

# Entering in Your Company Contact Information into SIPS

01/02/2026 9:12 am EST

You can access the preference page through the settings button. On the preference page you can update your password, enter your email address, and provide your company's contact information. The company's contact information that you have provided will be Company's contact information that will be provided on the cover page for the report. Below is a step-by-step guideline for entering in your company's contact information.

Step 1: Login: Login to SIPS.



Step 2: Settings: Click on the Settings button located in the upper right hand side of the screen.



Step 3: Company Name Text Box: Enter in the Company Name.

Preferences

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Save Cancel Select New Logo (\*.gif, \*.png, \*.bmp, \*.jpg, \*.jpeg) Upload

User id	.....	...
Old password	.....	...
New password	.....	...
Please re-enter new password	.....	...
Email address	.....	...
Company Name	.....	...
Company Address	.....	...
Company Address	.....	...
Company Phone	.....	...
Company Website	.....	...
Company Email	.....	...



Step 4: Company Address Text Box: Enter in the Company Address.

Preferences

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Save Cancel Select New Logo (\*.gif, \*.png, \*.bmp, \*.jpg, \*.jpeg) Upload

User id	.....	...
Old password	.....	...
New password	.....	...
Please re-enter new password	.....	...
Email address	.....	...
Company Name	Company Name	...
Company Address	.....	...
Company Address	.....	...
Company Phone	.....	...
Company Website	.....	...
Company Email	.....	...



Step 5: Company Phone Text Box: Enter in the Company Phone text box.

Preferences

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Save Cancel Select New Logo (\*.gif, \*.png, \*.bmp, \*.jpg, \*.jpeg) Upload

User id	.....	...
Old password	.....	...
New password	.....	...
Please re-enter new password	.....	...
Email address	.....	...
Company Name	Company Name	...
Company Address	1234 Anywhere Street	...
Company Address	City, State, Zip Code	...
Company Phone	.....	...
Company Website	.....	...
Company Email	.....	...



Step 6: Company Website Text Box: Enter in the Company Website URL.

Preferences

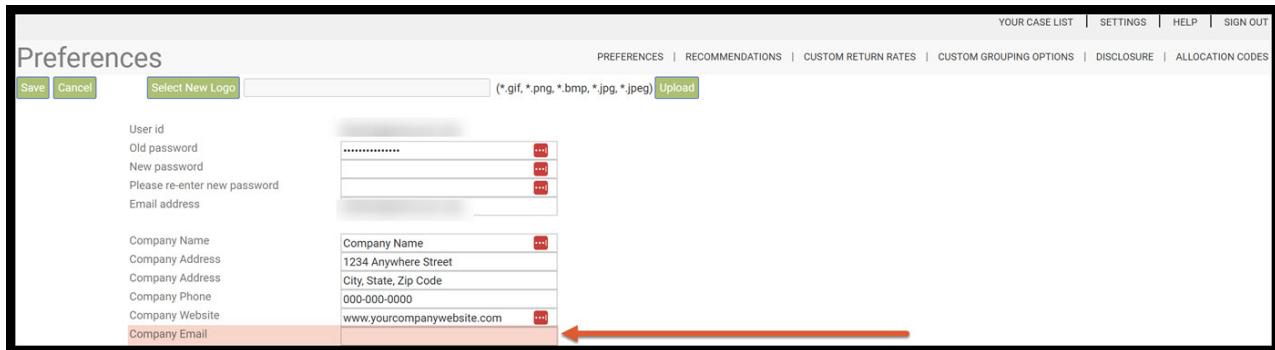
YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Save Cancel Select New Logo (\*.gif, \*.png, \*.bmp, \*.jpg, \*.jpeg) Upload

User id	.....	...
Old password	.....	...
New password	.....	...
Please re-enter new password	.....	...
Email address	.....	...
Company Name	Company Name	...
Company Address	1234 Anywhere Street	...
Company Address	City, State, Zip Code	...
Company Phone	000-000-0000	...
Company Website	.....	...
Company Email	.....	...

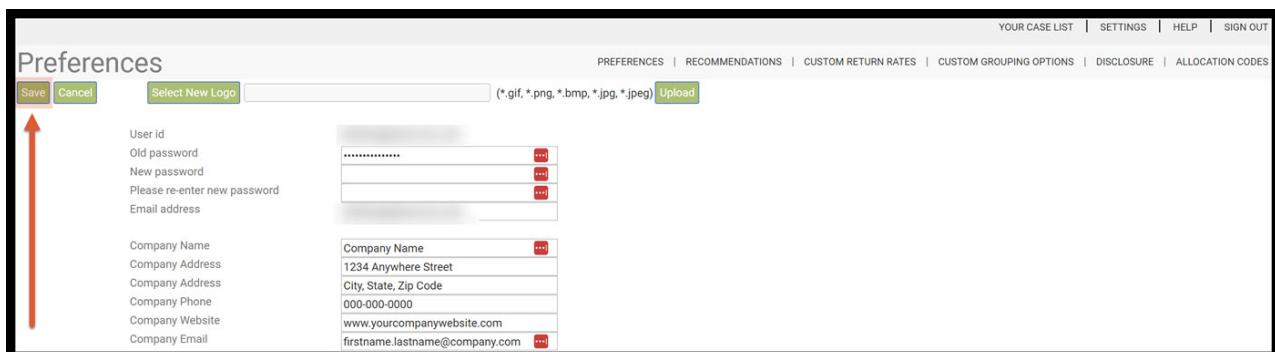


Step 7: Company Email Text Box: Enter in the company email address.



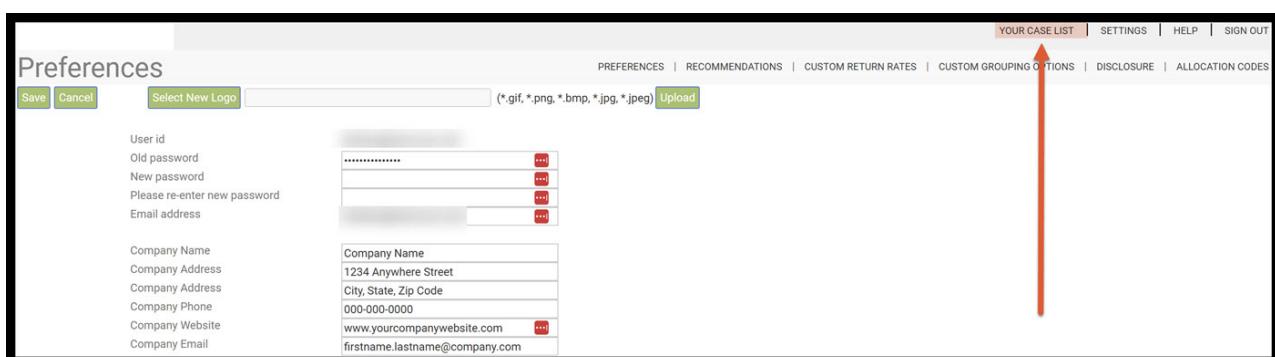
The screenshot shows the 'Preferences' page. The 'Company Email' field is highlighted with a red arrow. The field contains 'firstname.lastname@company.com'. Other fields like 'Company Name' and 'Company Address' are also visible.

Step 8: Save: Click on the green Save button underneath the Preferences heading.



The screenshot shows the 'Preferences' page. A red arrow points to the 'Save' button, which is highlighted in green. The 'Company Email' field contains 'firstname.lastname@company.com'.

Step 9: Your Case List: Click on Your Case List Button located on the right-hand side of your screen.



The screenshot shows the 'Preferences' page. A red arrow points to the 'Your Case List' button in the top right corner. The 'Company Email' field contains 'firstname.lastname@company.com'.

Step 10: View All Cases: Click on the green View All Cases underneath the Your Case List heading.



The screenshot shows the 'Your Case List' page. A red arrow points to the 'View All Cases' button, which is highlighted in green. The page also features a search bar and a table for managing cases.

Step 11: Case Selection: Select a case.

Step 12: Reports: Click on the Reports button underneath the Client's Name heading.

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## Client Information

[Edit](#) [Goto Incomes >>](#)

Case Title: [REDACTED]  
Description: [REDACTED]

Client one

Last: [REDACTED]	First: [REDACTED]	Client two
Date of birth: [REDACTED]	Initial plan age: [REDACTED]	Last: [REDACTED]
Current age: [REDACTED]	Retirement age: [REDACTED]	Short name: [REDACTED]
Gender: Female		Date of birth: [REDACTED]
		Initial plan age: 0
		Current age: 0
		Retirement age: 0

List Clients Beneficiaries (optional): [REDACTED]

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

PREPARED BY: [REDACTED]  
INITIAL PLAN DATE: [REDACTED]  
REVISED PLAN DATE: [REDACTED]

Selection tags

Initial plan date	[REDACTED]
Revision date	[REDACTED]
Address	[REDACTED]
City, State, Zip	[REDACTED]
Email	[REDACTED]
Phone	[REDACTED]
Cell Phone	[REDACTED]
Cell Phone	[REDACTED]

Step 13: Generate Report: Click on the green Generate Report button underneath the Clients Name.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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# Reports

[Generate Report](#)

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

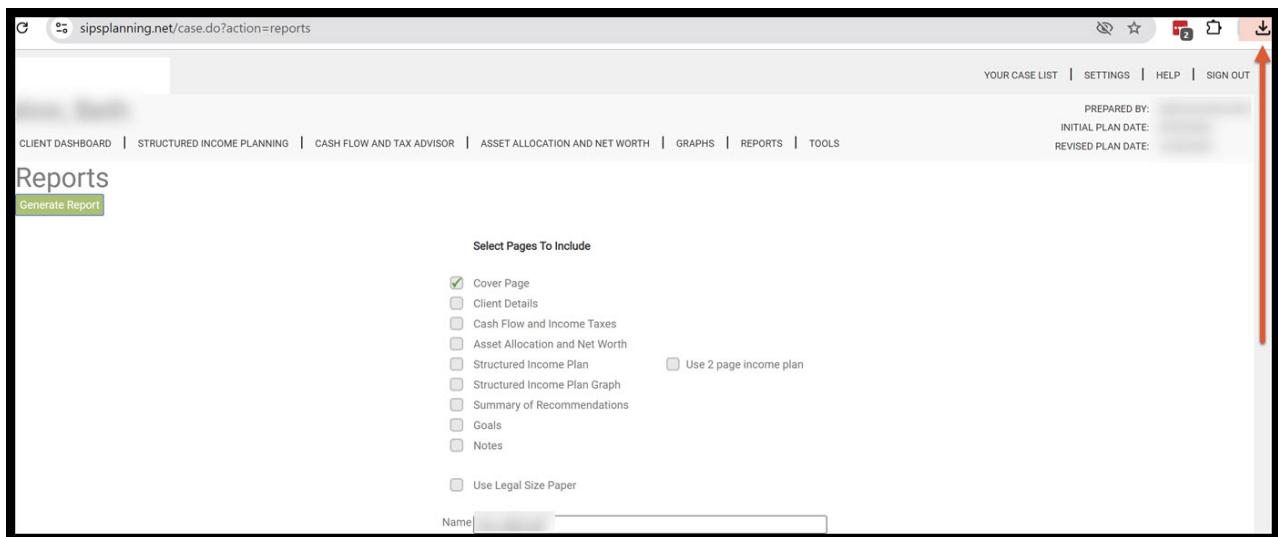
**Select Pages To Include**

Cover Page  
 Client Details  
 Cash Flow and Income Taxes  
 Asset Allocation and Net Worth  
 Structured Income Plan  
 Structured Income Plan Graph  
 Summary of Recommendations  
 Goals  
 Notes

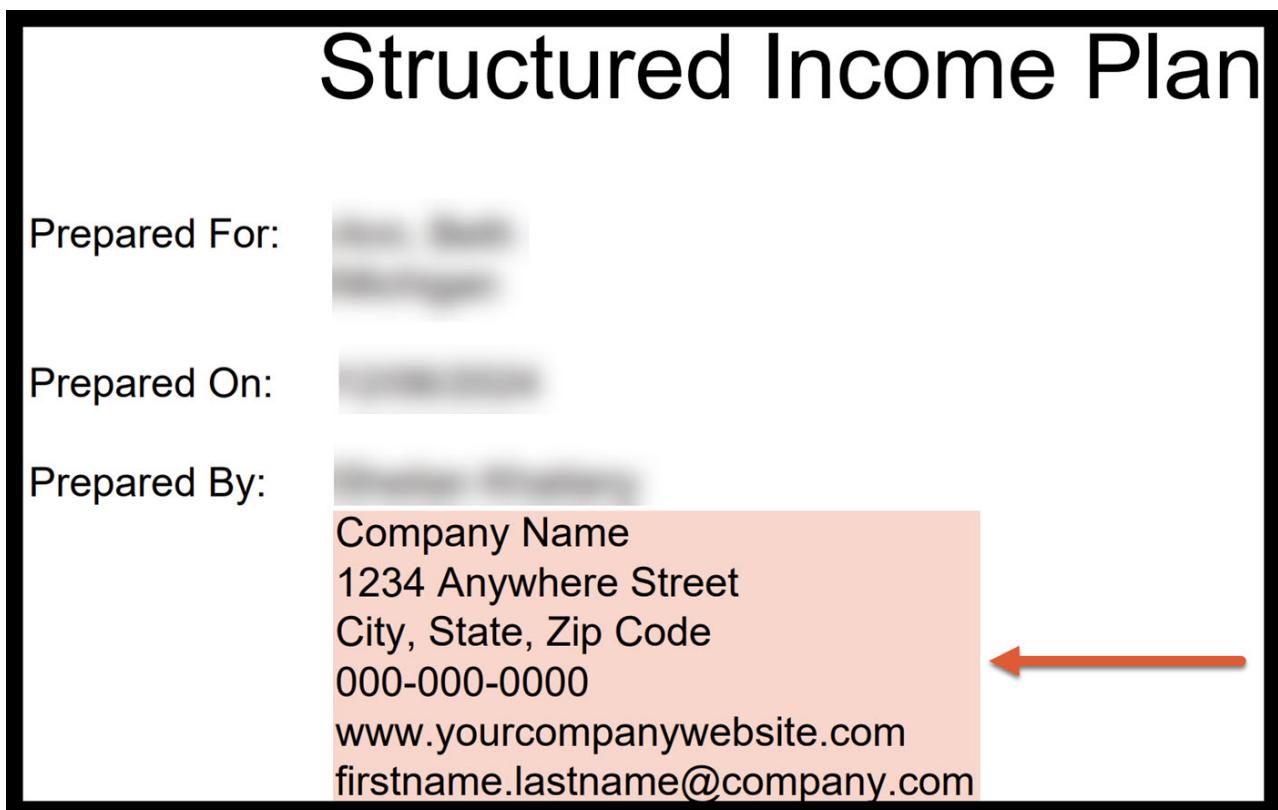
Use 2 page income plan  
 Use Legal Size Paper

Name

Step 14: Download the PDF: Download the PDF.



Step 15: Cover Page: The company contact information should be displayed on the cover page.



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](mailto:support@planscout.com).