Tell Title Something the CDA Has No Field For

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Wire instructions, a mailing address, an MLS number, a fee to collect from the other side — real closing details with no box to put them in. There's one field for all of it, and it prints.

Introduction

The Commission Module has a field for everything it calculates. What it doesn't have is a field for everything a closing agent might need to be told, and the gap between those two shows up on almost every unusual deal.

The answer support reaches for constantly is the instructions block. Anything you type there prints on the CDA, which means your title company reads it, and that's enough for a surprising share of the things offices come looking for a feature to handle.

Write it for one transaction during commission entry, or set it once per Location so it appears on every CDA that office produces.

When to Use This

- Escrow needs wiring or direct-deposit details for an agent's payment.
- An agent's mailing address has to be on the disbursement and there's no field for it.
- Your state or your title company wants the MLS number on the document.
- A builder or outside party is paying a bonus that no field accounts for.
- You're collecting a transaction fee from the co-op agent at closing.
- Earnest money exceeds the gross commission and the numbers need explaining.
- You need escrow to split a disbursement or pay a second entity.

1. Write Instructions for One Transaction

During commission entry, the final step carries a **CDA Instructions** / **Special Instructions** box. Type the detail there in plain language, addressed to the person who'll act on it — *Collect $250 transaction fee from the co-op agent at closing*, *Wire agent proceeds to…*, *Seller bonus of $1,500 paid by builder at closing*.

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

> Write it as an instruction, not a note to yourself. This block is read by someone outside your office who has no context for your arrangement, so name the amount, name who owes it, and name when.

2. Set Standing Instructions for a Whole Location

When the same sentence belongs on every CDA an office issues — a standing remittance instruction, a compliance line your state requires — put it in the Location's Commission & CDA Settings instead of retyping it. Every CDA that Location generates from then on carries it.

Set up Commission & CDA Settings for each of your offices to decide who gets paid directly, whose signature signs the CDA, and what instructions your title company reads.

See [Commission & CDA Settings]

> Standing instructions apply to CDAs generated afterwards. Documents you've already issued keep what they had until you run an update on them.

3. Store the Details You Retype Every Time

If you're pasting the same agent's bank details or address into instructions deal after deal, keep them on the agent instead. Commission Notes on their profile surface right where you're working, with a one-click copy that drops straight into the instructions box.

Some of an agent's plan won't fit in a percentage field. Commission Notes hold the rest, and show up right where you enter commissions.

See [Commission Notes]

Direct deposit details, a mailing address, a licence number, an odd split for lease deals — everything about an agent that has no field of its own goes in one place, and shows up exactly where you need it.

See [Stop Retyping an Agent's Payment Details]

4. Know What Instructions Can and Can't Do

Instructions communicate; they don't calculate. Nothing you write in that box is added, subtracted, tracked, or reported — it's text on a document telling a human what to do.

That's the honest limit worth knowing before you build a process on it. The Commission Module disburses in-house commission; collecting a fee from an agent at another brokerage, for instance, is genuinely outside what it does, and the instruction line is a workaround rather than a feature. It works, and your closing agent will act on it, but nothing in your reports will know the money moved.