

Entering in Your Company Contact Information into SIPS

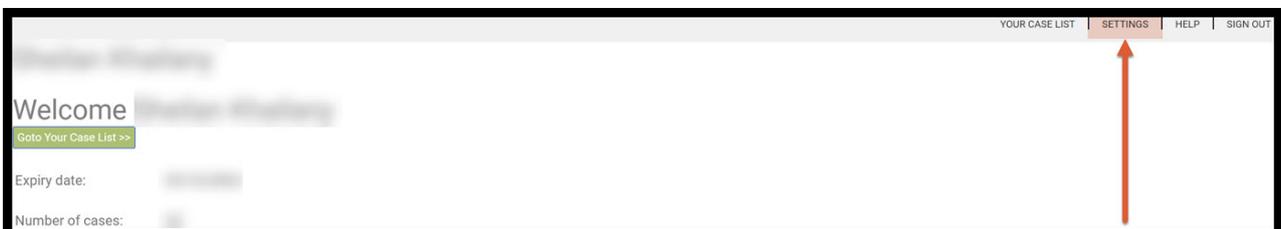
12/07/2024 2:29 pm EST

You can access the preference page through the settings button. On the preference page you can update your password, enter your email address, and provide your company's contact information. The company's contact information that you have provided will be Company's contact information that will be provided on the cover page for the report. Below is a step-by-step guideline for entering in your company's contact information.

Step 1: Login: Login to SIPS.



Step 2: Settings: Click on the Settings button located in the upper right hand side of the screen.



Step 3: Company Name Text Box: Enter in the Company Name.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences | PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

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

User id

Old password

New password

Please re-enter new password

Email address

Company Name

Company Address

Company Address

Company Phone

Company Website

Company Email

Step 4: Company Address Text Box: Enter in the Company Address.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences | PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

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User id

Old password

New password

Please re-enter new password

Email address

Company Name

Company Address

Company Address

Company Phone

Company Website

Company Email

Step 5: Company Phone Text Box: Enter in the Company Phone text box.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences | PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

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

User id

Old password

New password

Please re-enter new password

Email address

Company Name

Company Address

Company Address

Company Phone

Company Website

Company Email

Step 6: Company Website Text Box: Enter in the Company Website URL.

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences | PREFERENCES | RECOMMENDATIONS | CUSTOM RETURN RATES | CUSTOM GROUPING OPTIONS | DISCLOSURE | ALLOCATION CODES

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

User id

Old password

New password

Please re-enter new password

Email address

Company Name

Company Address

Company Address

Company Phone

Company Website

Company Email

Step 7: Company Email Text Box: Enter in the company email address.

The screenshot shows the 'Preferences' page with a navigation bar at the top containing 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the navigation bar are links for 'PREFERENCES', 'RECOMMENDATIONS', 'CUSTOM RETURN RATES', 'CUSTOM GROUPING OPTIONS', 'DISCLOSURE', and 'ALLOCATION CODES'. The main content area includes a 'Save' button, a 'Cancel' button, and a 'Select New Logo' button with an 'Upload' button. The form fields are: User id, Old password, New password, Please re-enter new password, Email address, Company Name, Company Address (1234 Anywhere Street), Company Address (City, State, Zip Code), Company Phone (000-000-0000), Company Website (www.yourcompanywebsite.com), and Company Email (firstname.lastname@company.com). A red arrow points to the Company Email field.

Step 8: Save: Click on the green Save button underneath the Preferences heading.

This screenshot is identical to the previous one, but a red arrow points to the green 'Save' button located at the top left of the form area.

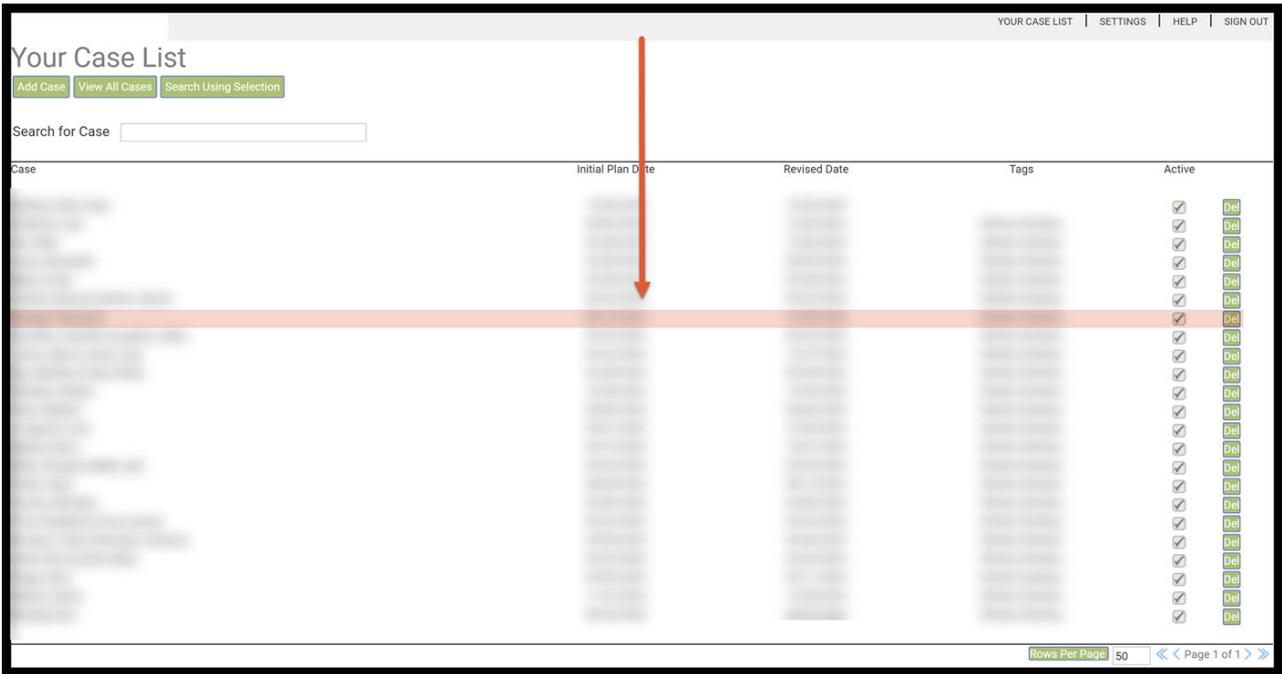
Step 9: Your Case List: Click on Your Case List Button located on the right-hand side of your screen.

This screenshot is identical to the previous ones, but a red arrow points to the 'YOUR CASE LIST' button in the top navigation bar.

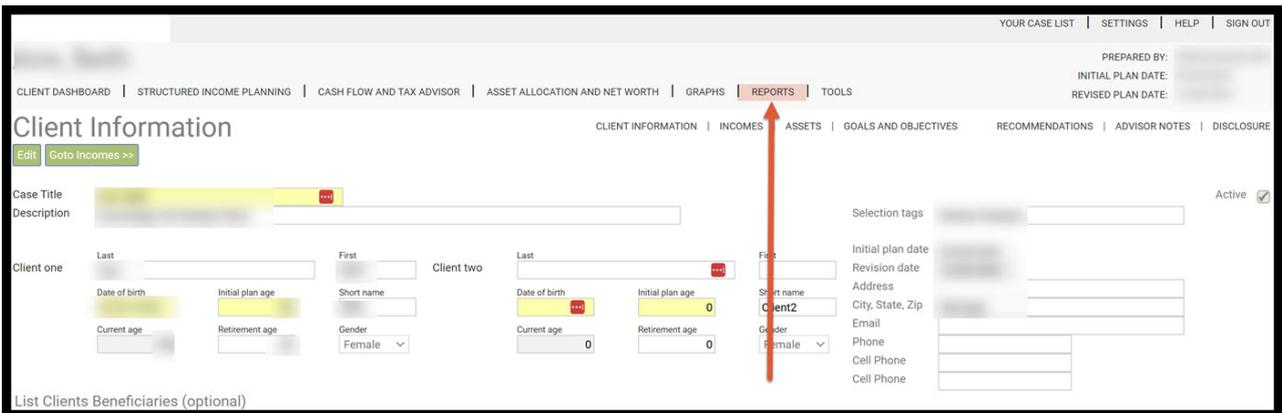
Step 10: View All Cases: Click on the green View All Cases underneath the Your Case List heading.

The screenshot shows the 'Your Case List' page with a navigation bar at the top containing 'YOUR CASE LIST', 'SETTINGS', 'HELP', and 'SIGN OUT'. Below the navigation bar are links for 'PREFERENCES', 'RECOMMENDATIONS', 'CUSTOM RETURN RATES', 'CUSTOM GROUPING OPTIONS', 'DISCLOSURE', and 'ALLOCATION CODES'. The main content area includes an 'Add Case' button, a 'View All Cases' button, and a 'Search Using Selection' button. There is a search box labeled 'Search for Case'. Below the search box is a table with columns: Case, Initial Plan Date, Revised Date, Tags, and Active. At the bottom right, there is a 'Rows Per Page' dropdown set to 50 and a 'No records' message. A red arrow points to the 'View All Cases' button.

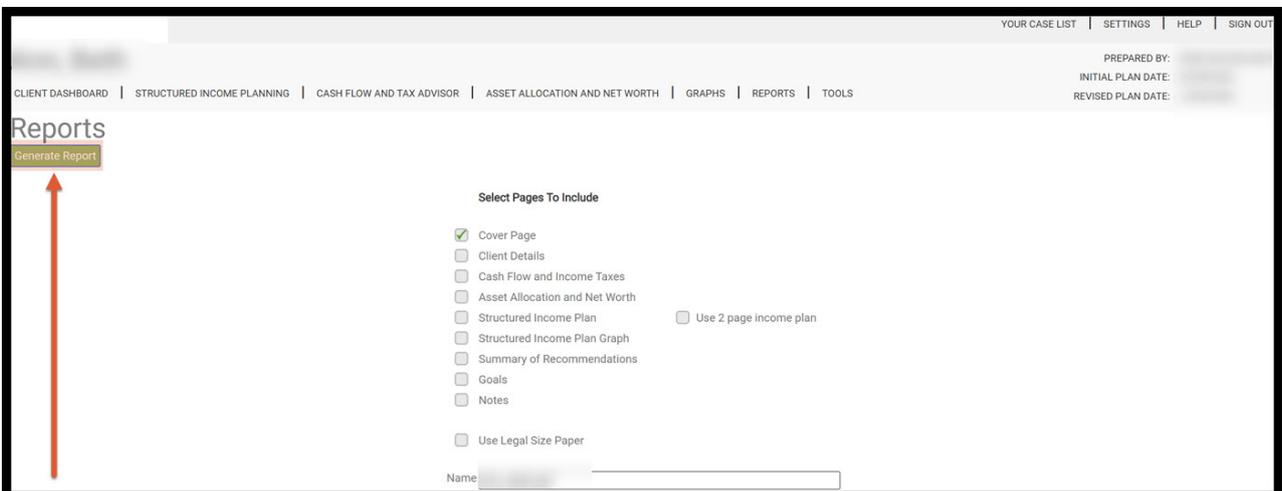
Step 11: Case Selection: Select a case.



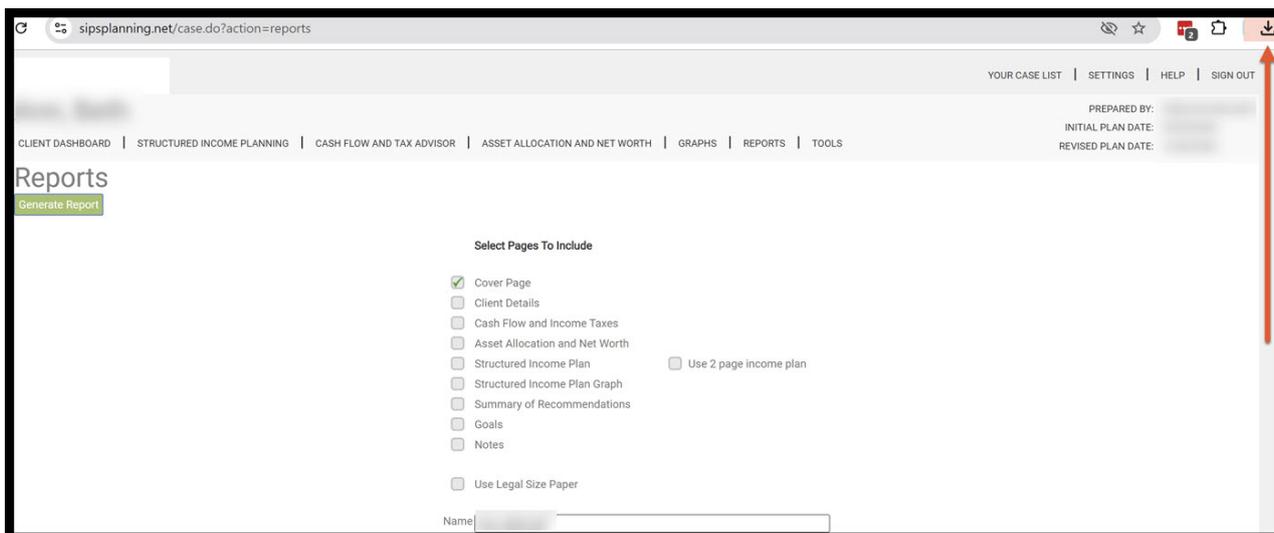
Step 12: Reports: Click on the Reports button underneath the Client's Name heading.



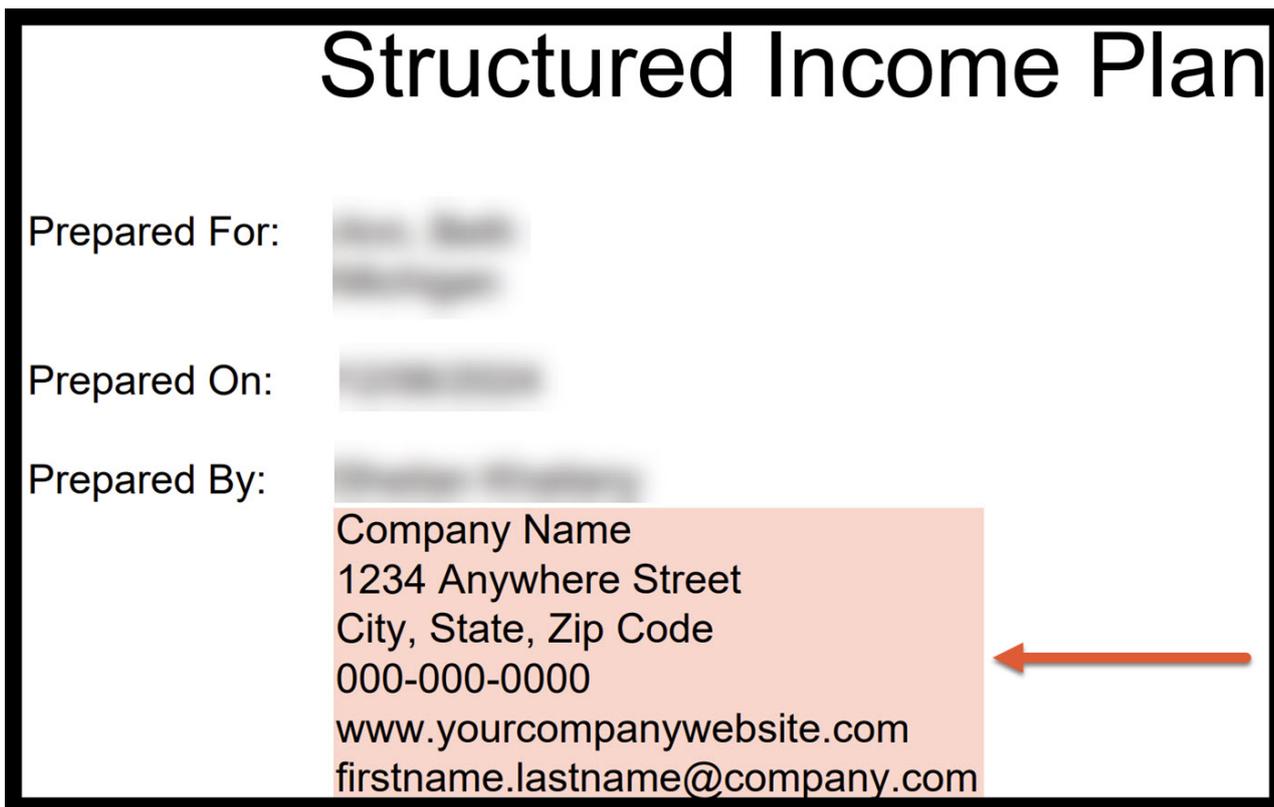
Step 13: Generate Report: Click on the green Generate Report button underneath the Clients Name.



Step 14: Download the PDF: Download the PDF.



Step 15: Cover Page: The company contact information should be displayed on the cover page.



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.