

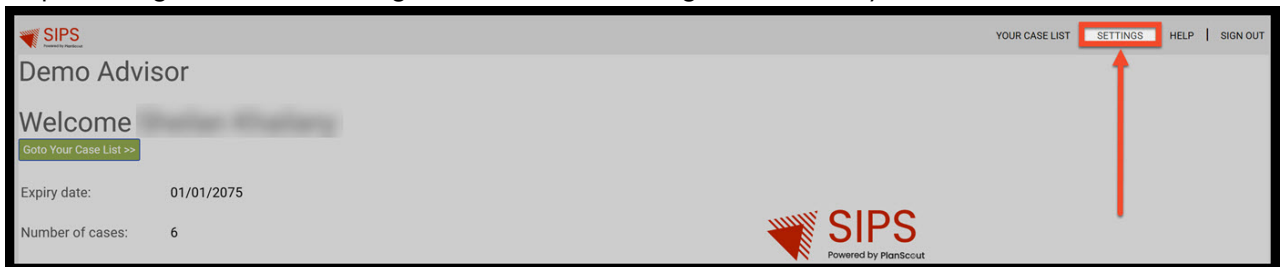
Changing the Colors of the Allocation Codes

08/28/2026 2:38 pm EDT

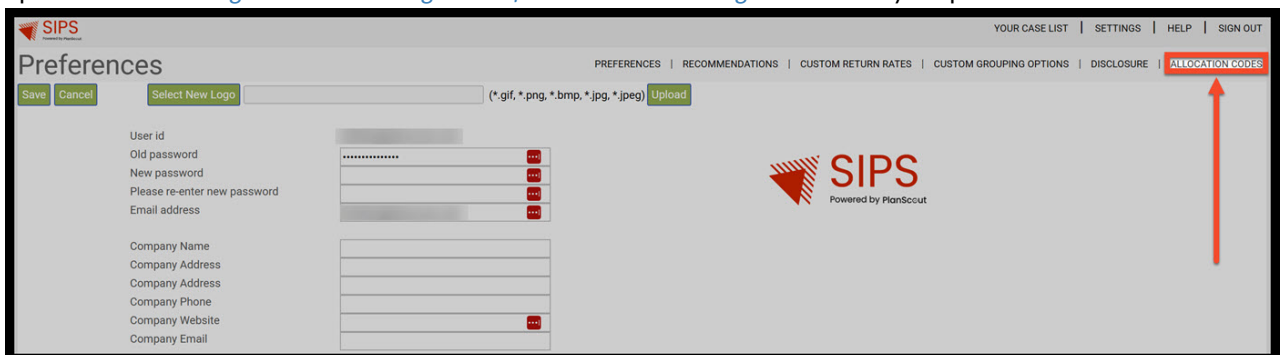
Administrators within SIPS have the ability to edit allocation codes. Within SIPS, you can customize the colors assigned to your allocation codes. This article walks you through changing the color for Conservative, Moderate, and Aggressive. This how to article will change the colors of Conservative to Red, Moderate to Yellow, and Aggressive to Green. We will start on the Welcome Landing page.

Related Articles: [Adding an Allocation Code](#), [Changing the Colors of the Allocation Codes](#), [Editing the Default Percentage Amounts on the Allocation Codes](#), [Editing the Maximum Percentage Amounts on the Allocation Codes](#), [Deleting an Allocation Code](#)

Step 1: Settings: Click on the Settings button located on the right-hand side of your screen.



Step 2: Allocation Codes: Click on the Allocation Codes button on the right-hand side of the screen. Not seeing this option? Check [Having Trouble Accessing the Preferences Under Settings?](#) to confirm your permission level.



Step 3: Sel Conservative: Click on the green Sel button next to Conservative and select the color red.

Allocation Code List

[Save](#)
[Cancel](#)
[Add Allocation Code](#)

[PREFERENCES](#) | [RECOMMENDATIONS](#) | [CUSTOM RETURN RATES](#) | [CUSTOM GROUPING OPTIONS](#) | [DISCLOSURE](#) | [ALLOCATION CODES](#)

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none		0.00	5.00	n/a	0
10904	non Qual		0.00	10.00	n/a	0
10905	Qualified		0.00	10.00	n/a	0
10906	green		0.00	10.00	n/a	0
13097	yellow		0.00	10.00	n/a	0
10908	red		0.00	10.00	n/a	0
10909	safe		0.00	10.00	Fixed Interest	0
10910	risk		0.00	10.00	Aggressive	0
10911	Fixed Interest		0.00	10.00	Fixed Interest	0
10912	Indexed Annuity		0.00	10.00	Indexed Annuity	0
10913	Conservative		0.00	10.00	Conservative	0
10914	Moderately Conservative		0.00	10.00	Moderately Conservative	0
10915	Moderate		0.00	10.00	Moderate	0
10916	Moderately Aggressive		0.00	10.00	Moderately Aggressive	0
10917	Aggressive		0.00	10.00	Aggressive	0
12370	Very Aggressive		5.00	10.00	Opportunistic	0

Combining Allocation Codes

You can merge one allocation code into another code by doing the following:

1. Find the id of the code you would like to keep which is located at the left side of the code.
2. Enter this id into the "Replace with id" field of the code you would like to be removed.
3. Press save.

All of the allocation codes on accounts using the "removed" code will be changed to use the "replace with" code.

Step 4: Sel Moderate: Click on the green Sel button next to Moderate and select the color yellow.

Allocation Code List

[Save](#)
[Cancel](#)
[Add Allocation Code](#)

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10905	Qualified		0.00	10.00	n/a	0
10906	green		0.00	10.00	n/a	0
13097	yellow		0.00	10.00	n/a	0
10908	red		0.00	10.00	n/a	0
10909	safe		0.00	10.00	Fixed Interest	0
10910	risk		0.00	10.00	Aggressive	0
10911	Fixed Interest		0.00	10.00	Fixed Interest	0
10912	Indexed Annuity		0.00	10.00	Indexed Annuity	0
10913	Conservative		0.00	10.00	Conservative	0
10914	Moderately Conservative		0.00	10.00	Moderately Conservative	0
10915	Moderate		0.00	10.00	Moderate	0
10916	Moderately Aggressive		0.00	10.00	Moderately Aggressive	0
10917	Aggressive		0.00	10.00	Aggressive	0
12370	Very Aggressive		5.00	10.00	Opportunistic	0

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Step 5: Sel Aggressive: Click on the green Sel button next to Aggressive and select the color green.

Allocation Code List

[Save](#)
[Cancel](#)
[Add Allocation Code](#)

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10911	Fixed Interest		0.00	10.00	Fixed Interest	0
10912	Indexed Annuity		0.00	10.00	Indexed Annuity	0
10913	Conservative		0.00	10.00	Conservative	0
10914	Moderately Conservative		0.00	10.00	Moderately Conservative	0
10915	Moderate		0.00	10.00	Moderate	0
10916	Moderately Aggressive		0.00	10.00	Moderately Aggressive	0
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Step 6: Save: Click on the green Save button underneath the Allocation Code List heading.

Allocation Code List

Save

Cancel

Add Allocation Code

10903

none

Del

10904

non Qual

Del

10905

Qualified

Del

10906

green

Del

13097

yellow

Del

10908

red

Del

10909

safe

Del

10910

risk

Del

10911

Fixed Interest

Del

10912

Indexed Annuity

Del

10913

Conservative

Del

10914

Moderately Conservative

Del

10915

Moderate

Del

10916

Moderately Aggressive

Del

10917

Aggressive

Del

12370

Very Aggressive

Del

Location Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none		0.00	5.00	n/a	0
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- Press save.

All of the allocation codes on accounts using the "removed" code will be changed to use the "replace with" code.

Your new colors will now display throughout SIPS wherever the allocation codes appear. 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.