Unreviewed CDAs

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Every CDA you generate lands in its own section of the Unreviewed page and stays there until an admin marks it Reviewed.

Introduction

A CDA is a document, and in Pipeline every document that lands on a transaction has to be looked at by an admin before it counts as handled. CDAs are no exception — the one you just generated joins the *Unreviewed* page automatically, in its own section, alongside the docs your agents have uploaded.

It's a small piece of machinery with one job: give the broker a running list of the disbursement documents the office has produced but nobody has looked at twice. Offices that don't want that second look can't switch it off, but clearing the list takes seconds.

How It Works

One section on an existing page, fed automatically, cleared by marking each CDA reviewed.

Where It Lives

On the *Unreviewed* page — click [Unreviewed] at the top of Pipeline — where CDAs appear in their own **Unreviewed CDAs** section, separate from the ordinary unreviewed docs.

How a CDA Gets Here

Automatically, the moment it's generated. There's nothing to queue and nothing to send. Every CDA the office produces lands here, which is what makes the section a complete list of disbursement documents rather than a sample of them.

How a CDA Comes Off

Only by being marked **Reviewed**, exactly like any other document. Nothing else clears it — not the transaction closing, not the CDA being emailed to title. And there's no setting that exempts CDAs from review. If your office doesn't want the extra step, the practical answer is to make clearing this section part of somebody's routine: open it periodically and mark everything reviewed in one pass.

Who Sees It

The same people who can see a CDA anywhere else. CDAs are broker-level financial documents, so an admin needs financial permission for the location to see them — and they need the doc-review permission to be on the *Unreviewed* page at all. Agents have neither, so no agent ever sees this section.

Getting a Copy From Here

There's no download button in this section. To save a CDA from the list, click its name to open the preview, then

use [Open Doc] and save it from there. Downloading the document from its own transaction works too.

View Your Unreviewed CDAs

See every CDA your office has generated that no admin has signed off on yet.

Who Can Do This: Master admins and admins with financial permission for the location, who also have permission to mark docs as reviewed.

To view your unreviewed CDAs:

1. Click [Unreviewed] at the top of Pipeline.
2. Go to the *Unreviewed CDAs* section.

Every CDA still waiting on review is listed. Marking one reviewed takes it off the list, the same way it works for any other document.

Save a CDA From the Unreviewed CDAs List

Open a CDA from the list and save a copy without going to its transaction.

Who Can Do This: Master admins and admins with financial permission for the location, who also have permission to mark docs as reviewed.

To save a CDA from the unreviewed CDAs list:

1. Click [Unreviewed] at the top of Pipeline, then go to the *Unreviewed CDAs* section.
2. Click the CDA's name to open its preview.
3. Click [Open Doc], then save the file from there.

You get a copy of the CDA and your place in the list is unchanged.

Clear a CDA Off the List

Nothing else takes a CDA off this section, and the sign-off does more than clear the row.

You sign off on a doc by checking **Reviewed** — that clears it from the queue, locks it against edits, and records who reviewed it and when.

See Doc Review