

Modify a User Defined Field

Accounting Specialists and **Card Administrators** can modify an existing user defined field (UDF) by completing the following steps.

1. Click the **Administration** tab.
2. From the **Manage Organizations** menu, select **User Defined Fields** and click **Modify**. The *Select OTC Endpoint* screen appears.
3. Select the highest level organization for which you want to modify a UDF. The *Step 1 of 3: Select User Defined Field to Maintain* page appears.
4. Click the UDF **Label** hyperlink. The *Step 2 of 3: Modify User Defined Field* page appears.



Application Tip

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

5. Make the changes to the UDF and click **Done**. The *Step 1 of 3: Select User Defined Field to Maintain* page appears.



Application Tip

You can modify a UDF as needed to accommodate your organization's changing needs. For deposit processing however, you cannot modify a UDF that is associated with a deposit that is still in **Draft** or **AWAP** status. **Draft** or **AWAP** deposits must be submitted to the Financial Institution before you can modify any UDFs associated with them. These **Draft** or **AWAP** status do not impact card processing.

6. Click **Next**. The *Step 3 of 3: Review* page appears.
7. Verify the correct UDF information is correct and click **Submit**. A confirmation page appears showing that the UDF data has been saved to the database.



Application Tip

Click **Edit** if you need to make additional changes before submitting the data and return to Step 4.



Application Tip

- Click **Cancel** to return to the OTCnet Home Page. No data will be saved.
- Click **Create UDF** to create a new UDF.
- Click **Next** to advance to the next page.
- Click **Previous** to return to the previous page.
- Click **Edit** to make additional changes to a UDF.
- Click **Submit** to complete the process and display the Confirmation page.
- Click **Return Home** to return to the OTCnet Home Page.