

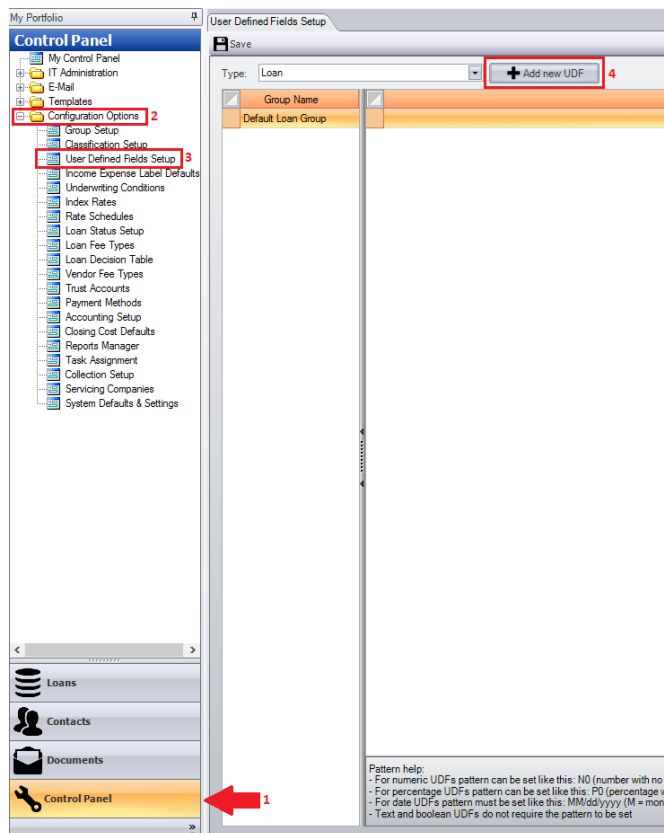
LOAN SERVICING SOFT Creating a UDFs and Classification Fields

This document will guide you through the process of creating UDFs and Classification fields in the LOAN SERVICING SOFT system.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

Creating a UDF

To create a UDF go to Control Panel, Configuration Options, User Defined Fields Setup and click the 'Add new UDF' button. Note, UDFs can be created on the Loans, Borrowers, Lenders, Venders, Collateral and a few other places. Click the Type drop down to choose where you wish to create a UDF before proceeding.



Defining the UDF

After you have created the UDF, you need to do a few more things before it is ready for use. You need to give it a label, give it a type, give it a code, set a pattern and decide whether to set it as active or inactive.

Group Name	Label	Type	Code	Pattern	Active
Default Loan Group		Text			<input checked="" type="checkbox"/>

Label: the name of the UDF that you are creating

Type: select the type of UDF you are creating. Types: text, numeric, percentage, date, Boolean, list, loan, borrower, lender, vendor, internal value

Code: this code is an internal system field which needs to be filled out for every UDF. Each code must be unique. Any alpha numeric combination. We would recommend a code that will remind you what the field is for. No spaces are allowed in the code, periods are allowed.

Active: switching the UDF between active and inactive

Pattern: see the Pattern help reference at the bottom of the UDF screen

Pattern help:

- For numeric UDFs pattern can be set like this: N0 (number with no decimals), N2 (number with two decimals)
- For percentage UDFs pattern can be set like this: P0 (percentage with no decimals), P3 (percentage with three decimals)
- For date UDFs pattern must be set like this: MM/dd/yyyy (M = months, d = days, y = year)
- Text and boolean UDFs do not require the pattern to be set

Creating and Defining a Classification Field

You essentially need to follow the same process, but from the Classification screen. Go to Control Panel, Configuration Options, Classification Setup and click the 'Add Category' button. Note, Classification Fields can be created on the Loans, Borrowers, Lenders, Venders, Collateral and a few other places. Click the Type drop down to choose where you wish to create a Classification Field before proceeding.

Once you have clicked the 'Add Category' button a Category line will be created on the left side of the screen. Give it a Name, Code, Sort Order and set to Active or not Active. On the right side of the screen, for each Category, you will need to create a list of drop down menu options. You will also need to set a Value Code for each menu option. You can also set one of the menu options as default and you can create a Sort Order as well.

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