

## Fiscal Year Workaround

Because there's no built-in option to group pivot table dates by fiscal year, you'll have to use a workaround solution. In the pivot table source data, you can add a column with a formula that calculates the fiscal year, and then add that field to the pivot table.

For example, if your fiscal year starts in July, use the following formula to calculate the fiscal year, where the date is in cell A2:

**=YEAR(A2)+(MONTH(A2)>=5)**

The formula calculates the year of the date in cell A2. Then, it calculates the month of the date in cell A2, and checks to see if the month number is 5 or higher. If the month is less than 5, then zero will be added to the year, otherwise 1 will be added.

In the screenshot below, you can see the fiscal year formula for dates in April and May.

	A	B	C	D	E	F
1	Month	Region	Product	Sales	Fiscal Year	Fiscal Quarter
318	2012-04-30	New England	Scrub, Hypo-Allergenic, 9 oz	7,461	2012	4
319	2012-04-30	Southeast	Scrub, Hypo-Allergenic, 9 oz	9,416	2012	4
320	2012-04-30	Midwest	Scrub, Hypo-Allergenic, 9 oz	8,352	2012	4
321	2012-04-30	West	Scrub, Hypo-Allergenic, 9 oz	7,321	2012	4
322	2012-05-31	New England	Astringent, Organic, 16 oz	10,499	2013	1
323	2012-05-31	Southeast	Astringent, Organic, 16 oz	12,523	2013	1
324	2012-05-31	Midwest	Astringent, Organic, 16 oz	11,891	2013	1
325	2012-05-31	West	Astringent, Organic, 16 oz	10,742	2013	1

## Fiscal Quarter Workaround

If you also want to group the pivot table dates by the fiscal quarter, you can add another column to the pivot table source data. Use this formula to calculate the fiscal quarter, if the fiscal year starts in July.

**=CHOOSE(MONTH(A2),3,3,3,4,4,4,1,1,1,2,2,2)**

The Choose formula calculates the month of the date in cell A2. Based on the month number, the formula selects the appropriate fiscal quarter number from the numbers that follow. For example, if the month is June, the month number is 6. In the Choose formula, the sixth number is 4, so June is in fiscal quarter 4.

In the screenshot below, you can see the fiscal quarter formula for dates in June and July.

- For the April dates, the month is 4, and the fourth month in the Choose formula is 4, so April is in fiscal quarter 4.
- For the May dates, the month is 5, and the fifth month in the Choose formula is 1, so May is in fiscal quarter 1.

	A	B	C	D	E	F
1	Month	Region	Product	Sales	Fiscal Year	Fiscal Quarter
318	2012-04-30	New England	Scrub, Hypo-Allergenic, 9 oz	7,461	2012	4
319	2012-04-30	Southeast	Scrub, Hypo-Allergenic, 9 oz	9,416	2012	4
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324	2012-05-31	Midwest	Astringent, Organic, 16 oz	11,891	2013	1
325	2012-05-31	West	Astringent, Organic, 16 oz	10,742	2013	1
326	2012-05-31	New England	Astringent, Organic, 24 oz	20,386	2013	1

## Add the Fiscal Dates to the Pivot Table

If you had grouped year and quarter dates in the pivot table, ungroup them and remove them.

Refresh the pivot table, and add the fiscal year and fiscal quarter fields to the Row Labels area.

The screenshot shows the PivotTable Fields task pane with the following configuration:

- Fields to add to report:**
  - Month
  - Region
  - Product
  - Sales
  - Fiscal Year
  - Fiscal Quarter
  - Quarters
  - Years
- Drag fields between areas below:**
  - Filters:** (Empty)
  - Columns:** Fiscal Quarter, Month
  - Rows:** Product
  - Values:** Sum of Sales

Q1									
	A	B	C	D	E	F	G	H	
1									
2									
3									
4		Q1			Q1 Total	Q2			
5	Row Labels	May	Jun	Jul		Aug	Sep	Oct	
6	Astringent, Organic, 16 oz	137,689	166,046	195,487	499,222	170,121	170,301	147,913	
7	Astringent, Organic, 24 oz	263,196	316,029	364,256	943,481	325,745	328,549	282,057	
8	Astringent, Organic, 32 oz	394,155	477,375	540,922	1,412,452	496,927	488,489	417,339	
9	Astringent, Organic, 48 oz	128,520	152,970	174,229	455,719	165,092	159,951	136,666	
10	Cream, Aloe Vera Hand, 9 oz	146,400	169,694	202,868	518,962	184,735	176,585	152,286	
11	Cream, Extra Moisturizing Hand, 9 oz	152,343	179,009	217,550	548,902	196,235	189,032	161,504	
12	Cream, Hand and Body, 16 oz	259,199	318,535	376,607	954,341	331,849	322,717	280,599	
13	Lotion, Extra Moisturizing Body, 9 oz	138,877	174,648	200,434	513,959	180,799	175,104	152,729	
14	Lotion, Organic Body, 16 oz	311,882	374,420	431,207	1,117,509	389,879	376,961	332,679	
15	Lotion, Organic Body, 24 oz	455,885	544,787	630,846	1,631,518	564,381	557,965	477,449	
16	Lotion, Organic Body, 9 oz	164,526	193,527	226,265	584,318	203,365	201,288	175,087	
17	Lotion, Organic Hand and Body, 16 oz	328,350	394,032	450,598	1,172,980	414,104	402,856	348,315	
18	Lotion, Organic Hand and Body, 9 oz	175,285	207,801	242,479	625,565	224,979	217,629	189,978	