

Pending Inventory Report

SUMMARY

The Pending Inventory Report allows you to forecast future commissions for specified time periods. It includes sales and commission figures for all your pending transactions, and can be filtered by side, Transaction Label, and date range.

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Generate a Pending Inventory Report

To generate a Pending Inventory report:

- 1 Click Reports from the top menu.
- 2 Click [Pending Inventory Report].
- 3 Define your filters for side and label(if applicable) and select your desired periods.
- 4 Click [Download Report].
- 5 Locate the saved file and open the report in your spreadsheet software

Financials

Commission Summary

Listing Inventory Report

Pending Inventory Report

Account Stats

Total Usage

Usage by Agent

Transaction Reports

With Incomplete Checklists

Overdue Closing

Closing in 30 days

Expiring in 14 days

Recent status changes

Added in May

Pending Inventory

Select the transaction side, transaction label, and date ranges below to include in the Pending Inventory report.

Side

Any Side

Label

Any Label

Periods to include

☒ Current Week

☒ Current Month (May, 2020)

☒ +1 Month (Jun, 2020)

☐ +2 Months (Jul, 2020)

☐ +3 Months (Aug, 2020)

☒ Current Year

Download Report

Q: Why am I missing transactions on my Pending Inventory Report?

A: Only transactions that contain a close date and are set to a pending status will be included in the report. If you feel transactions are missing from a report, verify the following details on the transaction:

- **Close Date:** Confirm the transaction has a "Close Date" and that it falls within the closing period selected for the report.
- **Transaction Status:** Make sure the transaction status is within a "Pending" status category.
- **Side or Label:** Confirm the info on the transaction matches any applied filters for side or label.

Q: Why is my Sales Volume or Pending Commission incorrect or missing?

A: This report is based on the values entered for the Sales Price and Total Commission fields of a transaction, so check to make sure you have entered both the Sales Price and Total Commission for each pending transaction. If one or more of these values is missing, you'll see an asterisk and error indicating there is missing information.

Q: What days of the week are included in the "Current Week" report?

A: The Current Week report is based on a Monday through Sunday time period.

Q: Commission Module Customers Only: Will this report include all pending transactions or only transactions with a CDA?

A: This will include all pending transactions that have a close date, regardless of whether you have generated a CDA or not.