page navigation controls; and 'Row Actions' points to a context menu for a row containing 'Accept', 'Transfer', 'Upload File', 'View', 'Edit', 'Clone', 'Delete', and 'Related Lists'.

Case Number	Subject	Case Type	Priority	Status	Last Modified	Contact		
1 <input checked="" type="checkbox"/>	03266936	Request for Real-Time Anal...	Sales Support	High	Escalated	01/15/20	Jarvis and Hess	Steve Holmes
2 <input type="checkbox"/>	03266977	New Reporting Feature Re...	Sales Support	Low	On Hold	01/15/20	Burch and Zimmerm...	Pam French
3 <input checked="" type="checkbox"/>	03266987	Real-Time Collaboration To...	Sales Support	Medium	On Hold	01/15/20	Wilmore	Hayden Banks
4 <input type="checkbox"/>	03271002	Feature for Scheduled Rep...	Technical Support	Low	On Hold	09/24/2024, 18:14:41	Abbott-Robertson	Meagan Bentley
5 <input checked="" type="checkbox"/>	03271029	Support for External Authentication Methods	Technical Support	Low	Escalated	09/24/2024, 18:14:41	Pineda, Barnes and Moore	Carol Saunders
6 <input type="checkbox"/>	03271083	Update 4 selected items	Technical Support	High	On Hold	09/24/2024, 18:14:41	Mann-Taylor	Gary Lee
7 <input type="checkbox"/>	03271103		Technical Support	Low	On Hold	09/24/2024, 18:14:41	Wolf-Cooper	Alec Briggs
8 <input checked="" type="checkbox"/>	03276619		Technical Support	High	On Hold	09/24/2024, 18:14:41	French, Scott and Hess	Mia Sandoval
9 <input type="checkbox"/>	03276627	Details on Custom Workflo...	Technical Support	Medium	Escalated	09/24/2024, 18:14:41	Cooley-Farmer	Veronica Pierce
10 <input type="checkbox"/>	03276649	Real-Time Collaboration To...	Technical Support	Medium	Escalated	09/24/2024, 18:14:41	Sanford-Preston	Christian Small