Change the Numbers After the CDA Is Generated

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The close date moved, the sale price changed, or the name on a payable was wrong. Everything you entered is still there — but there's one way to reopen it that leaves you with a CDA, and one that doesn't.

Introduction

Generating a CDA locks the figures behind it, which is the point: the transaction and the disbursement document can't quietly disagree. It doesn't mean the numbers are final. [Update Commissions] reopens the whole entry with every figure you typed still in place, and saving rebuilds the document from whatever you changed.

What catches people is what happens the instant you start. Moving past the first step deletes the existing CDA immediately, before you've entered anything new, so an update you begin and then abandon leaves the transaction with no CDA at all. Finish the pass, every time.

When to Use This

- The closing moved and the CDA still shows the old close date.
- The sale price or the commission changed after you'd already generated the document.
- A buyer's name, the company name, or an office address is wrong on a CDA you've issued.
- You changed the CDA signer and the existing documents still carry the old signature.
- You started an update, backed out, and now the transaction has no CDA on it.
- The deal fell through and it's still showing up in your commission reports.

Why This Beats Starting Over

The instinct when a figure is wrong is to delete the CDA and re-enter the deal from scratch. It feels safer — a clean document, nothing carried over from the mistake.

It's also a lot of retyping, and every re-keyed figure is a chance to introduce a second error into a document your closing agent is going to act on. Update keeps everything you already got right and lets you change only what moved. Deleting is for a deal that isn't happening, not for a deal whose details changed.

1. Reopen the Entry With Update Commissions

Click [Update Commissions] on the transaction. Every figure you entered before — sale info, splits, fees, deductions, referrals — comes back pre-filled, so you're editing rather than rebuilding.

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

See CDA Lock

2. Click Through Every Step in One Pass

This is the part to get right. The moment you move past the first step, the existing CDA is deleted — so there is no safe stopping point in the middle.

Do not start an update you don't have time to finish. Click [Calculate & Continue] through every step, changing what needs changing and leaving the rest alone, and end with [Save Commissions]. Walking away partway through leaves the transaction with no CDA until someone completes a full pass.

3. Let the Document Pick Up Everything Else That Changed

The rebuilt CDA doesn't only carry the figures you edited. It re-reads the settings behind the document as well, which is why an update is also the fix for changes made somewhere other than the transaction — a new close date, a corrected company name or address, an updated payable name, a new signer and signature image.

The Compensation 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



This is the whole reason a settings change comes with the phrase *applies to CDAs generated from now on*. Existing documents aren't rewritten in place — you run Update Commissions on the transactions that need the new details.

4. Delete Instead When the Deal Died

If the transaction isn't happening, don't update it. Delete the CDA using the gear icon beside the document, and the transaction drops out of your commission reports entirely — which is what you want for a deal that never produced any money.



Deleting the CDA doesn't delete the transaction or anything on it. The file, its documents, and its history all stay; only the disbursement document and the transaction's place in your financial reports go away.