# REPORTING ON HISTORICAL CHANGES IN YOUR DATA

## Summary

Get deeper insight and make data-driven decisions by analyzing your organization's activity over over the last three months.

## Report on Historical Changes

On top of the standard up-to-the-minute reporting on the current state of your business, you can analyze day-to-day and week-to-week changes in opportunities, cases, forecasts, and custom objects.

☑ **Note:** Historical trend reporting with charts is supported in Lightning Experience, but tabular views of historical trend reports aren't available.

## Learn about Historical Trend Reporting

Historical trend reporting uses a special custom report type designed to highlight changes between five snapshot dates, such as five business days or five business weeks. You can visually represent the data changes in charts and on dashboards.

For organizations created in Winter '14 and thereafter, historical trend reporting is activated by default. If your organization is older than that, you must activate historical trend reporting in the Setup menu.

Salesforce retains historical data for the previous three months, plus the current month. (The amount of historical data you can work with in practice depends on your organization's data design and use patterns.) You can select up to five date snapshots in that span to compare, using up to four historical filters.

Longer durations than days or weeks are not recommended. They may result in reports timing out and not returning. For small organizations with fewer records, month-to-month trend reporting may work, but this is not what historical trend reporting is designed for.

💡 **Tip:** You can also create and customize historical trend reporting reports via the Metadata API and the Reports and Dashboards REST API.

## Limitations on Historical Trend Reporting

Historical trending in Salesforce is subject to certain limits on the time during which data is tracked, the number of rows of data, and the fields and objects you can track. These limits are designed to restrict the data set so that reports return data quickly.

- Salesforce retains historical data for the previous three months, plus the current month.
- Up to 5 million rows of historical trending data can be stored for each object. Historical data capture stops when the limit is exceeded. The admin is alerted by email when any object reaches 70 percent of the limit, and again if the limit is exceeded.
- Each historical trend report can contain up to 100 fields. In Opportunities reports, this includes the standard preselected fields, which can't be disabled.
- Formula fields are not supported.
- You can specify up to five historical snapshot dates in each historical trend report.
- You can use up to four historical filters on each historical trend report.
- These field types are supported: Number, Currency, Date, Picklist, Lookup.

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- Dated exchange rates are not supported. When you run the historical trend report, it only uses the latest dated exchange rate.
- Internet Explorer 6 is not supported.
- The Report Wizard is not supported. Historical trend reports can only be created with the Report Builder.
- Historical trend reporting with charts is supported in Lightning Experience, but tabular views of historical trend reports aren't available.

⛔ **Important:** If a picklist field is already being used in a historical trending data filter, think hard before changing any of its values. You could make that field less useful for historical reporting in the future.

## Track Changes in Your Sales Pipeline

A historical report can help you monitor your company's sales pipeline to make sure it contains enough activity to meet current and future sales goals. You may want to focus on deals whose value grew or shrank in the last three months, or deals that moved into or out of a given target period.

You'll probably want to compare historical and current values of key attributes of opportunities, such as dates, amounts, and status, to see how your pipeline has changed over time. For example, this summary report points out opportunity amounts and close dates that have changed since yesterday.



1. Snapshot up to five dates to track day-to-day or week-to-week trends.
2. Current and historical values are shown side by side for easy comparison.
3. Changed dates and amounts are highlighted in red or green.
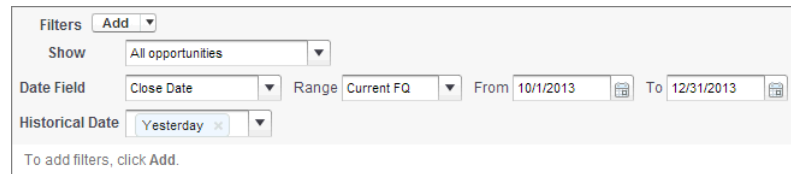
## Watch Your Pipeline Change Over Time

Let's say you want to know how the total value of your pipeline today compares with its value yesterday. Create a simple report to compare the two dates.

1. Create an opportunity history report.

    a. On the Reports tab, click **New Report**.

    b. Under **Select Report Type** > **Opportunities**, select `Opportunities with Historical Trending`.

    c. Click **Create**.

2. For `Show`, select `All Opportunities`.

   Note that the default value in the `Historical Date Field` is `Yesterday`, and the `Amount (Historical)` field shows yesterday's date.

   > 💡 Tip:  "Yesterday" is a *rolling* date value, meaning that it points to a date that is relative to today's date. If you run this same report tomorrow, `Amount (Historical)` will show today's date.



3. Click the down arrow in the headers of the `Amount (Historical)` and the `Amount—Today` columns. Click `Summarize This Field`, then select `Sum`.
   The total amount appears at the bottom of each column.

4. Click the down arrow in the header of the `Amount` column and select `Show Changes`.

5. Click **Run Report**.

6. In the `Change` column, observe the difference between the total value of the `Amount (Historical)` column and that of the `Amount—Today` column.

   > 💡 Tip:  You can see changes at a glance by looking for values that are colored green or red.

You've created a simple historical trending report that can help you analyze your pipeline's behavior.

## Identify Historical Deals Over a Given Value

Suppose you want to focus only on deals in your pipeline worth more than $5,000, but you're not concerned about today's fluctuations. You'll need a historical trending report that filters out any deal whose value was below $5,000 yesterday.

1. Create an opportunity history report.

   a. On the Reports tab, click **New Report**.

   b. Under **Select Report Type** > **Opportunities**, select `Opportunities with Historical Trending`.

   c. Click **Create**.

2. For `Show`, select `All Opportunities`.

3. Filter for historical values over $5,000.

   a. Click **Add** and select `Historical Field Filter`.

   b. Set `Amount (Historical)` to `Yesterday`.

   c. Select `greater than` for the operator.

   d. Enter `5,000` in the last field.

   e. Click **OK**.

**4.** Click **Run Report**.

**5.** In the finished report, observe that all the deals in the `Amount — Historical` column are worth more than $5,000.

> 💡 **Tip:** Values in the Amount, Close Date and Stage fields are shown in green or red to indicate the direction of change. You can reverse the colors by clicking the down arrow in the column header.

You've created a simple report that pulls out all the deals that have were worth more than a given amount as of a given historical snapshot date.

## Find Deals that Have Been Pushed Out

To focus on deals that are taking more time to close than expected, create a historical trending report that finds deals in your pipeline that have had their close dates moved to a later date.

**1.** Create an opportunity history report.

    **a.** On the Reports tab, click **New Report**.

    **b.** Under **Select Report Type** > **Opportunities**, select `Opportunities with Historical Trending`.

    **c.** Click **Create**.

**2.** For `Show`, select `All Opportunities`.

**3.** Filter for close dates that are later now than they were in the past.

    **a.** Click **Add** and select `Historical Field Filter`.

    **b.** Set `Close Date (Historical)` to Feb. 1, 2013.

> 💡 **Tip:** Use the calendar under **Fixed Days** to select the date.

    **c.** Click **OK**.

**4.** Click the down arrow in the header of the `Close Date` column and select `Show Changes`.

**5.** Click **Run Report**.

**6.** For each deal in the report, compare the date in the `Close Date — Historical` column with the date in the `Close Date — Today` column.

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💡 **Tip:** You can see changes at a glance by looking for values that are colored green or red.

## Identify Shrinking Deals

Historical trending analysis can help you prioritize by quickly identifying deals that may be at risk. For example, target the deals in your pipeline that have decreased in value since yesterday. You'll need a historical trending report that gives you the deals whose value yesterday was greater than their value today.

1. Create an opportunity history report.

   a. On the Reports tab, click **New Report**.

   b. Under **Select Report Type** > **Opportunities**, select `Opportunities with Historical Trending`.

   c. Click **Create**.

2. For `Show`, select `All Opportunities`.

3. Filter out any deal that wasn't worth more yesterday than today.

   a. Click **Add** and select `Historical Field Filter`.

   b. Set `Amount (Historical)` to `greater than`.

   c. Set the last field to `Field`.

   Here we're choosing to compare the historical amount with whatever amount is in the `Amount — Today` column, and not with a specific amount.

   d. Click **OK**.
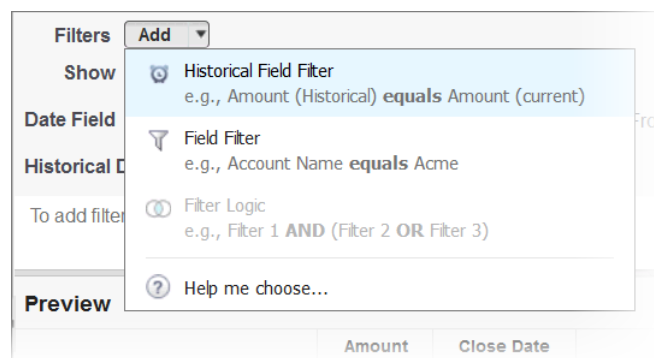


4. Click **Run Report**.

You've created a simple report that flags deals that have shrunk since yesterday. Note that all the results in the `Amount — Today` column are shown in red, to indicate decreases in value.

💡 **Tip:** To change the color-coding for amount changes, click the down arrow above the `Change` column and click `Reverse Colors`.

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## See How Forecast Amounts Have Changed

Let's build a historical report, in matrix format, of the amounts your team members have assigned to each forecast category. Changes in those amounts can reveal how accurately your team is forecasting.

For this example, we'll assume you're about a month into the current fiscal quarter.

1. Create a forecast history report.

   a. On the Reports tab, click **New Report**.

   b. Under **Select Report Type** > **Forecasts**, select *Forecasting Items with Historical Trending*. Before you can select this report type, your organization must have enabled Historical Trending for Forecasting Items. If you do not see the report type listed, talk to your administrator.

   c. Click **Create**.

2. In the Filters area, choose **Show** > **All forecasting items**, then set up your filters.

   a. For **Date Field**, choose End Date. For **Range**, choose Current FQ. The **From** and **To** date fields automatically get the beginning and end dates for the current quarter.

   b. For **Historical Date**, choose *3 Months Ago*, *2 Months Ago*, then *1 Month Ago* from the dropdown menu. Each date you select is added to the field.

**Filter for the historical data you want.**



> 💡 **Tip:** To move `Yesterday` to the right side of the field, delete it and add it again from the dropdown menu.

3. Choose the data you want to monitor for historical changes. In this case, we're interested in the category in which the changes were made and how the forecast amount changed.

   a. In the **Preview** pane, change **Tabular Format** to **Matrix Format**.

   b. Drag the `Owner: Full Name` field from the Field area to the Preview pane to create a row grouping.

   c. Drag the `Forecast Category` field over to the right of `Owner: Full Name` to create another row grouping.

   d. Drag the `Forecast Amount (Historical)` field to the matrix area of the Preview pane, below the yellow bar. In the **Summarize** dialog, select `Sum`.

**Select the fields that contain the data you want to track.**



Columns appear for each of the historical dates you chose in the filters area that contain records.

4. Click **Run Report** to see what data you've gathered so far. Then click **Customize** to keep adjusting your filters and fields if necessary.

5. Once you've defined the data you want to track, create a chart to show it graphically.

   a. In the Preview area, click **Add Chart** and select the line chart icon.

   b. On the Chart Data tab, choose `Sum of Forecast Amount (historical)` for the **Y-Axis** and `Snapshot Date` for the **X-Axis**.

   c. For **Group By**, choose `Forecast Category`, and select **Cumulative**.

   d. Click **OK**, then click **Run Report** again.

6. Click **Save As**. Choose a name and folder for the report and click **Save**.

## Track History for Cases

Monitor activity across cases and identify your case status changes in the last three months of a case's life cycle.

1.  One way to optimize contact center operations is to observe the `Status` field over time, watching for cases that move backward to a previous status. This can help reveal ways to resolve cases more effectively.

2.  For another example, try analyzing historical values of the `Priority` field to identify cases that may have been incorrectly classified when they were opened. Watching for frequent changes in priority may also lead to ways to improve the handling of complex cases.