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.

		YOUR CASE LIST	SETTINGS	HELP SIGN OUT
Preferer	nces	PREFERENCES RECOMMENDATIONS CUSTOM RETURN RATES CUSTOM GROUPING OPTIONS	DISCLOSURE	ALLOCATION CODES
Save Cancel	Select New Logo User id Old password New password	(*.gif, *.png, *.bmp, *.jpg, *.jpgg) Uptaad		1
	Email address Company Name	Powered by PlanSccut		
	Company Address Company Phone Company Website Company Email			

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

SIPS										YOUR CASE LIST SETTINGS HELP SIGN OUT
Allocat	ion (Code List				PREFERENCES RECOM	MENDAT	TIONS CUSTOM	RETURN	RATES CUSTOM GROUPING OPTIONS DISCLOSURE ALLOCATION CODES
Save Cancel	Add Alloc	ation Code								
Intelligit Hardworkshop	Management									
Allocation Id		Code	Color	Default %	Maximum %	Risk level	1	Replace With Id		Combining Allocation Codes
10903	none		Sel	0.00	5.00	n/a	~	0		
10904	non Qual		Sel	0.00	10.00	n/a	~	0		You can merge one allocation code into another code by doing the following:
10905	Qualified		Sel	0.00	10.00	n/a	\sim	0	Del	 Find the id of the code you would like to keep which is located at the left
10906	green		Sel	0.00	10.00	n/a	~	0	Del	side of the code.
10908	red		Sel	0.00	10.00	n/a	\sim	0	Del	Enter this id into the "Replace with id" field of the code you would like to be removed
10909	safe		Sel	0.00	10.00	Fixed Interest	~	0	Del	3. Press save.
10910	risk		Sel	0.00	10.00	Aggressive	~	0	Del	All of the allocation codes on accounts using the "removed" code will be
10911	Fixed Inte	est	Sel	0.00	10.00	Fixed Interest	~	0		changed to use the "replace with" code.
10912	Indexed A	nuity	Sel	0.00	10.00	Indexed Annuity	~	0		
10913	Conservat	ve	Sel	0.00	10.00	Conservative	~	0		
10914	Moderate	Conservative	Sel	0.00	10.00	Moderately Conservative	~	0		
10915	Moderate		Sel	0.00	10.00	Moderate	~	0		
10916	Moderate	Aggressive	Sel	0.00	10.00	Moderately Aggressive	~	0	Del	
10917	Aggressiv		Sel	0.00	10.00	Aggressive	~	0		
200000000					L	1000 T T T 1000 T 1000 T 1000				

Step 5: Code: Enter in Code Name.

									YOUR CASE LIST SETTINGS HELP SIGN OUT
Allocat	ion Code List				PREFERENCES RECOMM	MENDAT	IONS CUSTOM	I RETURN I	RATES CUSTOM GROUPING OPTIONS DISCLOSURE ALLOCATION CODES
Save Cancel	Add Allocation Code								
Allocation Id	Code	Color	Default %	Maximum %	Risk level		Replace With Id		Combining Allocation Codes
10903	none	Sel	0.00	5.00	n/a	\sim	0		
10904	non Qual	Sel	0.00	10.00	n/a	~	0		You can merge one allocation code into another code by doing the
10905	Qualified	Sel	0.00	10.00	n/a	~	0	Del	 Find the id of the code you would like to keep which is located at the left
10906	green	Sel	0.00	10.00	n/a	~	0	Del	side of the code.
10908	red	Sel	0.00	10.00	n/a	~	0	Del	Enter this id into the "Replace with id" field of the code you would like to be removed.
10909	safe	Sel	0.00	10.00	Fixed Interest	~	0	Del	3. Press save.
10910	risk	Sel	0.00	10.00	Aggressive	\sim	0	Del	All of the allocation codes on accounts using the "removed" code will be
10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	\sim	0		changed to use the "replace with" code.
10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	\sim	0		
10913	Conservative	Sel	0.00	10.00	Conservative	\sim	0		
10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	\sim	0		
10915	Moderate	Sel	0.00	10.00	Moderate	\sim	0		
10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	\sim	0	Del	
10917	Anaressive	Sel	0.00	10.00	Aggressive	\sim	0		
0			0.00		1// 0	~	0	Del	

Step 6: Sel: Select a color.

SIPS									YOUR CASE LIST SETTINGS HELP SIGN OUT
Allocat Save Cancel	tion Code List				PREFERENCES RECOMI	MENDATI	ONS CUSTOM	I RETURN	RATES CUSTOM GROUPING OPTIONS DISCLOSURE ALLOCATION CODES
Allocation Id	Code	Color	Default %	Maximum %	Risk level	R	eplace With Id		Combining Allocation Codes
10903	none	Sel	0.00	5.00	n/a	\sim	0		
10904	non Qual	Sel	0.00	10.00	n/a	~	0		You can merge one allocation code into another code by doing the
10905	Qualified	Sel	0.00	10.00	n/a	~	0	Del	 Find the id of the code you would like to keep which is located at the left
10906	green	Sel	0.00	10.00	n/a	~	0	Del	side of the code.
10908	red	Sel	0.00	10.00	n/a	\sim	0	Del	Enter this id into the "Replace with id" field of the code you would like to be removed
10909	safe	Sel	0.00	10.00	Fixed Interest	\sim	0	Del	3. Press save.
10910	risk	Sel	0.00	10.00	Aggressive	~	0	Del	All of the allocation codes on accounts using the "removed" code will be
10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	\sim	0		changed to use the "replace with" code.
10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	~	0		
10913	Conservative	Sel	0.00	10.00	Conservative	~	0		
10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	~	0		
10915	Moderate	Sel	0.00	10.00	Moderate	~	0		
10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	\sim	0	Del	
10917	Aggressive	Sel	0.00	10.00	Aggressive	\sim	0		
12370	Very Aggressive	Sel	0.00		117 W		0	Del	

Step 7: Default %: Select default percentage.

									YOUR CASE LIST SETTINGS HELP SIGN OUT
Allocat	ion Code List				PREFERENCES RECOMM	MENDAT	IONS 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		Combining Allocation Codes
10903	none	Sel	0.00	5.00	n/a	\sim	0		3
10904	non Qual	Sel	0.00	10.00	n/a	~	0		You can merge one allocation code into another code by doing the
10905	Qualified	Sel	0.00	10.00	n/a	~	0	Del	following: 1. Find the id of the code you would like to keep which is located at the left.
10906	green	Sel	0.00	10.00	n/a	~	0	Del	side of the code.
10908	red	Sel	0.00	10.00	n/a	~	0	Del	Enter this id into the "Replace with id" field of the code you would like to be removed
10909	safe	Sel	0.00	10.00	Fixed Interest	~	0	Del	3. Press save.
10910	risk	Sel	0.00	10.00	Aggressive	\sim	0	Del	All of the allocation codes on accounts using the "removed" code will be
10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	\sim	0		changed to use the "replace with" code.
10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	~	0		
10913	Conservative	Sel	0.00	10.00	Conservative	\sim	0		
10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	~	0		
10915	Moderate	Sel	0.00	10.00	Moderate	\sim	0		
10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	~	0	Del	
10917	Aggressive	Sel	0.00	10.00	Aggressive	\sim	0		
12370	Very Aggressive	Sel	0.00	-	ne w			Del	

Step 8: Maximum %: Select maximum percentage.

SIPS									YOUR CASE LIST SETTINGS HELP SIGN OUT
Allocat	ion Code List				PREFERENCES RECOMI	MENDATI	IONS CUSTOM	RETURN RAT	ES CUSTOM GROUPING OPTIONS DISCLOSURE ALLOCATION CODES
Allocation Id	Code	Color	Default %	Maximum %	Risk level	R	teplace With Id	c	Combining Allocation Codes
10903	none	Sel	0.00	5.00	n/a	\sim	0		
10904	non Qual	Sel	0.00	10.00	n/a	\sim	0	Y	ou can merge one allocation code into another code by doing the
10905	Qualified	Sel	0.00	10.00	n/a	\sim	0	Del 1	. Find the id of the code you would like to keep which is located at the left.
10906	green	Sel	0.00	10.00	n/a	~	0	Del	side of the code.
10908	red	Sel	0.00	10.00	n/a	\sim	0	Del 2	. Enter this id into the "Replace with id" field of the code you would like to be removed.
10909	safe	Sel	0.00	10.00	Fixed Interest	\sim	0	Del 3	Press save.
10910	risk	Sel	0.00	10.00	Aggressive	~	0	Del 🗛	Il of the allocation codes on accounts using the "removed" code will be
10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	\sim	0	C	hanged to use the "replace with" code.
10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	~	0		
10913	Conservative	Sel	0.00	10.00	Conservative	\sim	0		
10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	~	0		
10915	Moderate	Sel	0.00	10.00	Moderate	~	0	_	
10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	\sim	0	Del	
10917	Aggressive	Sel	0.00	10.00	Aggressive	~	0	_	
12370	Very Aggressive	Sel	5		1. p		v	1-2-11	

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

SIPS									YOUR CASE LIST SETTINGS HELP SIGN OUT
Allocat	ion Code List				PREFERENCES RECOM	MENDATIO	NS CUSTOM	I RETURN	RATES CUSTOM GROUPING OPTIONS DISCLOSURE ALLOCATION CODES
Save Cancel	Add Allocation Code								
Allocation Id	Code	Color	Default %	Maximum %	Risk level	Re	place With Id		Combining Allocation Codes
10903	none	Sel	0.00	5.00	n/a	~	0		
10904	non Qual	Sel	0.00	10.00	n/a	~	0		You can merge one allocation code into another code by doing the
10905	Qualified	Sel	0.00	10.00	n/a	~	0	Del	following: 1. Find the id of the code you would like to keep which is located at the left.
10906	green	Sel	0.00	10.00	n/a	~	0	Del	side of the code.
10908	red	Sel	0.00	10.00	n/a	~	0	Del	Enter this id into the "Replace with id" field of the code you would like to be removed
10909	safe	Sel	0.00	10.00	Fixed Interest	~	0	Del	3. Press save.
10910	risk	Sel	0.00	10.00	Aggressive	~	0	Del	All of the allocation codes on accounts using the "removed" code will be
10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	~	0		changed to use the "replace with" code.
10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	~	0		
10913	Conservative	Sel	0.00	10.00	Conservative	~	0		
10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	~	0		
10915	Moderate	Sel	0.00	10.00	Moderate	~	0		
10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	~	0	Del	
10917	Aggressive	Sel	0.00	10.00	Addressive	~	0		
12370	Very Aggressive	Sel	5	10	n/a	~		-	

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

-	SIPS									YOUR CASE LIST SETTINGS HELP SIGN OUT	
A Sav	locat	tion Code List				PREFERENCES RECOMM	MENDAT	FIONS CUSTOM	IRETURN	RATES CUSTOM GROUPING OPTIONS DISCLOSURE ALLOCATION CODES	
1	location Id	Code	Color	Default %	Maximum %	Risk level		Replace With Id		Combining Allocation Codes	
	10903	none	Sel	0.00	5.00	n/a	~	0			
	10904	non Qual	Sel	0.00	10.00	n/a	~	0		You can merge one allocation code into another code by doing the following:	
	10905	Qualified	Sel	0.00	10.00	n/a	\sim	0	Del	 Find the id of the code you would like to keep which is located at the left 	
	10906	green	Sel	0.00	10.00	n/a	\sim	0	Del	side of the code.	
	10908	red	Sel	0.00	10.00	n/a	\sim	0	Del	Enter this id into the "Replace with id" field of the code you would like to be removed.	
	10909	safe	Sel	0.00	10.00	Fixed Interest	\sim	0	Del	3. Press save.	
	10910	risk	Sel	0.00	10.00	Aggressive	~	0	Del	All of the allocation codes on accounts using the "removed" code will be	
	10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	~	0		changed to use the "replace with" code.	
	10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	~	0			
	10913	Conservative	Sel	0.00	10.00	Conservative	~	0			
	10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	\sim	0			
	10915	Moderate	Sel	0.00	10.00	Moderate	~	0			
	10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	~	0	Del		
	10917	Aggressive	Sel	0.00	10.00	Aggressive	~	0			
	12370	Very Aggressive	Sel	5	10	Opportunistic	\sim	0	Del		

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

REFERENCE RECOMMENDATIONS CUSTOM RETURN RATES CUSTOM GROUPING OPTIONS DISCLOSURE ALICAA MAID Castion Code List Superior Return RATES CUSTOM RETURN RATES CUSTOM GROUPING OPTIONS DISCLOSURE ALICAA Allocation Code Allocation Id Code Color Default % Maximum % Risk level Replace With Id Combining Allocation Codes 10903 non Qual 38 0.00 10.00 n/a 0<	SIPS									YOUR CASE LIST SETTINGS HELP SIGN OUT
Allocation id Code Color Default % Maximum % Risk level Replace With Id Combining Allocation Codes 10903 none 36 0.00 5.00 n/a 0 Vou can merge one allocation code into another code by doing If 10904 non Qual 58 0.00 10.00 n/a 0 10lowing: 10905 green 58 0.00 10.00 n/a 0 0 10906 green 58 0.00 10.00 n/a 0 0 10908 red 58 0.00 10.00 n/a 0 0 10908 red 58 0.00 10.00 n/a 0	Allocat Save Cancel	tion Code List				PREFERENCES RECOM	MENDATI	ONS CUSTO	OM RETURN	RATES CUSTOM GROUPING OPTIONS DISCLOSURE ALLOCATION CODES
10903 none Sel 0.00 5.00 n/a 0 10914 non Qual Sel 0.00 1.00 n/a 0 10905 Qualified Sel 0.00 1.00 n/a 0 10905 green Sel 0.00 10.00 n/a 0 10906 green Sel 0.00 10.00 n/a 0 10908 red Sel 0.00 10.00 n/a 0 10908 red Sel 0.00 10.00 n/a 0 10909 safe Sel 0.00 10.00 n/a 0 10909 risk Sel 0.00 10.00 Agressive 0 10910 risk Sel 0.00 10.00 Agressive 0 10911 Fixed Interest Sel 0.00 10.00 Agressive 0 10912 Indexed Annuity Sel 0.00 10.00 <	Allocation Id	Code	Color	Default %	Maximum %	Risk level	R	eplace With Ic	I	Combining Allocation Codes
10904 non Qual 1000 n/a 0 10905 Qualified 0.00 10.00 n/a 0 10905 green 0.00 10.00 n/a 0 10906 green 0.00 10.00 n/a 0 10908 red 0.00 10.00 n/a 0 10909 safe 0.00 10.00 n/a 0 10910 risk 0.00 10.00 n/a 0 10910 risk 0.00 10.00 n/a 0 10911 Fixed Interest 0.00 10.00 n/a 0 10912 Indexed Annuity 0.00 10.00 n/a 0 10913 Conservative 0.00 10.00 noderately Conservative 0 10914 Moderately Conservative 0.00 10.00 Moderately Conservative 0 10915 Moderately Aggressive 0.00 10.00 Moderately Aggressive 0	10903	none	Sel	0.00	5.00	n/a	~	0		
10905 Qualified Image: Set of the code you would like to keep which is located you would like to keep which you would li	10904	non Qual	Sel	0.00	10.00	n/a	~	0		You can merge one allocation code into another code by doing the
10006 green See 0.00 10.00 n/a 0 side of the code. 2. Enter this of into the "Replace with id" field of the code you we be removed. 10008 red 0.00 10.00 n/a 0 0 2. Enter this of into the "Replace with id" field of the code you we be removed. 2. Enter this of into the "Replace with id" field of the code you we be removed. 10910 risk 0.00 10.00 Riggressive 0 0 2. Enter this of into the "Replace with id" field of the code you we be removed. 3. Press save. 3. Press save. 3. Press save. 10 <td>10905</td> <td>Qualified</td> <td>Sel</td> <td>0.00</td> <td>10.00</td> <td>n/a</td> <td>~</td> <td>0</td> <td>Del</td> <td>1. Find the id of the code you would like to keep which is located at the left</td>	10905	Qualified	Sel	0.00	10.00	n/a	~	0	Del	1. Find the id of the code you would like to keep which is located at the left
10908 red Se 0.00 10.00 n/a 0 10909 safe 0.00 10.00 r/a 0 be removed. 10910 risk Se 0.00 10.00 r/a 0 10910 risk Se 0.00 10.00 Fixed Interest 0 10911 Fixed Interest Se 0.00 10.00 Aggressive 0 10912 Indexed Annuity Se 0.00 10.00 Indexed Annuity 0 10913 Conservative Se 0.00 10.00 Indexed Annuity 0 10914 Moderately Conservative Se 0.00 10.00 Moderately Conservative 0 10915 Moderately Aggressive Se 0.00 10.00 Moderately Aggressive 0 10916 Moderately Aggressive Se 0.00 10.00 Moderately Aggressive 0	10906	green	Sel	0.00	10.00	n/a	~	0	Del	side of the code.
10009 safe 0.00 10.00 Fixed Interest 00 3. Press save. 10010 risk 0.00 Aggressive 0 10011 Fixed Interest 0 0.00 Aggressive 0 10012 Indexed Annuity 0 0.00 Indexed Annuity 0 10013 Conservative 0 0.00 Indexed Annuity 0 10014 Moderately Conservative 0 0.00 Moderately Conservative 0 10016 Moderately Aggressive 0.00 0.00 Moderately Aggressive 0 10016 Moderately Aggressive 0.00 0.00 Moderately Aggressive 0	10908	red	Sel	0.00	10.00	n/a	\sim	0	Del	Enter this id into the "Replace with id" field of the code you would like to be removed
10910 risk Set 0.00 1000 Aggressive 0 10910 Fixed Interest 00 Fixed Interest 00 Fixed Interest 00 10912 Indexed Annuity Set 0.00 10.00 Fixed Interest 00 10913 Conservative Set 0.00 10.00 Conservative 00 10914 Moderately Conservative Set 0.00 10.00 Moderately Conservative 00 10916 Moderately Aggressive Set 0.00 10.00 Moderately Aggressive 00	10909	safe	Sel	0.00	10.00	Fixed Interest	\sim	0	Del	3. Press save.
10911 Fixed Interest 0 10912 Indexed Annuity 0 10912 Indexed Annuity 0 10913 Conservative 0 10914 Moderately Conservative 0 10915 Moderately Conservative 0 10916 Moderately Aggressive 0	10910	risk	Sel	0.00	10.00	Aggressive	~	0	Del	All of the allocation codes on accounts using the "removed" code will be
10912 Indexed Annuity Se 0.00 10.00 Indexed Annuity 0 10913 Conservative Se 0.00 10.00 Conservative 0 10914 Moderately Conservative Se 0.00 10.00 Moderately Conservative 0 10915 Moderately Conservative Se 0.00 10.00 Moderately Conservative 0 10916 Moderately Aggressive Se 0.00 10.00 Moderately Aggressive 0	10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	\sim	0		changed to use the "replace with" code.
10913 Conservative 0.00 10.00 Conservative 0 10914 Moderately Conservative SS 0.00 10.00 Moderately Conservative 0 10915 Moderate SS 0.00 10.00 Moderately Conservative 0 10916 Moderately Aggressive GO 10.00 Moderately Aggressive 0	10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	~	0		
10914 Moderately Conservative Sel 0.00 10.00 Moderately Conservative 0 10915 Moderate Sel 0.00 10.00 Moderately Conservative 0 10916 Moderately Aggressive Sel 0.00 10.00 Moderately Aggressive 0	10913	Conservative	Sel	0.00	10.00	Conservative	\sim	0		
10915 Moderate Sel 0.00 10.00 Moderate 0 10916 Moderately Aggressive Sel 0.00 10.00 Moderately Aggressive 0	10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	~	0		
10916 Moderately Aggressive Sea 0.00 10.00 Moderately Aggressive 0	10915	Moderate	Sel	0.00	10.00	Moderate	\sim	0		
	10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	\sim	0	Del	
10017 Aggressive 0	10917	Aggressive	Sol	0.00	10.00	Aggressive	~	0		
12370 Very Aggressive 5.00 10.00 Opportunistic V 0	12370	Very Aggressive	Sel	5.00	10.00	Opportunistic	~	0	-	

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