Turn On the Commission Module and Issue Your First CDA

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Commissions, splits, and the disbursement authorization your closing agent is waiting on, all produced from the transaction you already have open. Here is the whole path, from switching the module on to a finished CDA.

Introduction

The Commission Module is an add-on. Until a master admin turns it on, a transaction in Pipeline tracks the deal but not the money, and your CDAs are being typed somewhere else.

Turning it on takes about a minute and the first thirty days are free. What takes longer is the configuration that sits between activation and a usable CDA, and most offices underestimate it. Every Location you run commissions for needs its own settings: the address and company details that head the document, the name and signature image that sign it, who gets paid directly, and any fee that comes off the top. None of that is guessed for you.

Work through it in order and the first CDA comes out right. Skip ahead to a transaction and you'll find the Manage Commissions link isn't there yet.

When to Use This

- You've decided to run commissions out of Pipeline and don't know where to start.
- Your title company needs a disbursement authorization and someone is still producing them by hand.
- You turned the module on, opened a transaction, and there's no Manage Commissions option on it.
- You want to see what the module actually does before you commit to paying for it.
- You're moving off a spreadsheet and want your year-end numbers to come out of Pipeline instead.

1. Start the Free Trial

This is a master admin's job — nobody else sees the switch.

Ready to run commissions out of Pipeline? A master admin can switch the Commission Module on from inside your account, and the first 30 days are free.

See Commission Module Activation

2. Configure Commission & CDA Settings for Each Location

This is the step that decides what your CDA looks like, and it is set per Location — a second office means a second pass through this page.

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]

> Start with the company address and contact information under **Location Contact Info** — that's what prints at the head of every CDA this Location produces. Then work down the rest of the form: the signer's name and signature image, payability, and your franchise fee if your brand takes one.

3. Book the Setup Call

Support offers a free Commission Module setup call, and it is worth taking. Most offices that write in about activation end up on one, because the settings that shape your CDA depend on how your brokerage actually splits money — and that's a conversation, not a form.

Have your master admin on the call. Almost everything you'll walk through is master-admin only, so a call without them turns into a second call.

4. Enter Commissions on Your First Transaction

Open a closed or pending deal and click [Manage Commissions] on the left menu. You'll move through the numbered steps in order — the sale figures, then how the gross divides between the brokerage and its agents, then fees and deductions, then referrals — clicking [Calculate & Continue] between each one.

Manage Commissions is the one screen where you record a transaction's money, and it's what your CDA and every financial report are built from.

See Manage Commissions Workspace

> No [Manage Commissions] link on the transaction? Two things have to be true before it appears: at least one in-house agent who isn't tagged as an assistant is on the deal, and the Location's Commission & CDA Settings are configured. Adding the agent is the usual fix.

5. Collect the CDA

Nothing reaches your reports — and no CDA exists — until you click [Save Commissions] at the end. Save, and the document is produced for you.

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