

Modify a User Defined Field

To modify an existing 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 a UDF. The *Step 1 of 3: Select User Defined Field to Maintain* page appears.
3. 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.

4. Make the changes to the UDF and click **Done**. The *Step 1 of 3: Select User Defined Field to Maintain* page appears as shown in Figure 1.

Figure 1. Select User Defined Field to Maintain

Modify User Defined Fields
Step 2 of 3: Modify User Defined Field

Please refrain from creating user defined fields that request Personally Identifiable Information (PII), or any piece of information which can potentially be used to uniquely identify, contact, or locate a single person, such as a Social Security Number, Passport Number, or Driver's License Number.

Add and/or make changes to the user defined field for a specific activity.
Organization Hierarchy: FS - Bureau of the Fiscal Service
* Denotes required fields.

Activity
Create Card Processing

User Defined Field

Label*
Account

Description*
Account Number

Data Type*
Alphanumeric String Value
Date
Decimal Value
Drop Down List of Alphanumeric Values
U.S. Monetary Amount

Maximum Input Length*
16

Minimum Input Length*
4

Display Order Number*
1

Activity User Entry
☒ Mandatory
☐ Optional

Previous Cancel Done

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



Additional Buttons

- Click **Cancel** to return to the OTCnet Home Page. No data is 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.
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