Pending Inventory Report (Commission Module)

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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.

Introduction

A good part of what your office banks this quarter is sitting in deals nobody has cut a CDA for yet. Open the Financials reports to see what's coming and the pipeline can look thin, because most of those reports count from the disbursement rather than from the deal.

This one starts at the transaction instead. It picks up every pending deal carrying a close date inside the window you choose, totals the sales volume and the commission riding on them, and hands you a spreadsheet. Nothing has to be entered by an admin first. That's what sets it apart from the rest of the Financials menu, and it's why an office that waits until closing to cut a CDA can still see a full pipeline.

Monday morning, whoever runs the meeting can say how many deals are in flight, what they're worth, and what the office stands to earn on them. Expect it to disagree with the Commission Summary over the same month. Neither number is wrong. They're answering different questions, and the sections below say which is which.

How It Works

The report reads your pending transactions as they stand right now and files each one into a period by its Close Date.

Which Transactions Are Counted

Every transaction in a Pending status category right now, carrying a Close Date inside the reporting period. No CDA is needed and no commissions have to have been entered, which is what separates this report and the Listing Inventory Report from the rest of the Financials menu. A deal that has since closed drops out, and so does a pending deal with no Close Date entered.

Where the Dollars Come From

The Sales Price and Total Commission fields on each transaction — the ones anyone can fill in, not the commission entry an admin makes. Leave either empty and you get an asterisk and an error flagging the gap rather than a quietly wrong total.

What the Download Holds

The transaction count, the total sales price volume, and the total pending commission for each period you chose, broken out by location when your company has more than one. Filter by side and by Transaction Label before you download. The Current Week period runs Monday through Sunday.

Download a Pending Inventory Report

Set your side and label filters on the Reports page, pick your periods, then download the report as a spreadsheet.

Who Can Do This: Master admins, plus admins granted the View Financial Reports permission for the location. Company-wide figures need that permission in every location, including inactive ones.

To download a Pending Inventory Report:

1. Click [Reports] from the top menu.
2. Click [Pending Inventory Report] from the **Financials** section of the left menu.
3. Set your side and label filters, if you use them.
4. Choose the periods you want to report on.
5. Click [Download Report].

The report saves to your computer. Open it in your spreadsheet app to see sales price volume and pending commissions for each period.

Pending Inventory Report (Commission Module) FAQ

The Pending Inventory Report reads the Sales Price and Total Commission on every pending transaction with a close date, CDA or no CDA. Answers to the common questions about what's counted, which pending report to run, and why two reports disagree. See Pending Inventory Report (Commission Module) FAQ.