

TABLEAU YTD, QTD, MTD, WTD and LYTD, LMTD, LQTD, LMTD Calculations

Prepared By: Data Tutorials- <https://www.youtube.com/@datatutorials1>

YTD Current Year: *considered date field name as [Order Date]*

Year to date (YTD) refers to the period of time beginning the first day of the current **calendar year** or **fiscal year** up to the current date. YTD information is useful for analyzing business trends over time or comparing performance data to competitors or peers in the same industry.

Using Year() Function	Using DATEDIFF()	By Fixed LOD
<pre>IF [Order Date]<=TODAY() AND YEAR([Order Date])=YEAR(TODAY()) THEN [Sales] END</pre>	<pre>IF [Order Date]<= TODAY() AND DATEDIFF('year',[Order Date],TODAY())=0 THEN [Sales] END</pre>	<pre>{FIXED : SUM(IF YEAR([Order Date])={MAX(YEAR([Order Date]))} THEN [Sales] END)}</pre>

Prior YTD (PYTD): Sales/Profit of Last Year

Using Year Function	Using DATEDIFF()	By Fixed LOD
<pre>IF [Order Date]<=TODAY() AND YEAR([Order Date])=YEAR(TODAY())-1 THEN [Sales] END</pre>	<pre>IF [Order Date]<= TODAY() AND DATEDIFF('year',[Order Date],TODAY())=1 THEN [Sales] END</pre>	<pre>{FIXED : SUM(IF YEAR([Order Date])={MAX(YEAR([Order Date]))}-1 THEN [Sales] END)}</pre>

QTD Current Year:

Quarter-to-date (QTD) is a time interval that captures a company's financial information/Sales/Profit from the start of a quarter to a point later in the quarter.

Older versions of Tableau when Quarter() Function was not Available	Using Quarter() Function in latest version of Tableau	Using DATEDIFF
IF [Order Date]<=TODAY() AND DATEPART('quarter',[Order Date])=DATEPART('quarter',TODAY()) AND YEAR([Order Date])=YEAR(TODAY()) THEN [Sales] END	IF [Order Date]<=TODAY() AND YEAR([Order Date])=YEAR(TODAY()) AND QUARTER([Order Date])=QUARTER(TODAY()) THEN [Sales] END	IF [Order Date]<=TODAY() AND DATEDIFF('quarter',[Order Date],TODAY())=0 THEN [Sales] END

PQTD (Prior QTD): Sales of Prior Quarter of Same/ Current Year

Older versions of Tableau when Quarter() Function was not Available	Using Quarter() Function in latest version of Tableau	Using DATEDIFF
IF [Order Date]<=TODAY() AND DATEPART('quarter',[Order Date])=DATEPART('quarter',TODAY())-1 AND YEAR([Order Date])=YEAR(TODAY()) THEN [Sales] END	IF [Order Date]<=TODAY() AND YEAR([Order Date])=YEAR(TODAY()) AND QUARTER([Order Date])=QUARTER(TODAY())-1 THEN [Sales] END	IF [Order Date]<=TODAY() AND DATEDIFF('quarter',[Order Date],TODAY())=1 THEN [Sales] END

MTD Current Year:

Month to date refers to the first of the month to the last business day before the given current date. For instance, if today is August 17, month to date would equal August 1 to August 16. Depending on this condition you have to change the argument `[Order Date]<=TODAY()` (this includes current day) to `[Order Date]<TODAY()` (excludes current day)

This is because business has not been finalized for the current day. Month to date is used for similar metrics as year to date, such as measuring earnings, return, and income.

Using Month() function	Using DATEDIFF Function
IF [Order Date]<=TODAY() AND YEAR([Order Date])=YEAR(TODAY()) AND MONTH([Order Date])=MONTH(TODAY()) THEN [Sales] END	IF [Order Date]<= TODAY() AND DATEDIFF('month',[Order Date],TODAY())=0 THEN [Sales] END

PMTD (Prior QTD): Sales of Prior Month of Same/ Current Year

-

Using Month() function	Using DATEDIFF Function
IF [Order Date]<=TODAY() AND YEAR([Order Date])=YEAR(TODAY()) AND MONTH([Order Date])=MONTH(TODAY())-1 THEN [Sales] END	IF [Order Date]<= TODAY() AND DATEDIFF('month',[Order Date],TODAY())=1 THEN [Sales] END

WTD Current Year:

Using Week() function	Using DATEDIFF Function
IF [Order Date]<=TODAY() AND YEAR([Order Date])=YEAR(TODAY()) AND WEEK([Order Date])=WEEK(TODAY()) THEN [Sales] END	IF [Order Date]<=TODAY() AND DATEDIFF('week',[Order Date],TODAY())=0 THEN [Sales] END

PWTD (Prior WTD): Sales of Prior Week of Same/ Current Year

Using Week() function	Using DATEDIFF Function
IF [Order Date]<=TODAY() AND YEAR([Order Date])=YEAR(TODAY()) AND WEEK([Order Date])=WEEK(TODAY())-1 THEN [Sales] END	IF [Order Date]<=TODAY() AND DATEDIFF('week',[Order Date],TODAY())=1 THEN [Sales] END

LY YTD (Last Year Year to Date sales) LYTD

Returns the year-to-date total for the previous year's (Last Year) current time member

- For eg. Today if 17 May 2021 and we need to calculate the YTD for the Sales of current year, that means Sales from 01 Jan 2021 to 17 May 2021
- LY YTD calculates the Sales of Last Year till current time of present year i.e from 01 Jan 2020 to 17 May 2020.
- It is calculated to study the performance of Sales Year on Year (YOY) basis.
- **YOY performance = Sum(Sales) of YTD – Sum(Sales) of LY YTD/ Sum(Sales) of LY YTD**

Using Year() function	Using DATEDIFF Function
IF [Order Date]<=DATEADD('year',-1,TODAY()) AND YEAR([Order Date])=YEAR(TODAY())-1 THEN [Sales] END	IF [Order Date]<=DATEADD('year',-1,TODAY()) AND DATEDIFF('year',[Order Date],TODAY())=1 THEN [Sales] END

YOY (Year on Year) Performance

- **YOY performance = Sum(Sales) of YTD – Sum(Sales) of LY YTD/ Sum(Sales) of LY YTD**

$(\text{SUM}([YTD]) - \text{SUM}([LYTD])) / \text{SUM}([LYTD])$

LY QTD (Last Year Quarter to Date sales)/ LQTD

Returns the quarter-to-date total for the previous year's current time member.

Using Year() function	Using DATEDIFF Function
IF [Order Date]<=DATEADD('year',-1,TODAY()) AND YEAR([Order Date])=YEAR(TODAY())-1 AND QUARTER([Order Date])=QUARTER(TODAY()) THEN [Sales] END	IF [Order Date]<=DATEADD('year',-1,TODAY()) AND DATEDIFF('quarter',[Order Date],TODAY())=4 THEN [Sales] END

LY MTD (Last Year Month to Date sales)/ LMTD

Returns the month-to-date total for the previous year's current time member.

Using Year() function	Using DATEDIFF Function
IF [Order Date]<=DATEADD('year',-1,TODAY()) AND YEAR([Order Date])=YEAR(TODAY())-1 AND MONTH([Order Date])=MONTH(TODAY()) THEN [Sales] END	IF [Order Date]<=DATEADD('year',-1,TODAY()) AND DATEDIFF('month',[Order Date],TODAY())=12 THEN [Sales] END