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](image)

   **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.

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

   Add a UDF by:
   - Selecting the **Activity** type for the UDF

**Application Tip**

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

**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.
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