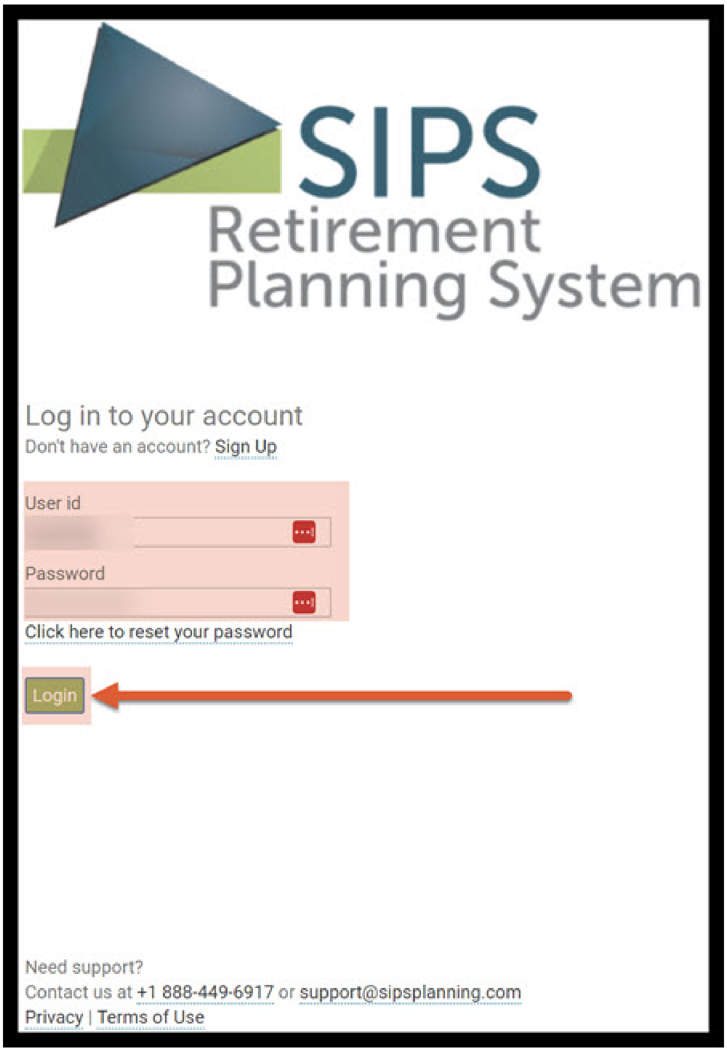
Advisor Notes

08/23/2024 5:57 pm EDT

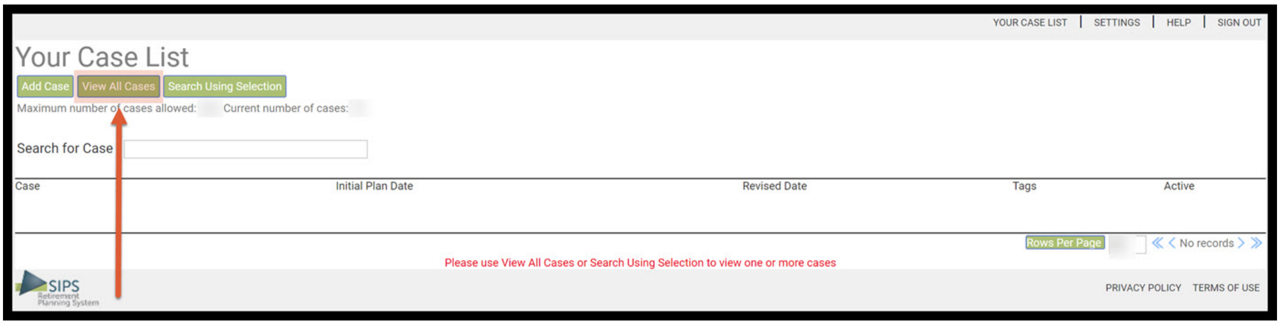
This page in the SIPS program is a place where you can write out the advisor notes. What you put into this page will show up when you do a report and you click on the notes option. Below is a step-by-step guide on how to filter the information in for the advisor notes.

Step 1: Logging In: Log in to SIPS.

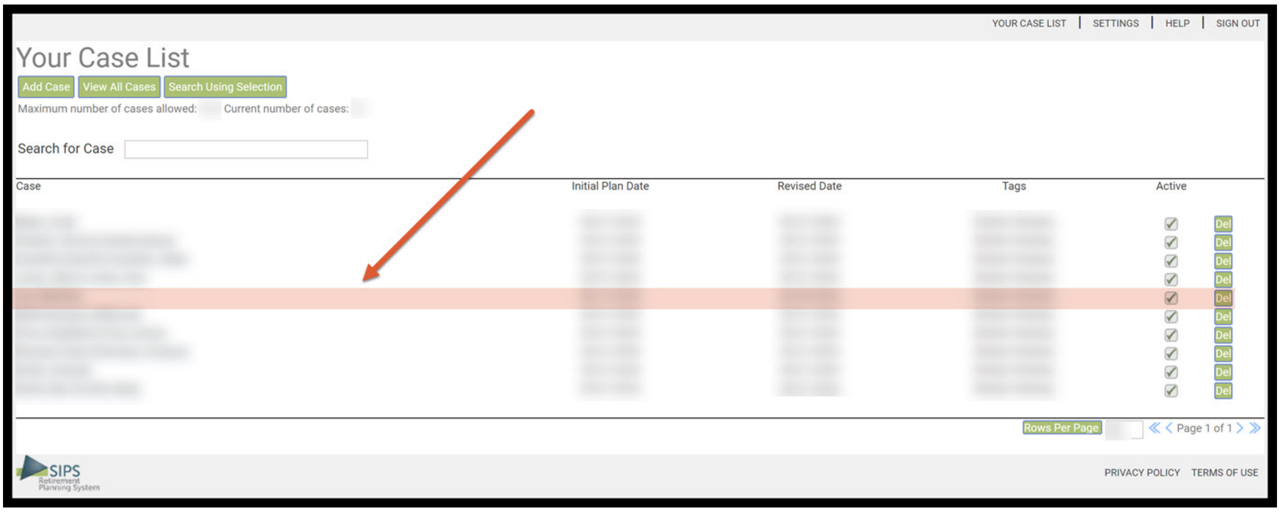


Step 2: Go To Your Case List: Click on either the Goto Your Case List button or click on the Your Case List Heading to take you to your case list.

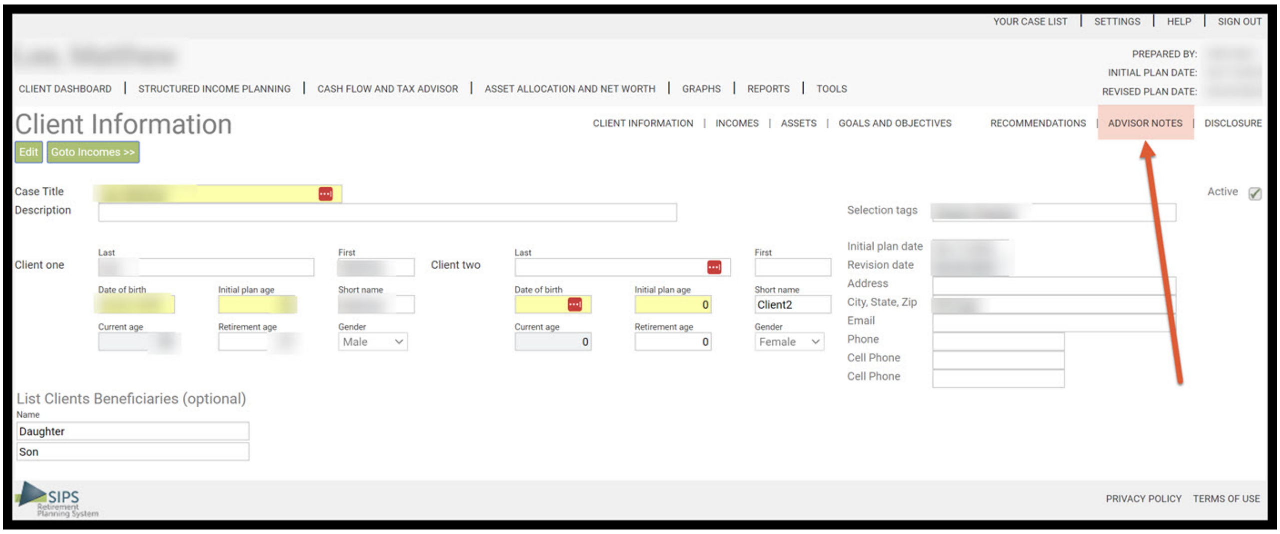
Step 3: View All Cases: Click on the View All Cases button to see the list of all of your cases.



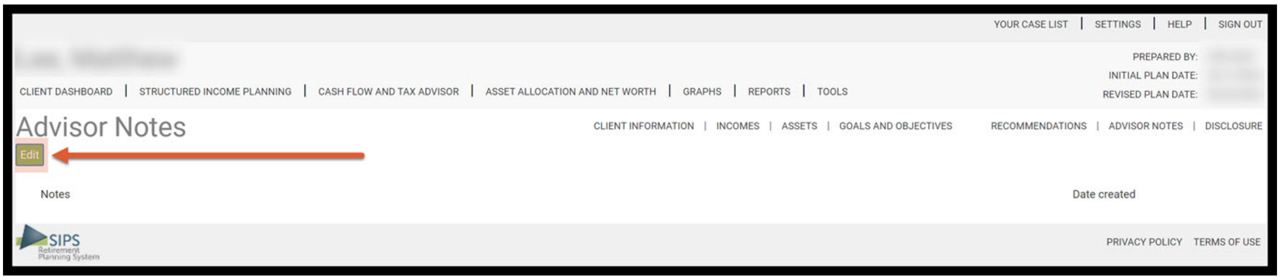
Step 4: Selection: Select which case you would like to open up to do the editing. Double click on the case to open it up to take you to the client information page.



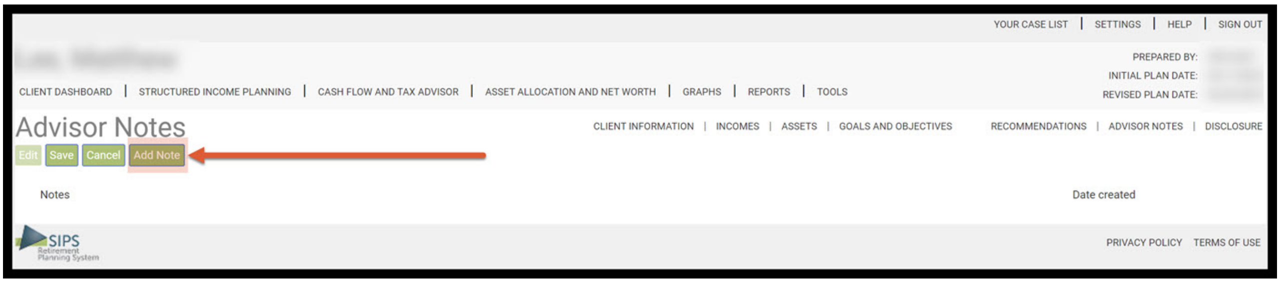
Step 5: Advisor Notes: Click on the Advisor Notes subheading located on the right-hand side of the screen. This subheading is stationary throughout all the pages that correlate with the client dashboard. The client dashboard pages are the client information, income, assets, goals and objectives, recommendations, advisor notes, disclosure.



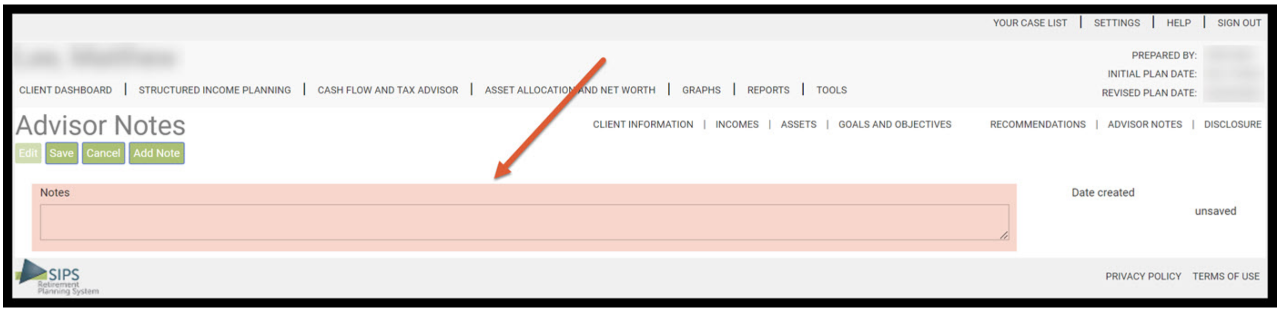
Step 6: Edit: Click on the green Edit button underneath the Advisor Notes subheading.



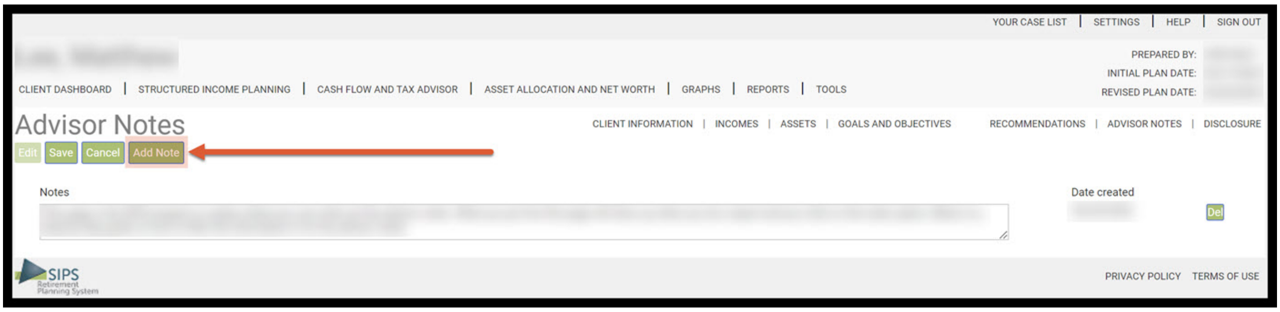
Step 7: Add Note: Click on the green Add Note button underneath the Advisor Notes subheading.



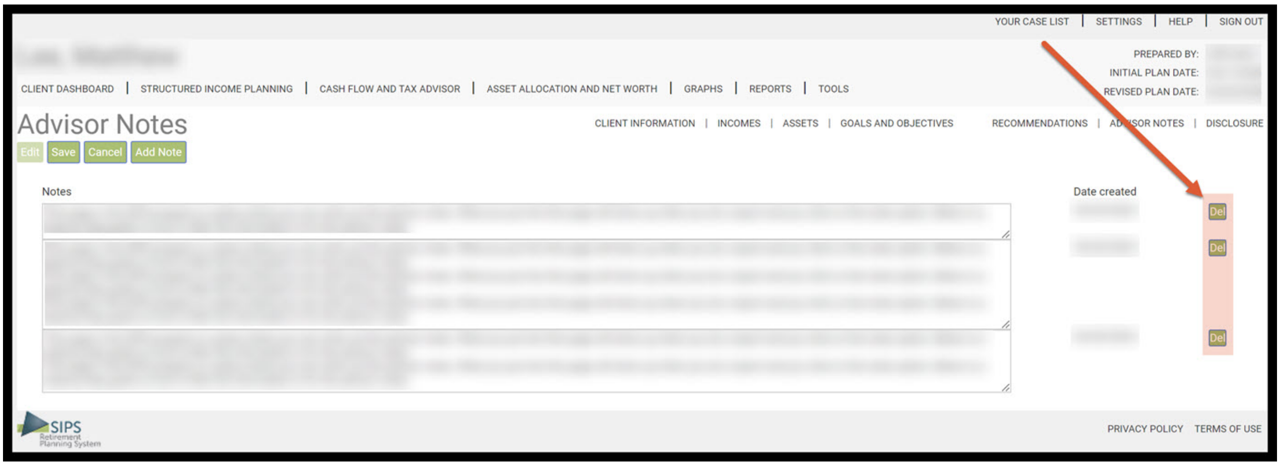
Step 8: Filtering in the Text Box: Click in the text box underneath the Notes heading and filter in the text box. If the text is too much for the size of text box, a dropdown arrow will appear in the text box so that you can scroll through the text. After you click a green button to go to the next step, the text box will be resized to fit the text that was written.



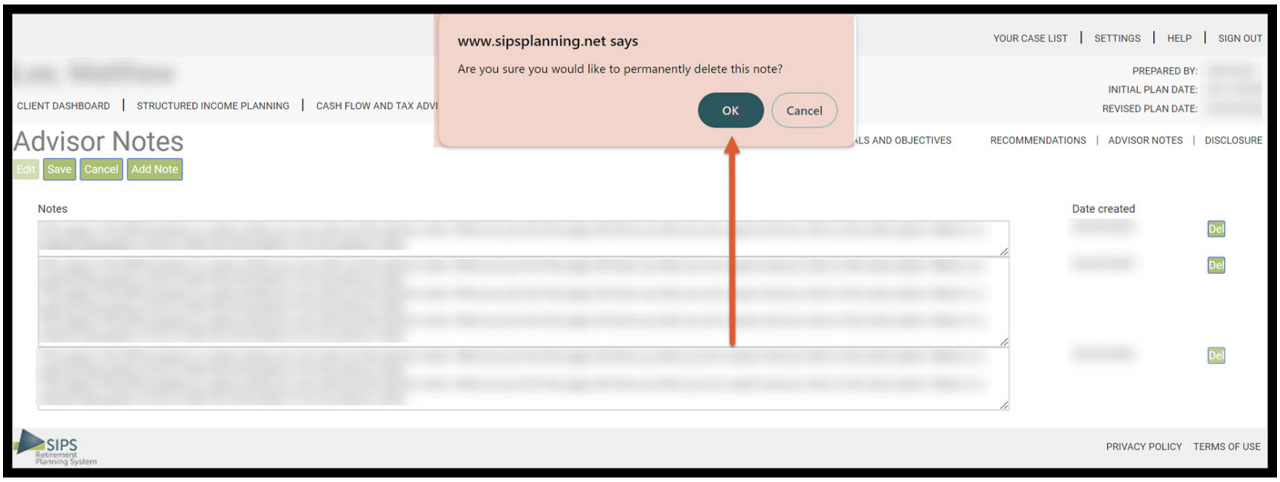
Step 9: Adding More Data: If you need to add another Advisor note, click on the green Add Note again and repeat Step 7 and Step 8. If the text is too much for the size of text box, a dropdown arrow will appear in the text box so that you can scroll through the text. After you click a green button to go to the next step, the text box will be resized to fit the text that was written.



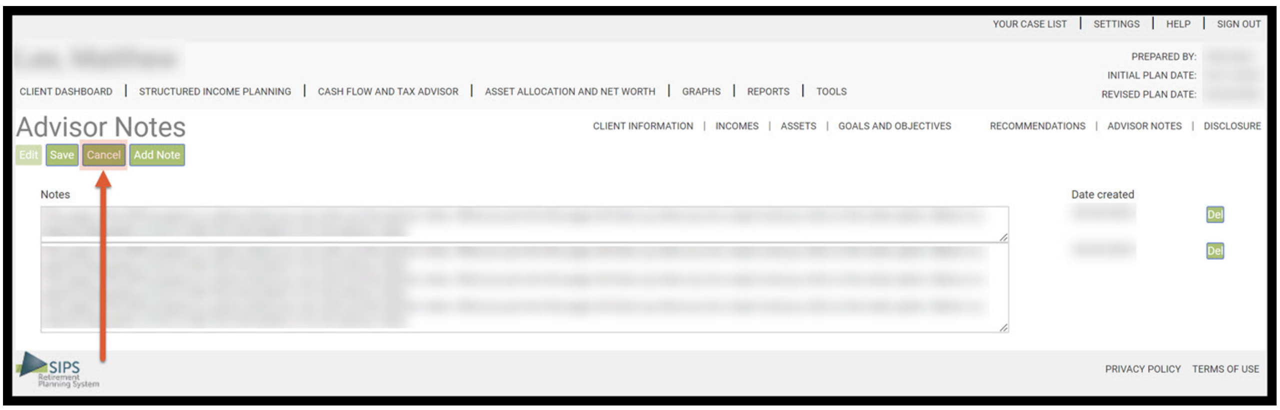
Step 10: Delete: To delete a note, click on the green Del button located at the righthand side of the screen.



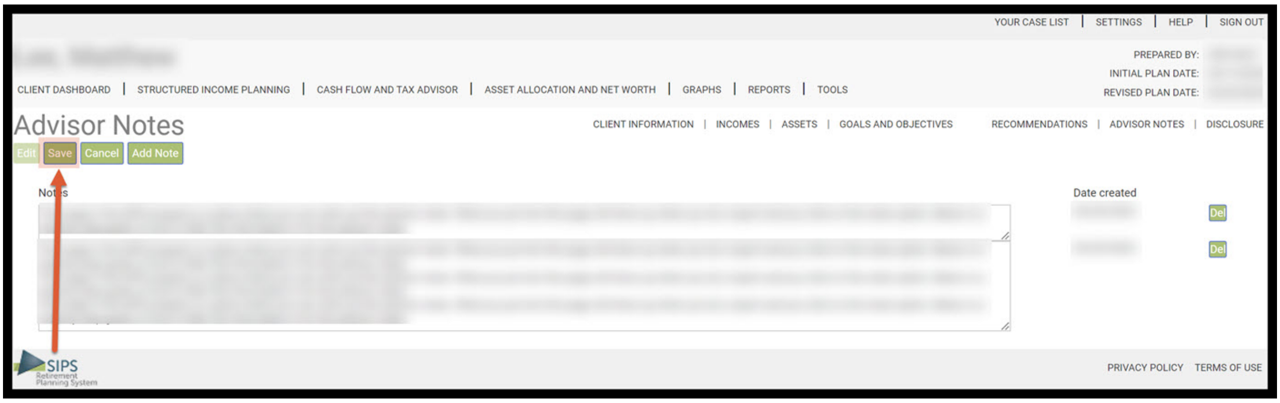
Step 11: Permanent Deletion: After clicking on the green Del button a sipsplanning.net text box will come up and ask, "Are you sure you would like to permanently delete this recommendation?" Click the OK button to permanently delete the item.



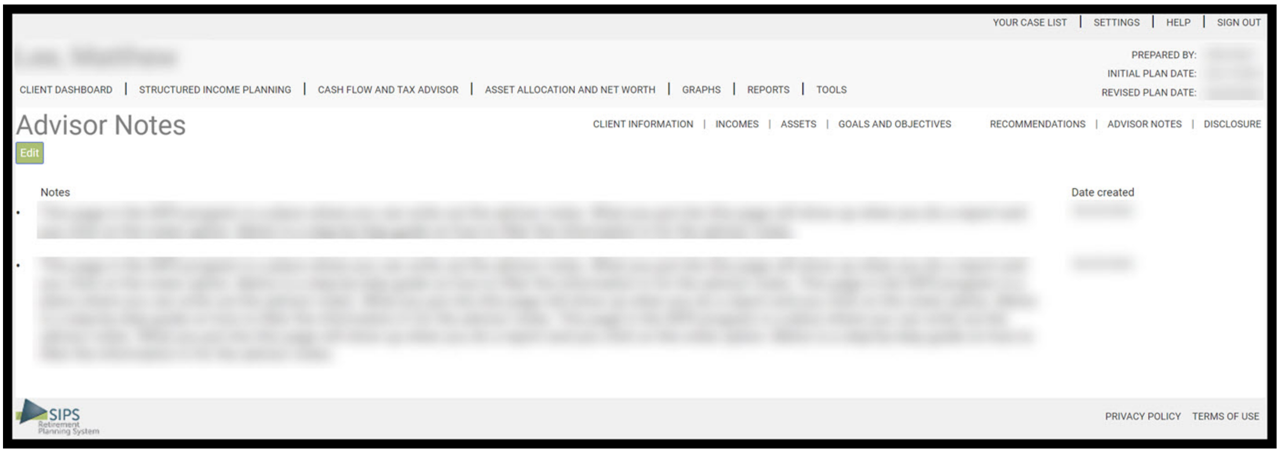
Step 12: Cancel: To cancel out any editing you have made, click on the green cancel button underneath the Goals and Concerns for Clients name subheading.



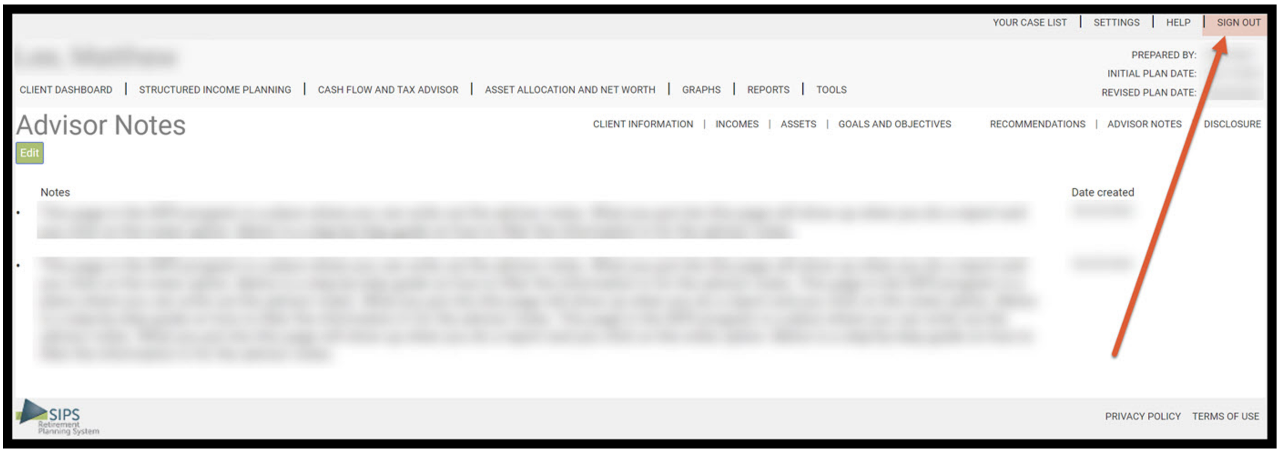
Step 13: Save: Click on the Save button underneath the Advisor Notes subheading.



Step 14: Final Version: Once you save the documentation it will show up as notes on the Advisor notes screen. This documentation will also be the documentation on the notes page for 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.