Commission & CDA Settings

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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.

Introduction

The Commission Disbursement Authorization is the document your title company, escrow officer, or closing attorney actually acts on — it tells them who to cut checks to and for how much. Commission & CDA Settings are where you decide what that document says before you ever generate one.

These settings belong to a Location, not to your account. Every office you plan to manage commission for gets its own set, and saving them is what makes Manage Commissions appear on that office's transactions. Set the payability rules, upload the signature that signs the form, add your office's contact details, and write whatever standing instructions your title company needs, and the rest of the module has what it needs to work.

How It Works

One page per office, reached through that office's gear menu, holding everything the CDA needs to know.

Where the Settings Live

Click the **[Gear]** in the upper-right corner, then **[Admin / Settings]**. From the left menu, click **[Manage Locations]**, click the gear next to a Location, and choose **[Commission & CDA Settings]**.

One Office at a Time

Settings are per Location, and there's no shortcut for copying them. Add a new office and you'll set it up from scratch — though you can download the signature image from an office you've already configured and re-upload it to the new one rather than hunting for the original file.

What Changes Take Effect On

A CDA is a static PDF, written the moment you save commissions. Everything you change here applies to CDAs generated from that point forward. To bring an already-generated CDA up to date, reopen its transaction and re-save the commissions — Pipeline keeps the figures you entered, so there's nothing to type again.

What Sits Above These Settings

A few things that appear on the CDA aren't set here at all. Your company name, your logo, and the brokerage's payable name are account-level, so they're the same on every office's CDA. If two offices need genuinely different branding on their disbursement forms, that's two accounts.

Set Up Commission & CDA Settings for a Location

> Configure one office's disbursement form — who gets paid directly, who signs, and what the title company

> reads.

> **Who Can Do This**: Master admins.

To set up Commission & CDA Settings for a Location:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings]. From the left menu, click [Manage Locations], click the gear next to the Location, then select [Commission & CDA Settings].

2. Complete the settings that apply to this office (outlined below), then click [Save Settings].

CDA Payability Settings

Two checkboxes that decide who the title company pays. Check the first and the CDA instructs them to send **agent commissions** to your brokerage, which then disburses to agents; leave it unchecked and each agent gets their own payable line and is paid directly. The second box does the same for **referral commissions**.

CDA Signature

Upload the **Signature Image** of the broker or whoever is authorized to sign, then fill in the **Signer's Name** and the **Signature Text** — title, company name, address, anything that should print under the signature.

Location Contact Info

The **Address** and **Phone Number** that print in the CDA header, with **Fax** and **Email** optional. This is how escrow reaches your office about the disbursement.

Franchise Fee

If this office pays a franchise or corporate fee per transaction, set it here as a flat dollar amount or a percentage, and give it whatever name your office uses in the **Franchise fee custom name** field. Leave the amount empty if you don't pay one, or enter 0 if it varies deal to deal.

Off-the-Top Deductions

Check **Allow off-the-top deductions** to collect deductions such as B&O, a royalty fee, or state tax before the broker and agent split the commission.

Earnest Money Deposit

Check **Allow earnest money deposit deduction** if your brokerage holds earnest money that needs to be credited back at closing.

CDA Instructions

Standing text that prints on every CDA for this office — wiring details, a mailing address, anything escrow needs.

You get two boxes, one shown above the Payables section and one below.

Save, and the office is ready: **[Manage Commissions]** now appears on its transactions, and every CDA you generate for it follows these rules.

Update the CDA Signature

> New managing broker? Swap the signature for that office and every CDA generated afterward is signed by the right person.

> **Who Can Do This**: Master admins.

To update the CDA signature:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings], then [Manage Locations].
2. Click the gear next to the Location, then [Commission & CDA Settings].
3. Scroll to the CDA signature section and click [Replace Image] to upload the new signature.
4. Update the **Signer's Name** and **Signature Text** so the block under the signature matches.
5. Click [Save Settings].

Every CDA generated for that office from now on carries the new signature. CDAs already sitting on transactions keep the old one until you re-save their commissions.

Add Custom Instructions to Your CDAs

> Wiring details, a mailing address, a note about how checks should be cut — put it on every CDA this office generates.

> **Who Can Do This**: Master admins.

To add CDA instructions:

1. Open the Location's Commission & CDA Settings.

2. Enter your text in **CDA instructions (to be shown above Payables)**, **CDA instructions (to be shown below Payables)**, or both.

3. Click [Save Settings].

New CDAs for that office carry the instructions, and you can edit them per transaction while entering commissions. One thing to know: a transaction that already has commissions entered won't pick up instructions you add later — paste them into the instructions field when you update commissions there.

Commission & CDA Settings FAQ

Every office you manage commission for gets its own Commission & CDA Settings, and a master admin sets them. Answers to the common questions about finding the page, changing a signature, and updating CDAs you've already generated.

See Commission & CDA Settings FAQ

Commission & CDA Settings Troubleshooting

Can't find the page? Start here.

- Why Don't I See Commission & CDA Settings?