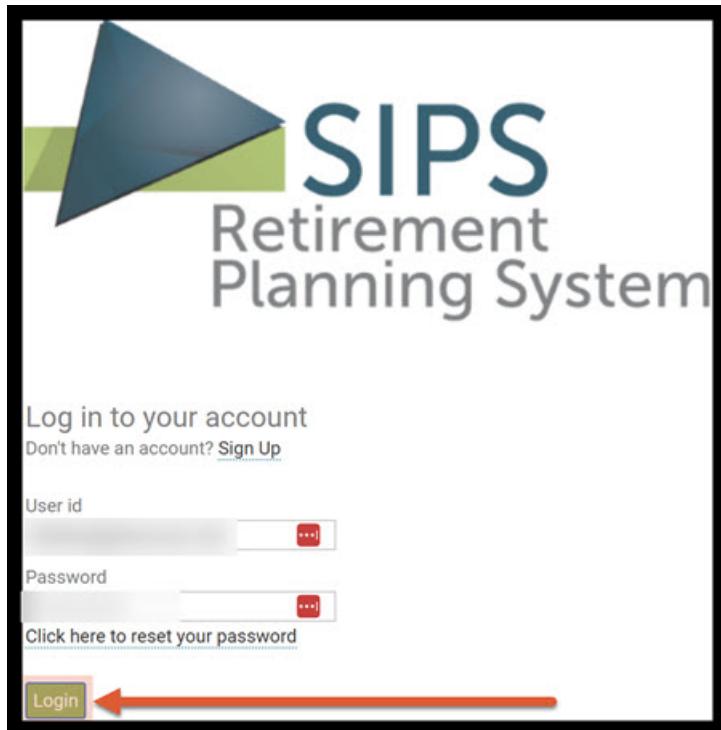


# Changing the Colors of the Allocation Codes

01/02/2026 9:11 am EST

Underneath the settings subheading you can go to the allocation codes page. On this page you can edit many different items with the allocation codes. Below is a step by step guideline for changing the colors of the allocation codes.

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

## Preferences

Save | Cancel | Select New Logo | (\*.gif, \*.png, \*.bmp, \*.jpg, \*.jpeg) | Upload

User id	<input type="text"/>	...
Old password	<input type="password"/>	...
New password	<input type="password"/>	...
Please re-enter new password	<input type="password"/>	...
Email address	<input type="text"/>	...
Company Name	<input type="text"/>	
Company Address	<input type="text"/>	
Company Address	<input type="text"/>	
Company Phone	<input type="text"/>	...
Company Website	<input type="text"/>	...
Company Email	<input type="text"/>	

ALLOCATION CODES 

Step 4: Sel: Click on the green Sel button next to code that you would like to change the color for.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

## Allocation Code List

Save | Cancel | Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none		0.00	5.00	n/a	0
10904	non Qual		0.00	n/a	0	Del
10905	Qualified		0.00	n/a	0	Del
10906	green		0.00	n/a	0	Del
10907	yellow		0.00	n/a	0	Del
10908	red		0.00	n/a	0	Del
10909	safe		0.00	n/a	0	Del
10910	risk		0.00	Fixed Interest	0	Del
10911	Fixed Interest		0.00	Aggressive	0	Del
10912	Indexed Annuity		0.00	Fixed Interest	0	Del
10913	Conservative		0.00	Indexed Annuity	0	Del
10914	Moderately Conservative		0.00	Conservative	0	Del
10915	Moderate		0.00	Moderately Conservative	0	Del
10916	Moderately Aggressive		0.00	Moderate	0	Del
10917	Aggressive		0.00	Moderately Aggressive	0	Del

Step 5: Color Selection: Pick which color selection you would like to go with.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

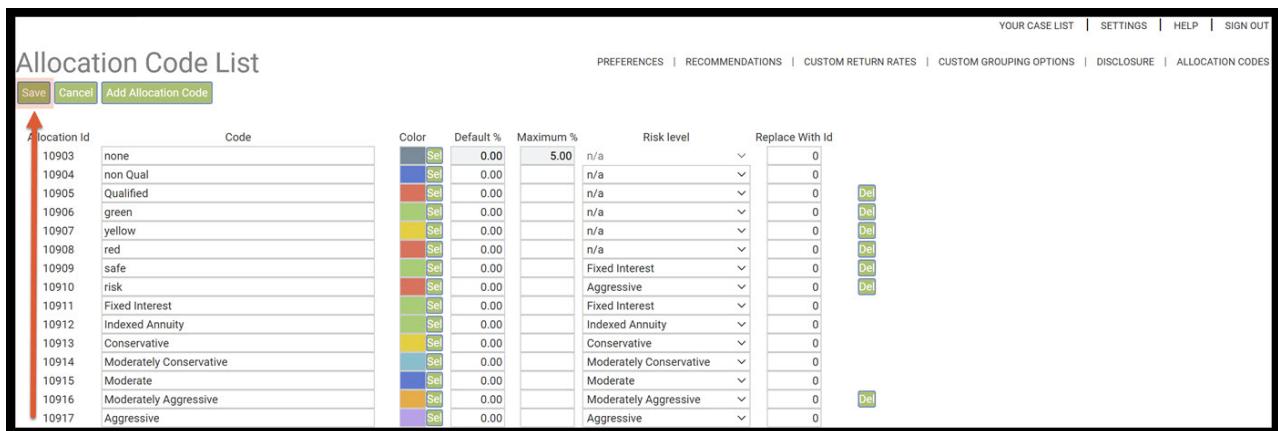
## Allocation Code List

Save | Cancel | Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none		0.00	n/a	0	Del
10904	non Qual		0.00	n/a	0	Del
10905	Qualified		0.00	n/a	0	Del
10906	green		0.00	n/a	0	Del
10907	yellow		0.00	n/a	0	Del
10908	red		0.00	n/a	0	Del
10909	safe		0.00	Fixed Interest	0	Del
10910	risk		0.00	Aggressive	0	Del
10911	Fixed Interest		0.00	Fixed Interest	0	Del
10912	Indexed Annuity		0.00	Indexed Annuity	0	Del
10913	Conservative		0.00	Conservative	0	Del
10914	Moderately Conservative		0.00	Moderately Conservative	0	Del
10915	Moderate		0.00	Moderate	0	Del
10916	Moderately Aggressive		0.00	Moderately Aggressive	0	Del
10917	Aggressive		0.00	Aggressive	0	Del

PRIVACY POLICY | TERMS OF USE 

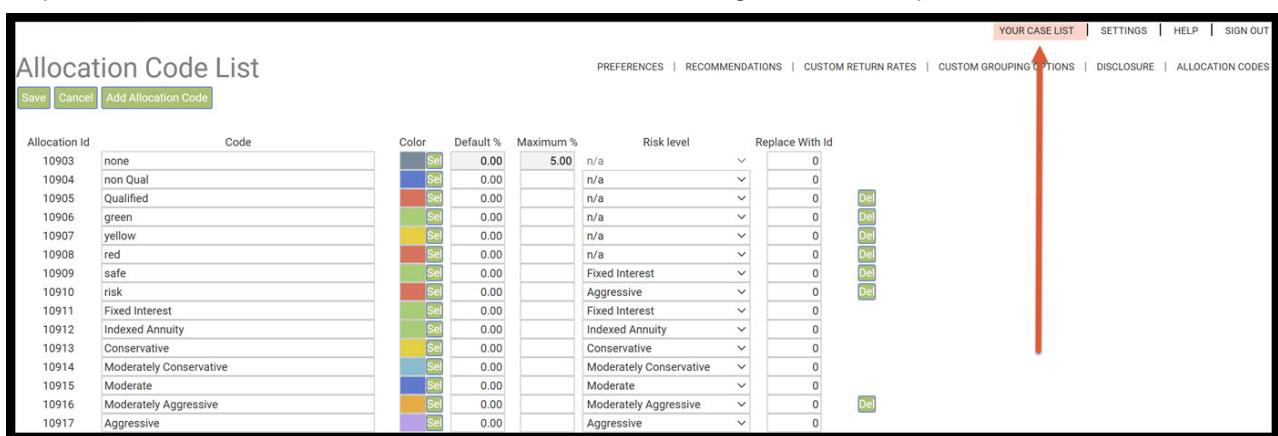
Step 6: Save: Click on the green save button underneath the Allocation Code List heading.



The screenshot shows the 'Allocation Code List' page. At the top, there are buttons for 'Save', 'Cancel', and 'Add Allocation Code'. Below this is a table with columns: 'Allocation Id', 'Code', 'Color', 'Default %', 'Maximum %', 'Risk level', and 'Replace With Id'. The 'Replace With Id' column contains 'Del' buttons. A red arrow points to the 'Save' button. The table data is as follows:

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Sel	0.00	5.00	n/a	0
10904	non Qual	Sel	0.00	n/a	▼	0
10905	Qualified	Sel	0.00	n/a	▼	0
10906	green	Sel	0.00	n/a	▼	0
10907	yellow	Sel	0.00	n/a	▼	0
10908	red	Sel	0.00	n/a	▼	0
10909	safe	Sel	0.00	Fixed Interest	▼	0
10910	risk	Sel	0.00	Aggressive	▼	0
10911	Fixed Interest	Sel	0.00	Fixed Interest	▼	0
10912	Indexed Annuity	Sel	0.00	Indexed Annuity	▼	0
10913	Conservative	Sel	0.00	Conservative	▼	0
10914	Moderately Conservative	Sel	0.00	Moderately Conservative	▼	0
10915	Moderate	Sel	0.00	Moderate	▼	0
10916	Moderately Aggressive	Sel	0.00	Moderately Aggressive	▼	0
10917	Aggressive	Sel	0.00	Aggressive	▼	0

Step 7: Your Case List: Click on the Your Case List button on the right hand side of your screen.



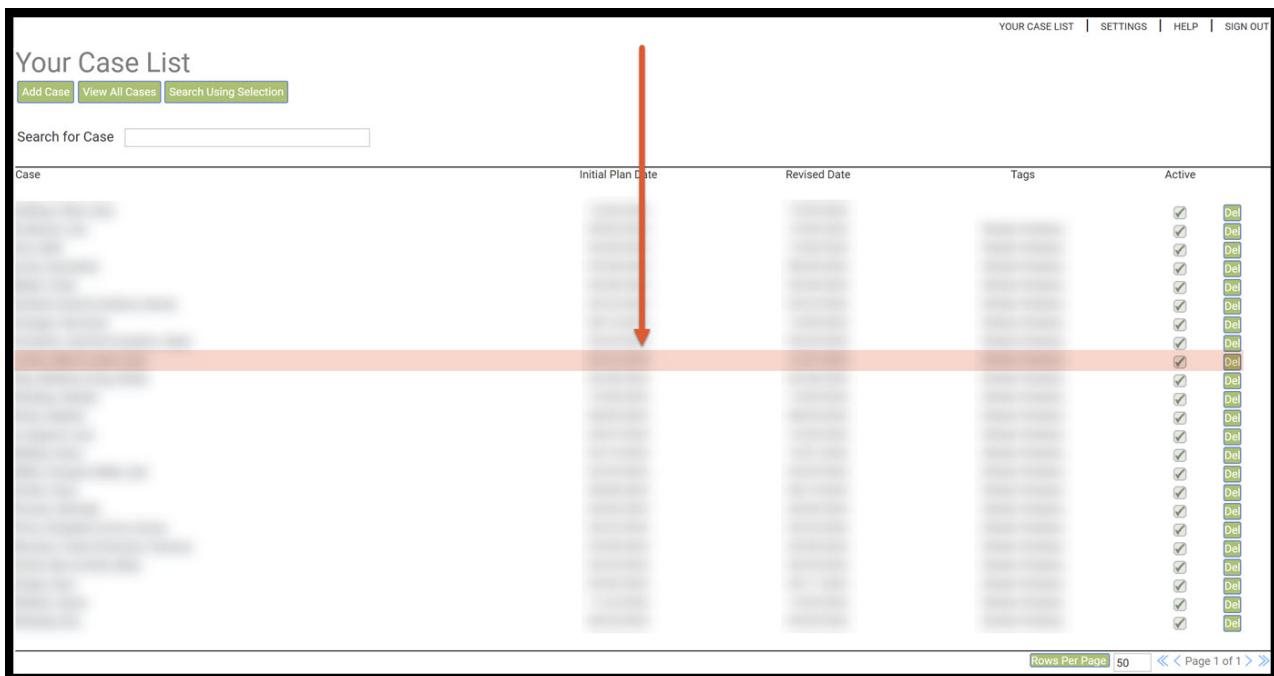
The screenshot shows the 'Allocation Code List' page again. A red arrow points to the 'YOUR CASE LIST' button in the top right corner. The table data is identical to the previous screenshot.

Step 8: View All Cases: Click on the green View All Cases button.



The screenshot shows the 'Your Case List' page. At the top, there are buttons for 'Add Case', 'View All Cases', and 'Search Using Selection'. A red arrow points to the 'View All Cases' button. Below this is a search bar labeled 'Search for Case'. The table at the bottom has columns: 'Case', 'Initial Plan Date', 'Revised Date', 'Tags', and 'Active'. The 'View All Cases' button is highlighted with a green box.

Step 9: Case Selection: Select a case.



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Your Case List

Add Case View All Cases Search Using Selection

Search for Case

Case Initial Plan Date Revised Date Tags Active

Initial Plan Date

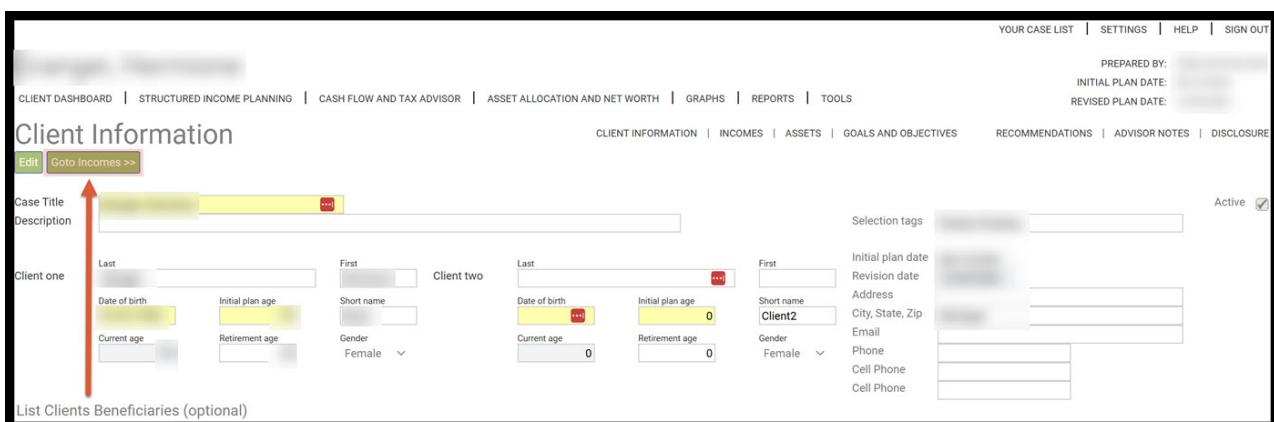
Revised Date

Tags

Active

Rows Per Page 50 < Page 1 of 1 >

Step 10: GoTo Incomes: Click on the green GoTo Incomes underneath the Client Information heading.



YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY: INITIAL PLAN DATE: REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES | RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

Client Information

Edit Goto Incomes >>

Case Title  Description

Client one Client two

Last First Last First

Date of birth Initial plan age Short name Initial plan age

Current age Retirement age Gender Client2 Gender

Female Female

Selection tags

Active

Initial plan date  
Revision date  
Address  
City, State, Zip  
Email  
Phone  
Cell Phone  
Cell Phone

List Clients Beneficiaries (optional)

Step 11: GoTo Assets: Click on the green GoTo Assets underneath the Incomes heading.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

**Incomes**

[Edit](#) [Goto Assets >>](#)

Wages/Income	Current income (if still working)	Yearly amount	Wages/Income	Current income (if still working)	Yearly amount		
	Expected wage increase while working %	<input type="text" value="0.0"/>		Expected wage increase while working %	<input type="text" value="0.0"/>		
Social security	At age	62	Social security	At age	62		
	Projected benefits	66	Yearly amount	unknown	Yearly amount		
		70					
	Or		Or				
	OR Current benefit if already retired		OR Current benefit if already retired				
	Expected COLA increase %	<input type="text" value="2.2"/>	Expected COLA increase %	<input type="text" value="0.0"/>			
Pensions	At age	0	Pensions	Projected benefits	At age	0	Yearly amount
	Projected benefits	<input type="text" value="0"/>		Or			
	Or		OR Current benefit if already retired				
	OR Current benefit if already retired		Expected COLA increase %	<input type="text" value="0.0"/>	Expected COLA increase %	<input type="text" value="0.0"/>	

Step 12: Current Monetary Assets Allocation: The Allocation should be written in the color that you have selected.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

**Assets**

[Edit](#) [Create Planning Scenario](#)

Current Monetary Assets	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Roth IRA	IRA	Mod	Moderate	<input type="text" value="Sel"/>	3.0	\$1,000,000
401(k)	401k	Aggr	Aggressive	<input type="text" value="Sel"/>	6.0	\$1,000,000

Property List (homes, rentals, land)

Other Assets & Liabilities (boats, RV, collectibles)

Step 13: Structured Income Planning: Click on the Structured Income Planning button located on the left-hand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

CLIENT INFORMATION | INCOMES | ASSETS | GOALS AND OBJECTIVES

RECOMMENDATIONS | ADVISOR NOTES | DISCLOSURE

**Assets**

[Edit](#) [Create Planning Scenario](#)

Current Monetary Assets	Owner	Tax Qualification	Risk Level	Allocation	Return	Balance
Roth IRA	IRA	Mod	Moderate	<input type="text" value="Sel"/>	3.0	\$1,000,000
401(k)	401k	Aggr	Aggressive	<input type="text" value="Sel"/>	6.0	\$1,000,000

Property List (homes, rentals, land)

Other Assets & Liabilities (boats, RV, collectibles)

Step 14: Accounts: The Accounts color should be changed to the one you have selection on the Allocation Codes page.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Structured Income Planning

Edit | Dynamic Mode

Scenario | Planning Horizon Timeline

Planning Horizon		Accounts				Incomes					
Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	Pension	SS	Total Income	Year
net return	6.00 %	IRA	4.00 %		765,000	Subtotal 0 of account incomes	175,000	30,000	28,282	233,282	
initial amount	665,000		100,000		765,000		178,850	30,960	28,904	238,714	end of 1
bonus %	0.00 %		0.00 %		765,000		182,785	31,951	29,540	244,275	end of 2
w/bonus	665,000		100,000		765,000		186,806	32,973	30,190	249,969	end of 3
end of 1	71	704,900	0	104,000	0	808,900	175,000	30,000	28,282	233,282	end of 4
end of 2	72	747,194	0	108,160	0	855,354	178,850	30,960	28,904	238,714	end of 5
end of 3	73	792,025	0	112,486	0	904,512	182,785	31,951	29,540	244,275	end of 6
end of 4	74	839,547	0	116,986	0	956,533	186,806	32,973	30,190	249,969	end of 7
end of 5	75	889,920	0	121,665	0	1,011,585	190,916	34,028	30,854	255,798	end of 8
end of 6	76	943,315	0	126,532	0	1,069,847	195,116	35,117	31,533	261,766	end of 9
end of 7	77	999,914	0	131,593	0	1,131,507	199,408	36,241	32,227	267,876	end of 10
end of 8	78	1,059,908	0	136,857	0	1,196,765	203,795	37,401	32,936	274,132	end of 11
end of 9	79	1,123,503	0	142,331	0	1,265,834	208,279	38,597	33,660	280,536	end of 12
end of 10	80	1,190,913	0	148,024	0	1,338,937	212,861	39,833	34,401	287,094	end of 13
end of 11	81	1,262,368	0	153,945	0	1,416,313	217,544	41,107	35,158	293,809	end of 14
end of 12	82	1,338,110	0	160,103	0	1,498,213	222,330	42,423	35,931	300,683	end of 15
end of 13	83	1,418,396	0	166,507	0	1,584,904	227,221	43,780	36,722	307,723	end of 16
end of 14	84	1,503,500	0	173,168	0	1,676,668	232,220	45,181	37,529	314,930	end of 17
end of 15	85	1,593,710	0	180,094	0	1,773,804	237,329	46,627	38,355	322,311	end of 18
end of 16	86	1,689,332	0	187,298	0	1,876,630	242,550	48,119	39,199	329,868	end of 19
					0	3,313,008	614,338	535,420	4,462,766		

Orange backgrounds indicate hypothetical returns

Step 15: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

PREPARED BY:  
INITIAL PLAN DATE:  
REVISED PLAN DATE:

CLIENT DASHBOARD | STRUCTURED INCOME PLANNING | CASH FLOW AND TAX ADVISOR | ASSET ALLOCATION AND NET WORTH | GRAPHS | REPORTS | TOOLS

## Structured Income Planning

Edit | Dynamic Mode

Scenario | Planning Horizon Timeline

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Year	Account	Income	Account	Income	Accounts Total	Planned Distribution	Wages	Pension	SS	Total Income	Year
net return	6.00 %	IRA	4.00 %		765,000	Subtotal 0 of account incomes	175,000	30,000	28,282	233,282	
initial amount	665,000		100,000		765,000		178,850	30,960	28,904	238,714	end of 1
bonus %	0.00 %		0.00 %		765,000		182,785	31,951	29,540	244,275	end of 2
w/bonus	665,000		100,000		765,000		186,806	32,973	30,190	249,969	end of 3
end of 1	71	704,900	0	104,000	0	808,900	175,000	30,000	28,282	233,282	end of 4
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end of 4	74	839,547	0	116,986	0	956,533	186,806	32,973	30,190	249,969	end of 7
end of 5	75	889,920	0	121,665	0	1,011,585	190,916	34,028	30,854	255,798	end of 8
end of 6	76	943,315	0	126,532	0	1,069,847	195,116	35,117	31,533	261,766	end of 9
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end of 10	80	1,190,913	0	148,024	0	1,338,937	212,861	39,833	34,401	287,094	end of 13
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end of 13	83	1,418,396	0	166,507	0	1,584,904	227,221	43,780	36,722	307,723	end of 16
end of 14	84	1,503,500	0	173,168	0	1,676,668	232,220	45,181	37,529	314,930	end of 17
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end of 16	86	1,689,332	0	187,298	0	1,876,630	242,550	48,119	39,199	329,868	end of 19
					0	3,313,008	614,338	535,420	4,462,766		

Orange backgrounds indicate hypothetical returns

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](mailto:support@planscout.com).