**Create Quarters**

In dim\_date table, we have 3 columns:

1. Date
2. fiscal\_year
3. month.

======================================================= **Dividng into Quarters**

========================================================

Company’s fiscal year starts from September, Hence

Sep, Oct, Nov ---- Q1

Dec, Jan, Feb ---- Q2

Mar, Apr, May ---- Q3

Jun, Jul, Aug ----- Q4

Created a calculated column in DAX for fiscal year month number as:

fy\_month\_num =

MONTH ( DATE ( YEAR( dim\_date[date] ), MONTH ( dim\_date[date] )+4 ,1 ))

Deriving Quarters from fiscal year month number as:

Quarters = "Q" & ROUNDUP( dim\_date[fy\_month\_num] / 3, 0)

======================================================= **Classifying into YTD (**Year to Date**) / YTG (**Year to Go)

===============================================================

Now in dim\_date table, we have 5 columns:

1. Date
2. fiscal\_year
3. month
4. fy\_month\_num
5. Quarters

According to calendar dates:

YTD – 1st Jan to current day (Today)

YTD – Current day to year end (31st Dec)

According to company’s financial calendar:

Current day is Last sales month from fact\_sales\_monthly

IF financial month > Last sales month, “YTG”

IF financial month < Last sales month, “YTD”

ytd\_ytg =

VAR lastsalesdate = MAX(fact\_sales\_monthly[date])

VAR lastsalesFYmonth =

MONTH(DATE(YEAR(lastsalesdate), MONTH(lastsalesdate)+4, 1))

RETURN

IF(dim\_date[fy\_month\_num]>lastsalesFYmonth, "YTG", "YTD")