

Deleting an Allocation Code

01/02/2026 9:17 am EST

From the settings page you have the ability to delete an allocation code if you are at administrator status. Below are the step-by-step guidelines for deleting an allocation code starting from the login page.

Step 1: Log In: Log in into SIPS.



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



Step 3: Allocation Codes: Click on the Allocation codes button on the right-hand side of the screen.

Step 4: Del: Click on the green Del button next to the Allocation Id you would like to delete.

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.

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id	Del
10903	none	Sei	0.00	5.00	n/a	0	
10904	non Qual	Sei	0.00	10.00	n/a	0	
10905	Qualified	Sei	0.00	10.00	n/a	0	
10906	green	Sei	0.00	10.00	n/a	0	
10907	yellow	Sei	0.00	10.00	n/a	0	
10908	red	Sei	0.00	10.00	n/a	0	
10909	safe	Sei	0.00	10.00	Fixed Interest	0	
10910	risk	Sei	0.00	10.00	Aggressive	0	
10911	Fixed Interest	Sei	0.00	10.00	Fixed Interest	0	
10912	Indexed Annuity	Sei	0.00	10.00	Indexed Annuity	0	
10913	Conservative	Sei	0.00	10.00	Conservative	0	
10914	Moderately Conservative	Sei	0.00	10.00	Moderately Conservative	0	
10915	Moderate	Sei	0.00	10.00	Moderate	0	
10916	Moderately Aggressive	Sei	0.00	10.00	Moderately Aggressive	0	
10917	Aggressive	Sei	0.00	10.00	Aggressive	0	

Step 5: Permanent Deletion: After clicking on the green Del button a sipsplanning.net text box will come up and ask, "Are you sure you would like to permanently delete this recommendation?" Click the OK button to confirm and permanently delete the allocation code.

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10908	red	Sei	0.00	10.00	n/a	0	
10909	safe	Sei	0.00	10.00	Fixed Interest	0	
10910	risk	Sei	0.00	10.00	Aggressive	0	
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10913	Conservative	Sei	0.00	10.00	Conservative	0	
10914	Moderately Conservative	Sei	0.00	10.00	Moderately Conservative	0	
10915	Moderate	Sei	0.00	10.00	Moderate	0	
10916	Moderately Aggressive	Sei	0.00	10.00	Moderately Aggressive	0	
10917	Aggressive	Sei	0.00	10.00	Aggressive	0	

Step 6: Allocation Code List: The deleted allocation code should no longer appear in the list.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Allocation Code List

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

Save Cancel Add Allocation Code

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10905	Qualified		0.00	10.00	n/a	0
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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
10917	Aggressive		0.00	10.00	Aggressive	0

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- Press save.

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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.