# Recommendations

08/23/2024 5:41 pm EDT

This page in the SIPS program is a place where you can write out the client's recommendations. There is an option to select a prewritten text if you would like this to show up on the final report. If you are writing unique text or if you pick the prewritten text this will show up in the final report if you select the summary of recommendations option. Below is a step-by-step guide on how to filter in the data for the recommendations.

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.
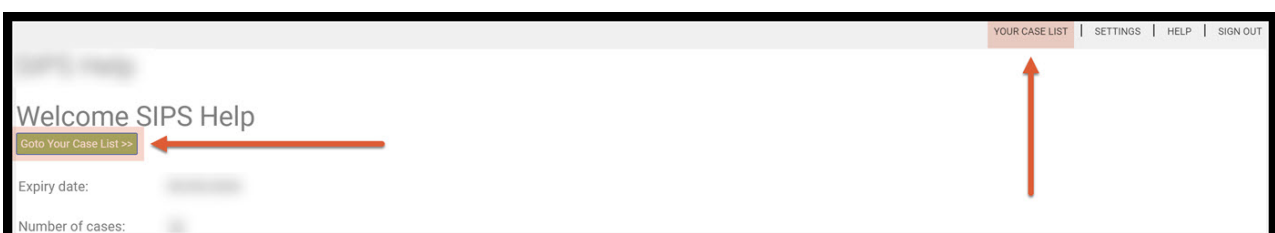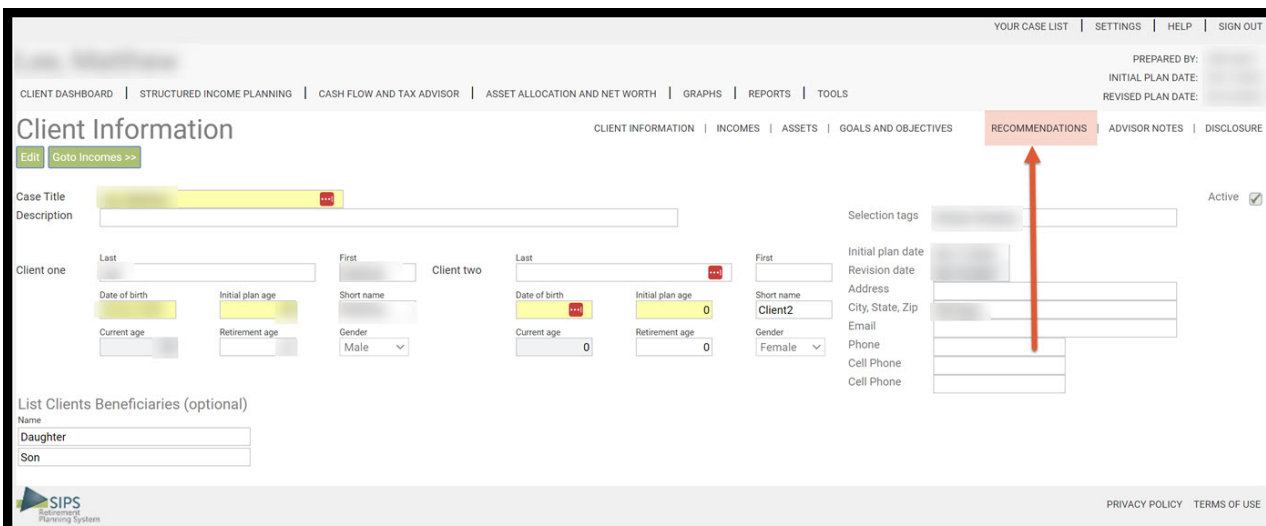
Step 3: View All Cases: Click on the Green View All Cases button underneath the Your Case List Heading located on the lefthand side of your screen.
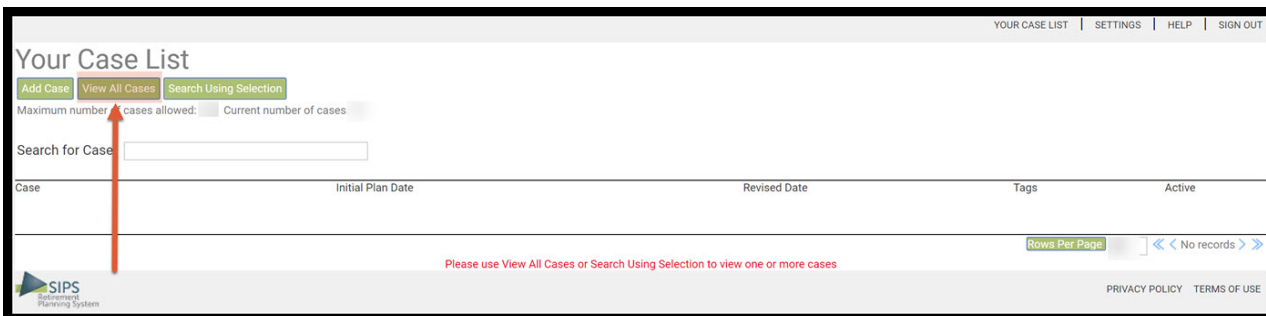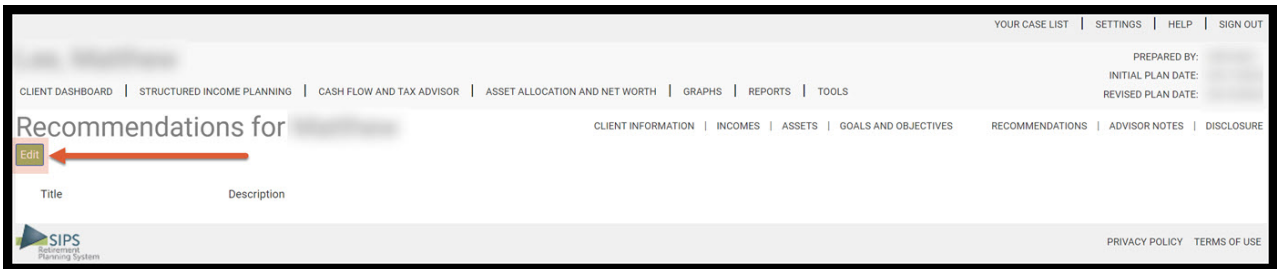

Step 4: Selection: Select which case you would like to work in by double clicking on the case.
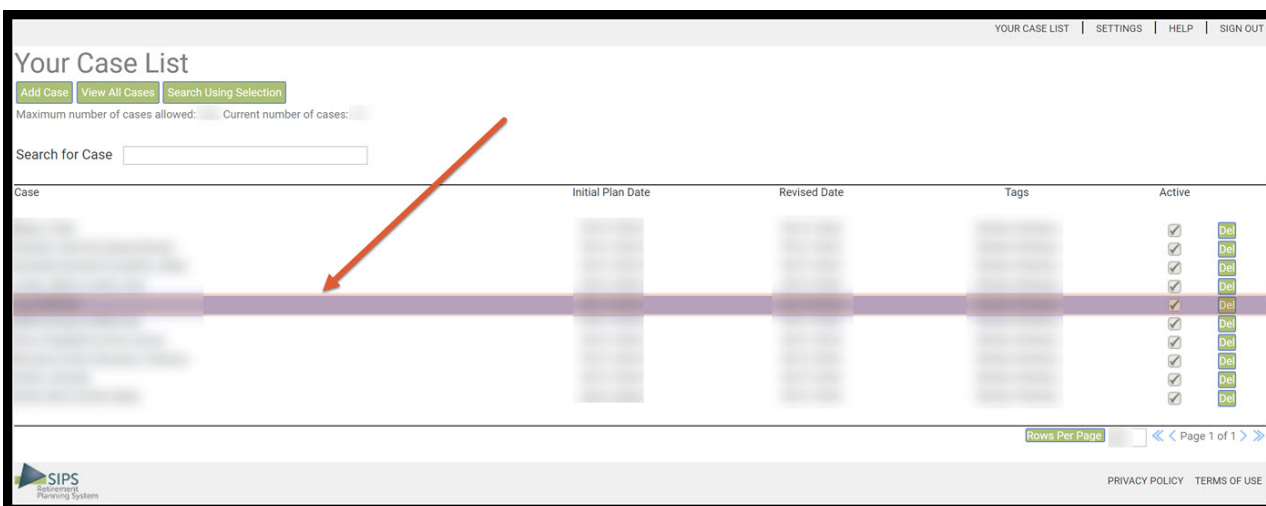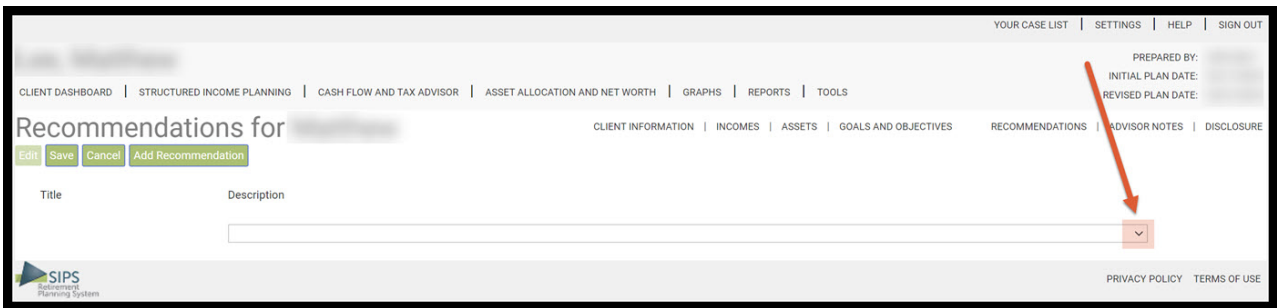

Step 5: Recommendations: Click on the Recommendations subheading that is located on the right-hand side of the screen.

Step 6: Edit: Click on the green Edit button underneath the heading stating Recommendations for Client's Name.

Step 7: Down Carrot Arrow: Click on the down carrot arrow in the text box and select which prewritten text you would like to use.


Step 8: Prewritten Text Selection: Select which option of text you would like to have for the description. Click on the green Add Recommendation button underneath the Recommendations for Clients Name subheading.
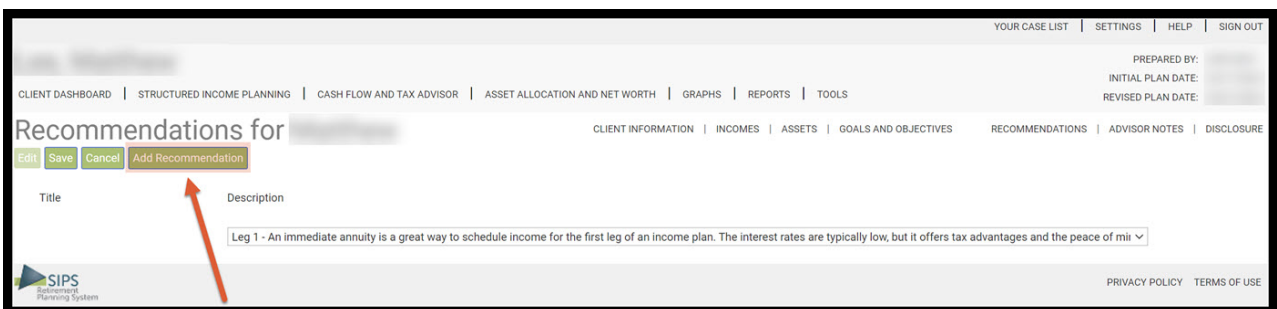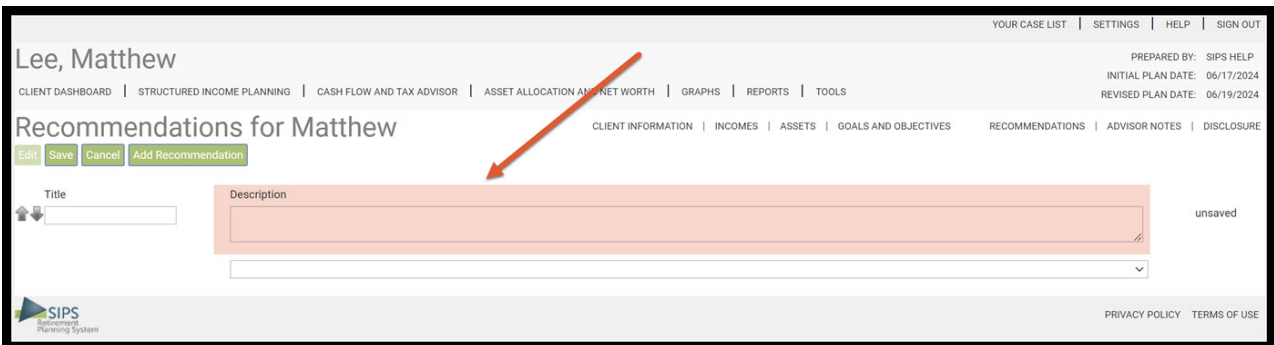

Step 9: Adding more than one prewritten text: Repeat steps 7 and 8 as many times as needed.

Step 10: Writing in your own recommendation: Click on the green Add recommendation button.
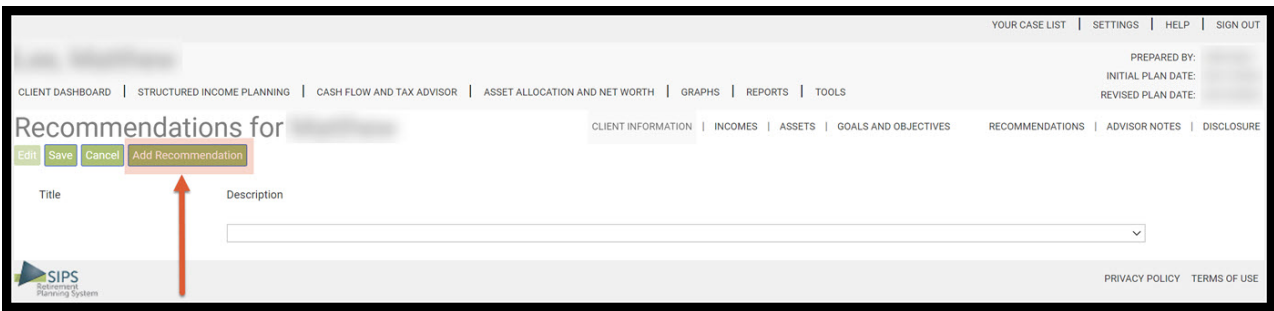
Step 11: Adding unique text: Click in the text box you would like to filter in your own information. If there is prewritten text in the text box, highlight the prewritten text and delete it. Start typing in your unique text.


Step 12: Adding A Unique Title: Click in the Title box to Add a title. If there is prewritten text in the text box, highlight the prewritten text and delete it. Start typing in your unique text.
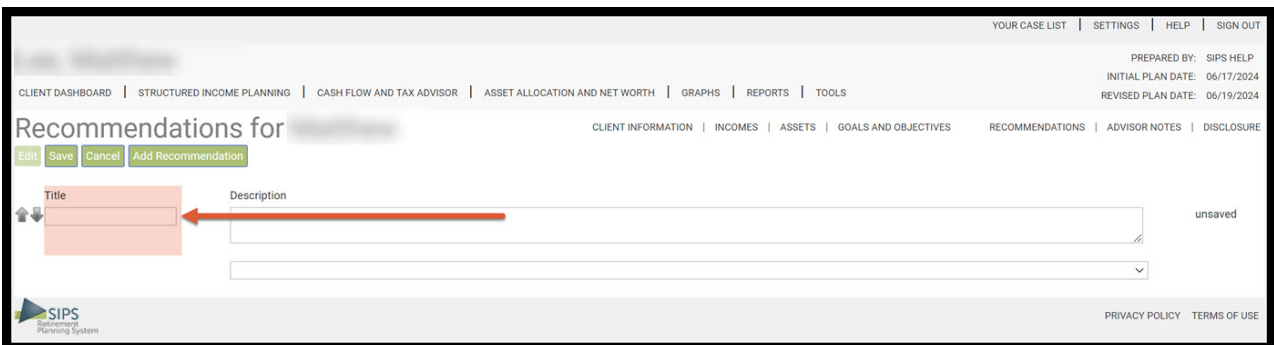

Step 13: Writing in more than one unique recommendations: If you have more than one unique recommendation you would like to write in repeat steps 10 to 12 until you have finished your process.

Step 14: Ordering the recommendations: After filtering in the text and you have decided to change the order of the text, click on the black up and down carrots symbols located on the left-hand side of the text.
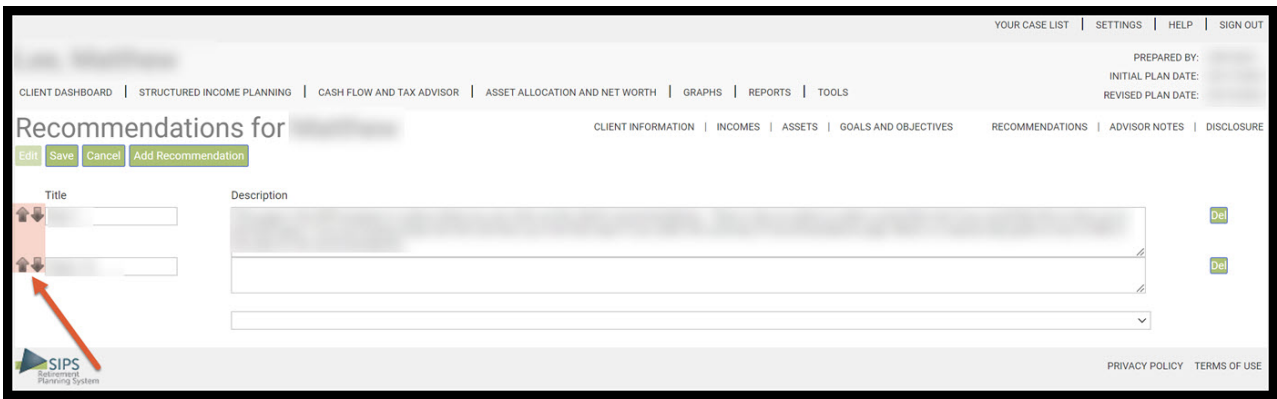
Step 11: Deletion: If you need to delete a recommendation click on the green Del box located on the righthand side of the screen.
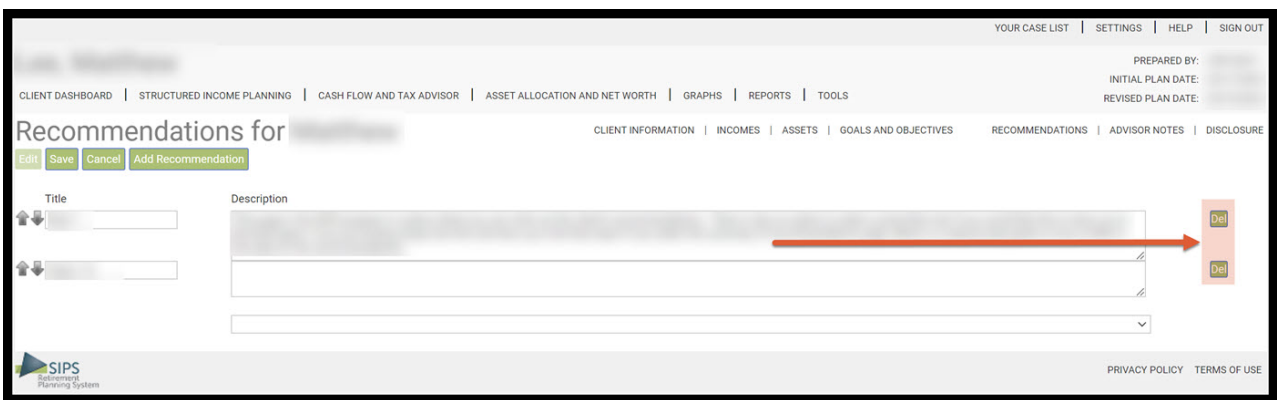

Step 12: Permanent Deletion: After clicking on the green Del button a sipsplanning.net text box will come up and ask, "Are you sure you would like to permanently delete this recommendation?"   Click the OK button to permanently delete the item.
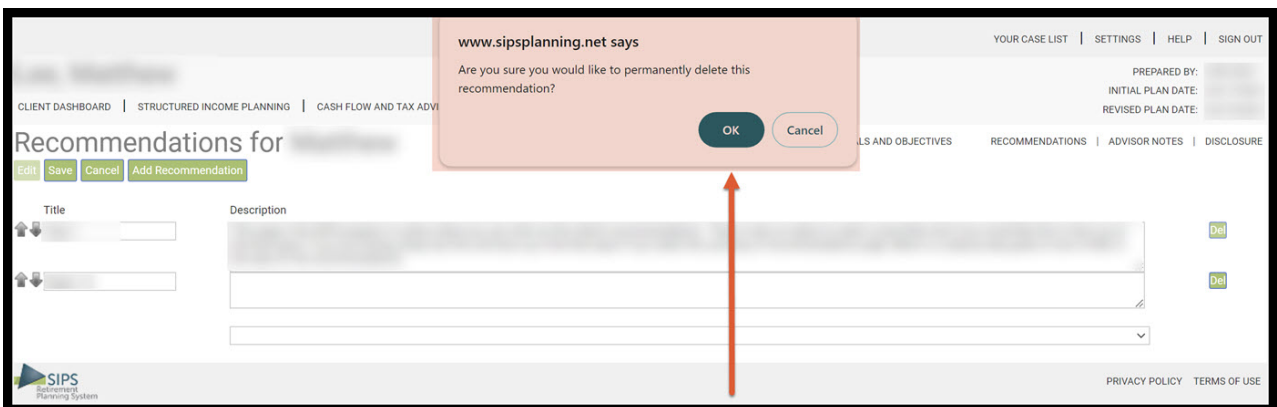

Step 13: Save: Once done will all the editing click on the green save button underneath the Recommendations for Client's name heading.
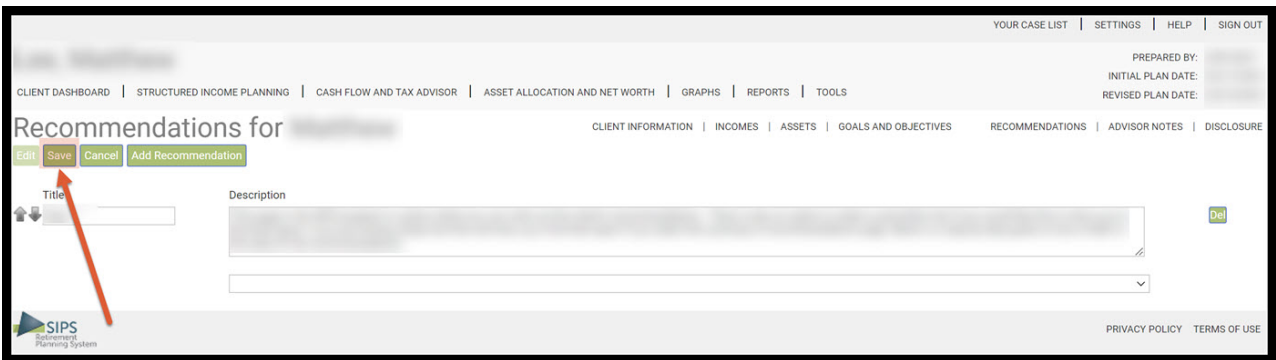
After clicking save, the finalized recommendations will be shown underneath the Recommendations for Clients Name heading. These will also be the recommendations that will show up summary of recommendations page in the final report.
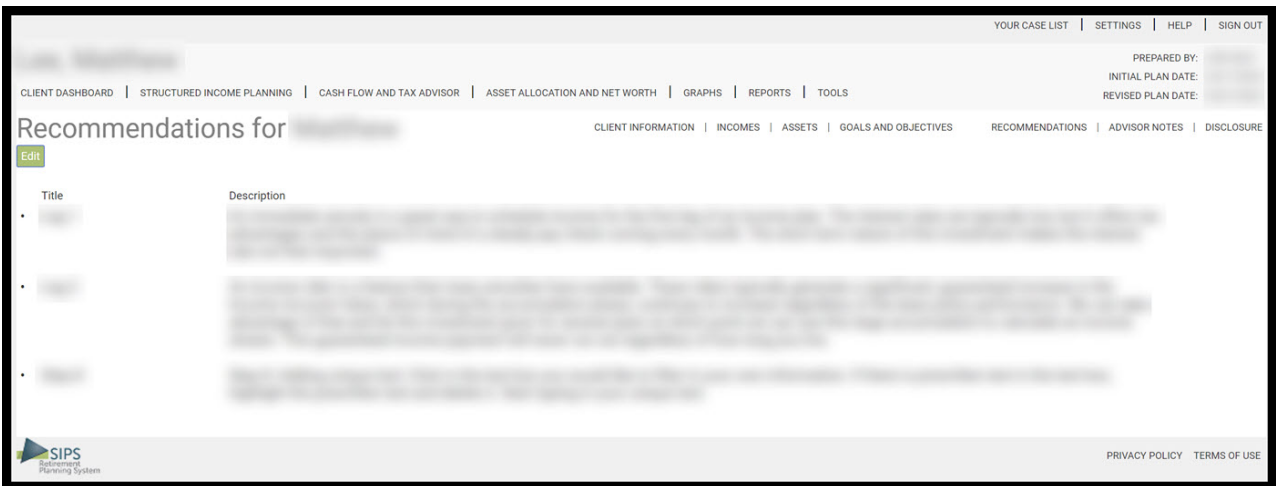
Step 14: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.
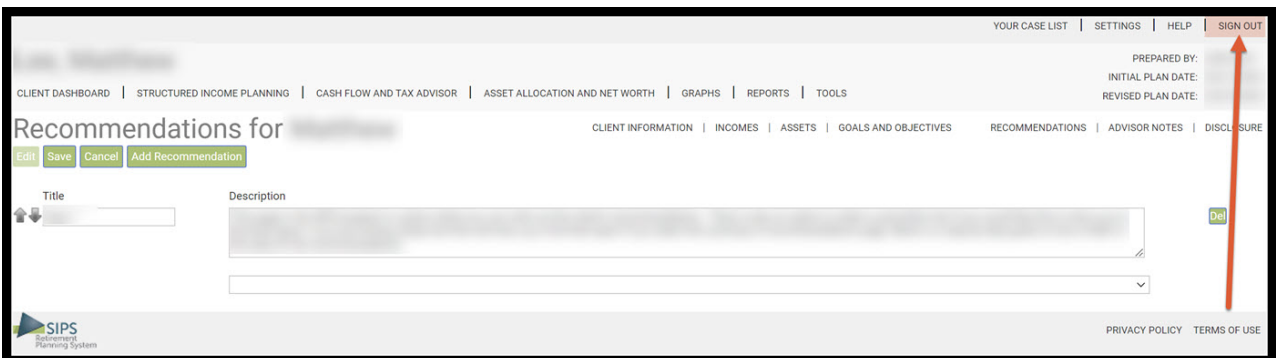
If you feel you need more support or would like to set up demo time with one of our representatives, please contact us at: +1-888-449-6917 or support@planscout.com.