Adding An Allocation Code

10/17/2026 4:08 pm EDT

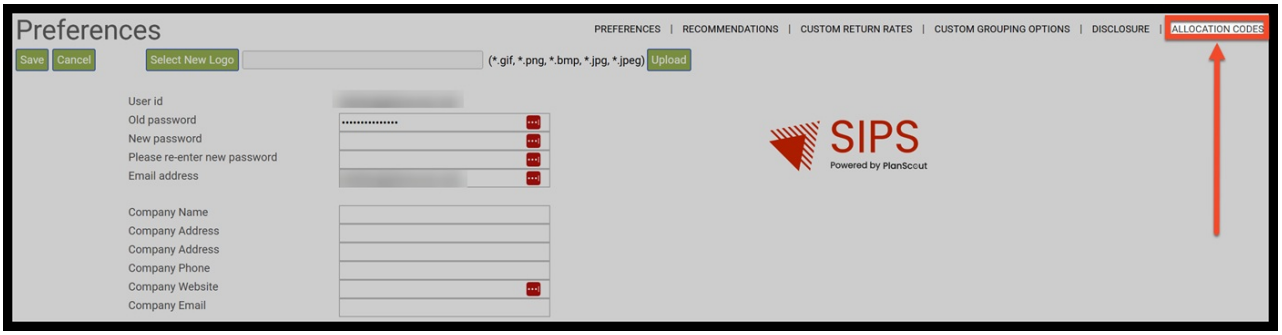
Administrators within SIPS have the ability to add a unique allocation code. Allocation codes are a way to keep track of different investment purposes (ie "short-term", "Long-Term", "Market Exposure", etc) and guardrails for them like maximum growth rates to reduce the opportunity for manual error. In this article, we'll show you how to create one from start to finish. For our example, we're adding an allocation code called Very Aggressive with a purple color, a 5% default, an 8% maximum, and an opportunistic risk level. We will start on the Welcome Landing Page.

Related Articles: *Changing the Colors of the Allocation Codes, Editing the Default Percentage Amounts on the Allocation Codes, Editing the Maximum Percentage Amounts on the Allocation Codes,Deleting an Allocation Code*

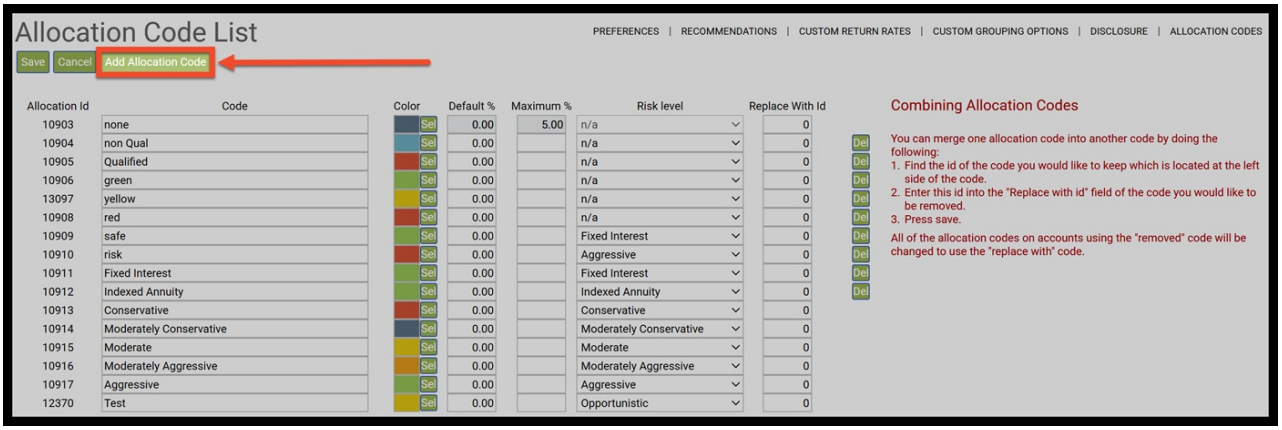
Step 1: Settings: Click on the Settings button located on the right-hand side of your screen.



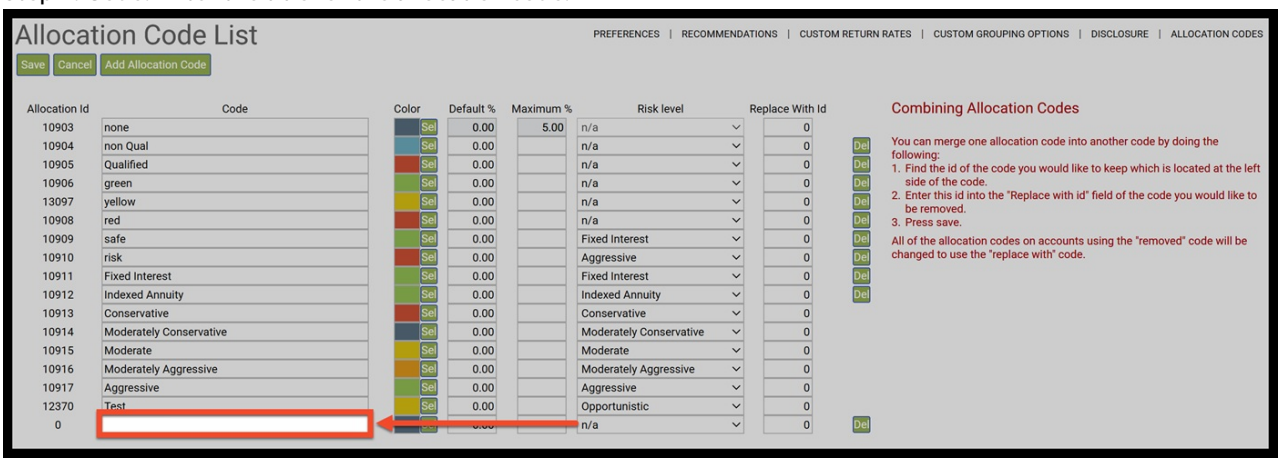
Step 2: Allocation Codes: Click on the Allocation Codes button on the right-hand side of the screen. Not seeing this option? Check *Having Trouble Accessing the Preferences Under Settings?* to confirm your permission level.



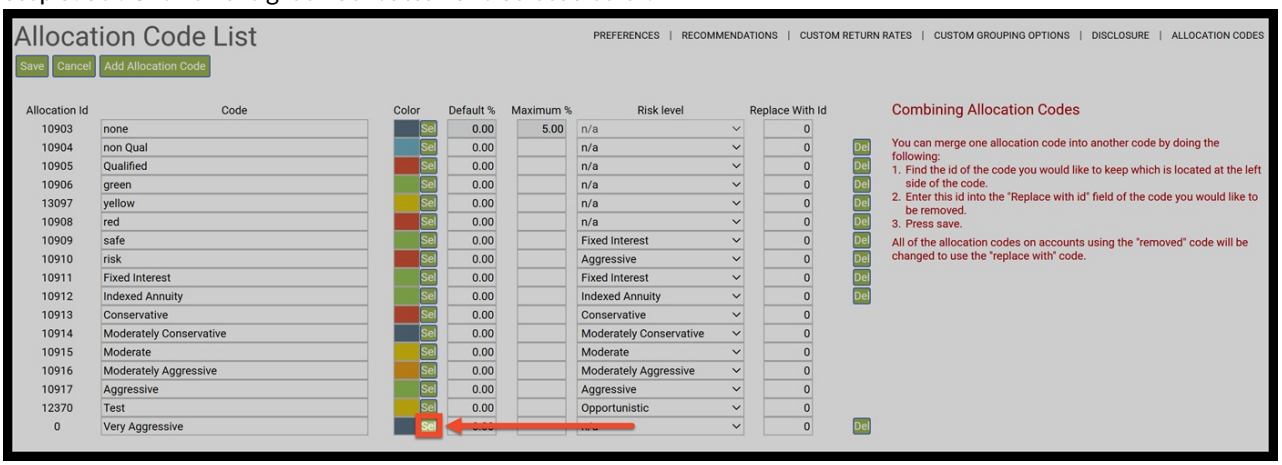
Step 3: Add Allocation Code: Click on the green Add Allocation Code button underneath the Allocation Code List heading.



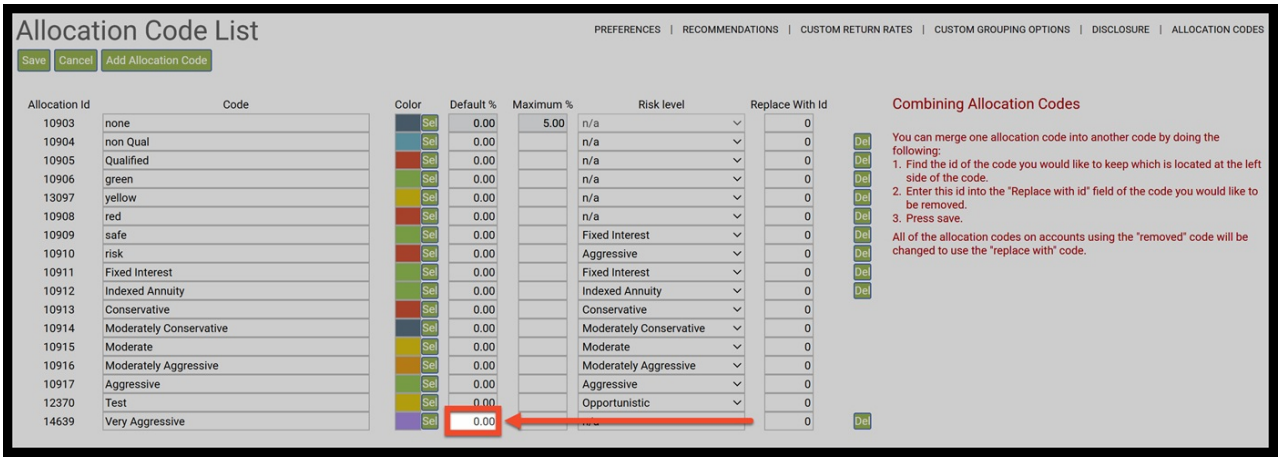
Step 4: Code: Enter the title for the allocation code.



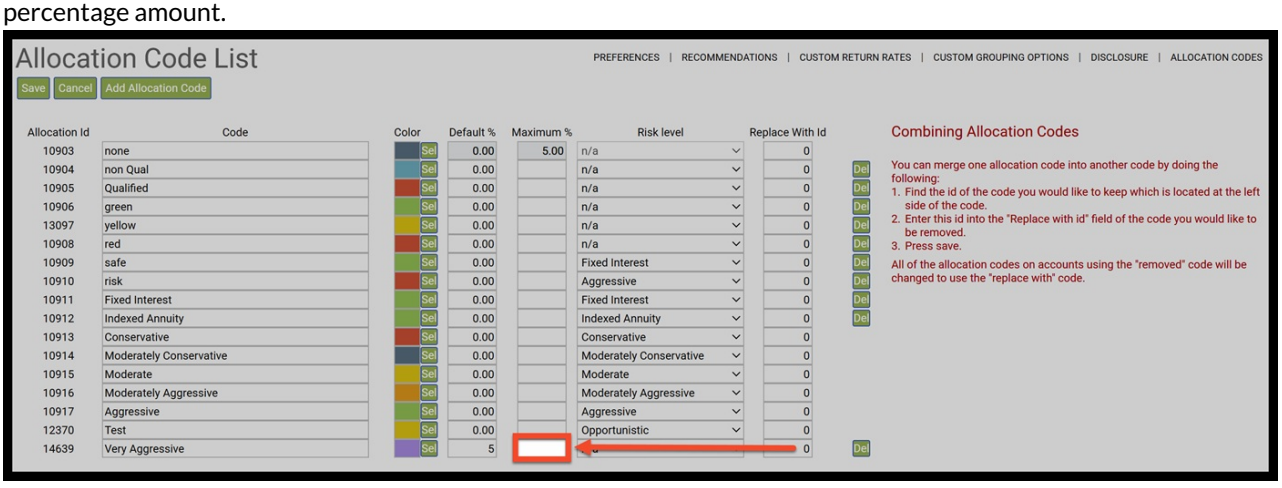
Step 5: Sel: Click on the green Sel button and select a color.



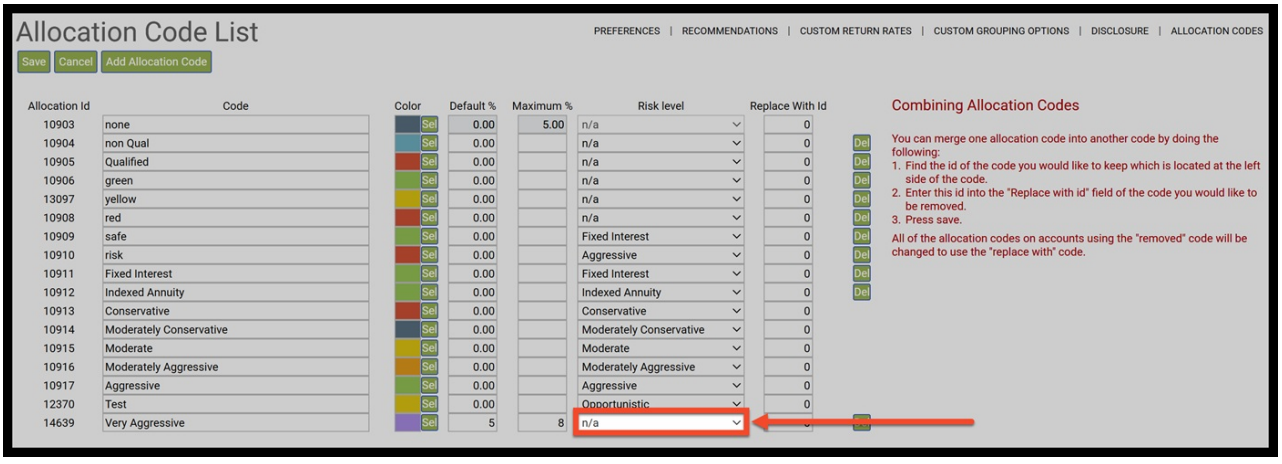
Step 6: Default %: Textbox: Move your cursor into the Default % textbox and enter the new default percentage amount.



Step 7: Maximum % Textbox: Move your cursor into the Maximum % textbox and enter the new maximum percentage amount.



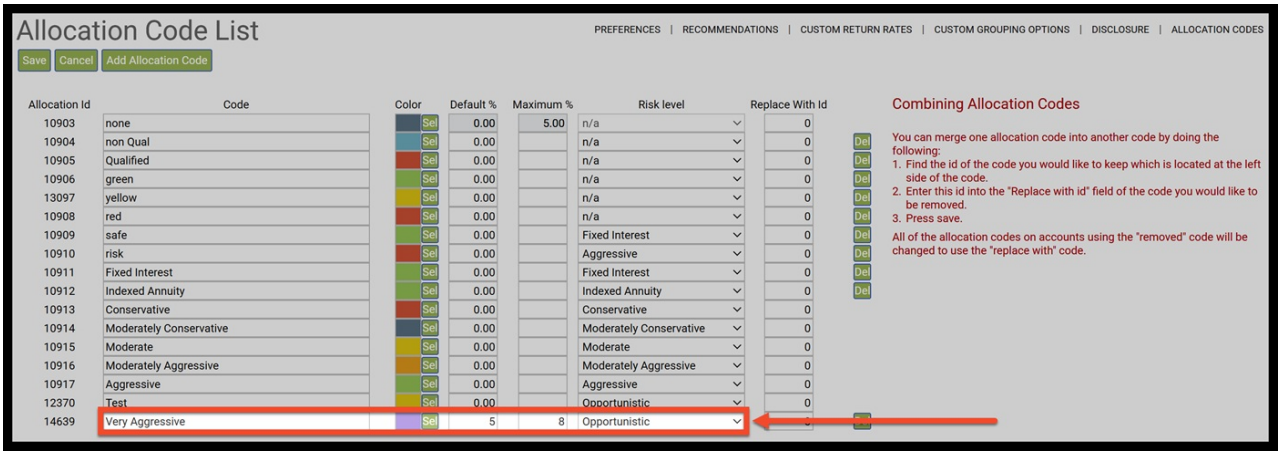
Step 8: Risk Level Dropdown Caret Arrow: In the Risk Level dropdown, select the drop-down caret arrow and select a risk level.



Step 9: Save: Click on the green Save button underneath the Allocation Code List heading.



Step 10: Allocation Code List: SIPS will automatically add the new Allocation Code to the list.



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.