Editing the Default Percentage Amounts on the Allocation Codes

09/23/2026 1:48 pm EDT

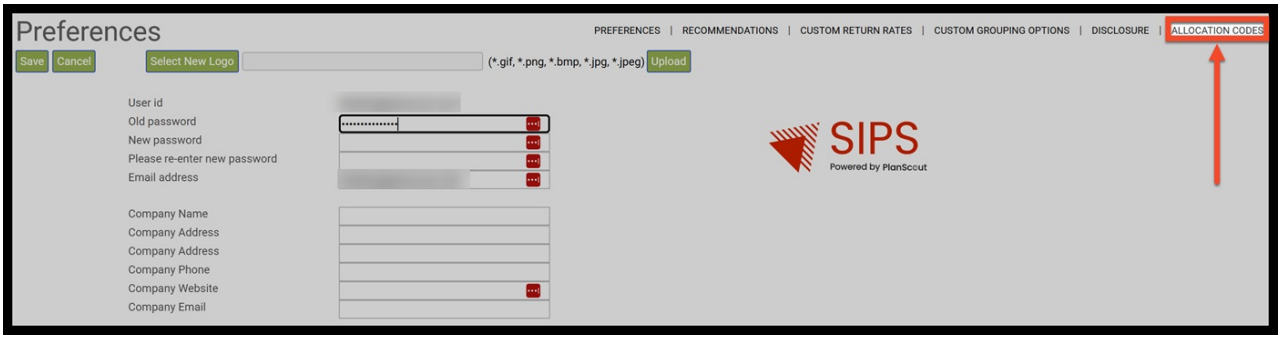
Administrators within SIPS have the ability to edit the default percentage amounts on the allocation codes. Allocation codes are a way to keep track of different investment purposes (ie "short-term", "Long-Term", "Market Exposure", etc) and guardrails for them like maximum growth rates to reduce the opportunity for manual error. This article walks you through changing the default percentage amounts for Conservative to 2%, Moderate to 3.5%, and Aggressive to 5%. We will start on the Welcome Landing Page.

Related Articles: *Adding an Allocation Code*, *Changing the Colors of the Allocation Codes*, *Editing the Default Percentage Amounts on the Allocation Codes*, *Editing the Maximum Percentage Amounts on the Allocation Codes*, *Deleting an Allocation Code*

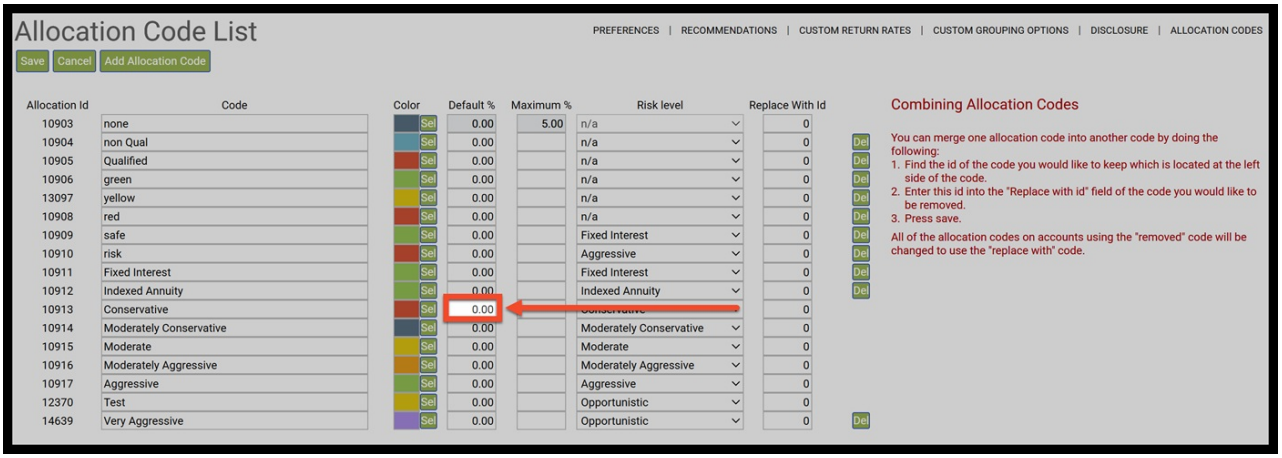
Step 1: Settings: Click on the Settings button located on the right-hand side of your screen.



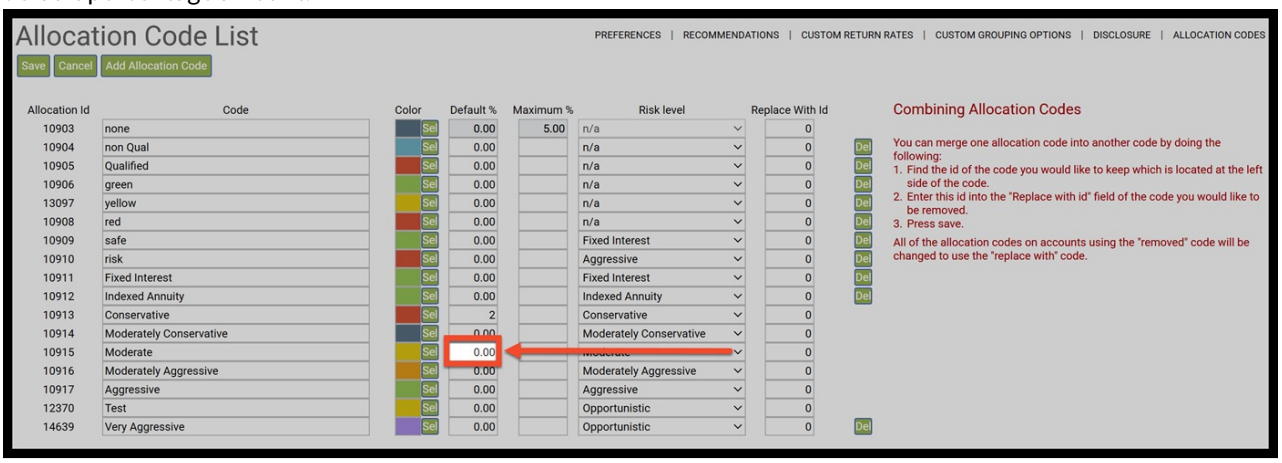
Step 2: Allocation Codes: Click on the Allocation Codes button on the right-hand side of the screen. Not seeing this option? Check *Having Trouble Accessing the Preferences Under Settings?* to confirm your permission level.



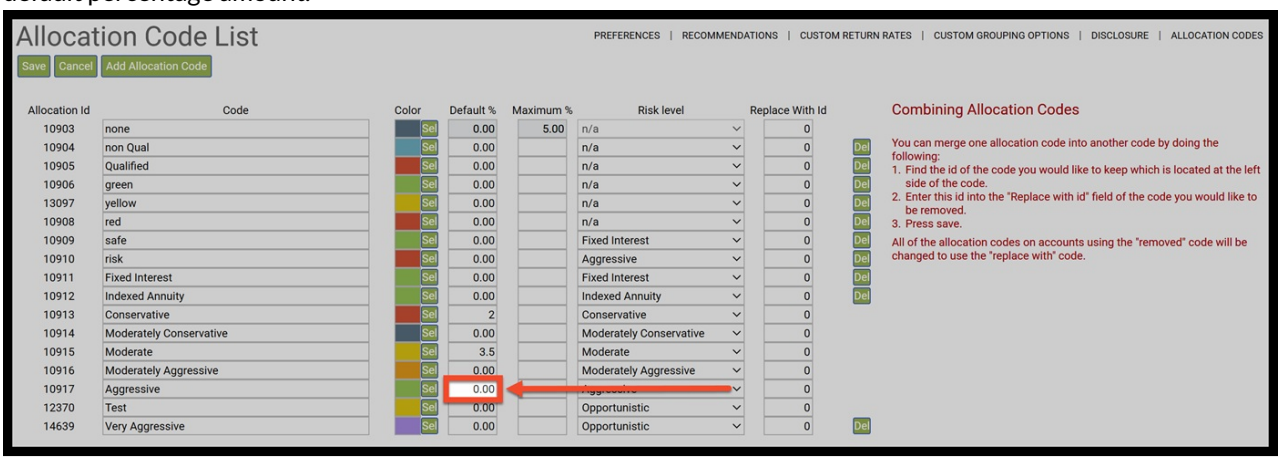
Step 3: Conservative Default % Textbox: Move your cursor into the Conservative Default % textbox and enter the new default percentage amount.



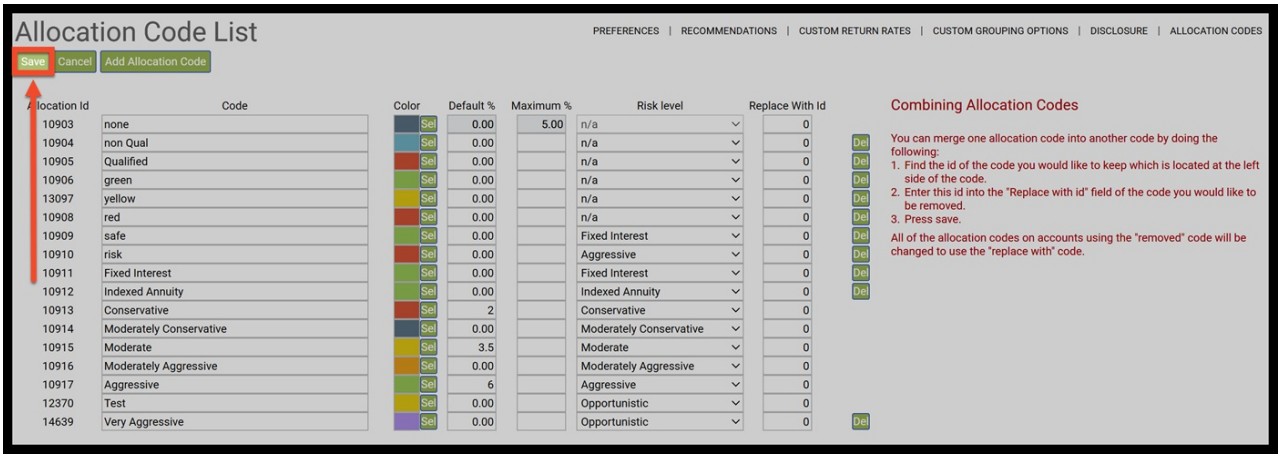
Step 4: Moderate Default % Textbox: Move your cursor into the Moderate Default % textbox and enter the new default percentage amount.



Step 5: Aggressive Default % Textbox: Move your cursor into the Aggressive Default % textbox and enter the new default percentage amount.



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



Step 7: Saved Allocation Codes: SIPS will have automatically saved the new Default % amounts.



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.