

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.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences

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

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences

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

Save Cancel Select New Logo CompanyLogo.jpg (*.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 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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YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences

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

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

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Company Email

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

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Preferences

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

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

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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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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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.

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YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Add Case View All Cases Search Using Selection

Search for Case

Case	Initial Plan Date	Revised Date	Tags	Active
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Rows Per Page 50 << No records >>

Please use View All Cases or Search Using Selection to view one or more cases

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

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YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Add Case View All Cases Search Using Selection

Search for Case

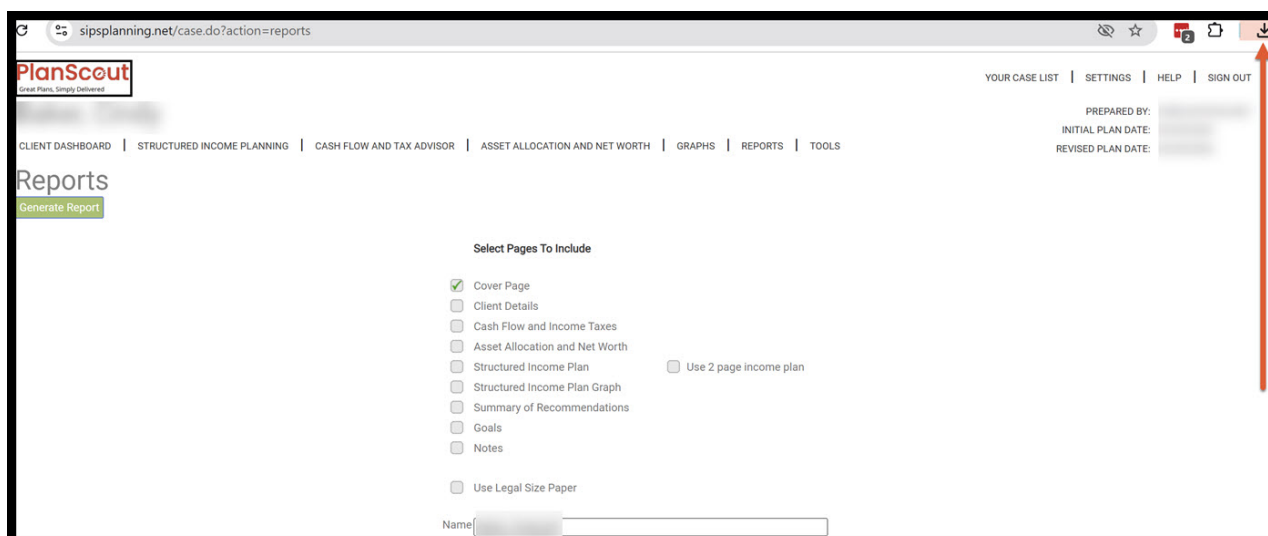
Case	Initial Plan Date	Revised Date	Tags	Active
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Rows Per Page 50 << No records >>

Please use View All Cases or Search Using Selection to view one or more cases

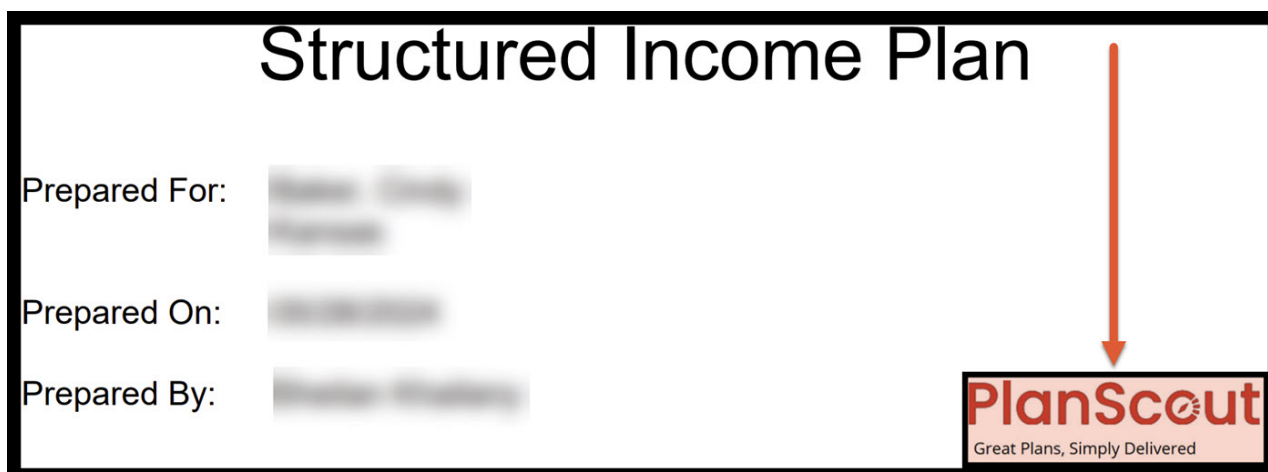
Step 10: Case Selection: Select a case.

Step 13: Download the PDF: Download the PDF.



The screenshot shows the PlanScout web interface. The browser address bar displays 'sipsplanning.net/case.do?action=reports'. The PlanScout logo is in the top left. The top navigation bar includes 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below this, a section for 'PREPARED BY:', 'INITIAL PLAN DATE:', and 'REVISED PLAN DATE:' is visible. The main heading is 'Reports' with a 'Generate Report' button. Under 'Select Pages To Include', there is a list of checkboxes: 'Cover Page' (checked), 'Client Details', 'Cash Flow and Income Taxes', 'Asset Allocation and Net Worth', 'Structured Income Plan', 'Structured Income Plan Graph', 'Summary of Recommendations', 'Goals', 'Notes', and 'Use Legal Size Paper'. There is also an option 'Use 2 page income plan'. A 'Name' input field is at the bottom.

Step 14: Cover Page: The logo should be displayed on the cover page.



The screenshot shows the 'Structured Income Plan' cover page. The title 'Structured Income Plan' is at the top. Below it, the text 'Prepared For:', 'Prepared On:', and 'Prepared By:' is followed by blurred information. The PlanScout logo, with the tagline 'Great Plans, Simply Delivered', is in the bottom right corner. A red arrow points down to the logo.

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.