Adding a Default Recommendation

10/15/2026 3:07 pm EDT

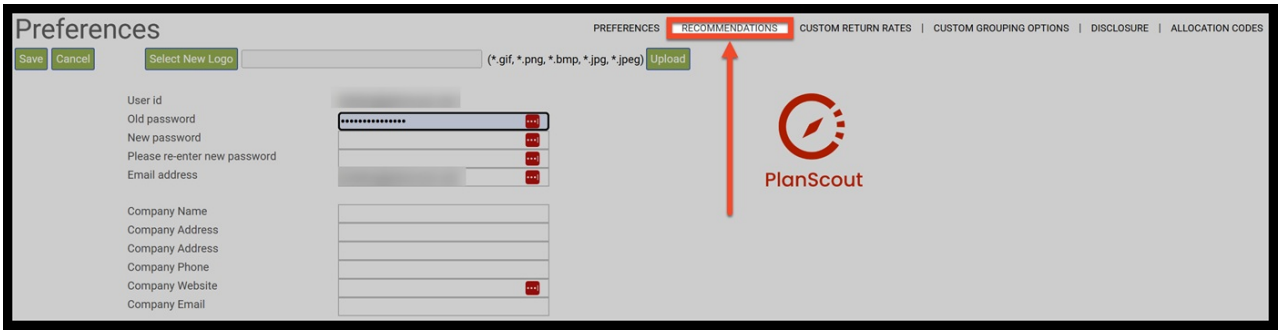
Default recommendations are prewritten text that you can select from the Recommendations page in the Client Dashboard. If there is a recommendation you give to many of your clients, you can add it to this list, so it is ready to use in every case. You must have administrator status within SIPS to add a default recommendation. This how-to article will show you how to create a new default recommendation, starting from the Welcome page.

Related Articles: *Recommendations*

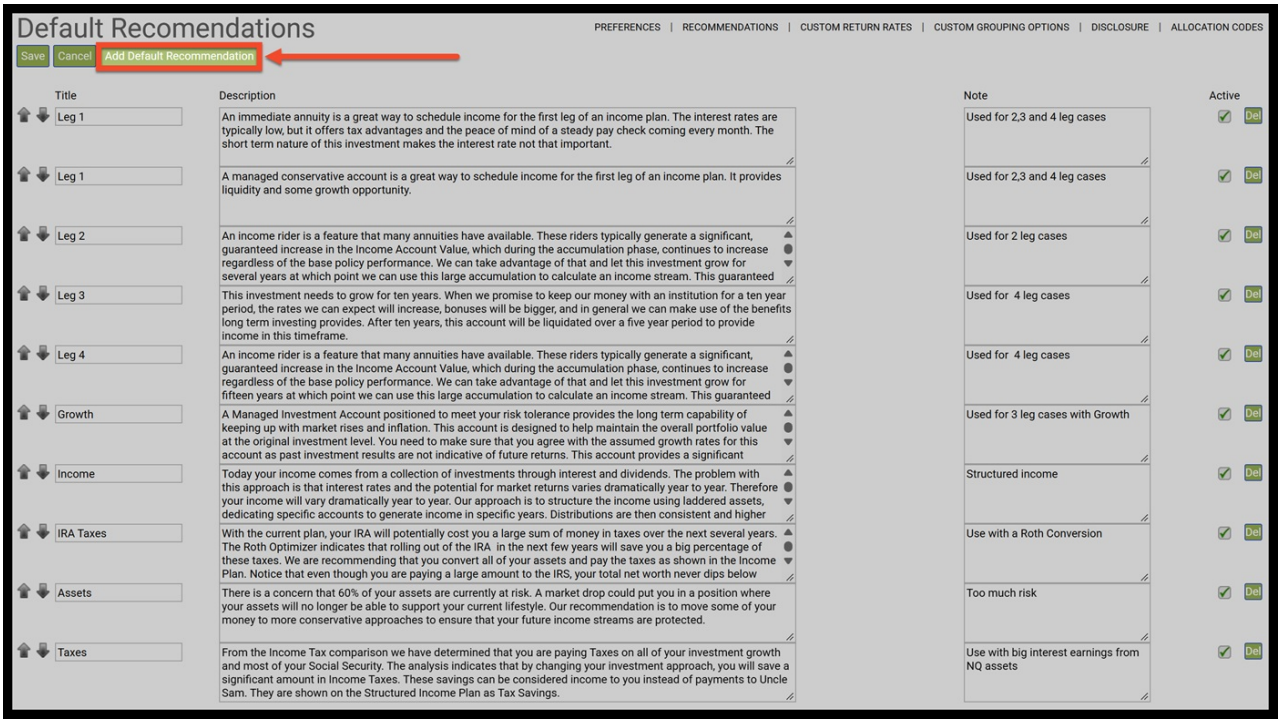
Step 1: Settings: Click on the Settings button located in the upper right-hand corner of the screen.



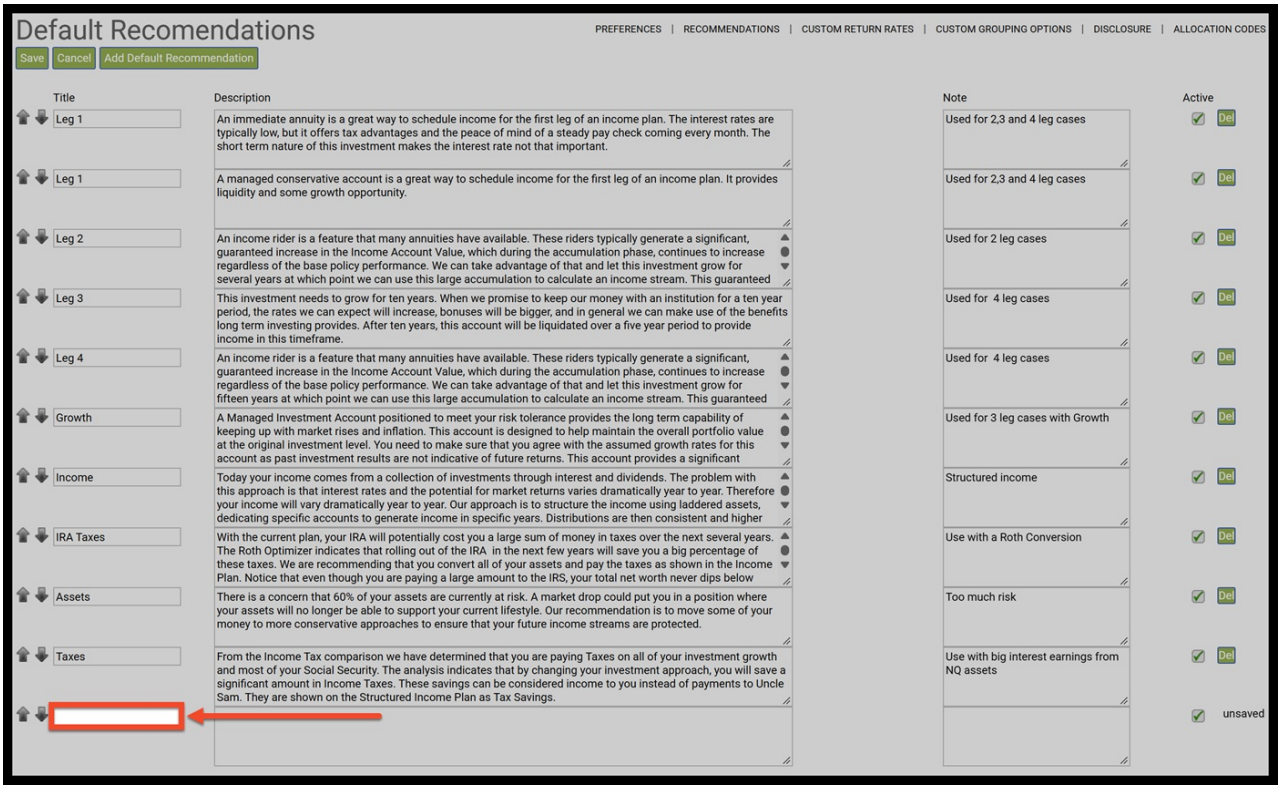
Step 2: Recommendations: Click on the Recommendations button in the middle of your screen. Not seeing this option? Check *Having trouble accessing the Preferences under Settings?*To confirm your permission level.



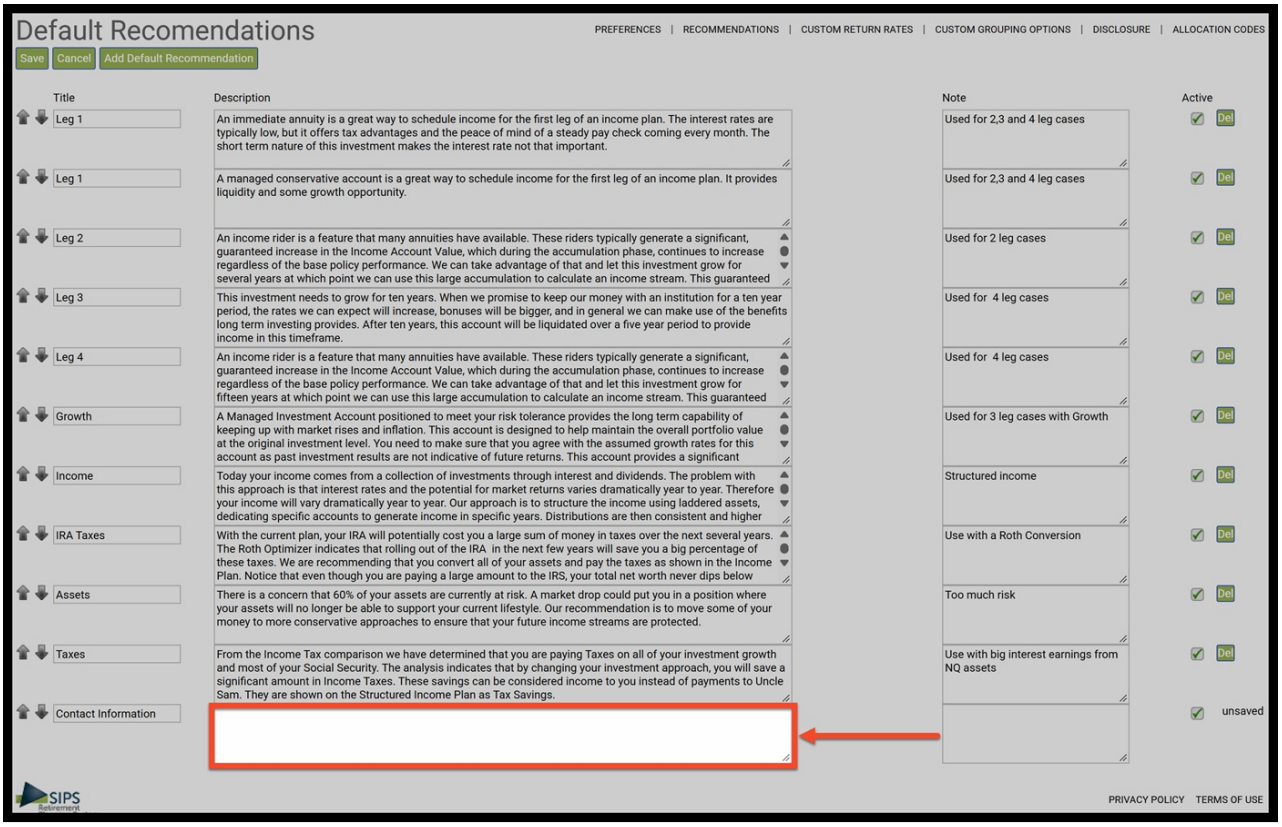
Step 3: Add Default Recommendation: Click on the green Add Default Recommendation button underneath the Default Recommendations heading.



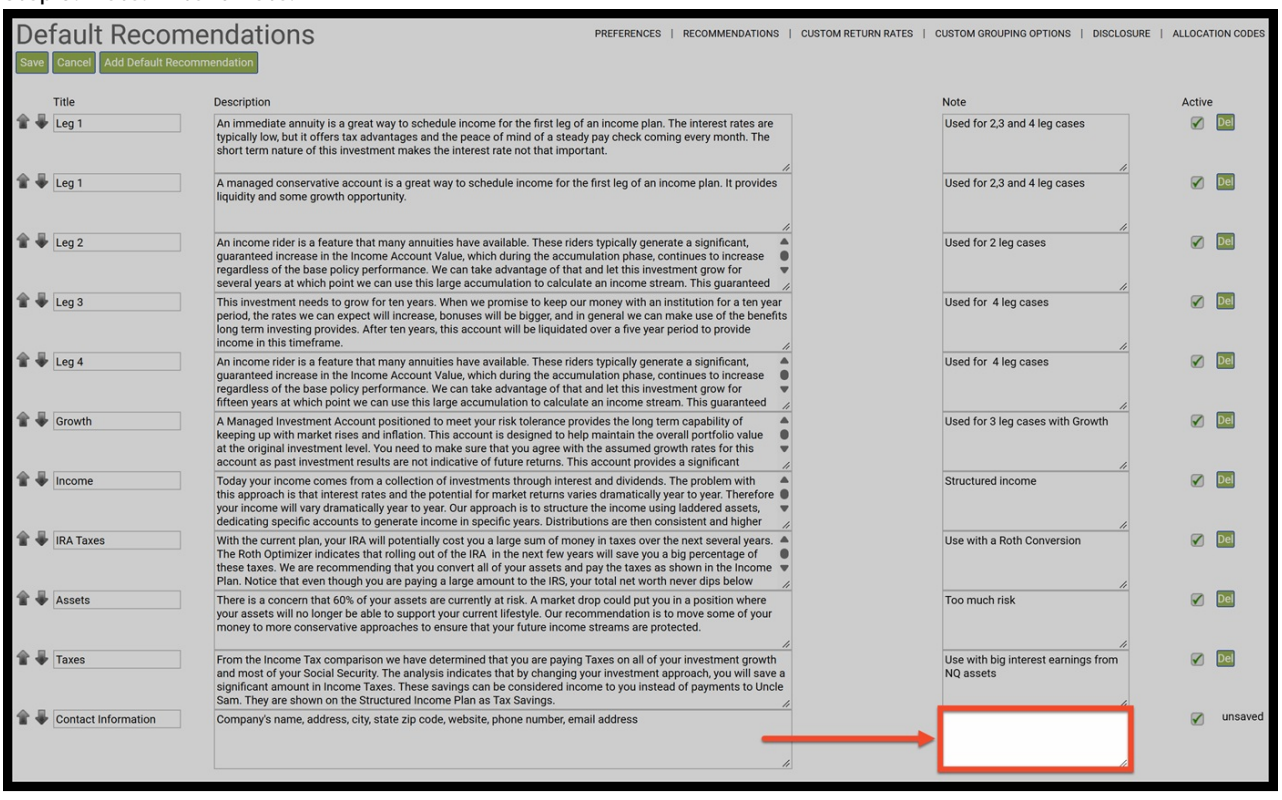
Step 4: Title: Type a title for your recommendation.



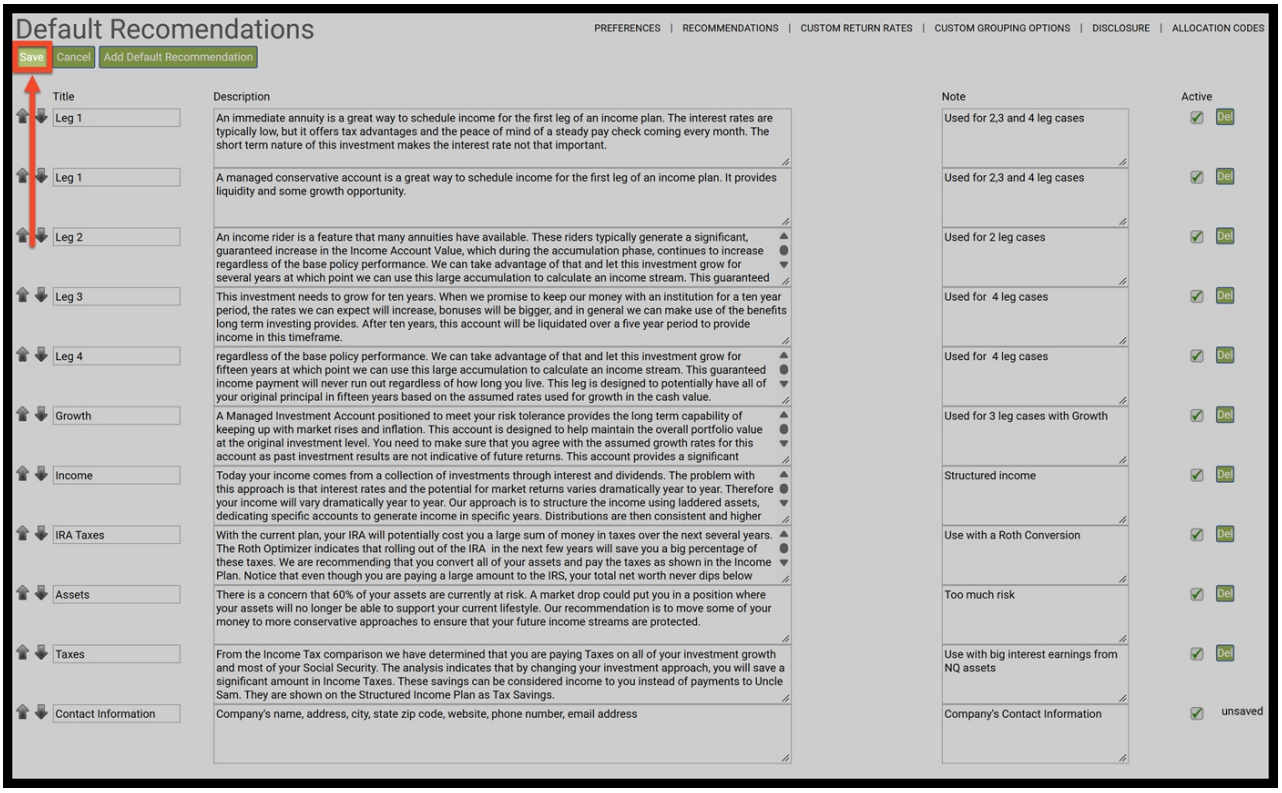
Step 5: Description: Type a description for your recommendation.



Step 6: Note: Enter a note.



Step 7: Save: Click on the green Save button underneath the Default Recommendations heading.



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.