

Create a User Defined Field

To create a user defined field (UDF), complete the following steps:

1. From the **Administration** tab, click **Manage Organizations>User Defined Fields> Modify**. The *Select OTC Endpoint* screen appears.
2. Select the highest-level organization for which you want to modify UDFs. The *Step 1 of 3: Select User Defined Field to Maintain* page appears.
3. Click **Create UDF** as shown in Figure 1. The *Step 2 of 3: Modify the User Defined Field* page appears.

Figure 1. Select 1 of 3: Select User Defined Field to Maintain

Modify User Defined Fields [1] [2]

Step 1 of 3: Select User Defined Field to Maintain

Organization Hierarchy: TTTL - Training Team

Click on the activity label to edit the User Defined Field.
 Click on the 'Create UDF' button to create a new User Defined Field.
 Click the related checkbox to delete a User Defined Field.

Activity	Label	Description	Display Order	Data Type	Delete [Delete All / Undelete All]

Cancel Create UDF Next >>



Application Tip

A message displays discouraging users from creating UDFs that request personally identifiable information (PII) data.

4. Add the UDF and click **Done**.

Add a UDF by:

- Selecting the **Activity** type for the UDF



Application Tips

- There are two types of deposit processing activities (**Create Deposit** and **Create Deposit Subtotal**) and one activity for card processing (**Create Card Processing**).
- For TGA/CDC Endpoints with active deposits, in the drop-down **Activity** menu, the deposit activities are disabled. In this case, **Accounting Specialists** and **Card Administrators** can only select the **Create Card Processing** activity

- Entering the **Label** and **Description**

- Selecting a **Data Type**
 - If the **Drop Down List of Alphanumeric Values** Data Type is selected, proceed to step 6.
 - If another **Data Type** is selected, continue entering in information for the fields below. Proceed to step 7.
- Entering the
 - Maximum Input Length (Maximum length is 255)
 - Minimum Input Length
 - Display Order Number
- Selecting **Mandatory** or **Optional** for Activity User Entry



Application Tips

- When a deposit is in progress at a TGA or CDC endpoint, a UDF cannot be modified or deleted if the deposit is in **Draft** or **Awaiting Approval (AWAP)** status.
- If the **Accounting Specialist** or **Card Administrator** selected an endpoint that is both a TGA, and a CDC Endpoint and this endpoint has a deposit that is currently in progress, the deposit processing activities are disabled to read-only.
- Only the **Card Processing** activity is active.
- The **Card Administrator** continues card processing activities when a deposit is in progress.



Application Tips

- If the **Drop-Down List of Alphanumeric** values data type is selected a **Permitted Values** section appears.
- Click **List Values**. A *Step 2 of 3 (Continued): Define Permitted Values* page appears.
- Enter details for both the **Value** and **Description**.
- Click **Done** to return to the *Step 2 of 3: Modify the User Defined Field* page.

5. The *Step 1 of 3: Select User Defined Field to Maintain* page appears again. Select **Next**.
6. The *Step 3 of 3: Review* page appears. Verify the UDF information is correct. Select the plus sign next to the UDF to expand it.
7. The *Step 3 of 3: Review* page appears. Verify the UDF information is correct and click **Submit** as shown in Figure 2.

Figure 2. Review User Defined Fields page

Modify User Defined Fields 1 2 3

Step 3 of 3: Review

Verify the User Defined Field information is correct and click **Submit**. [Edit]

Active User Defined Fields

UDF # 1 UDF 1

Activity Type	Create Card Processing
Label	UDF 1
Description	UDF 1
Data Type	U.S. Monetary Amount
Display Order Number	1
Activity User Entry	Optional
Minimum Input Length	3
Maximum Input Length	8

No User Defined Fields are marked for deletion.

8. The *Confirmation* page appears presenting the UDF data that is saved to the database.



Additional Buttons

- Click **Cancel** to return to the OTCnet Home Page. No data is saved.
- Click **Edit** to make additional changes.
- Click **Next** to advance to the next page.
- Click **Previous** to return to the previous page.
- Click **Return Home** to return to the OTCnet Home Page