CDA Generation FAQ

Last Modified on 09/04/2026 11:16 am EDT

One CDA lives on a transaction at a time, it's built from the commission numbers you enter, and only admins with financial permission ever see it. Answers to the common questions about creating, updating, deleting, and sharing a CDA.

Can agents see the CDA?

No — CDAs are admin-only financial documents. There's no permission and no doc category that opens one to an agent. Agents can download their own *Agent Commission Statement* from the transaction, and an admin can email a CDA to an agent when they genuinely need one.

Can I have more than one CDA on a transaction?

No — one CDA per transaction. Generating a new one replaces the previous version. Separate CDAs per side of a dual deal, or per agent on a shared file, aren't available; offices that need two documents run the two sides as two transactions.

Can I edit the CDA document itself?

No — you change the numbers behind it instead. Click [Update Commissions] on the transaction, adjust the figures, and [Save Commissions]. Pipeline builds a fresh CDA from the result.

What happens if I delete a CDA?

It resets the transaction as though commissions were never entered. The financial information behind the document goes with it. If you only need to correct a figure, use [Update Commissions] rather than deleting.

If I start Update Commissions and don't finish, do I lose the CDA?

Yes — the old CDA is removed as soon as you pass the first step. Clicking [Calculate & Continue] deletes it whether or not you finish, so work through every step and click [Save Commissions] in one sitting.

Can I generate a CDA for an agent who has been deactivated?

Yes, with one extra move. Reactivate the agent's profile, enter commissions and generate the CDA, then deactivate them again. Deactivating a user never deletes their transactions, commission entries, or CDAs.

Can I change the wording or layout of the CDA?

No — the format and verbiage are fixed. What you do control is the custom CDA instructions above and below the payables, the signature block, and the location contact details in the header.

Where did the Generate CDA button go?

It was renamed. The same control is now [Manage Commissions] on a transaction with no commissions entered, and [Update Commissions] once they have been.

Can a Zap run when a CDA is generated?

No — a transaction status change is the only Zapier trigger Pipeline offers. Offices that want a CDA to kick off an automation usually add a status to their workflow, such as *Closed/Paid*, and trigger on that instead.

How do I find closed transactions that never got a CDA?

Search for them. From the transactions list, open *More Search Options*, filter to a Closed status with the close-date range you want, and select **Commissions Not Entered**.

Learn More

The Commission Disbursement Authorization tells your closing agent how the commission should be split — and Pipeline builds it from the numbers you enter on the transaction.

See CDA Generation

Still Have Questions?

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