Forecast What's Closing

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Three reports answer 'what's closing' and none of them agree, because each one gates on something different. Pick by the gate you can live with, and the numbers stop looking broken.

Introduction

Run all three pending views on the same day and you'll get three different totals. That's the design, not a fault: each one requires something different to be true about a transaction before it counts, and the requirement is the point.

The strictest one only shows deals whose money is already recorded, which makes it the most reliable forecast and the emptiest list. The loosest one shows every pending deal in the account, which makes it the most complete list and the least financial. The one in between totals your forecast volume and commission without needing anyone to have done commission entry yet.

Once you know which gate each applies, the disagreement stops being confusing and starts being useful.

When to Use This

- You want to know what's expected to close this month or next.
- You're forecasting the brokerage's cash and need volume and commission on deals under contract.
- Two pending reports gave you different totals and you want to know which to trust.
- You need a downloadable list of every pending deal, financials or not.
- Your office enters commissions at closing rather than at contract, and the forecast reports look empty.

1. Run Pending Inventory for the Forecast

Everything in a Pending status with a close date in the period you choose, totalled into forecast sales volume and commission. It doesn't require commissions to have been entered, which makes it the one that works for most offices most of the time.

Forecast the whole pipeline, not just the part you've done the paperwork on: the Pending Inventory Report totals sales volume and commissions on every pending transaction that carries a close date.

See Pending Inventory Report (Commission Module)

> A pending deal with no close date on it won't appear. That's the single most common reason a forecast comes up short — the transaction is there, the date isn't.

2. Run Pending Commissions for Figures You've Already Committed To

The narrower view: only transactions where commissions have been entered and a CDA generated. Fewer deals, but the numbers on them are the ones you actually calculated rather than estimated.

Look forward instead of back. Pending Commissions lists the commission figures on deals that are under contract but haven't closed yet.

See Pending Commissions

> If your office enters commissions at closing, this report will always look sparse — that isn't a fault, it's the gate doing its job. Use Pending Inventory for the forecast and this one for the deals already through paperwork.

3. Search Transactions for the Complete List

When you want every pending deal regardless of financial state — for a closing calendar, a status meeting, a spreadsheet of your own — filter the Transactions page to Pending and download the result. There's no financial gate and no window restriction, so you get the whole thing.

Narrow the Transactions page to exactly the deals you need — search by name, filter by any field, sort the result, and download it.

See Transaction Search

> If you run the same search every week, save it as a shortcut so it's one click from your Home page instead of a rebuild each time.

4. Pick by the Gate, Then Stop Reconciling Them

Choose the report whose requirement matches how your office actually works, and use that one consistently. Trying to make three differently-gated reports agree is work with no answer at the end of it — they're counting different populations on purpose.

> Agent Production carries pending figures too — pending sales volume and pending agent split — if what you want is the forward view broken out per agent rather than per transaction.
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> Every agent on one page: pending and closed units, sales volume, fees, deductions, and commission, all in a single download.
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> See Agent Production