Create an OTC Endpoint

To add an OTC Endpoint from the highest organization hierarchy, complete the following steps:

1. From the Administration tab, select Manage Organization>Organization Hierarchy>Modify. The Step 1 of 3: Select an OTC Endpoint page appears.

2. Select your OTC Endpoint from the list. The Step 2 of 3: Update OTC Endpoint Information page appears. View details for Add lower levels to this OTC Endpoint checkbox as shown in Error! Reference source not found..

3. Check the Add lower levels to this OTC Endpoint checkbox.

4. Enter the lower level OTC Endpoint’s Short Name(s) and Description(s) and click Next.

Figure 1. Step 2 of 3: Update OTC Endpoint Information

- In the table that appears, add new OTC Endpoints that fall in the level under the current OTC Endpoint.
- Short name(s) are user-defined text describing an organization. Short names must be unique within an organization hierarchy (e.g., Short name: IRS; Description: Internal Revenue Service).

5. In the Step 3 of 3: Review OTC Endpoint(s) page, review and verify the OTC Endpoint details and click Submit. A Confirmation page appears presenting the modified OTC Endpoint (and verifies the added lower level OTC Endpoint).
**Additional Buttons**

- Click **Add More Lines** to add additional lower levels to this endpoint.
- Click **Cancel** to return to the OTCnet Home Page. No data is saved.
- Click **Previous** to return to the previous page.
- Click **Return Home** to return to the OTCnet Home Page.