

# Adding An Allocation Code

12/20/2024 4:06 pm EST

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

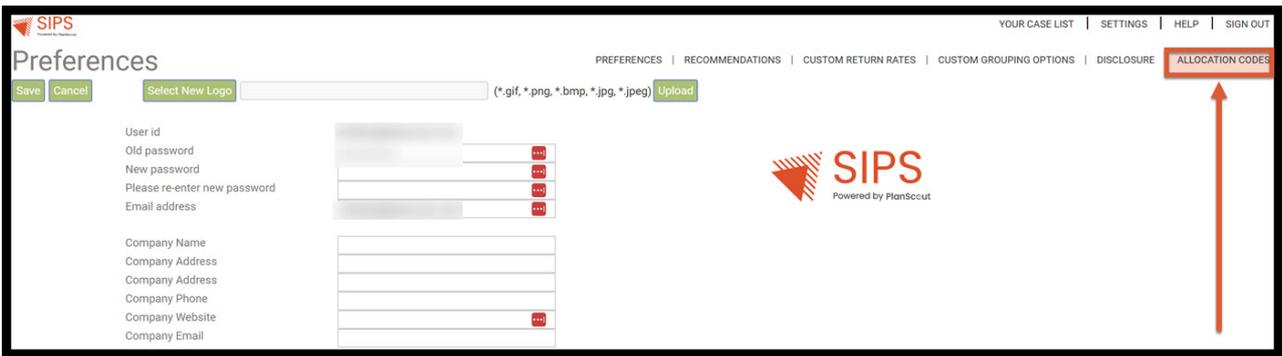
Step 1: Log In: Log in into SIPS.



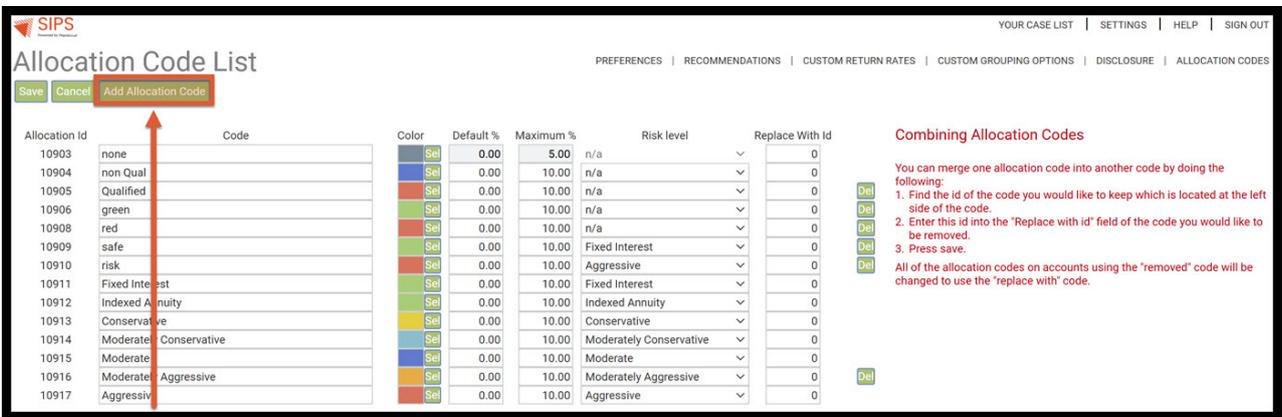
Step 2: Settings: Click on the settings button located on the right-hand side of your screen.



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



Step 4: Add Allocation Code: Click on the green Add Allocation Code underneath the Allocation Code List heading.



Step 5: Code: Enter in Code Name.



Step 6: Sel: Select a color.

**SIPS** 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

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Set	0.00	5.00	n/a	0
10904	non Qual	Set	0.00	10.00	n/a	0
10905	Qualified	Set	0.00	10.00	n/a	0
10906	green	Set	0.00	10.00	n/a	0
10908	red	Set	0.00	10.00	n/a	0
10909	safe	Set	0.00	10.00	Fixed Interest	0
10910	risk	Set	0.00	10.00	Aggressive	0
10911	Fixed Interest	Set	0.00	10.00	Fixed Interest	0
10912	Indexed Annuity	Set	0.00	10.00	Indexed Annuity	0
10913	Conservative	Set	0.00	10.00	Conservative	0
10914	Moderately Conservative	Set	0.00	10.00	Moderately Conservative	0
10915	Moderate	Set	0.00	10.00	Moderate	0
10916	Moderately Aggressive	Set	0.00	10.00	Moderately Aggressive	0
10917	Aggressive	Set	0.00	10.00	Aggressive	0
12370	Very Aggressive	Set	0.00	10.00	Aggressive	0

**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.

Step 7: Default %: Select default percentage.

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Save Cancel Add Allocation Code

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10903	none	Set	0.00	5.00	n/a	0
10904	non Qual	Set	0.00	10.00	n/a	0
10905	Qualified	Set	0.00	10.00	n/a	0
10906	green	Set	0.00	10.00	n/a	0
10908	red	Set	0.00	10.00	n/a	0
10909	safe	Set	0.00	10.00	Fixed Interest	0
10910	risk	Set	0.00	10.00	Aggressive	0
10911	Fixed Interest	Set	0.00	10.00	Fixed Interest	0
10912	Indexed Annuity	Set	0.00	10.00	Indexed Annuity	0
10913	Conservative	Set	0.00	10.00	Conservative	0
10914	Moderately Conservative	Set	0.00	10.00	Moderately Conservative	0
10915	Moderate	Set	0.00	10.00	Moderate	0
10916	Moderately Aggressive	Set	0.00	10.00	Moderately Aggressive	0
10917	Aggressive	Set	0.00	10.00	Aggressive	0
12370	Very Aggressive	Set	0.00	10.00	Aggressive	0

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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.

Step 8: Maximum %: Select maximum percentage.

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## Allocation Code List

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

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Set	0.00	5.00	n/a	0
10904	non Qual	Set	0.00	10.00	n/a	0
10905	Qualified	Set	0.00	10.00	n/a	0
10906	green	Set	0.00	10.00	n/a	0
10908	red	Set	0.00	10.00	n/a	0
10909	safe	Set	0.00	10.00	Fixed Interest	0
10910	risk	Set	0.00	10.00	Aggressive	0
10911	Fixed Interest	Set	0.00	10.00	Fixed Interest	0
10912	Indexed Annuity	Set	0.00	10.00	Indexed Annuity	0
10913	Conservative	Set	0.00	10.00	Conservative	0
10914	Moderately Conservative	Set	0.00	10.00	Moderately Conservative	0
10915	Moderate	Set	0.00	10.00	Moderate	0
10916	Moderately Aggressive	Set	0.00	10.00	Moderately Aggressive	0
10917	Aggressive	Set	0.00	10.00	Aggressive	0
12370	Very Aggressive	Set	5	10.00	Aggressive	0

**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.

Step 9: Risk Level Dropdown Caret Arrow: In the Risk level text box select the drop down caret arrow and select a risk level.

The screenshot shows the 'Allocation Code List' interface. A red arrow points to the dropdown arrow on the 'Risk level' column for the row with Allocation Id 12370. The table contains the following data:

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Blue	0.00	5.00	n/a	0
10904	non Qual	Blue	0.00	10.00	n/a	0
10905	Qualified	Red	0.00	10.00	n/a	0
10906	green	Green	0.00	10.00	n/a	0
10908	red	Red	0.00	10.00	n/a	0
10909	safe	Green	0.00	10.00	Fixed Interest	0
10910	risk	Red	0.00	10.00	Aggressive	0
10911	Fixed Interest	Green	0.00	10.00	Fixed Interest	0
10912	Indexed Annuity	Green	0.00	10.00	Indexed Annuity	0
10913	Conservative	Yellow	0.00	10.00	Conservative	0
10914	Moderately Conservative	Blue	0.00	10.00	Moderately Conservative	0
10915	Moderate	Blue	0.00	10.00	Moderate	0
10916	Moderately Aggressive	Orange	0.00	10.00	Moderately Aggressive	0
10917	Aggressive	Red	0.00	10.00	Aggressive	0
12370	Very Aggressive	Purple	5	10	n/a	0

On the right side, there is a section titled 'Combining Allocation Codes' with instructions on how to merge codes and a 'Del' button for each row.

Step 10: Save: Click on the green Save button underneath the Allocation Code List heading.

The screenshot shows the 'Allocation Code List' interface. A red arrow points to the 'Save' button located below the table heading. The table data is identical to the previous screenshot.

Step 12: Allocation Code List: The new allocation code should be added to the list.

The screenshot shows the 'Allocation Code List' interface. A red arrow points to the new row at the bottom of the table, Allocation Id 12370. The table data is as follows:

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Blue	0.00	5.00	n/a	0
10904	non Qual	Blue	0.00	10.00	n/a	0
10905	Qualified	Red	0.00	10.00	n/a	0
10906	green	Green	0.00	10.00	n/a	0
10908	red	Red	0.00	10.00	n/a	0
10909	safe	Green	0.00	10.00	Fixed Interest	0
10910	risk	Red	0.00	10.00	Aggressive	0
10911	Fixed Interest	Green	0.00	10.00	Fixed Interest	0
10912	Indexed Annuity	Green	0.00	10.00	Indexed Annuity	0
10913	Conservative	Yellow	0.00	10.00	Conservative	0
10914	Moderately Conservative	Blue	0.00	10.00	Moderately Conservative	0
10915	Moderate	Blue	0.00	10.00	Moderate	0
10916	Moderately Aggressive	Orange	0.00	10.00	Moderately Aggressive	0
10917	Aggressive	Red	0.00	10.00	Aggressive	0
12370	Very Aggressive	Purple	5.00	10.00	Opportunistic	0

The 'Save' button is now green, indicating it has been clicked. The 'Risk level' for the new code is 'Opportunistic'.

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)

