CDA Generation

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

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.

Introduction

Somewhere between your office and the closing table, someone has to put in writing how this commission gets divided and who each check is made out to. That document is the Commission Disbursement Authorization, and your closing agent works from it when the money moves.

In Pipeline you never build one by hand. You enter the transaction's commission figures in the Commission Module, and Pipeline produces the CDA from them the moment you save. That's the whole point of the connection. The document your title company reads and the reports you run at month end come out of one set of numbers, so they can't tell different stories about the same deal and nobody has to reconcile a spreadsheet against a PDF.

The document your closing agent works from and the file it came from can't disagree. If a figure turns out to be wrong, you don't correct the document. You go back to the commission entry, change it there, and Pipeline builds the CDA again from the corrected numbers.

How It Works

One transaction, one CDA, built from the commission entry and stored with the transaction's financial docs.

Where a CDA Comes From

From the commission entry on that transaction. You work through **[Manage Commissions]** — or **[Update Commissions]** if figures are already in — and saving builds the document. A transaction holds exactly one, so generating again replaces the previous version rather than adding a second. If you're looking for a **[Generate CDA]** button you remember, that's what it was renamed to years ago.

What Has to Be True Before You Can Generate One

Four things, and all four have to hold:

- Your account is subscribed to the **Commission Module**. It's a paid add-on, and without it there's no CDA option anywhere.
- Your location's **Commission & CDA Settings** are saved, including the CDA signer's name and signature.
- The transaction has at least one **active in-house agent who isn't marked as an assistant**
- You have the **Enter Financial Data** permission for that location.

What You Can Do With One Afterward

The document itself can't be edited. You change the commission entry behind it and Pipeline builds a fresh CDA from the result, and deleting it resets the transaction as though you'd never entered commissions. Either way the transaction's history records the CDA having been created and deleted. Agents never open the CDA doc; they read their own *Financial Info* and download their own commission statement, while an admin with **View Financial Reports** can read the CDA without being able to change the numbers. To find the closed files still waiting on one, open *More Search Options* on the transactions list and filter on **Commissions Not Entered**.

Generate a CDA

> Enter the transaction's commission numbers and Pipeline produces the CDA when you save.

> **Who Can Do This**: Master admins and admins with the **Enter Financial Data** permission for the transaction's location.

To generate a CDA:

1. Go to the transaction and click [Manage Commissions] from the left menu.
2. Enter the transaction's commission information in each section, clicking [Calculate & Continue] to move to the next one.
3. Click [Save Commissions].

Pipeline generates the CDA and adds it to the transaction's *Financial Docs*, a *Financial Info* section appears on the transaction, and the CDA joins your *Unreviewed* page.

Update a CDA

> Change the commission entry and save — Pipeline rebuilds the CDA from the corrected numbers.

> **Who Can Do This**: Master admins and admins with the **Enter Financial Data** permission for the transaction's location.

To update a CDA:

1. Go to the transaction and click [Update Commissions] from the left menu. Everything you entered before is still there.
2. Correct the figures you need to change, clicking [Calculate & Continue] through every step. Don't stop partway — the previous CDA is removed as soon as you pass the first step.

3. Click [Save Commissions].

A new CDA replaces the old one, and Pipeline updates any values it shares with the transaction — buyer name, sale price, total commission — at the same time.

Delete a CDA

> Remove the CDA and the commission entry behind it so you can start the transaction's commissions over.

> **Who Can Do This**: Master admins and admins with the **Enter Financial Data** permission for the transaction's location.

To delete a CDA:

1. Go to the transaction and find the *Commission Disbursement Authorization* document.

2. Click the [Gear] to the right of the document, then [Delete].

Pipeline removes the CDA, and the transaction returns to the state it was in before you entered commissions. To put a CDA back, enter commissions again from the beginning.

Get the CDA to Escrow or Title

The CDA leaves Pipeline as an email attachment rather than a download and a re-upload, and because agents can't send one themselves, this is the step an admin does on their behalf.

Every transaction has a built-in message area — write a note for your own records, or send an email with docs attached, without leaving the deal.

See Composing an Email

When One Deal Needs Two CDAs

A transaction holds one CDA, so a dual-sided deal that needs a separate document for each side, or a commission arriving in installments, needs a second transaction to hang the second CDA on.

Restart a deal or manage multiple offers without starting over — New Offer gives you a clean, linked transaction.

See New Offers

CDA Generation FAQ

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.

See CDA Generation FAQ

CDA Generation Troubleshooting

Running into a problem? Start here.

- Why Can't I Generate a CDA?