

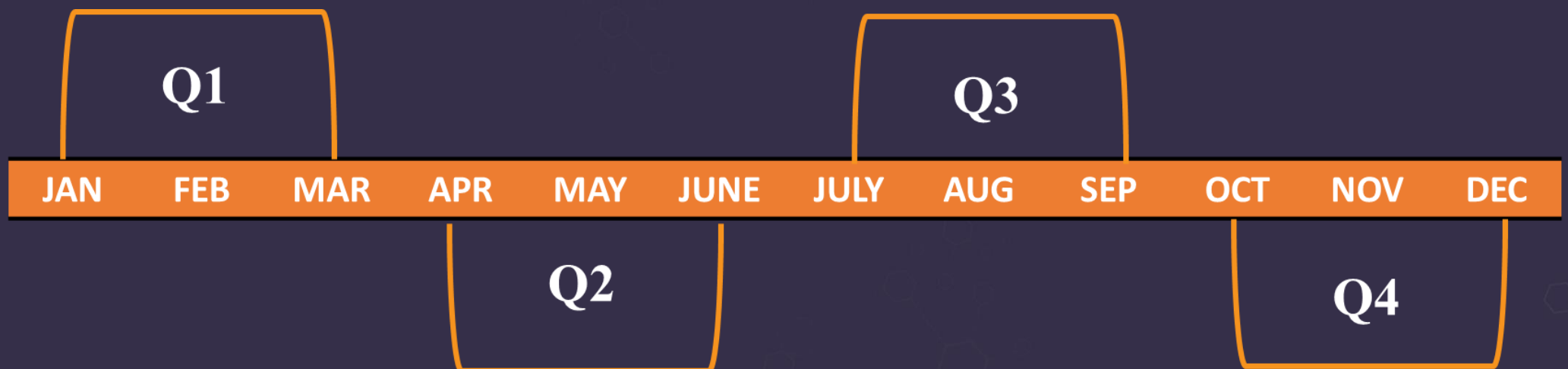
# ANKIT GUPTA

Data Analyst | Prompt Engineer



## CREATING A QUARTER COLUMN IN POWER QUERY

A quarter refers to a period of three consecutive months, typically used in business and financial contexts to track performance, report earnings, or analyze trends. In a calendar year, there are four quarters, each covering three months:



- ❑ Q1: January, February, March
- ❑ Q2: April, May, June
- ❑ Q3: July, August, September
- ❑ Q4: October, November, December



## CREATING A QUARTER COLUMN IN POWER QUERY

**Creating a quarter column in power query that displays quarters as "Q1," "Q2," "Q3," & "Q4,"**

- Load your data into Power Query.
- Select the date column that you want to use to create the quarter column.
- Go to the "Add Column" tab in the Power Query Editor.
- Click on "Custom Column" in the "General" group.
- In the "Custom Column" dialog box, enter a name for your new column, such as "Quarter."
- In the "Custom column formula" box, enter the following formula to extract the quarter in the desired format:

```
let
    QuarterNumber = Date.QuarterOfYear([YourDateColumn]),
    QuarterText =
        if QuarterNumber = 1 then "Q1"
        else if QuarterNumber = 2 then "Q2"
        else if QuarterNumber = 3 then "Q3"
        else if QuarterNumber = 4 then "Q4"
        else "Invalid Quarter"
in
    QuarterText
```



## CREATING A QUARTER COLUMN IN POWER QUERY

Creating a quarter column in power query that displays quarters as "Q1," "Q2," "Q3," & "Q4,"

- Replace [YourDateColumn] with the name of your date column.
- Click OK to create the custom column.



The new "Quarter" column will now display quarters as "Q1," "Q2," "Q3," and "Q4" based on the date values in your dataset.



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## HANDLING DIFFERENT QUARTER STARTING MONTHS

If a company, such as **Earthy Loofa**, has a different starting quarter period that begins in **September** instead of **January** (which is typical for most companies), it means they follow a non-calendar fiscal year. In this case, their fiscal year would start in September and end in August, aligning with their operational and financial cycles.

For Earthy Loofa, the quarters would be structured as follows:



- ❑ Q1: September, October, November
- ❑ Q2: December, January, February
- ❑ Q3: March, April, May
- ❑ Q4: June, July, August



## HANDLING DIFFERENT QUARTER STARTING MONTHS

### STEPS TO FOLLOW:

- In the "Custom Column" dialog box, enter a name for your new column, such as "Fiscal Quarter."
- In the "Custom column formula" box, enter the following formula to calculate the fiscal quarter:

```
let
  MonthNumber = Date.Month([YourDateColumn]),
  FiscalQuarter =
    if MonthNumber >= 9 and MonthNumber <= 11 then "Q1"
    else if MonthNumber >= 12 or MonthNumber <= 2 then "Q2"
    else if MonthNumber >= 3 and MonthNumber <= 5 then "Q3"
    else "Q4"
in
  FiscalQuarter
```

- Replace [YourDateColumn] with the name of your date column that represents the fiscal year.
- Click OK to create the custom column.

The new "Fiscal Quarter" column will now display quarters as "Q1," "Q2," "Q3," and "Q4" based on the non-calendar fiscal year structure starting from September.