Why Is My Commission Report Blank or Missing Transactions?

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A commission report only counts a transaction once its CDA, its close date, its status, and your filters all line up. Here's how to find the one that's off.

Start With the CDA

This is the check that resolves most of them. Every report in the Financials group is built from the commissions you've entered, and entering commissions is what generates the CDA. No CDA, no row.

It catches people out most often right after activating the Commission Module: the transactions are all there, but until commissions have been managed on them, the reports have nothing to read.

To check a transaction the report skipped:

1. Open the transaction the report should have counted.
2. Look for a generated CDA in the commission section.
3. If there isn't one, enter commissions on the transaction and save to generate it.
4. Run the report again.

On a dual-sided deal entered as two transactions, each one needs its own CDA. That's the usual reason only one side turns up.

Then Check the Close Date and the Status

Once the CDA is there, the report still has to place the transaction in your period and in the right pile.

- **Close date.** The transaction needs one, and it has to fall inside the closing period you selected. A transaction with no close date has nowhere to land, so it's counted nowhere.
- **Status category.** Closed reports count statuses in the Closed category. The Pending Commissions report counts statuses in the Pending category. A transaction in a Fell Through category is excluded from both.
- **The status now, not then.** Reports read what a transaction is today. A deal that has since closed drops off the pending report.

Your Filters May Be Narrowing It

Filters you set on the way in quietly shrink what comes back.

- **Acceptance Date Range.** On the Pending Commissions report this is the one to watch. Setting it makes the report match on both the close date and the acceptance date, so every transaction without an acceptance date drops out. Clear it unless you need it.

- **Side and Label.** If the transaction's side or label doesn't match what you selected, it isn't returned.
- **Location.** A location filter excludes everything outside it. Company-wide is the default on most of these reports, but not on all of them.
- **Closing Period.** Several reports default to Last Month or the next 30 days. Widen the period, or set a custom date range, before concluding anything is missing.

A Transaction Appears but an Agent Doesn't

Sometimes the deal is on the report and one of the agents isn't. That usually means the CDA was generated with the agent's Sales Volume left blank.

To put the agent back on the report:

1. Open the transaction.
2. Click [Update Commissions].
3. Go to Step 2 — Broker/Agent Commission Disbursement.
4. Enter the agent's Sales Volume, and their unit value if that's blank too.
5. Continue through the remaining steps and save your commissions.

A new CDA is generated and the reports pick the agent up. Everything you'd already entered is preserved.

Canceled Transactions Show Up When You Don't Want Them

This is the opposite complaint, and it has the same root. Whether a canceled deal counts depends on which category your Canceled status sits in. If it's categorized as Closed, commission reports include it. Move it to the Fell Through category in your transaction status settings and it drops out.

Still Missing?

If the CDA, the close date, the status, and the filters all check out and the transaction still isn't there, send us the report you ran and the transaction you expected on it, and we'll take a look.

Learn More

This article covers the reports you download from the Financials menu. The Commission Summary page has its own checks.

A blank page, a missing deal, or a total that can't possibly be right almost always comes back to the same thing: what the report can read. Here's how to find it.

See My Commission Summary Doesn't Look Right

If it's a core production or inventory report rather than a Commission Module one, the checks are different again.

A transaction only lands on a production report when its status, its dates, and your filters all line up. Here's what each report is looking for.

See Why Are Transactions Missing From My Report?

Still Have Questions?

Didn't find your answer above? Email us at help@paperlesspipeline.com and we'll help.