

Uploading A Logo

01/02/2026 9:10 am EST

On the preferences page you can upload a logo. The logo will be displayed in the upper left-hand side of your screen. Once uploaded it will be displayed on all the pages in SIPS and it will be included in the final report. After uploading a logo it cannot be deleted from the pages. Below is a step-by-step guideline for uploading a logo.

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: Select New Logo: Click on the green Select New Logo button underneath the Preferences heading.

Preferences

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Save | Cancel | Select New Logo

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

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

(*.gif, *.png, *.bmp, *.jpg, *.jpeg)



Step 4: Upload: Click on the green Upload button underneath the Preferences heading.

Preferences

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Save | Cancel | Select New Logo CompanyLogo.jpg

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

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(*.gif, *.png, *.bmp, *.jpg, *.jpeg)



Step 5: New Logo: The new logo should appear in the upper left-hand side of the screen and in the middle of the screen.

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Preferences

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

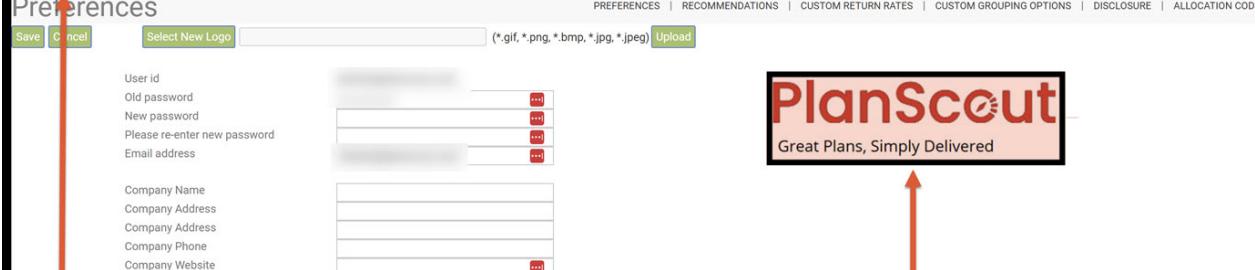
Save | Cancel | Select New Logo

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

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(*.gif, *.png, *.bmp, *.jpg, *.jpeg)



Step 6: Save: Click on the green save button underneath the Preferences heading.

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Preferences

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

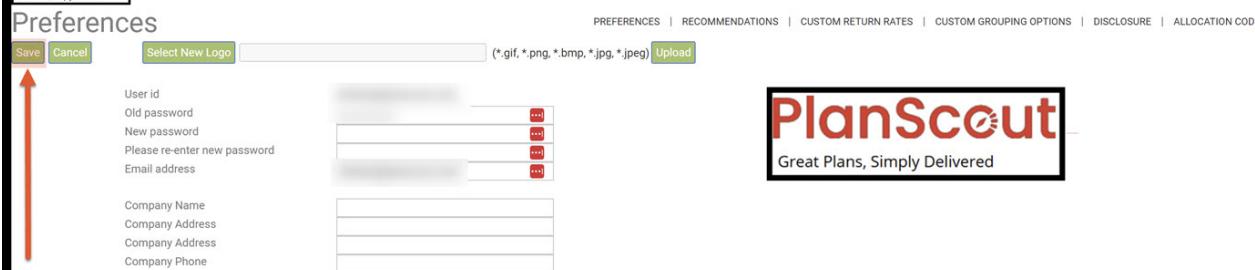
Save | Cancel | Select New Logo

User id
Old password
New password
Please re-enter new password
Email address

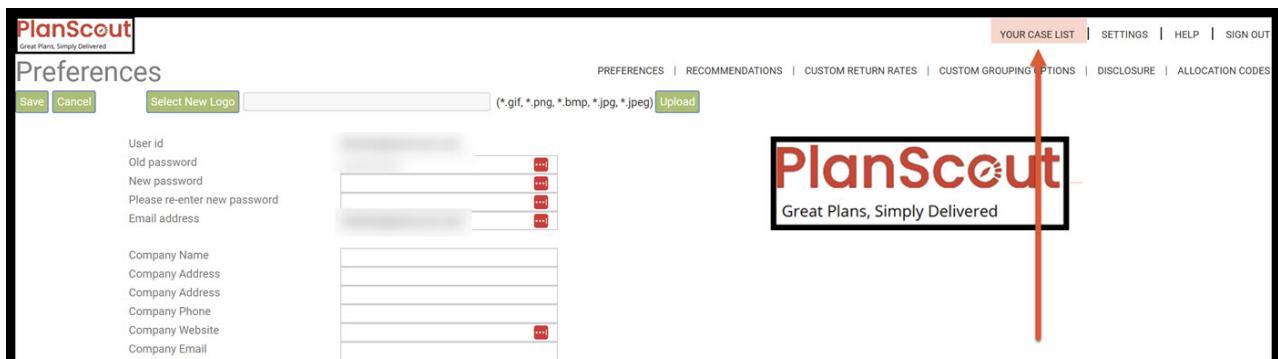
Company Name
Company Address
Company Address
Company Phone
Company Website
Company Email

PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

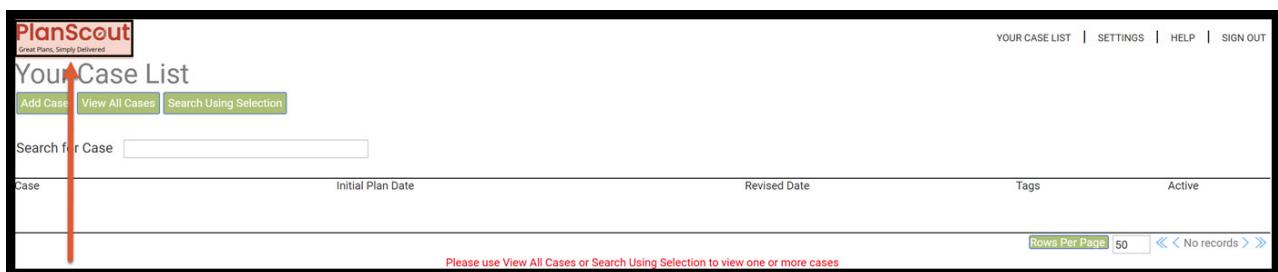
(*.gif, *.png, *.bmp, *.jpg, *.jpeg)



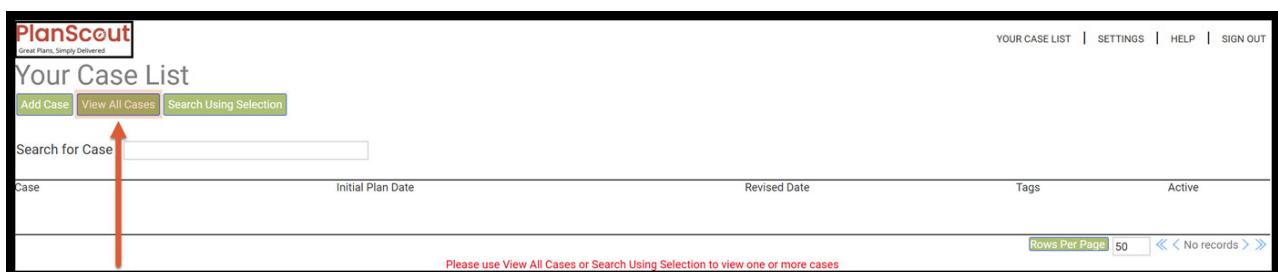
Step 7: Your Case List: Click on the Your Case List button located at the right-hand side of the screen.



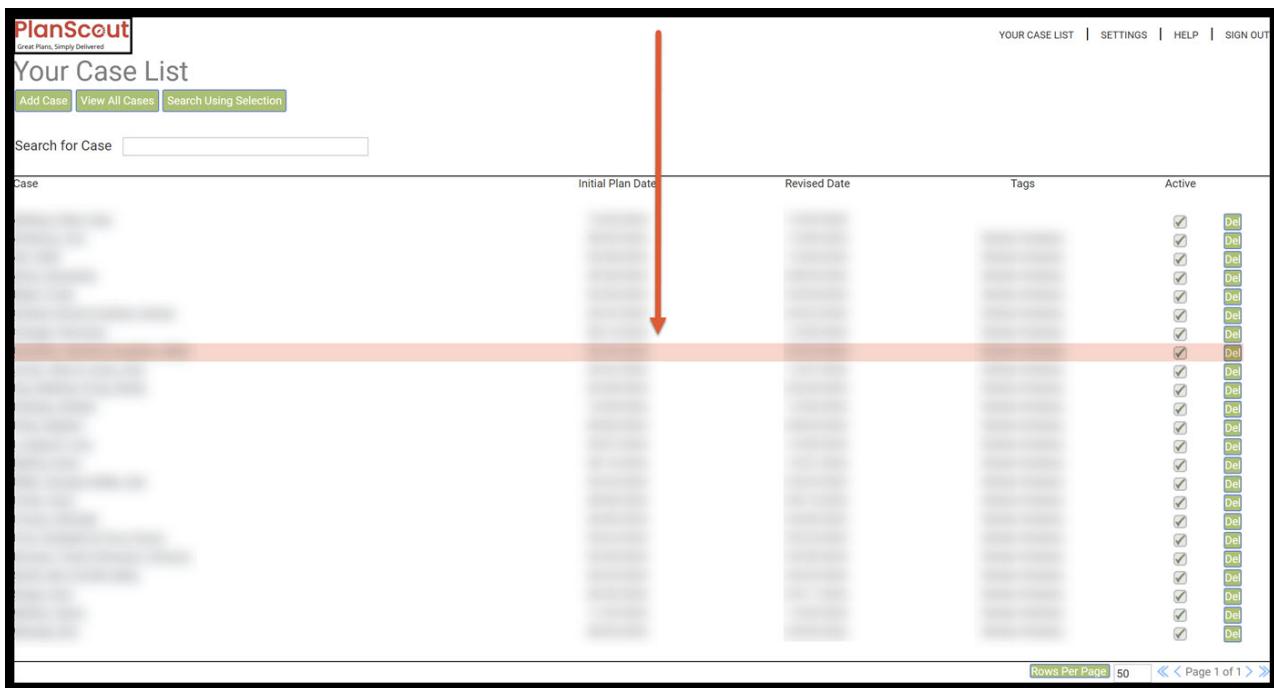
Step 8: Company Logo: Your company logo should be staying at the left-hand side of the screen while you click through all the different screens of the SIPS program.



Step 9: View All Cases: Click on the green View All Cases underneath the Your Case List heading.



Step 10: Case Selection: Select a case.



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YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Your Case List

Add Case | View All Cases | Search Using Selection

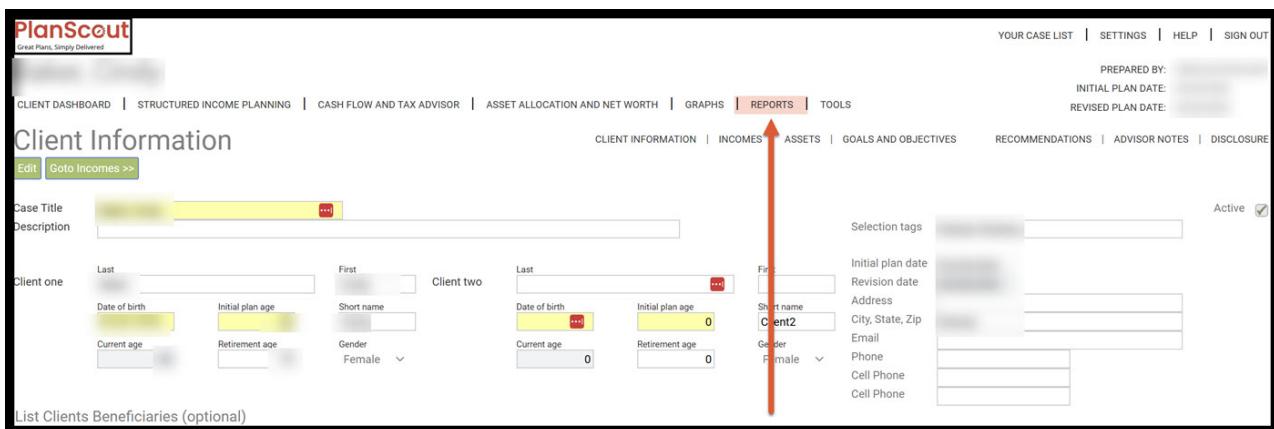
Search for Case:

Case Initial Plan Date Revised Date Tags Active

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

Case	Initial Plan Date	Revised Date	Tags	Active
Redacted Case	Redacted Date	Redacted Date	Redacted Tags	Redacted Active

Step 11: Reports: Click on the Reports button underneath the Client's Name heading.



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YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | **REPORTS** | TOOLS

Client Information

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

Edit | Goto Incomes >>

Case Title: Case Description:

Client one: Last First Client two: Last First

Date of birth: Initial plan age: Short name:

Current age: Retirement age: Gender: Female

Client two: Last First Client two: Last First

Date of birth: Initial plan age: Short name: Client2

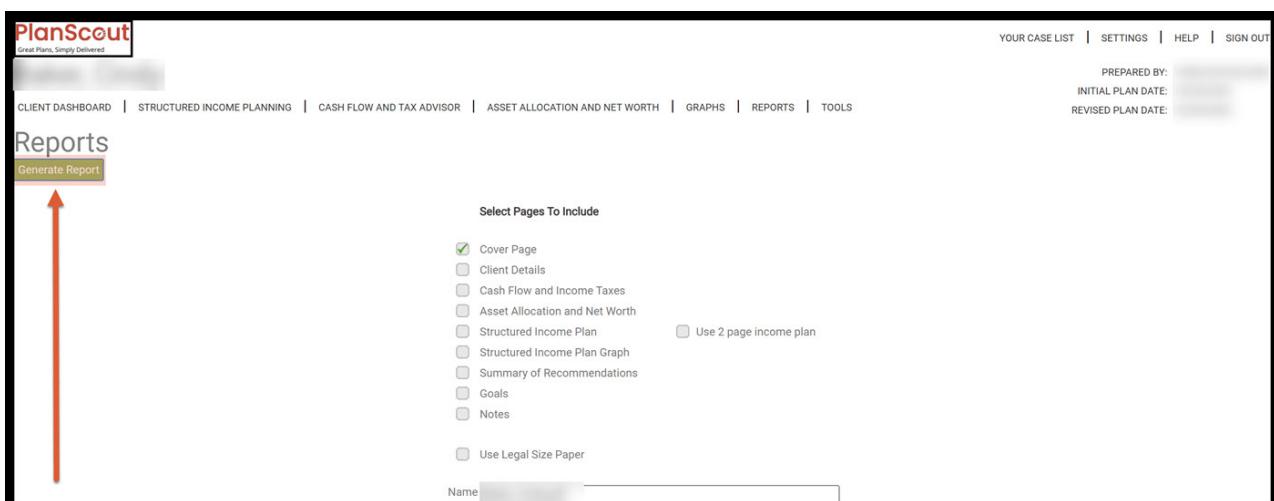
Current age: Retirement age: Gender: Female

Selection tags: Active

Initial plan date:
Revision date:
Address:
City, State, Zip:
Email:
Phone:
Cell Phone:
Cell Phone:

List Clients Beneficiaries (optional):

Step 12: Generate Report: Click on the green Generate Report button underneath the Clients Name.



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YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:
INITIAL PLAN DATE:
REVISED PLAN DATE:

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Reports

Generate Report

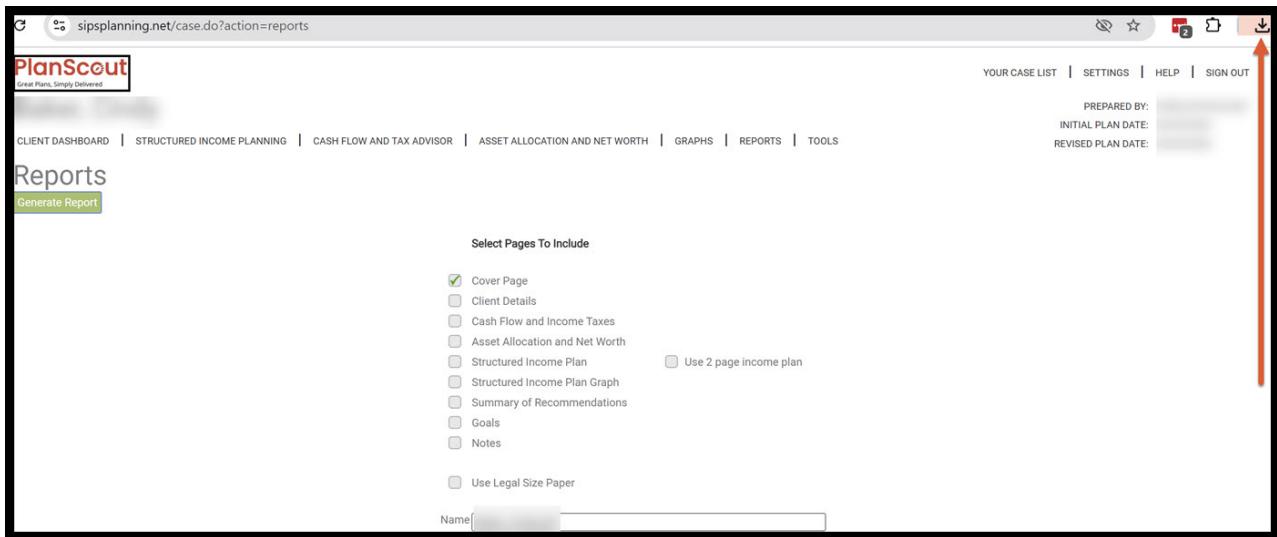
Select Pages To Include

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

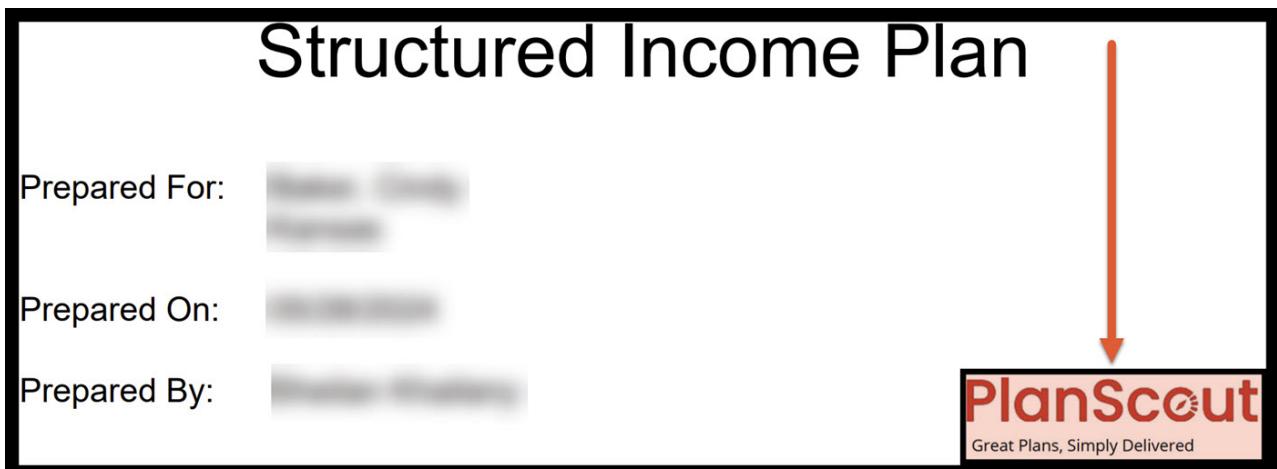
Use 2 page income plan
 Use Legal Size Paper

Name:

Step 13: Download the PDF: Download the PDF.



Step 14: Cover Page: The logo 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.