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.

Frequently Asked Questions

Does a transaction need a CDA to appear on this report?

No. This is one of the few reports in the Financials menu that reads the transaction instead of the CDA. Every pending transaction with a close date is counted, whether or not commissions have been entered on it.

Why does this report show more pending transactions than the Commission Summary?

Because they're built on different things. This report counts every pending transaction with a close date in the period. The Commission Summary counts only those that also have commissions entered and a CDA generated. Both numbers are right for the question each report is asking.

Which pending report should I run?

The one that matches how far along your paperwork is. Run the Pending Inventory Report when you want the whole pipeline, including deals nobody has entered commissions on yet. Run Pending Commissions when you want commission detail on the deals that have been through Manage Commissions. When you want a list of files rather than totals, a transaction search filtered by Pending gives you that and downloads as a spreadsheet.

Why is sales volume or pending commission blank on a row?

A transaction is missing its Sales Price or its Total Commission. The report flags the gap with an asterisk and an error rather than reporting a total it can't stand behind. Fill the field in on the transaction and download the report again.

Why is a pending transaction missing entirely?

Check its status, its Close Date, and your filters. It needs a Pending status right now and a Close Date inside the period you chose, and it has to match any side or label filter you set. A deal that has since closed drops out, and a pending deal with no Close Date has no period to land in.

What days does the Current Week period cover?

Monday through Sunday. The Current Week period runs on that week, not on a rolling seven days.