

# Case Study: Building a Scalable Field History Tracking App for Salesforce

## Identifying the Need

Across a range of client engagements, our team observed a consistent pattern: organizations needed better visibility into field-level changes across Salesforce records. While Salesforce provides basic field history tracking, its limitations quickly became apparent in environments with complex compliance requirements, cross-functional workflows, and multi-object architectures.

Clients struggled with:

- Limited field tracking per object
- Lack of centralized visibility into changes across objects
- Manual overhead in reviewing and reporting changes
- No built-in backup, restore, or export capabilities
- Inefficient integrations with external systems like cloud storage

Recognizing the need for a more flexible, administrator-friendly solution, we developed **Field History Tracking**, a configurable Salesforce-native app designed to streamline auditability, support compliance, and centralize historical data in a scalable, user-friendly way.

---

## The Solution

**Field History Tracking** is a modular app that brings structure, visibility, and control to how organizations monitor changes in their Salesforce data. Built natively on the platform, it was designed for rapid deployment and easy configuration—without sacrificing power or flexibility.

Key product features include:

### 1. Configurable Field Tracking Across Objects

Admins can select any standard or custom object and choose which fields to track. A

user-friendly interface allows organizations to customize tracking to their operational priorities, rather than being limited by platform constraints.

## **2. Centralized Change History**

All tracked field changes are stored in a centralized custom object. This allows users and managers to quickly review a complete history of changes without navigating across multiple page layouts or audit logs.

## **3. Flow-Ready Architecture**

The app supports integration with Salesforce Flows and Apex Actions, making it simple to trigger updates, log changes, or extend automation. This architecture enables flexibility while maintaining platform best practices.

## **4. Integrated Backup and Restore**

Administrators can back up field change data to Salesforce or external cloud storage solutions. This includes support for data export, restore from snapshots, and secure deletion. For organizations with strict audit or retention policies, this ensures complete control over change history.

## **5. Google Drive Integration**

For clients using Google Workspace, we built a secure connection between Salesforce and Google Drive, allowing automated backups of field history data. The integration uses OAuth and Named Credentials to ensure secure communication without exposing sensitive access details.

---

## **Strategic Benefits**

The product was designed not only to solve specific tracking limitations, but to elevate how teams interact with data history. Clients using the app have seen improvements in the following areas:

### **Audit Readiness**

Regulated industries and enterprise clients now have an auditable trail of changes across key business objects, with centralized access and filtering.

### **Administrative Control**

Admins can quickly add or remove tracked fields, change configurations, and schedule backups, all from within the app—eliminating reliance on external tools or custom code.

### **Operational Transparency**

Teams are able to understand who changed what, when, and why. This improves accountability, collaboration, and customer service outcomes.

**Data Governance**

With built-in backup and restore, clients gain confidence in their ability to safeguard data and recover from accidental changes or deletions.

**Scalability and Futureproofing**

The app's modular architecture and configuration model ensures that as clients grow, their tracking needs can scale without requiring rework or new deployments.

---

**Looking Ahead**

Since its launch, the Field History Tracking app has become a core part of our internal toolkit and a frequently recommended solution for clients seeking visibility into their data lifecycle.

Future versions will expand support for advanced analytics, customizable reporting dashboards, and integration with third-party compliance platforms.

This product reflects our broader approach at Legendary Solutions: identifying real client pain points, building reusable tools to address them, and ensuring those tools are scalable, extensible, and easy to adopt across industries.