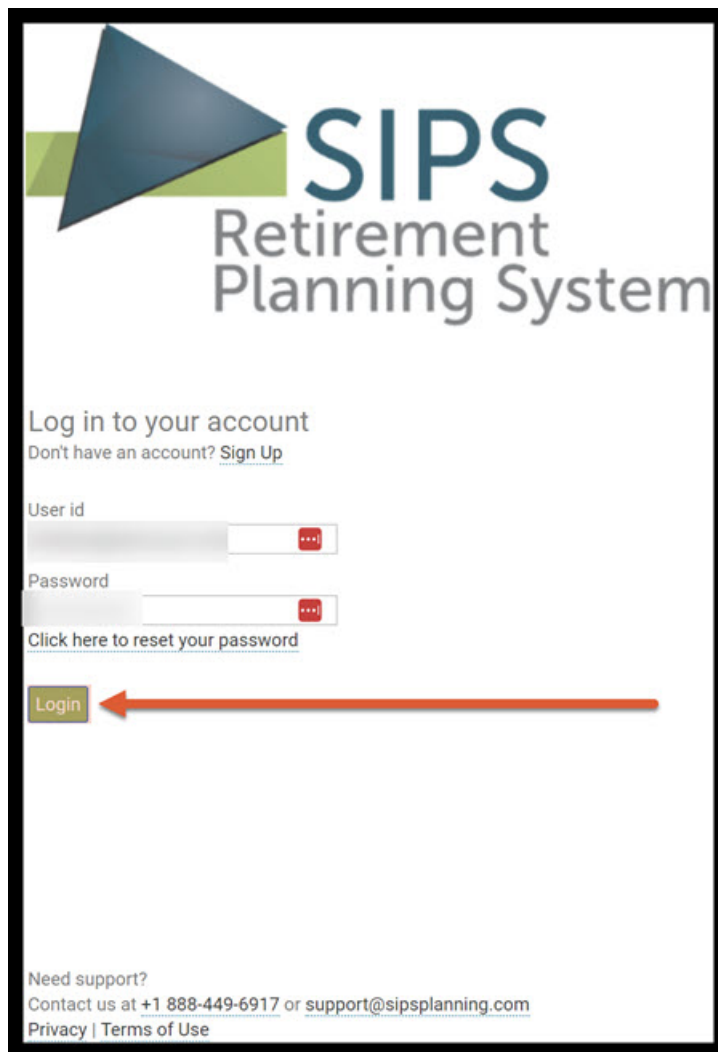


Changing the Colors to the Allocation Codes

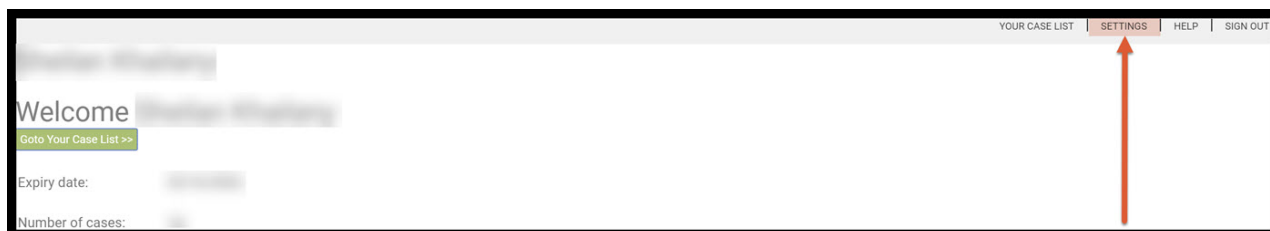
08/23/2024 4:38 pm EDT

Within the settings page you can change the colors of the allocation codes. Below is a step by step guide for editing the allocation codes.

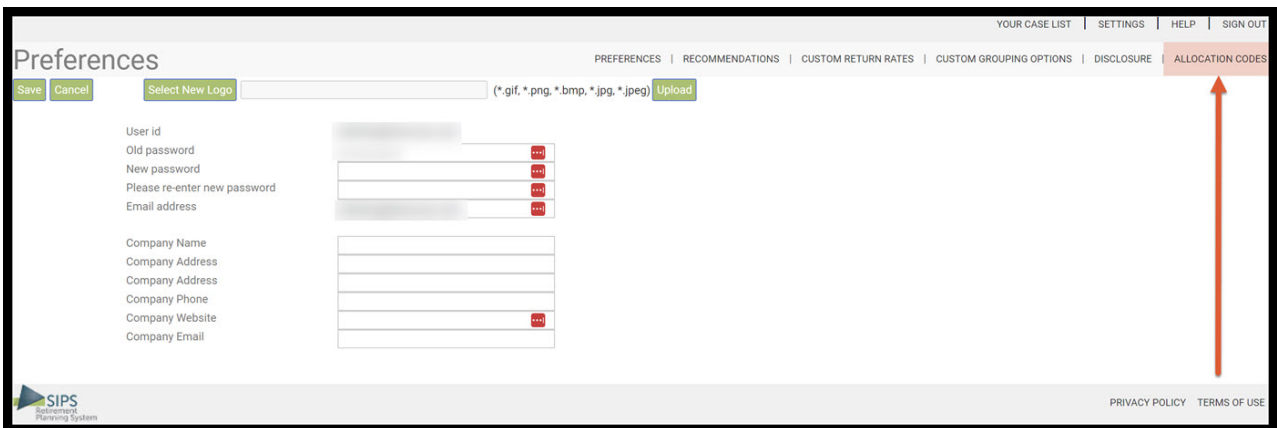
Step 1: Log In: Log in into SIPS.



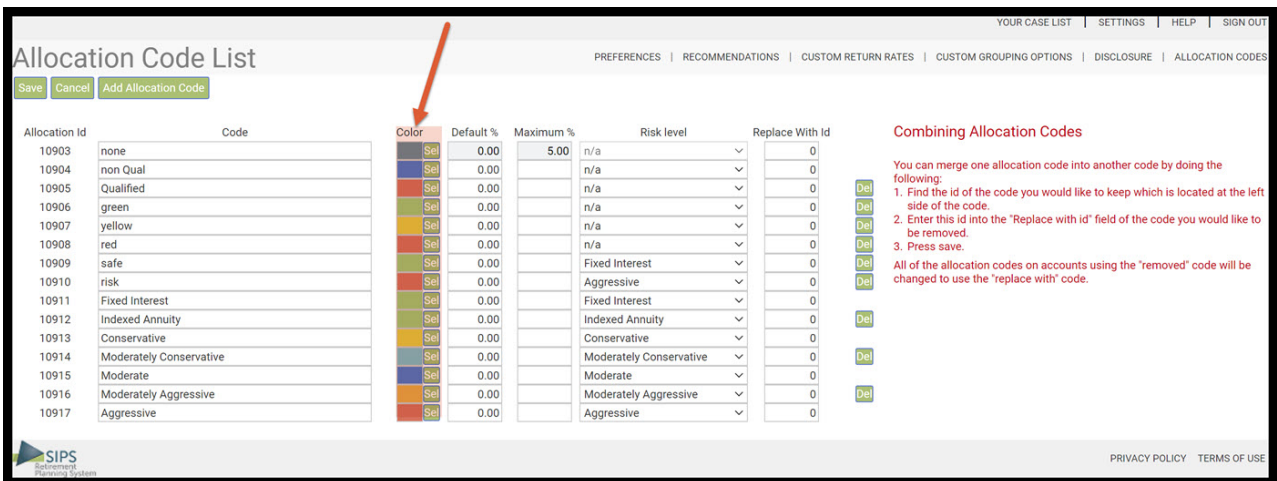
Step 2: Settings: Double click on the Setting header that is located in the upper right-hand side of the screen.



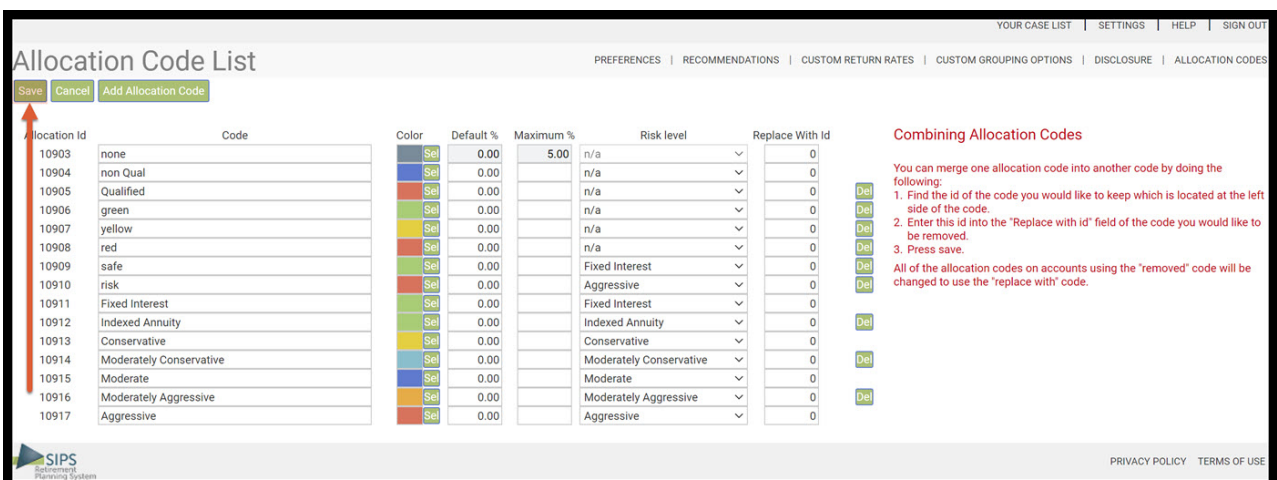
Step 3: Allocation Codes: Double click on the Allocation code subheading located in the upper right-hand side of the screen.



Step 4: Color Selection: Click on the green Sel next to the color selection and select a color.



Step 5: Save: Double click on the green Save button underneath Allocation Code List once done with the color selection.



Step 6: Exiting Out of the Allocation Code Page: Double Click on any of the subheadings to exit out of the Allocation Code page.

The screenshot shows the 'Allocation Code List' interface. At the top right, there is a navigation bar with links: 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below this is a secondary navigation bar with 'PREFERENCES', 'RECOMMENDATIONS', 'CUSTOM RETURN RATES', 'CUSTOM GROUPING OPTIONS', 'DISCLOSURE', and 'ALLOCATION CODES'. An orange arrow points from the 'Allocation Code List' title to the 'ALLOCATION CODES' link. Below the navigation is a table with columns: Allocation Id, Code, Color, Default %, Maximum %, Risk level, and Replace With Id. The table lists 17 allocation codes from 10903 to 10917. To the right of the table is a section titled 'Combining Allocation Codes' with instructions on how to merge codes and a 'Del' button for each row.

Step 7: Logout: To sign out of SIPS, click on the Sign Out heading that is located in the upper right-hand side of the screen.

This screenshot is identical to the one above, but with an orange arrow pointing from the 'SIGN OUT' link in the top right navigation bar to the right edge of the browser window.

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