

Advisor Notes

01/09/2026 11:37 am EST

This page in the SIPS program is a place where you can write out the advisor notes. What you put into this page will show up when you do a report and you click on the notes option. Below is a step-by-step guide on how to filter the information in for the advisor notes.

Step 1: Logging In: Log in to SIPS.



Step 2: Go To Your Case List: Click on either the Goto Your Case List button or click on the Your Case List Heading to take you to your case list.



Step 3: View All Cases: Click on the View All Cases button to see the list of all of your cases.

Your Case List

Add Case View All Cases (arrow) Search Using Selection

Search for Case (arrow)

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 Page 50 << < > >> No records >>

Step 4: Selection: To open a case, double-click on the case.

Your Case List

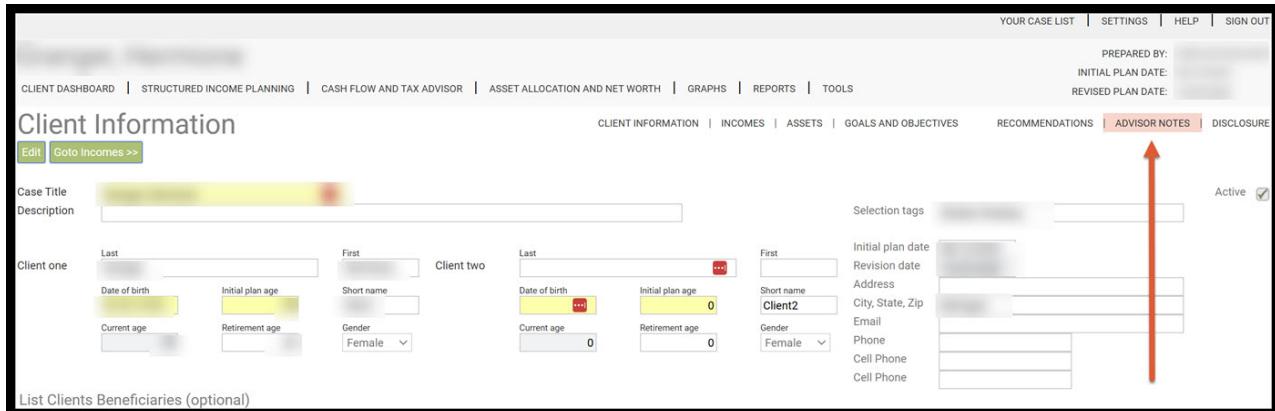
Add Case View All Cases Search Using Selection

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active
(highlighted row)				

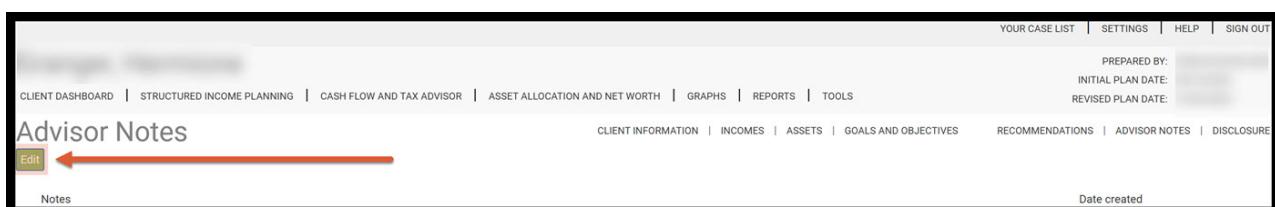
Rows Per Page 50 << < > >> Page 1 of 1

Step 5: Advisor Notes: Click on the Advisor Notes subheading located on the right hand side of the screen. This subheading remains accessible across all the pages within the client dashboard, including Client Information, Incomes, Assets, Goals and Objectives, Recommendations, Advisor Notes, and Disclosures.



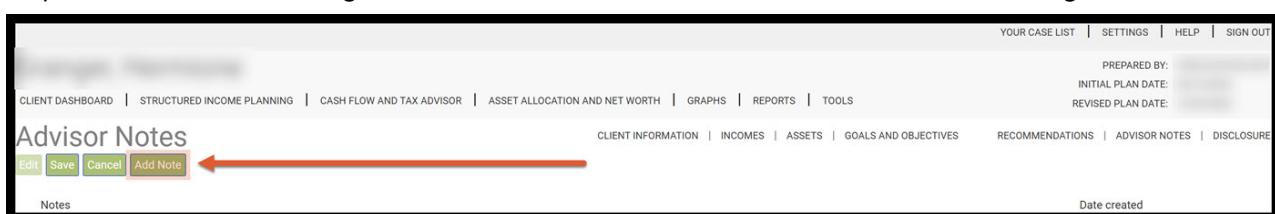
This screenshot shows the 'Client Information' page. At the top right, there are tabs for 'RECOMMENDATIONS', 'ADVISOR NOTES' (which is highlighted with a red arrow), and 'DISCLOSURE'. Below these tabs, there are sections for 'CLIENT INFORMATION', 'INCOMES', 'ASSETS', 'GOALS AND OBJECTIVES', 'RECOMMENDATIONS', 'ADVISOR NOTES', and 'DISCLOSURE'. The 'ADVISOR NOTES' tab is active, indicated by a green border and a red arrow pointing to it.

Step 6: Edit: Click on the green Edit button underneath the Advisor Notes subheading.



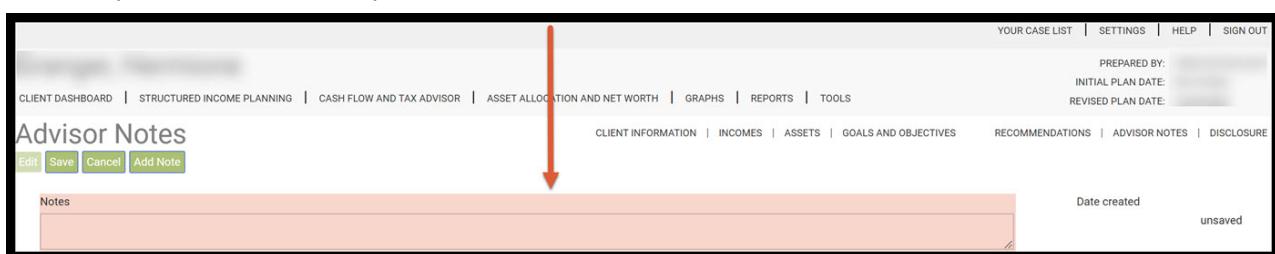
This screenshot shows the 'Advisor Notes' page. At the top left, there is a green 'Edit' button with a red arrow pointing to it. Below the 'Edit' button, there is a text area labeled 'Notes' and a 'Date created' timestamp.

Step 7: Add Note: Click on the green Add Note button underneath the Advisor Notes subheading.



This screenshot shows the 'Advisor Notes' page. At the top left, there are buttons for 'Edit', 'Save', 'Cancel', and 'Add Note' (which is highlighted with a red arrow). Below these buttons, there is a text area labeled 'Notes' and a 'Date created' timestamp.

Step 8: Filtering in the Text Box: Click inside the text box under the Notes heading to filter the content. If the text exceeds the box size, a dropdown arrow will appear, allowing you to scroll through the text. After clicking the green button to proceed to the next step, the text box will resize to fit the entered text.



This screenshot shows the 'Advisor Notes' page. At the top left, there are buttons for 'Edit', 'Save', 'Cancel', and 'Add Note'. Below these buttons, there is a text area labeled 'Notes' with a red arrow pointing to it. To the right of the 'Notes' area, there is a 'Date created' timestamp and a status indicator 'unsaved'.

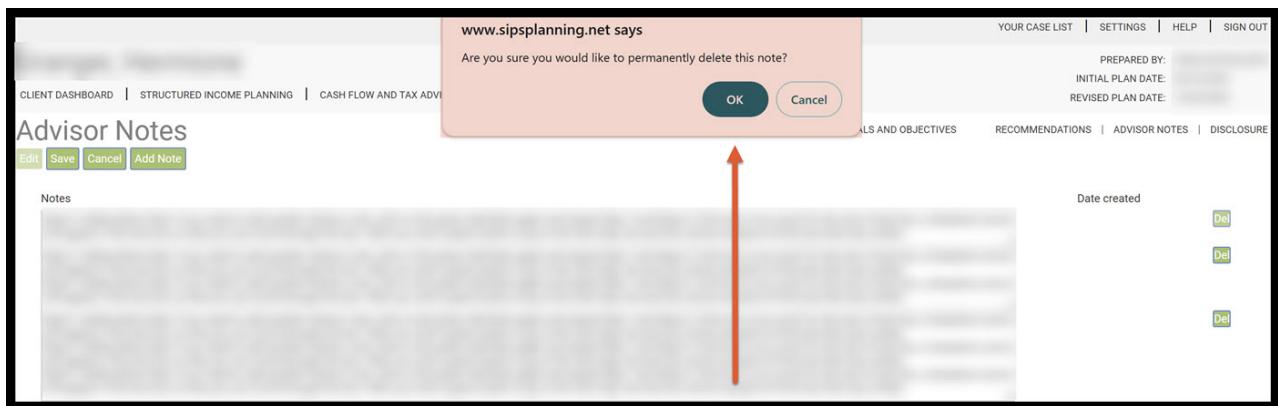
Step 9: Adding More Data: To add another advisor note, click the green Add Note button and repeat Steps 7 and 8. If the text exceeds the text box size, a dropdown arrow will appear, enabling you to scroll through the text. After clicking the green button to proceed, the text box will resize to fit the entered content.



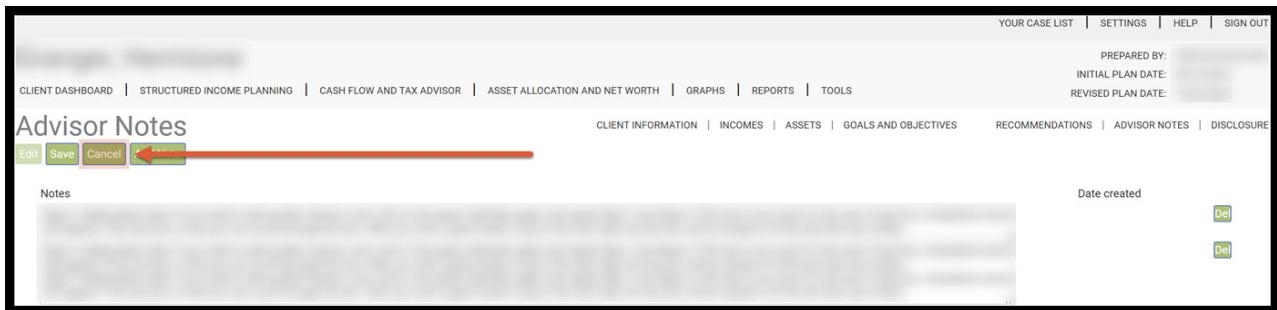
Step 10: Delete: To delete a note, click on the green Del button located at the righthand side of the screen.



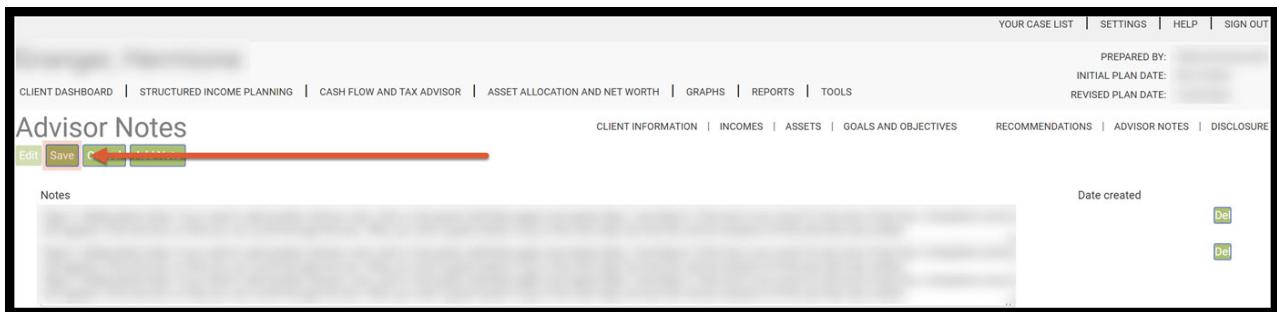
Step 11: Permanent Deletion: After clicking the green Del button, a sipsplanning.net dialog box will appear asking, "Are you sure you would like to permanently delete this note?" Click OK to confirm the permanent deletion.



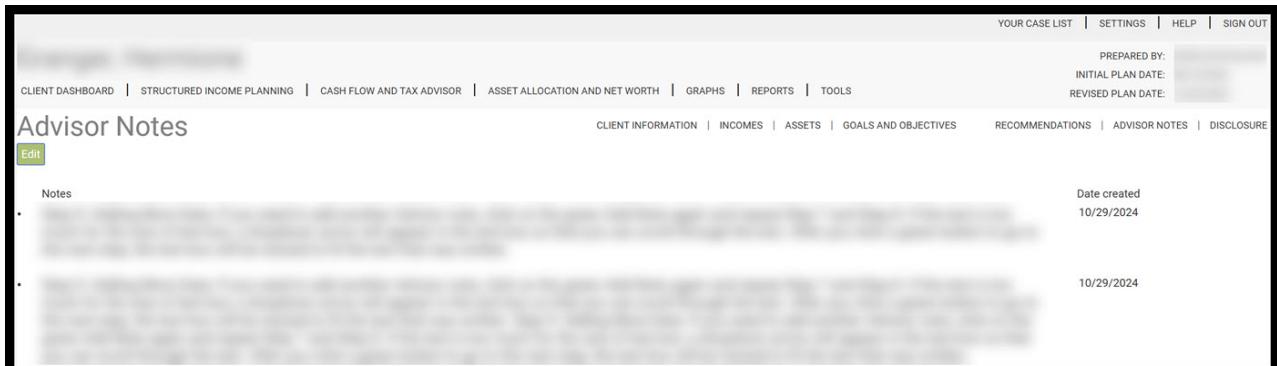
Step 12: Cancel: To discard any edits you have made, click the green Cancel button underneath the Advisor Notes subheading.



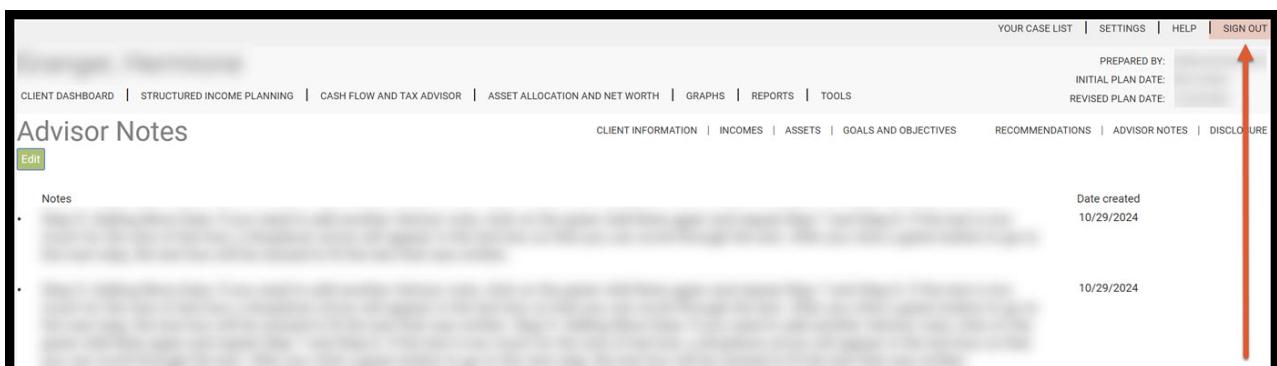
Step 13: Save: Click on the green Save button underneath the Advisor Notes subheading.



Step 14: Final Version: Once saved, the documentation will appear as notes on the Advisor Notes screen and will also be included on the Notes page of the report.



Step 15: Logout: To log out of SIPS click on the Sign Out heading that is located in the upper righthand 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: support@planscout.com.
