

Record History Tracking (Timeline)

1. Document Purpose

This document defines the requirements for **Record History Tracking**, which provides a unified, read-only timeline of all changes and activities associated with a CRM record on mobile devices.

2. Feature Overview

Record History Tracking presents a chronological **Timeline tab** within each CRM record that displays both user-generated activities and system-generated record changes.

3. Goals and Objectives

Goals

- Provide complete visibility into record lifecycle changes.
- Enable quick review of customer engagement and data changes.
- Maintain consistency with web CRM record history.

Success Metrics

- User engagement with Timeline tab.
 - Reduction in support escalations due to missing history.
 - Data consistency between web and mobile timelines.
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4. In-Scope Functionality

4.1 Timeline Entries

The timeline must display:

- Logged activities (calls, meetings, emails, follow-ups).
- System-generated record changes including:
 - Field value updates
 - Status or stage changes

- Ownership changes

4.2 Timeline Behavior

- Entries displayed in reverse chronological order.
 - Visual differentiation between activity entries and system changes.
 - Read-only access for system-generated entries.
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5. User Flows

View Record Timeline

1. Open CRM record.
 2. Navigate to Timeline tab.
 3. Scroll through chronological history.
 4. Tap entries to view details.
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6. Functional Requirements

- Timeline must load incrementally for large histories.
 - Timeline must reflect updates in near real time.
 - Timeline must respect user permissions.
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7. Non-Functional Requirements

Performance

- Timeline initial load under 2 seconds for up to 100 entries.
- Smooth scrolling without UI lag.

Reliability

- No missing or duplicated entries.
 - Consistent ordering across sessions.
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8. Out of Scope

- Editing or deleting system-generated history.

- Advanced filtering and analytics (future phase).
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9. Acceptance Criteria

- Timeline displays complete and accurate record history.
 - System changes are clearly identifiable.
 - Timeline data matches web CRM history.
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10. Dependencies

- Record audit trail services.
- Activity Management feature.
- Metadata and permissions services.