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

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. YTDinformation 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
IF [Order Date]<=TODAY() AND YEAR([Order Date])=YEAR(TODAY()) THEN [Sales] END	IF [Order Date]<= TODAY() AND DATEDIFF('year',[Order Date],TODAY())=0 THEN [Sales] END	{FIXED : SUM(IF YEAR([Order Date])={MAX(YEAR([Order Date]))} THEN [Sales] END)}

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

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

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

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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**

```
(SUM([YTD])-SUM([LYTD]))/ 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
``` |