

Configure Commission & CDA Settings

SUMMARY

Paperless Pipeline's commission module generates commission disbursement authorizations (CDA's) right out of Pipeline. The CDA is a document that can be sent to escrow, title company, an attorney, or whoever is handling the closing. It gives instructions on how commission should be dispersed. The look, feel, and language of the CDA can be customized.



As of 4/2/17, the "Generate CDA" option has been renamed to Manage/Update Commissions

IN THIS ARTICLE

[Navigate to Commission & CDA Settings](#)

[Customize Commission & CDA Settings](#)

🕒 2:25

Navigate to Commission & CDA Settings

- 1 **Go to Admin / Settings**
 - Click your name in the upper right corner, then [Admin / Settings].
- 2 **Click "Manage Locations" from the left menu.**
- 3 **Click the gear to the right of the office locations and select "Commission & CDA Settings".** This page allows customization of the CDA settings for that specific office.



These customization steps must be followed for each individual active office location.

Search by address, mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

Add Transaction Help Rachel M.

Admin / Company Settings

Global Settings (PP Account ID: 2016-1019)

Company Name
Coffee is for Closers Realty

Brokerage License #
ABC-123

☐ Only allow PDF documents

☐ Enable Entered Docs feature

☒ Prevent duplicate document uploads

☐ Email agents expiring and closing transaction reminders

☒ Email agents when admin comments on documents

☒ Enable New Offer feature

☒ Enable auto-expiration of listings

Current Plan

Monthly charge	\$350
Transactions created	188
Transaction quota	350
Next bill date	8/18

Customize Commission & CDA Settings

There are several different sections of the CDA that can be customized.

Payability Settings

Determine if direct disbursement is needed for the selected office in this section.

Checking the first checkbox adds that Escrow needs to pay agents' and brokerage commissions to the company. The company will then disburse the appropriate commission amount to the agents.

Clicking the second checkbox adds Escrow needs to pay referral commissions to the company and the company will disburse this commission to referrers.

CDA Signature and Signer

The next section allows uploading a signature for the name that should appear on the CDA as having approved it.

- 1 Include a CDA Signer's Name which should match the signature in the Signature Signer field.
- 2 Fill out any signature text that will appear beneath that person's name. This could include address, office location, phone number, and optionally fax and email.

Franchise Fees

If the company charges a franchise fee, that percentage or flat dollar amount can be included here. If there is no franchise fee charged, then leave this field blank.

CDA Instructions

The CDA instructions field is where instructions that need to appear on the document can be listed.

CDA Preview

- 1 To preview the CDA, click the magnifying glass to the right. A quick preview of the instructions and any of the other features will appear.