

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 Figure 1.
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

Modify Organization [1] 2

Step 2 of 3: Update OTC Endpoint Information

Update the OTC Endpoint information.

Organization Hierarchy: TTTL - Training Team Top Level .00002099
 OTC Endpoint: TTTL - Training Team Top Level .00002099
 * Denotes required fields.

General

Short Name*
 TTTL x Max: 10 alpha-numeric characters

Description*
 Training Team Top Le

☐ Allow OTC Endpoint to create deposits for over-the-counter collections

☒ Check Cashing Policies

☒ Data Privacy

☒ Enable Check Capture

☐ Enable Card Processing

☒ Add lower levels to this OTC Endpoint

Short Name*	Description*
LL1	Lower Level 1
LL2	Lower Level 2
LL3	Lower Level 3

Add More Lines

Advanced Administration

Special Designation

< Previous Cancel Next >



Application Tips

- 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.
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