Make Your CDAs Show the Right Company and Payable Names

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The name at the top of the CDA, the name on the brokerage's check, and the name on an agent's check are three different settings in three different places. Here is which one you're actually looking for.

Introduction

A CDA carries several names, and they come from several places. The company name at the head of the document, the address underneath it, the brokerage's line in the payables, and each agent's line — each has its own field, and none of them updates any of the others.

That's a feature rather than an oversight. A brokerage that operates under a DBA, an agent who takes payment through an LLC, an office that moved: each needs one of those names to change without dragging the rest along. But it does mean fixing a wrong name starts with working out which of the four you're actually looking at.

When to Use This

- Your office moved and the old address is still heading every CDA.
- The checks need to be made out to your DBA, not the name at the top of the account.
- An agent takes payment through an LLC or a team name and their personal name is printing.
- You changed a name in settings and the CDAs you already issued still show the old one.
- Your logo looks blurry or stretched on the document.

1. Fix the Address at the Head of the CDA

The address block comes from the Location, not the account, so it's set per office: Admin / Settings → Manage Locations → the gear beside the Location → Commission & CDA Settings → **Location Contact Info**.

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

2. Fix the Company Name

The name at the top of the account is a global setting, and changing it changes it everywhere — nothing is lost, no transactions or documents are affected.

Set the company name and brokerage license number that identify your account throughout Pipeline.

See Company Name & License

> If the whole brokerage is changing names rather than just the CDA, there's more to touch than this one field.
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> Your brand lives in a handful of places in Pipeline — your company settings, your locations, and your team's email signatures. Here's each one, in the order to update it.
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> See Rebrand Your Company Across Pipeline

3. Fix the Brokerage's Payable Name

This is the one most people can't find, because it isn't with the company name. When the check should be written to something other than the name at the top of the account — a DBA, a separate legal entity — set it under Admin / Settings → **Financial Settings**. Only the payable line changes; the account keeps its own name.

Payables is the part of the CDA that says who gets paid what — one line per party, written in the names your closing agent should make the checks out to.

See Payables

4. Fix an Agent's Payable Name

An agent paid through an LLC, a team name, or a DBA gets their own field on their user record: open them from Manage Users and fill in **Payable LLC or Corp**. From then on that name replaces their personal name on every CDA, and it doesn't change how they appear anywhere else in Pipeline.

A user's profile holds who they are and where they work — their name, role, primary location, and license number.

See User Profile

5. Regenerate the CDAs You've Already Issued

Every one of these settings applies to CDAs generated *after* you save it. Documents already sitting on transactions keep the old name until someone rebuilds them, which means a name change is really two jobs: the setting, and then a pass over the affected deals.

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.

See Change the Numbers After the CDA Is Generated

> While you're in the branding: the CDA sizes your logo to a 16:9 shape, so a very wide logo gets squeezed and looks blurry. Trimming the margins so the image is closer to 16:9 usually fixes it.
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> Add your brokerage's logo so your Home page, coversheets, and commission documents all carry your brand.
>
> See Company Logo