Why Can't I Generate a CDA?

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When the option to enter commissions isn't there, or it's there and won't let you through, it's almost always one of five gates. Work down the list in order.

Your Account Isn't on the Commission Module

The Commission Module is a paid add-on. Without it there's no CDA anywhere in Pipeline — no [Manage Commissions] in a transaction's left menu, no commission fields, no CDA document. This is the usual answer when someone follows a tutorial video and can't find the controls it shows.

Fix: Ask a master admin whether the module is on your account. If it isn't, email us and we'll walk you through adding it.

Commission & CDA Settings Haven't Been Saved for That Location

You set Commission & CDA Settings per location, and a transaction's location needs its own settings saved before you can enter commissions against it. The signature block matters here more than people expect: if the CDA signer's name and signature image aren't filled in and saved, the option doesn't appear on transactions even though the settings page itself opens fine.

Fix: A master admin completes and saves Commission & CDA Settings for that location — including the signer's name and signature — then reload the transaction with a hard refresh.

There's No Active In-House Agent on the Transaction

A CDA disburses commission to somebody, so the transaction needs at least one **active in-house agent who isn't marked as an assistant**. A file with only an assistant on it doesn't qualify, and the [Manage Commissions] option doesn't appear.

Fix: Open [Edit Transaction] and either remove the [assistant] label from the agent who's actually the agent on this file, or add an active in-house agent alongside them.

The Agent on the File Is Deactivated

Same gate, different cause. An agent whose profile has been deactivated no longer counts as an active in-house agent, so an old closed file can lose its ability to generate a CDA long after the fact.

Fix: Reactivate the agent's profile, enter commissions and generate the CDA, then deactivate them again. Deactivating doesn't touch the financial information you just entered.

You Don't Have the Enter Financial Data Permission

Entering commissions and generating CDAs takes the **Enter Financial Data** permission for the transaction's location. Admins without it don't see the option at all. The **View Financial Reports** permission is a different thing —

it lets someone read CDAs and broker-level reports, but not create or update one.

Fix: A master admin grants **Enter Financial Data** for the relevant location from the user's profile on the Manage Users page. We can't make permission changes on an account's behalf.

Still Stuck?

If all five check out and the option still isn't there, try a hard refresh first — then contact us and tell us which transaction you're looking at, so we can see the same screen you are.

Learn More

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

Still Have Questions?

Email us at help@paperlesspipeline.com and we'll take a look at the transaction with you.