

# Uploading A Logo

12/10/2024 2:57 pm 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 from the pages. Below is a step-by-step guideline for uploading a logo.

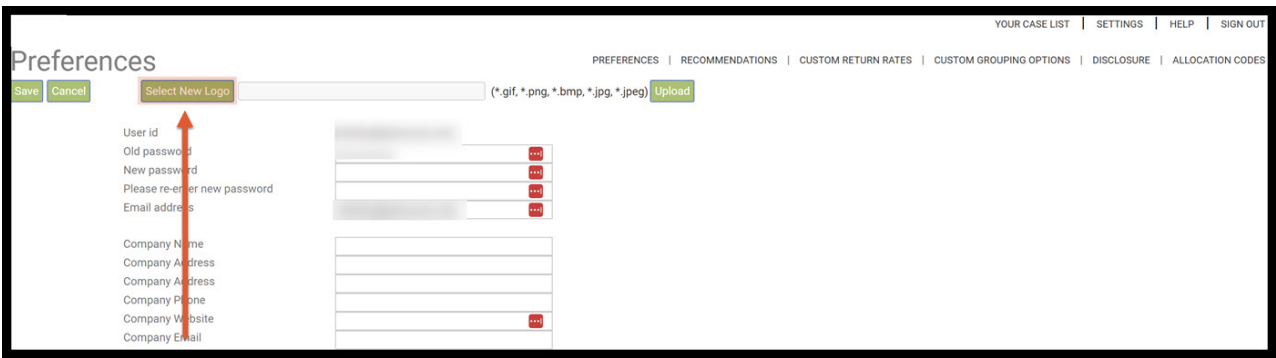
Step 1: Login: Login to SIPS.



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



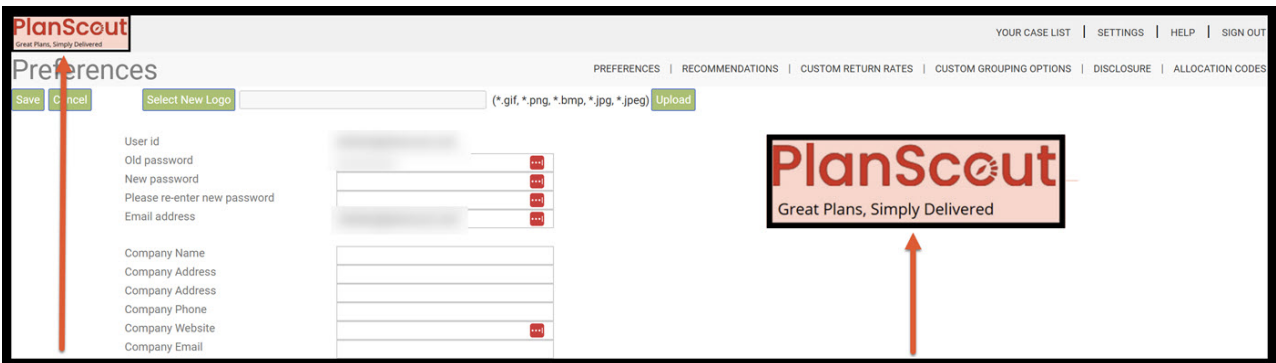
Step 3: Select New Logo: Click on the green Select New Logo button underneath the Preferences heading.



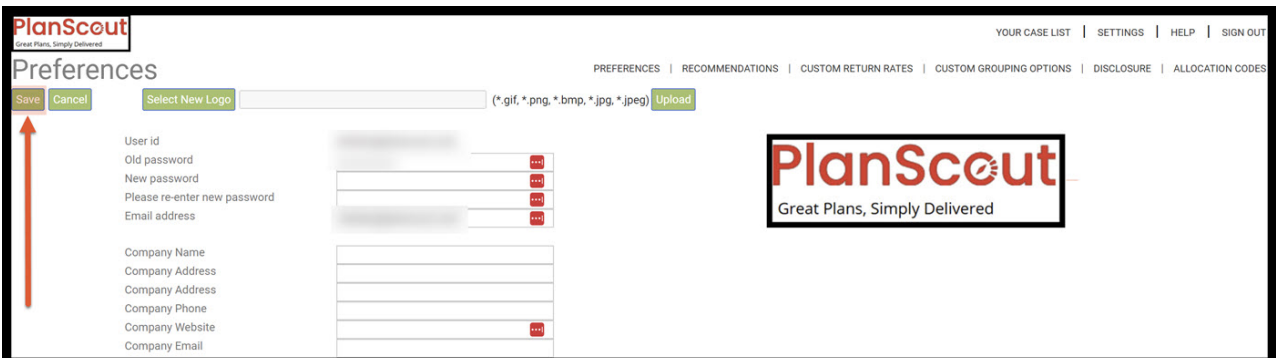
Step 4: Upload: Click on the green Upload button underneath the Preferences heading.



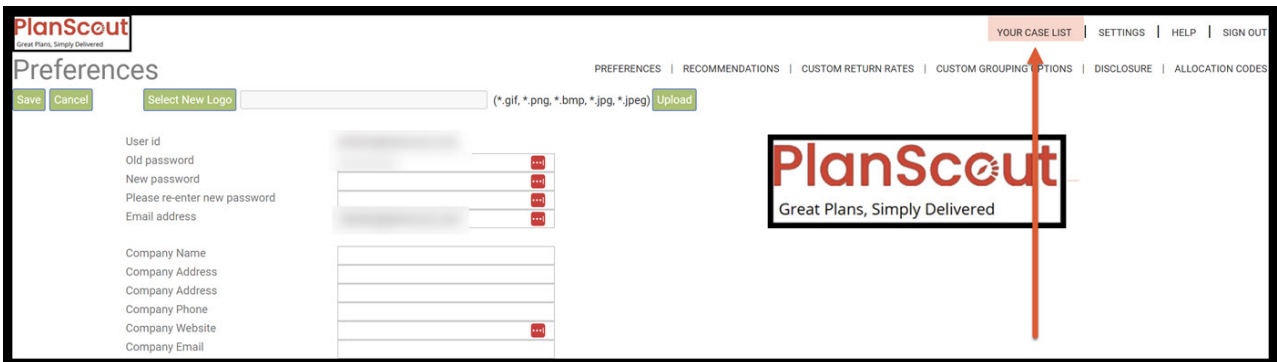
Step 5: New Logo: The new logo should appear in the upper left-hand side of the screen and in the middle of the screen.



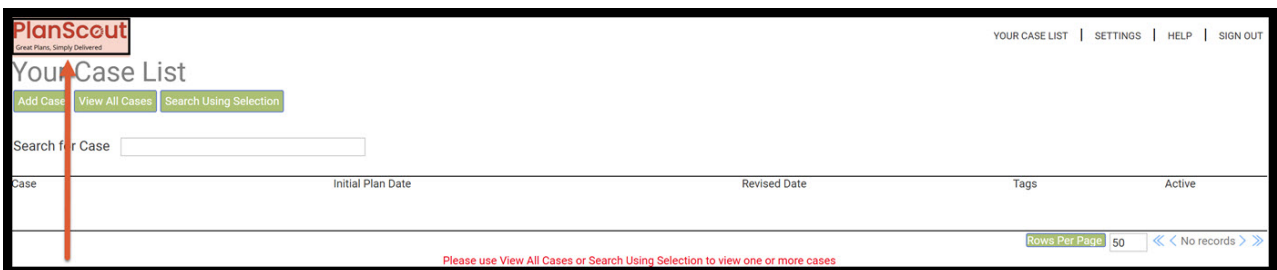
Step 6: Save: Click on the green save button underneath the Preferences heading.



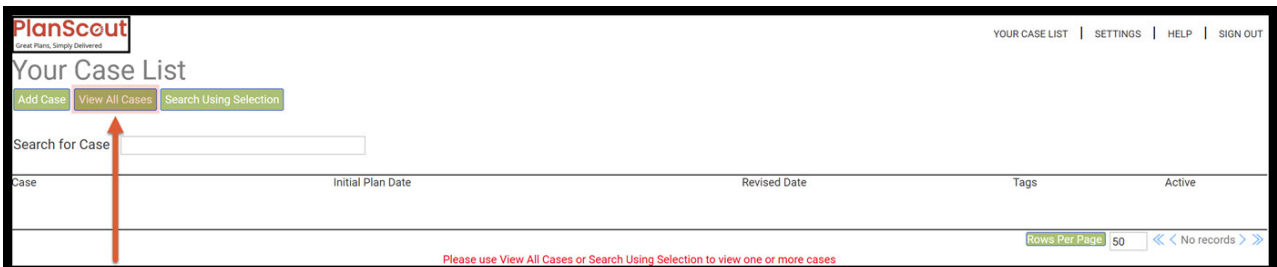
Step 7: Your Case List: Click on the Your Case List button located at the right-hand side of the screen.



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
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del
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				<input checked="" type="checkbox"/> Del
				<input checked="" type="checkbox"/> Del

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

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

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

### Client Information

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

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

Case Title

Description

Selection tags

Active

Client one

Last  First

Date of birth  Initial plan age

Client two

Last  First

Date of birth  Initial plan age

Current age  Retirement age

Short name

Gender Female

Client2

City, State, Zip

Email

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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### Reports

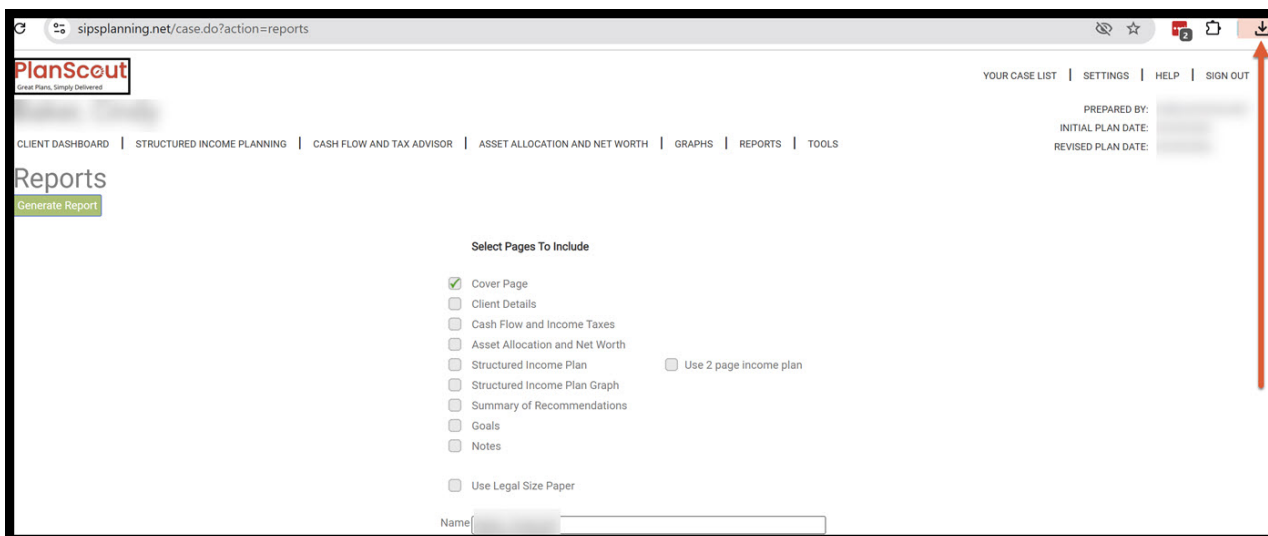
**Generate Report**

Select Pages To Include

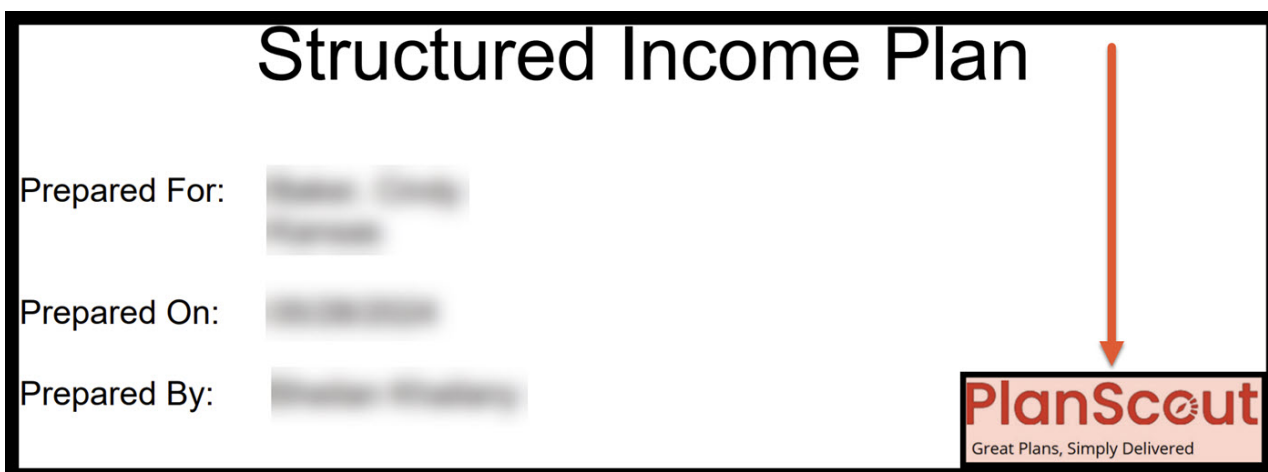
- Cover Page
- Client Details
- Cash Flow and Income Taxes
- Asset Allocation and Net Worth
- Structured Income Plan  Use 2 page income plan
- Structured Income Plan Graph
- Summary of Recommendations
- Goals
- Notes
- Use Legal Size Paper

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: +1-888-449-6917 or [support@planscout.com](mailto:support@planscout.com).