Advisor Notes

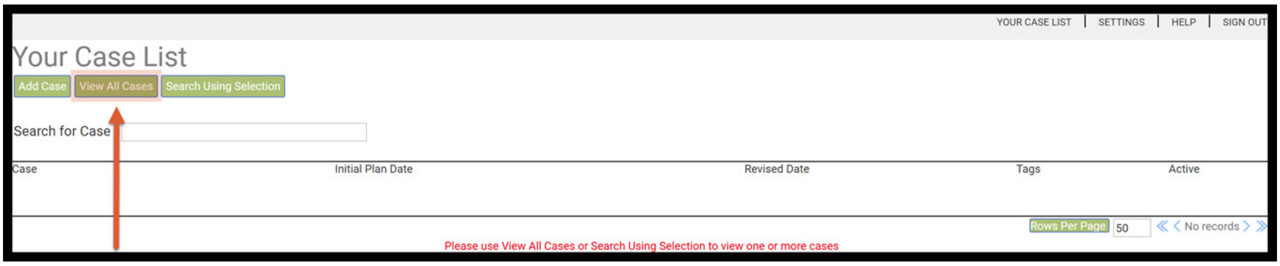
10/29/2024 4:19 pm EDT

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.

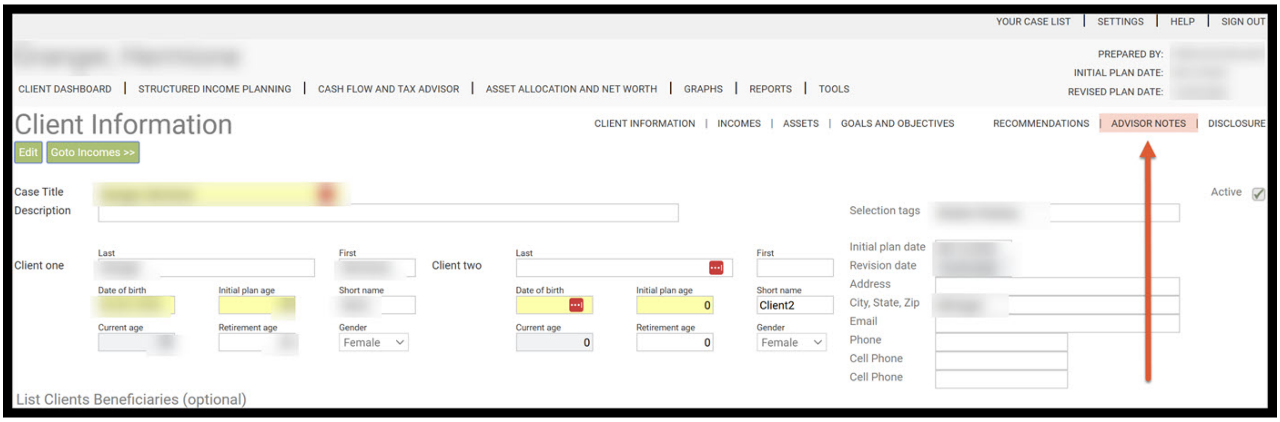
Step 2: Go To Your Case List: Click on either the Goto Your Case List button or click on the Your Case List Heading to take you to your case list.

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

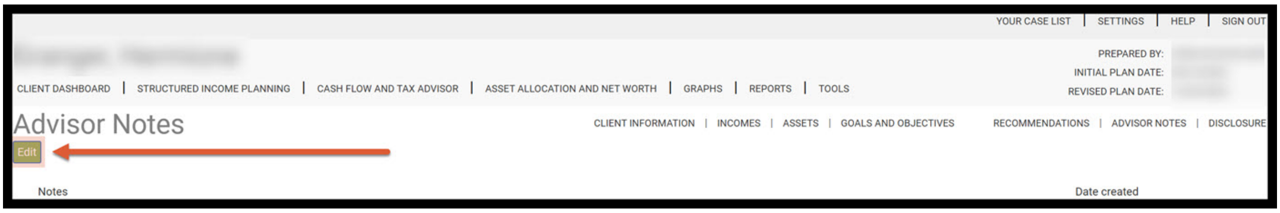


Step 4: Selection: To open a case, double-click on the case.

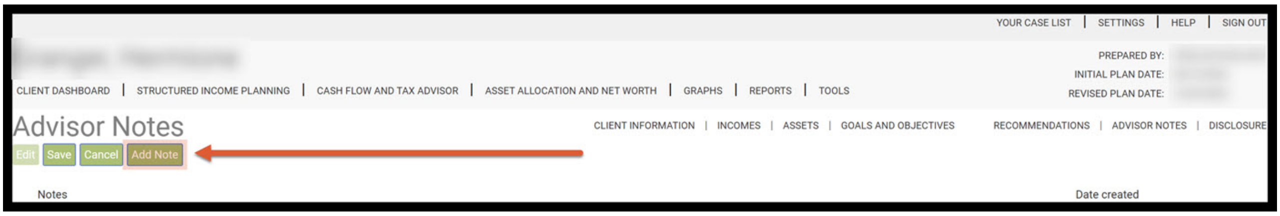
Step 5: Advisor Notes: Click on the Advisor Notes subheading located on the right hand side of the screen. This subheading remains accessible across all the pages within the client dashboard, including Client Information, Incomes, Assets, Goals and Objectives, Recommendations, Advisor Notes, and Disclosures.



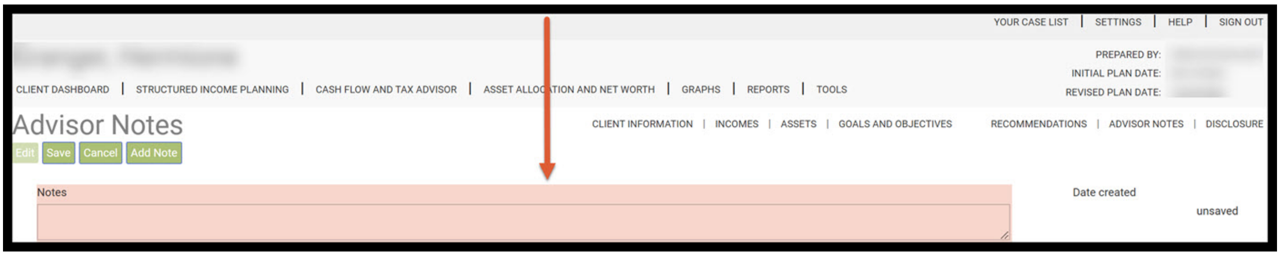
Step 6: Edit: Click on the green Edit button underneath the Advisor Notes subheading.



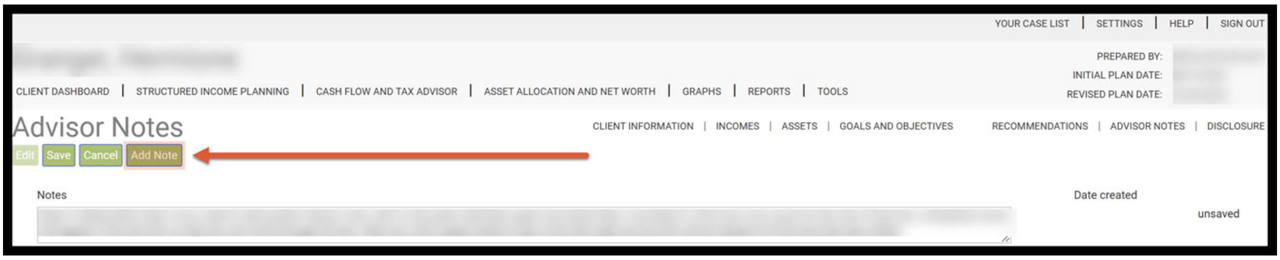
Step 7: Add Note: Click on the green Add Note button underneath the Advisor Notes subheading.



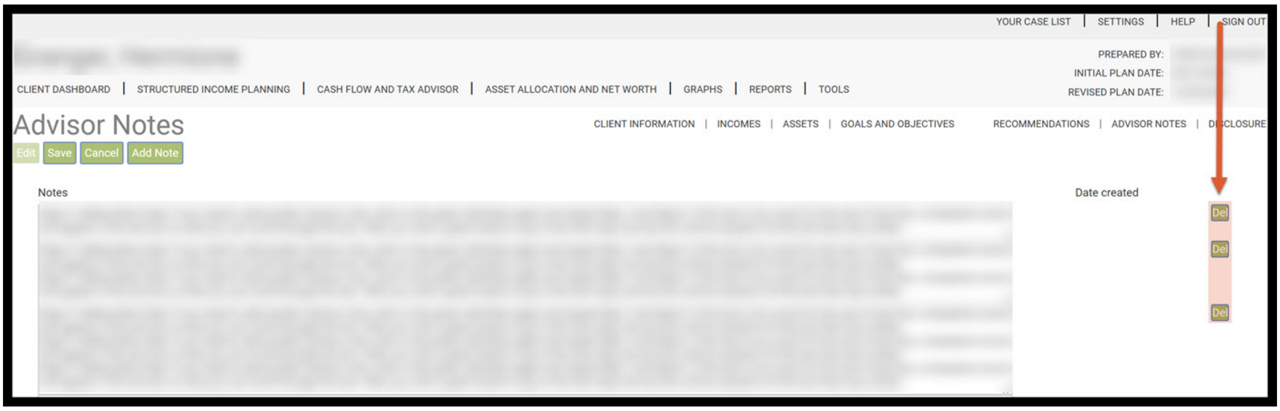
Step 8: Filtering in the Text Box: Click inside the text box under the Notes heading to filter the content. If the text exceeds the box size, a dropdown arrow will appear, allowing you to scroll through the text. After clicking the green button to proceed to the next step, the text box will resize to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



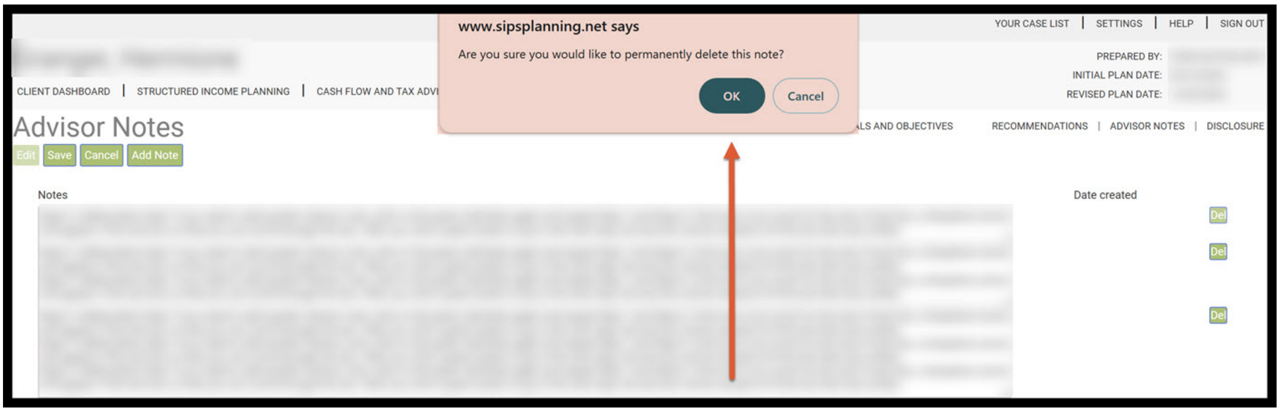
Step 9: Adding More Data: To add another advisor note, click the green Add Note button and repeat Steps 7 and 8. If the text exceeds the text box size, a dropdown arrow will appear, enabling you to scroll through the text. After clicking the green button to proceed, the text box will resize to fit the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



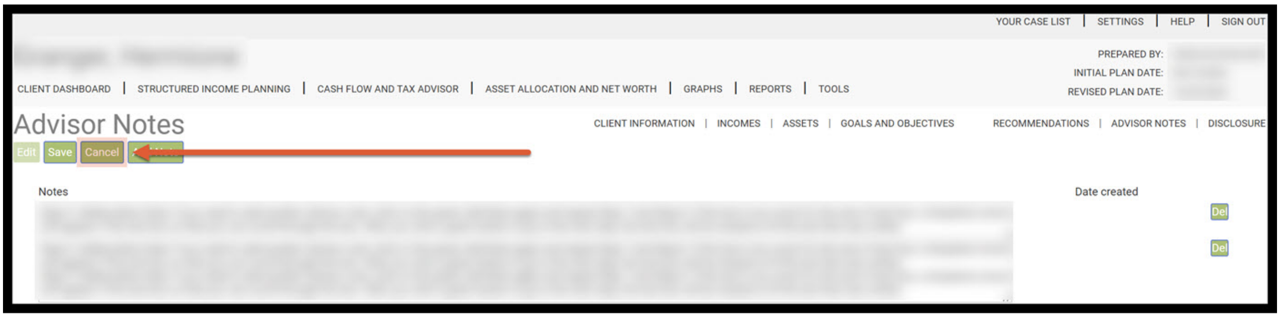
Step 10: Delete: To delete a note, click on the green Del button located at the righthand side of the screen.



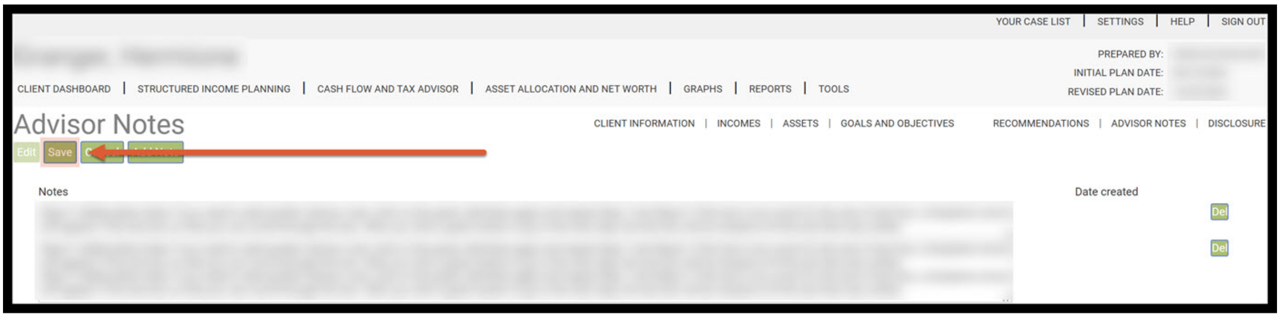
Step 11: Permanent Deletion: After clicking the green Del button, a sipsplanning.net dialog box will appear asking, "Are you sure you would like to permanently delete this recommendation?" Click OK to confirm the permanent deletion.



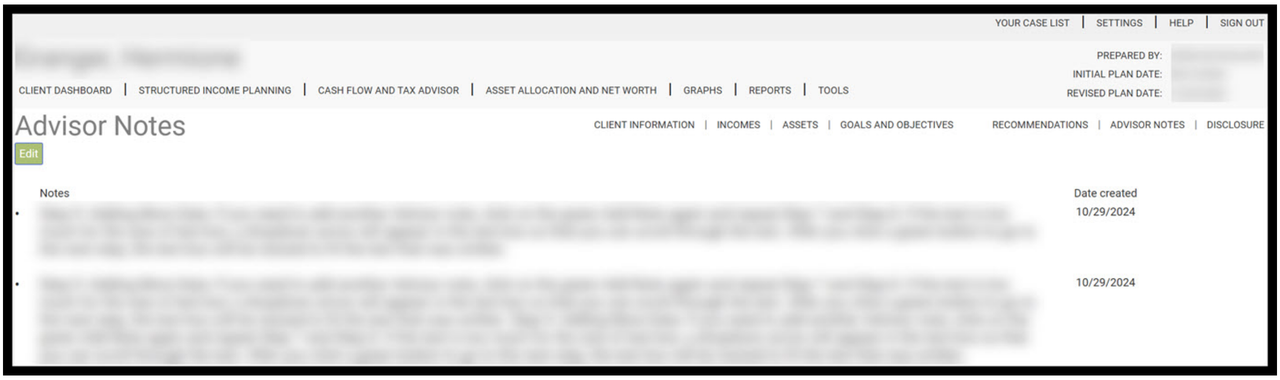
Step 12: Cancel: To discard any edits you have made, click the green Cancel button underneath the Advisor Notes subheading.



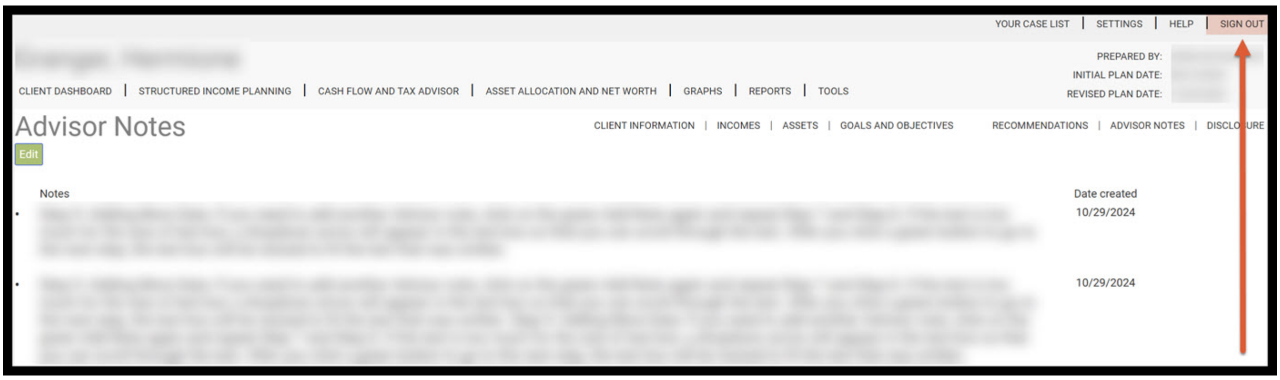
Step 13: Save: Click on the green Save button underneath the Advisor Notes subheading.



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: +1-888-449-6917 or support@planscout.com.