LOAN SERVICING SOFT Creating a UDF/Classification Field
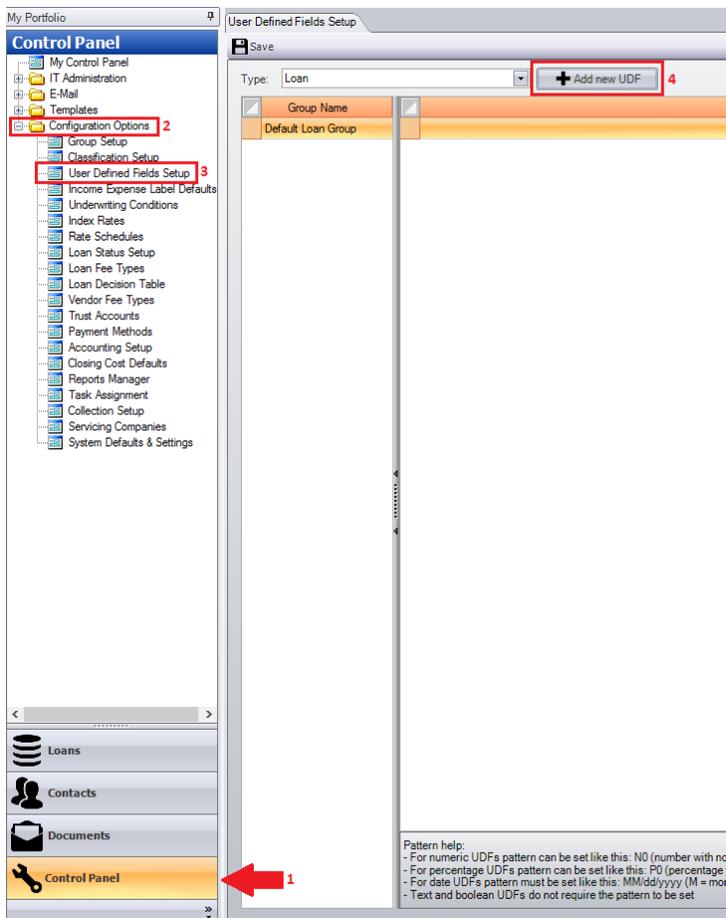
This document will guide you through the process of creating UDF's and Classification fields in the LOAN SERVICING SOFT system.

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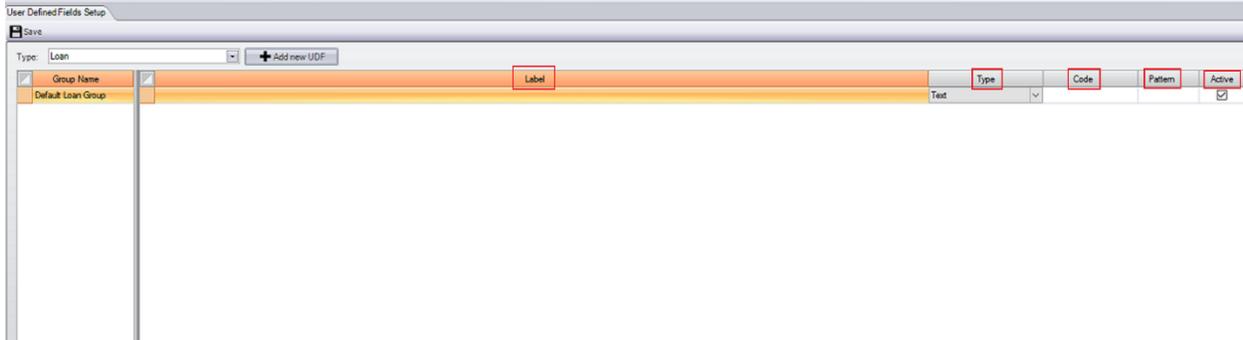
Creating a UDF

To create a UDF, you need to start by going to Control Panel → Configuration Options → User Defined Fields Setup → "Add new UDF".

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.

Label: the name of the UDF that you are creating

Type: select the type of UDF you are creating. Example: 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.
(Note: no spaces are allowed in the code, periods are allowed)

Active: switching the UDF between active and inactive

Pattern: reference bottom of 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

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Creating and Defining a Classification Field

You essentially need to follow the same process, but from the Classification set up screen.

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