Recommendations

10/22/2026 2:51 pm EDT

In the final report, which can be printed as a PDF, there is a page titled Summary of Recommendations. This page is linked to the Recommendations section within SIPS. On this page, you can select prewritten text and write unique text in as recommendations for your client. Below is a step-by-step guide on how to select prewritten text and write unique text for the Summary of Recommendations page in the final report.

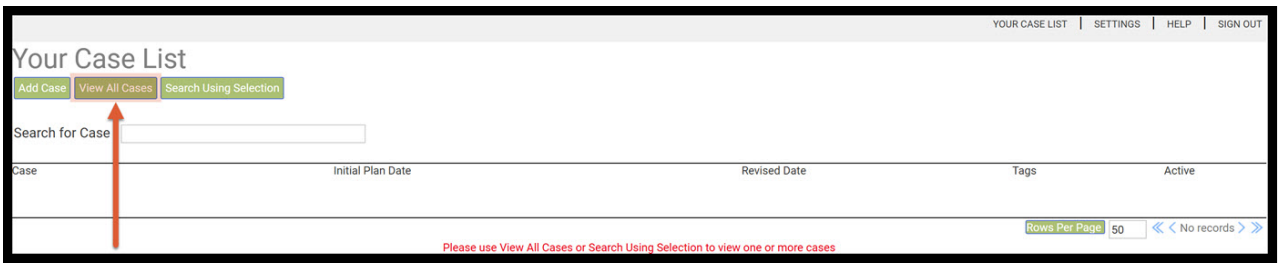
Step 1: Logging In: Log into SIPS.



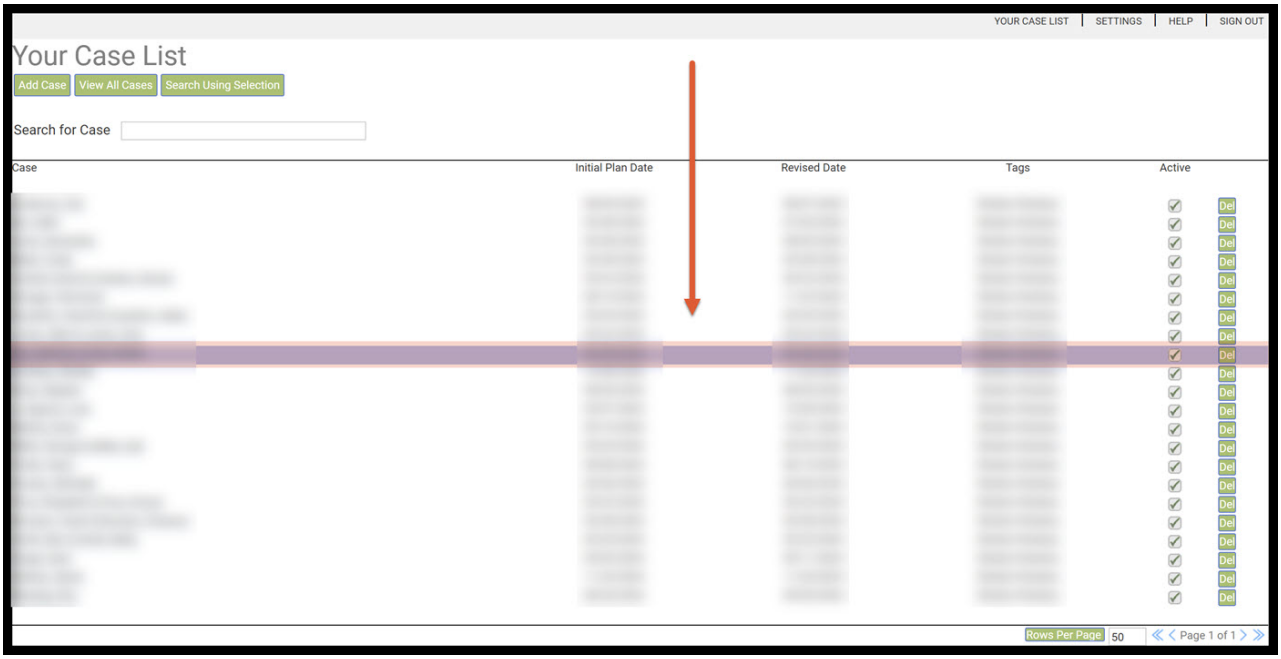
Step 2: Go To Your Case List: You can do this either by clicking the green 'Go To Your Case List' button or by selecting the 'Your Case List' subheading located in the upper-right corner of your screen.



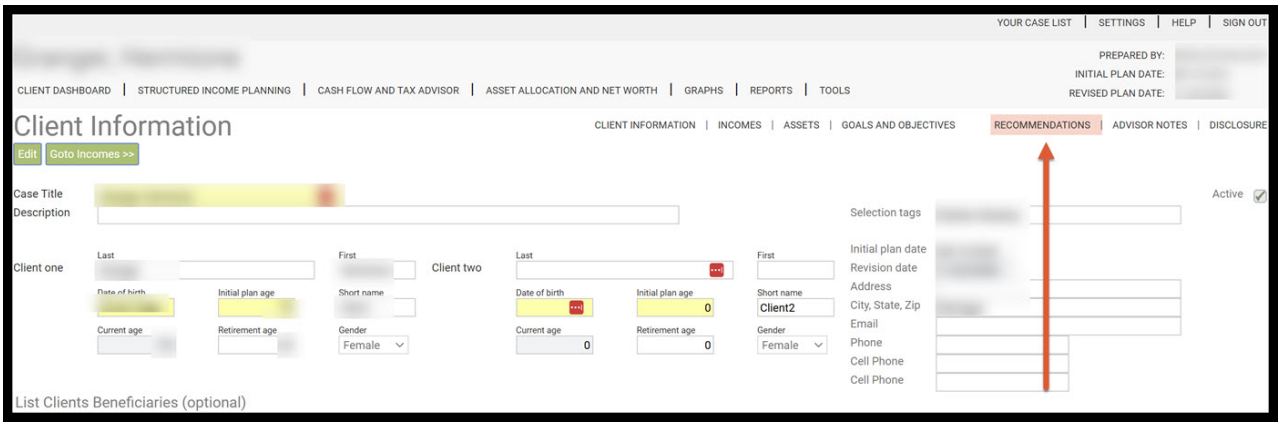
Step 3: View All Cases: Click on the Green View All Cases button underneath the Your Case List Heading located on the lefthand side of your screen.



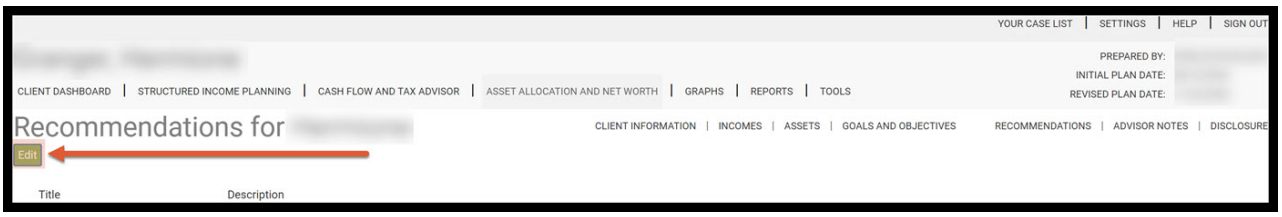
Step 4: Selection: Select which case you would like to work in by clicking on the case.



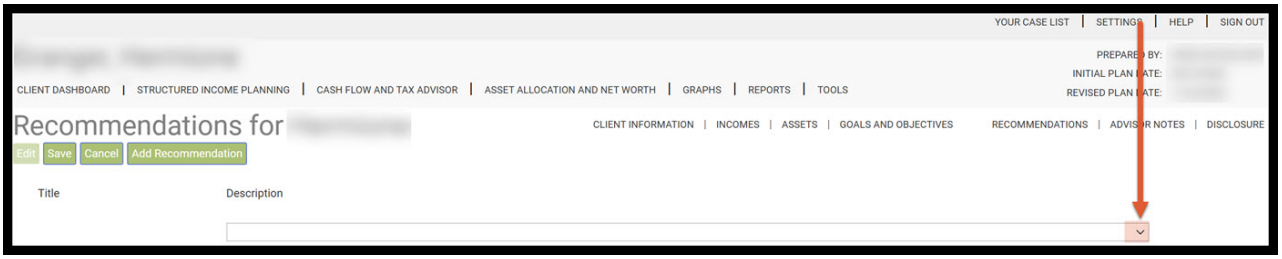
Step 5: Recommendations: Click on the Recommendations subheading that is located on the right-hand side of the screen.



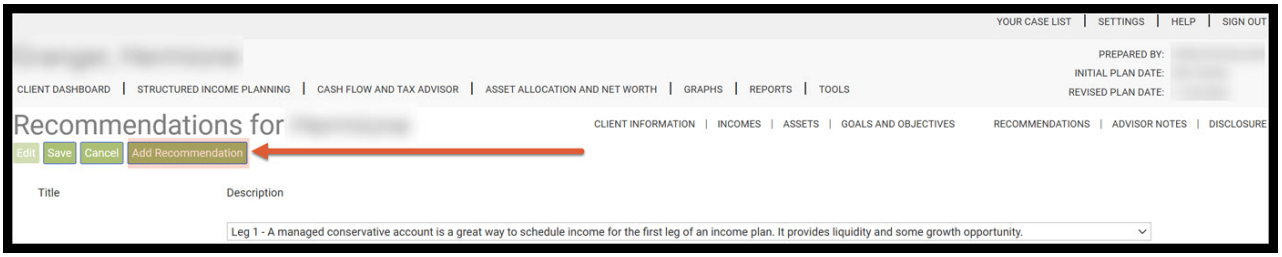
Step 6: Edit: Click on the green Edit button underneath the Recommendations for Client's Name heading.



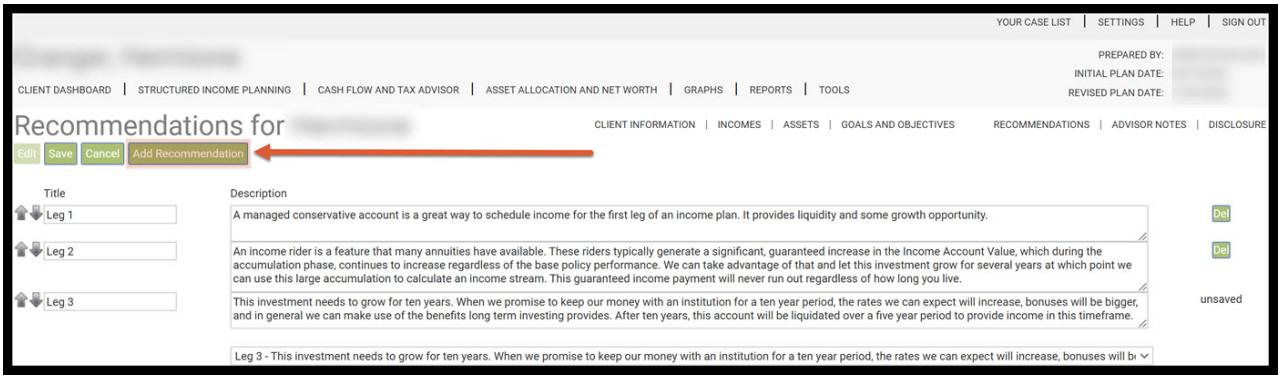
Step 7: Down Caret Arrow: Click on the down carrot arrow in the description text box and select which prewritten text you would like to use.



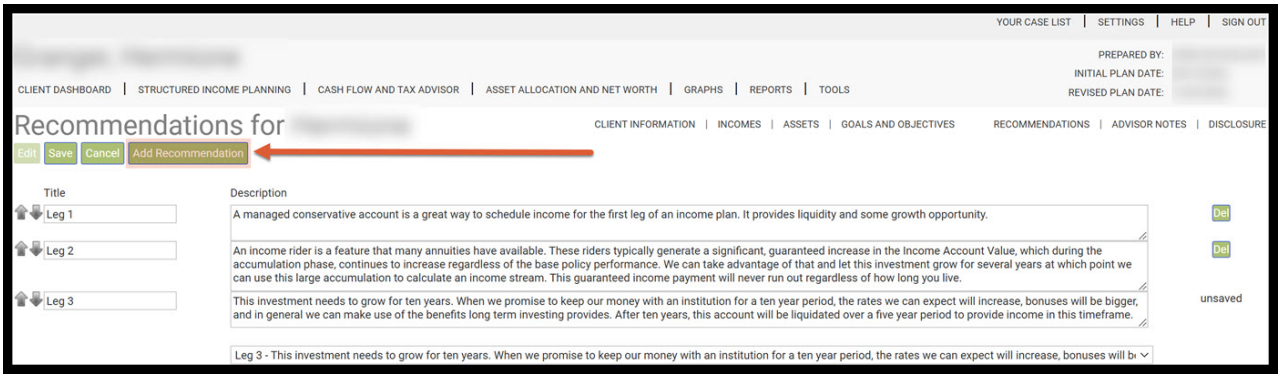
Step 8: Add Recommendation: Click on the green Add Recommendation button underneath the Recommendations for Client Name subheading.



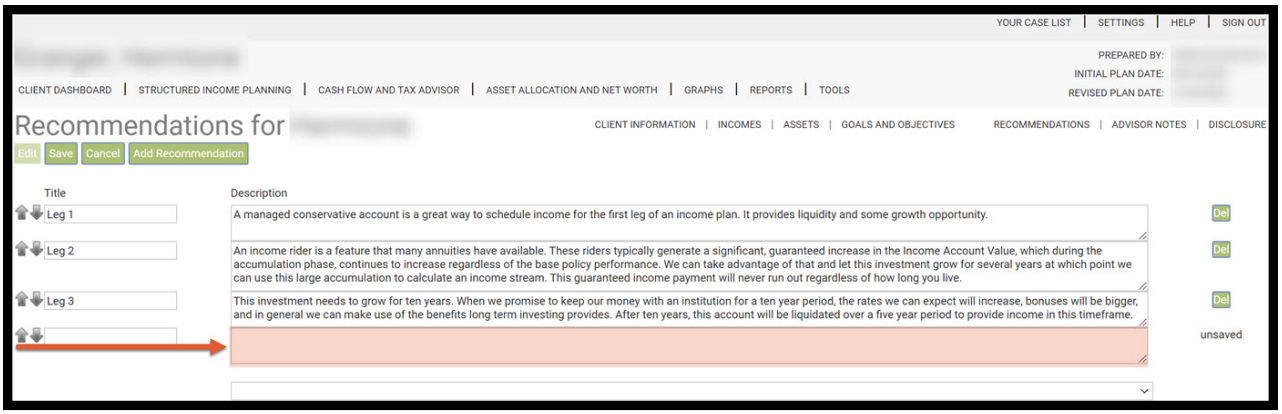
Step 9: Add Recommendation: Repeat step 7 and 8 to add more prewritten texts to the report.



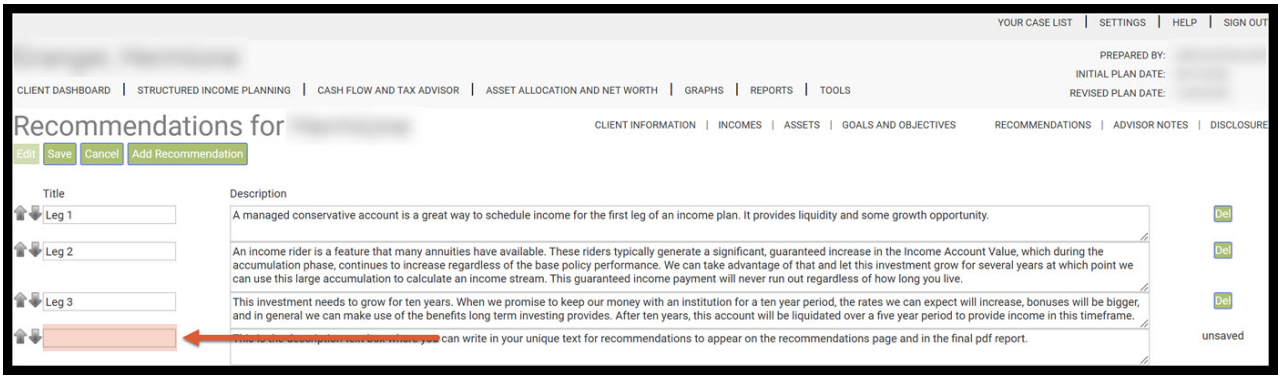
Step 10: Adding Unique Text: Click on the green Add Recommendation button underenath the Recommendations for Client Name subheading.



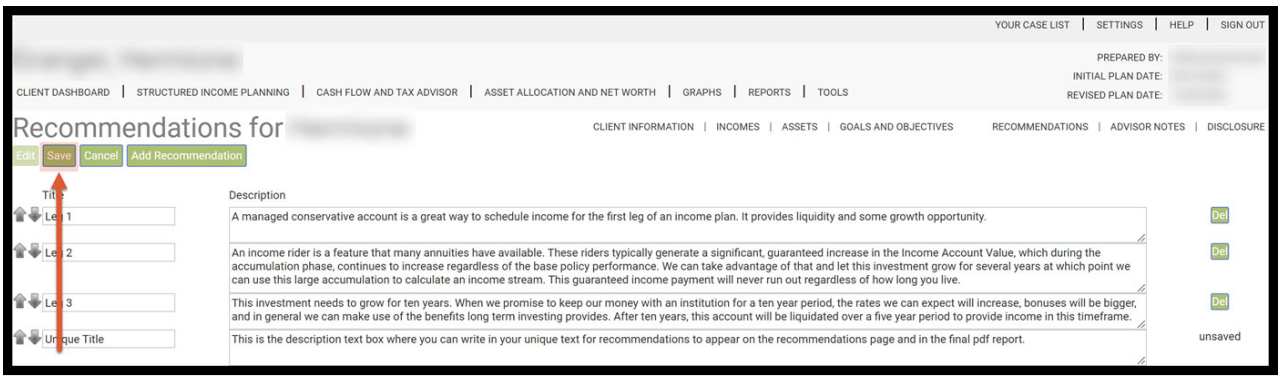
Step 11: Description TextBox: Click in the description text box and write in your unique text.



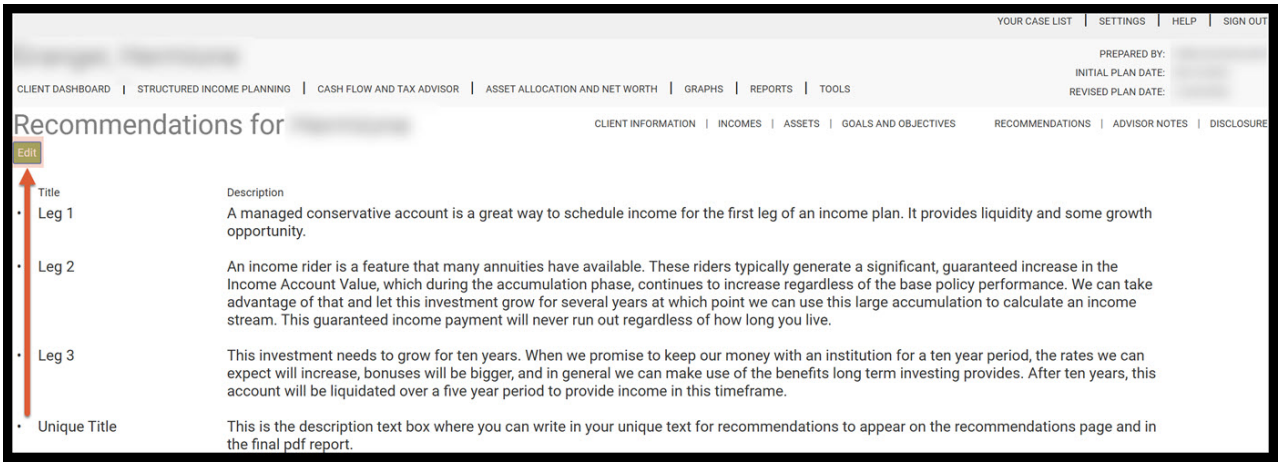
Step 12: Title TextBox: Click in the title text box and write in your unique title.



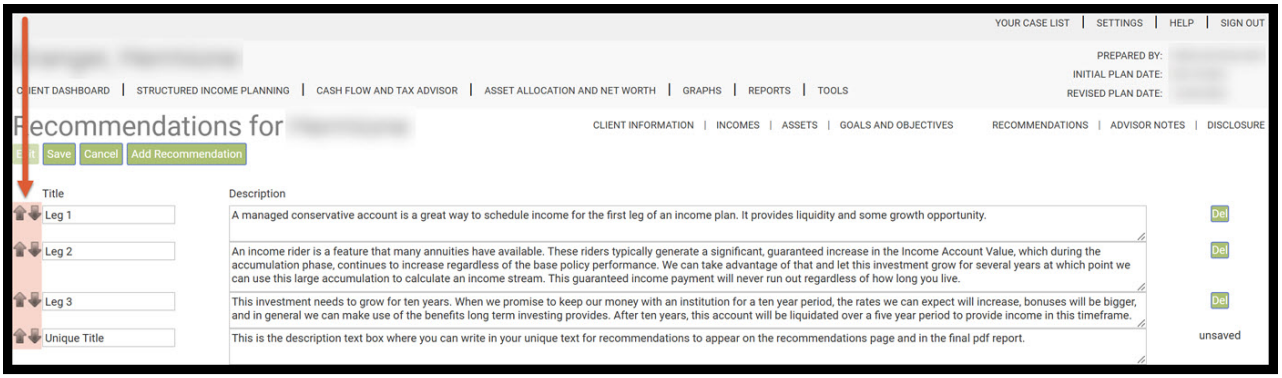
Step 13: Save: Click on the green Save button underneath the Recommendations for Clients Name subheading.



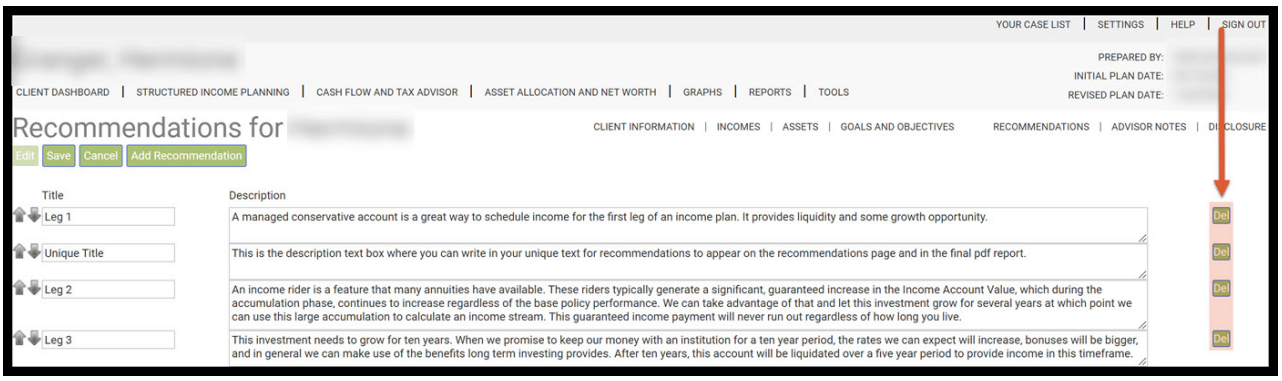
Step 14: Edit: Click on the green Edit button underneath the Recommendations for Client's Name heading.



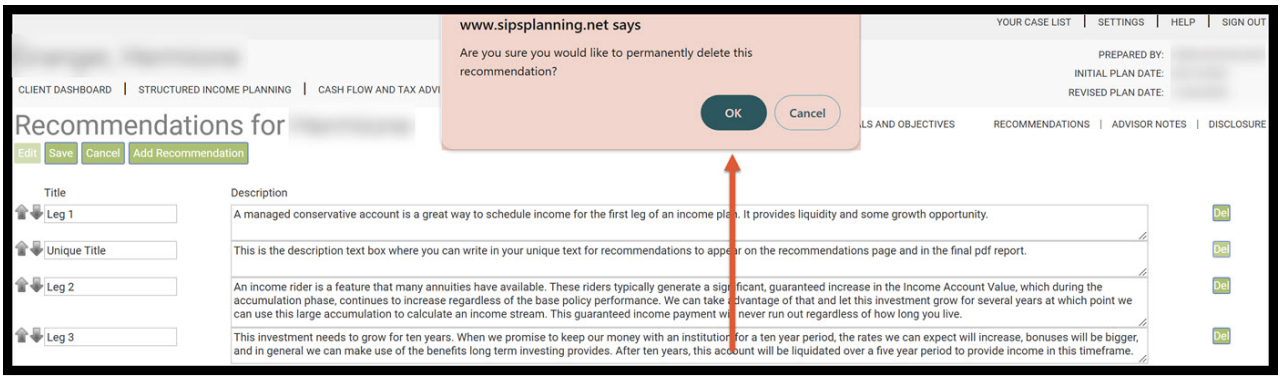
Step 15: Ordering the Recommendations: Use the up and down carrot arrows located on the left hand side of the screen to re-arrang the order of recommendations.



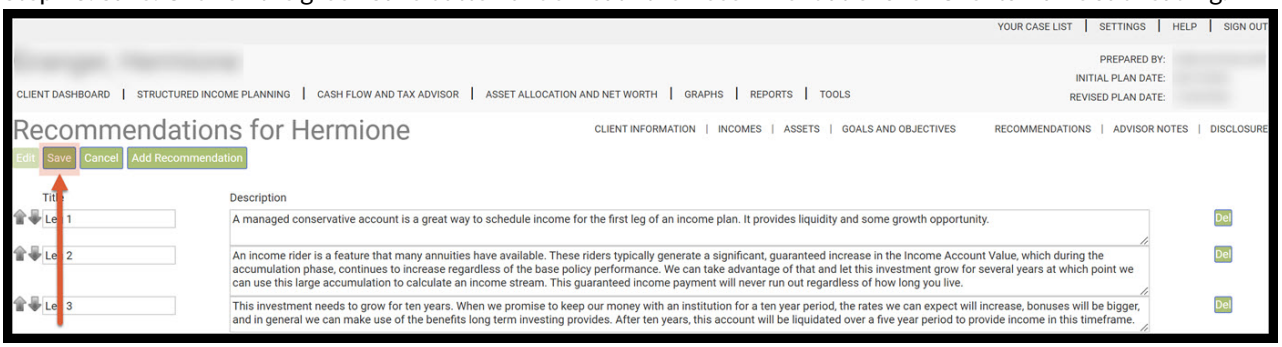
Step 16: Deletion: Click on the green Del button to delete a description.



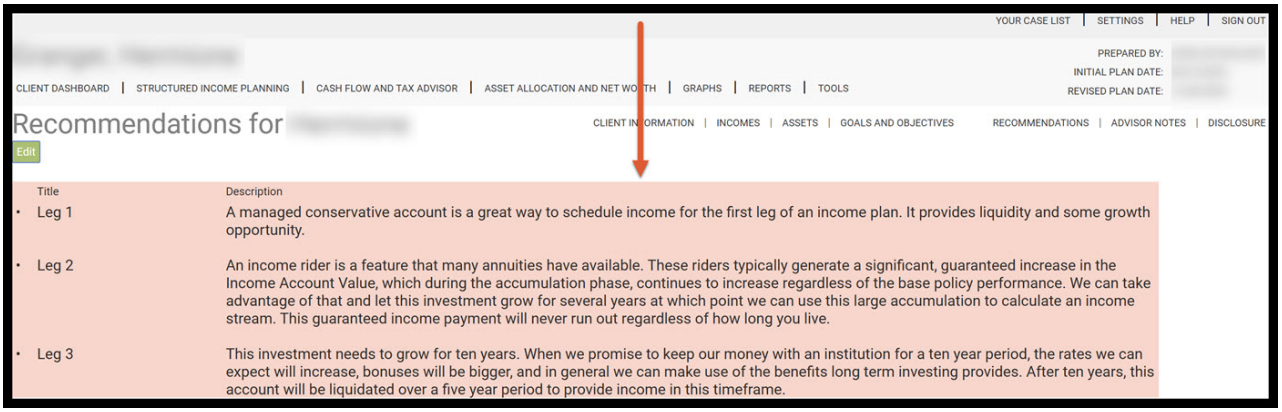
Step 17: Click OK: Click OK to the text message box that comes up from www.sipsplanning .net says, “Are you sure you would like to permanently delete this recommendation?



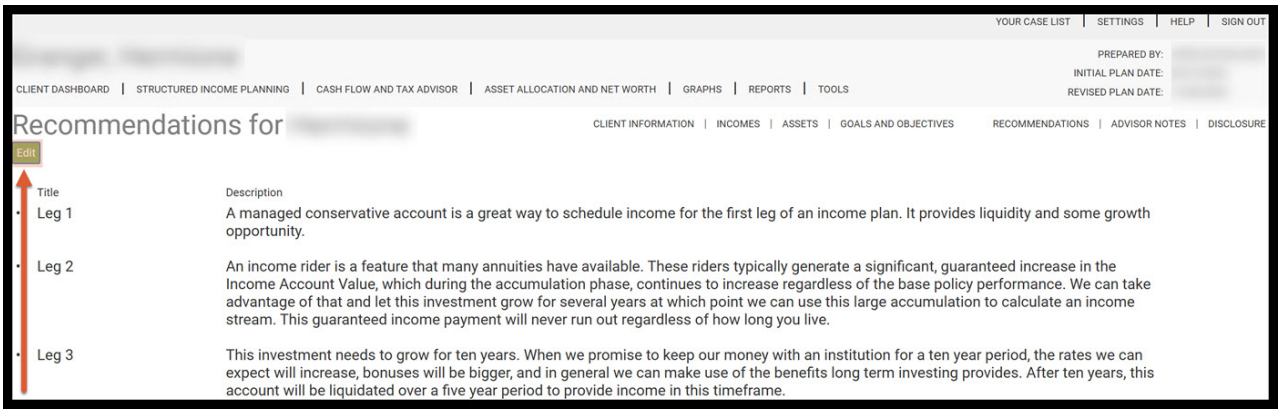
Step 18: Save: Click on the green Save button underneath the Recommendations for Clients Name subheading.



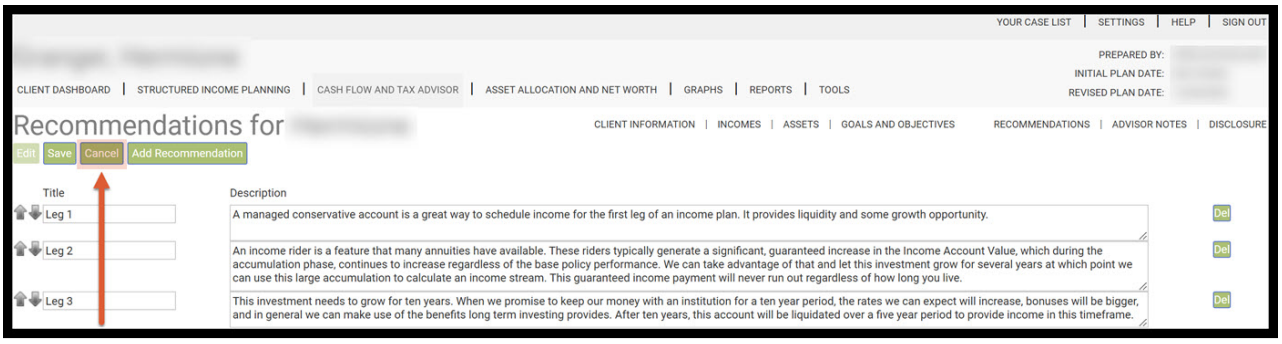
Step 19: Clicking: The finalized version of the description and text will be displayed.



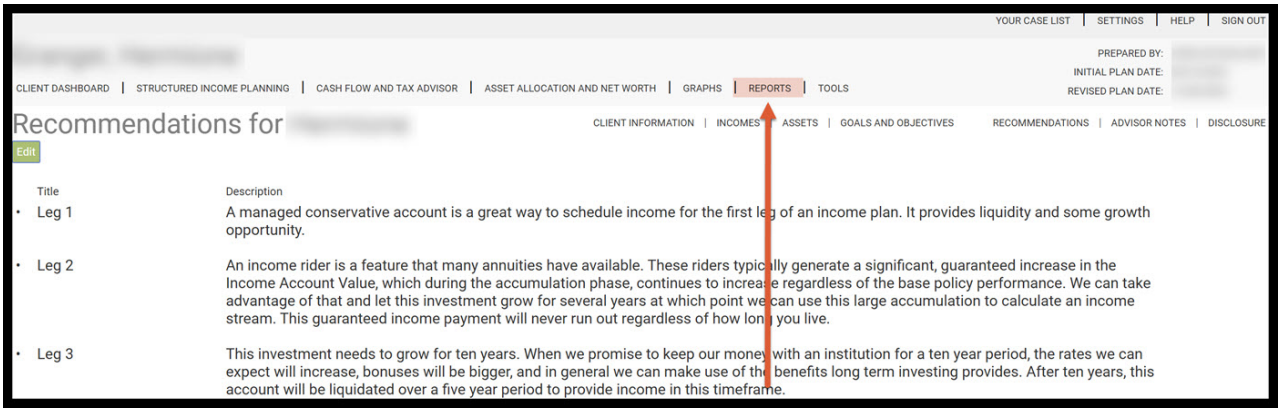
Step 20: Edit: If you need to make an edit to the Recommedantioons for client name click on the green edit button underneath the Recommendaitons for client name subheading.



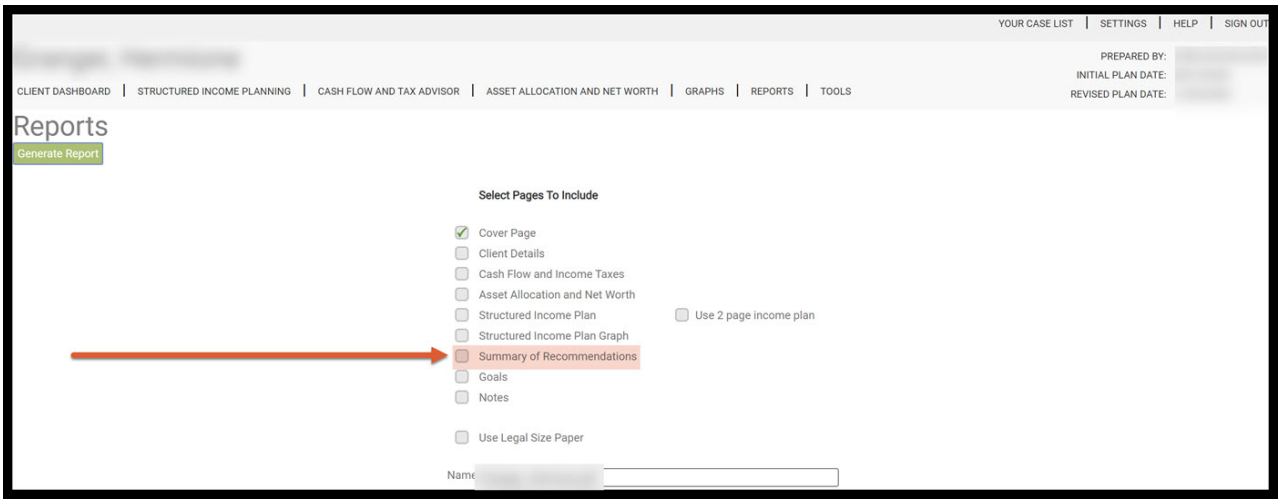
Step 21: Cancel: To go back to the previous page, click on the green Cancel button underneath the Recommendations for Client Name subheading.



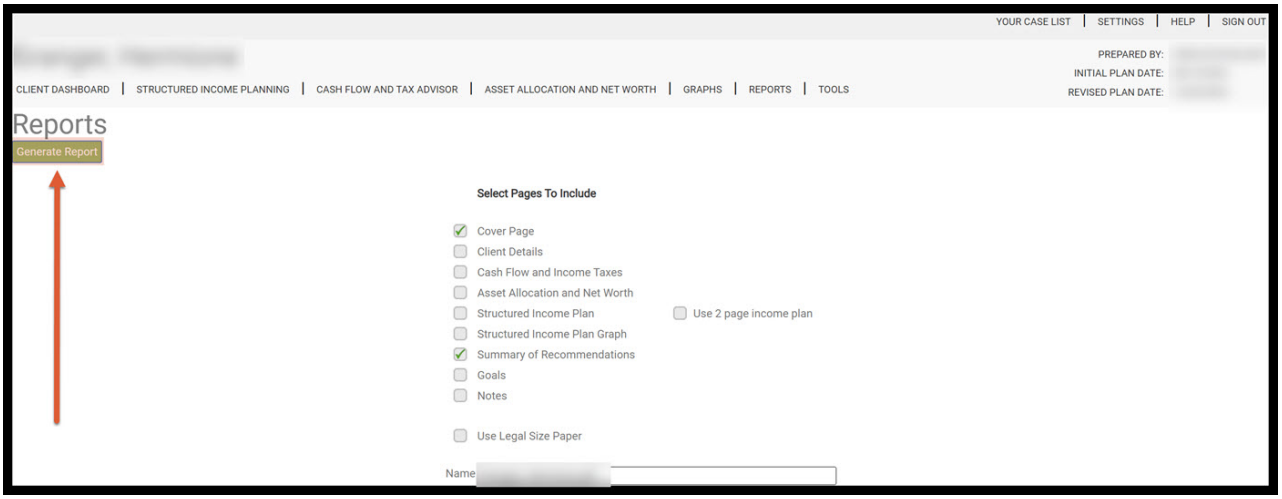
Step 22: Reports: Click on the Reports subheading located in the middle of the screen.



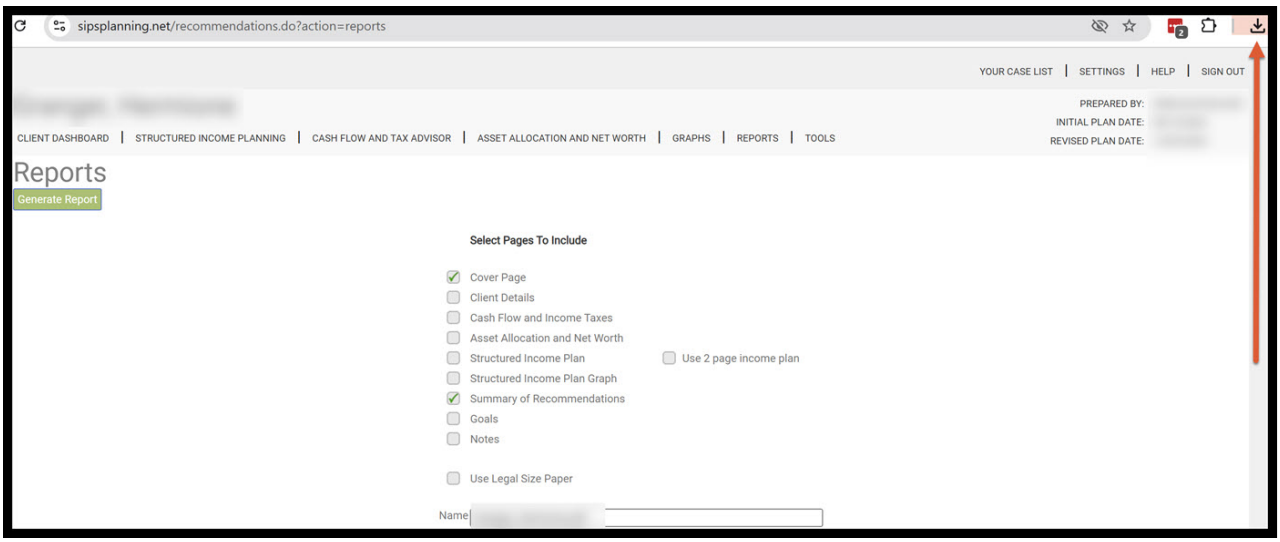
Step 23: Summary of Recommendations Checkbox: Click on the Summary of Recommendations Checkbox.



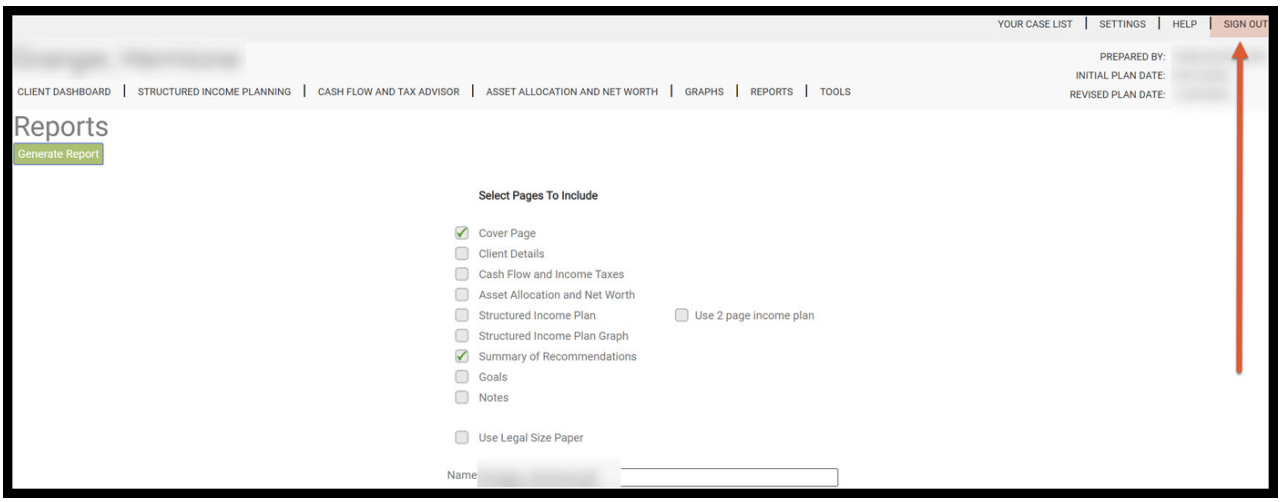
Step 24: Generate Report: Click on the green Generate Report button underneath the Reports subheading.



Step 25: Download: Open the pdf document that has been downloaded.



Step 26: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.



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.