Searching for a Case

08/23/2024 4:43 pm EDT

There are 2 different ways to search for a specific case in SIPS. One way is clicking on search using selection button underneath the main dashboard on the Your Case List page. This will redirect you to the text box Search for Case. The other way is to automatically filter in the text data into the Search for Case text box. The search features only recognize text, so the way to search for a case is either typing in the name you used for the selection tags, case names, or grammatical parts of the case name. Below are the step-by-step instructions.

Step 1: Logging In: Log into SIPS.



Step 2: Go To Your Case List: You can either do this by clicking on the green GoTo Your Case List button or clicking on the Your Case List Subheading located in the upper righthand side of your screen.

		YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
1077 marga		1			
Welcome Goto Your Case List >>	and the second				
Expiry date:		<u>ا</u>			
Number of cases:					

Option 1: Search Using Selection:

Step 3: Search using Selection: Click on Search Using Selection and start typing the text into Search for Case text box. Double click when done writing in the text box.

			YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
Your Case List						
Add Case View All Cases Search Using Selection						
Maximum number of cases allowed:	of cases:					
Search for Case						
Case	Initial Plan Date	Revised Date	Tags		Active	
		Please use View All Cases or Search Using Selection to view one or more cases	Rows Per F	age 25	≪ < No re	ecords > »
Retirement Planning System				PRIVACY F	OLICY TE	RMS OF USE

Option 2: Search for Case:

Step 4: Search for Case: Click inside the text box next to the Search for Case subheading. Once done typing double click to bring the case up.

			YOUR CASE LIST	SETTINGS	HELP	SIGN OUT
Your Case List Add Case View All Cases Search Using Selection Maximum number of cases allowed: Current number of cases	ies:					
Search for Case						
Case	Initial Plan Date	Revised Date	Tags		Active	
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Step 5: Selection: Double click on the case you are looking for.

			YOUR CASE LIST SE	TTINGS HELP	SIGN OUT
Your Case List					
Add Case View All Cases Search Using Selection					
Maximum number of cases allowed: Current number of cases:					
Search for Case					
Case	Initial Plan Date	Revised Date	Tags	Active	
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			Rows Per Page	25 《 < Page	e 1 of 1 > ≫
SIPS Patienting System				PRIVACY POLICY T	ERMS OF USE

Step 6: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

									YOUR CASE LIST SETTINGS	HELP SIGN OUT
CLIENT DASHBO	OARD STRUCTURE	D INCOME PLANNING	CASH FLOW AND TAX ADVISE	DR ASSET ALLO	CATION AND NET	worth graphs	REPORTS TOO	DLS	PREPAI INITIAL PLAT REVISED PLAT	RED BY: N DATE: N DATE:
Client Edit Goto Ind	Informat	ion			CLIENT	INFORMATION INCO	DMES ASSETS	GOALS AND OBJECTIVES	RECOMMENDATIONS ADVISOR NO	TES DISCLOSURE
Case Title Description								Selection tags		Active 🖉
Client one	Last Date of birth	Initial plan age	First Clie Short name	nt two	birth	Initial plan age	First Short name	Initial plan date Revision date Address		
	Current age	Datisament ann	Gender Male V	Current	age 0	0 Retirement age	Client2 Gender Female ∨	City, State, Zip Email Phone Cell Phone		
List Clients	Beneficiaries (o	ptional)						Cell Phone	/	
SIPS Retirement Planning Syste	em								PRIVACY POL	ICY TERMS OF USE

If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: +1-888-449-6917 or support@planscout.com