CDA Lock

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Generating a CDA locks the numbers behind it, so the transaction and the disbursement document can never quietly disagree.

Introduction

An agent goes to fix the sale price on a transaction and can't. The field is still there, it just doesn't take an edit any more, and the notice mentions a completed CDA. Nothing broke, and nobody took their access away.

Once a CDA exists, a short list of fields stops being editable on the Edit Transaction page: the buyer's name, the sale price, the total commission, the earnest money amount. Those are the figures the disbursement was built from and has already told a closing agent about. Changing one somewhere that doesn't feed back into the commission entry would leave your transaction and the document sitting at title saying different things about the same deal. It isn't a permission problem, so there's nothing for an admin to switch on.

It's a different door, though, not a dead end. Every one of those fields is still changeable from inside the commission entry, and when you change it there the transaction and the CDA move together. One thing to carry in: the word lock covers a second, unrelated behavior here, where Pipeline holds a transaction for a few minutes while an admin is already entering commissions on it.

How It Works

One gate, a short list of fields behind it, and two ways through.

What Locks, and When

Generating a CDA locks four fields on the *Edit Transaction* page: **Buyer**, **Sale Price**, **Total Commission**, and **Earnest Money Amount**. Buyer and seller contact details go with the buyer name, so an office that adds buyer contacts after the fact does it before entering commissions. The *Commission Summary* section locks on either of two events, a CDA being generated or the transaction reaching a Closed status, whichever happens first. This applies to everyone on that page, admins included, and it isn't a permission, so there's nothing to switch on. An admin's way through is the commission entry; deleting the CDA also releases the lock, but it resets the entry with it, so reach for that only when you want to start over. An agent who needs one of these figures changed asks an admin, and can email one directly from the transaction.

What the Lock Doesn't Cover

The fields above, and only those. Change a closing date or remove an agent after a CDA exists and Pipeline doesn't prompt you to rebuild it — the CDA quietly keeps the figures it was built with. If your workflow allows late changes to dates or agents, make regenerating the CDA part of it.

The Other Lock: One Admin at a Time

When an admin opens a transaction's commission entry, Pipeline temporarily locks that transaction so a second admin can't work the same numbers at once. The second admin sees a message saying the transaction is locked by another user. It clears on its own after up to 15 minutes, or immediately when the first admin clicks **[Save Commissions]**. Nobody else can override it, so the fastest resolution is to ask whoever is in there to finish and save.

Change a Locked Field on a Transaction With a CDA

Edit the buyer name, sale price, total commission, or earnest money through the commission entry, so the transaction and the CDA update together.

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

To change a locked field on a transaction that already has a CDA:

1. Go to the transaction and click [Update Commissions] from the left menu.
2. Correct the figure in the step it belongs to — buyer name, sale price, and total commission all sit in*Sale Info*, the first step.
3. Click [Calculate & Continue] through every remaining step without stopping.
4. Click [Save Commissions].

Pipeline updates both the transaction and the CDA to the new figure, and you don't have to re-enter anything else.

Adjust Earnest Money After a CDA Exists

When earnest money is held as a deduction in the Commission Module, you can change it without deleting the CDA.

Who Can Do This: Master admins and admins with the **Enter Financial Data** permission for the transaction's location. **Allow earnest money deposit deduction** must be turned on in the location's Commission & CDA Settings.

To adjust earnest money after a CDA exists:

1. Go to the transaction and click [Update Commissions] from the left menu.
2. Click [Calculate & Continue] to the *Fees & Deductions* step.
3. Update the **Earnest Money Deposit** amount.

4. Click [Calculate & Continue] through the remaining steps, then click [Save Commissions].

Pipeline revises the deduction and builds a new CDA from it, leaving the rest of the entry untouched.

CDA Lock FAQ

Once a CDA exists, Pipeline holds the buyer, sale price, total commission, and earnest money to the figures on it. Answers to the common questions about what locks, why, and how to change it anyway.

See CDA Lock FAQ