Editing the Maximum Percentage Amounts on the Allocation Codes

09/23/2026 1:49 pm EDT

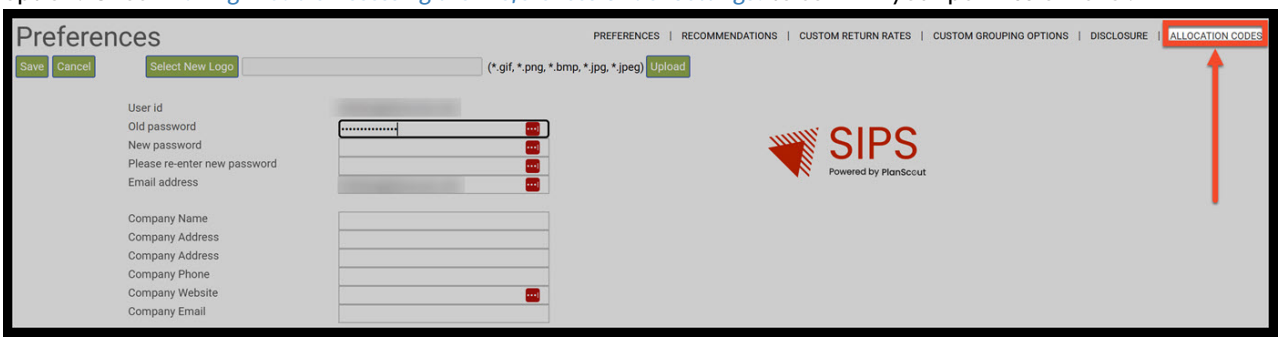
Administrators within SIPS have the ability to customize the maximum percentage amounts on the allocation codes. Allocation codes are a way to keep track of different investment purposes (ie "short-term", "Long-Term", "Market Exposure", etc) and guardrails for them like maximum growth rates to reduce the opportunity for manual error. This article walks you through changing the maximum percentage for the Conservative, Moderate, and Aggressive allocations. In this example, we'll adjust each one to 10%. You'll start from the Welcome landing page in Settings.

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*

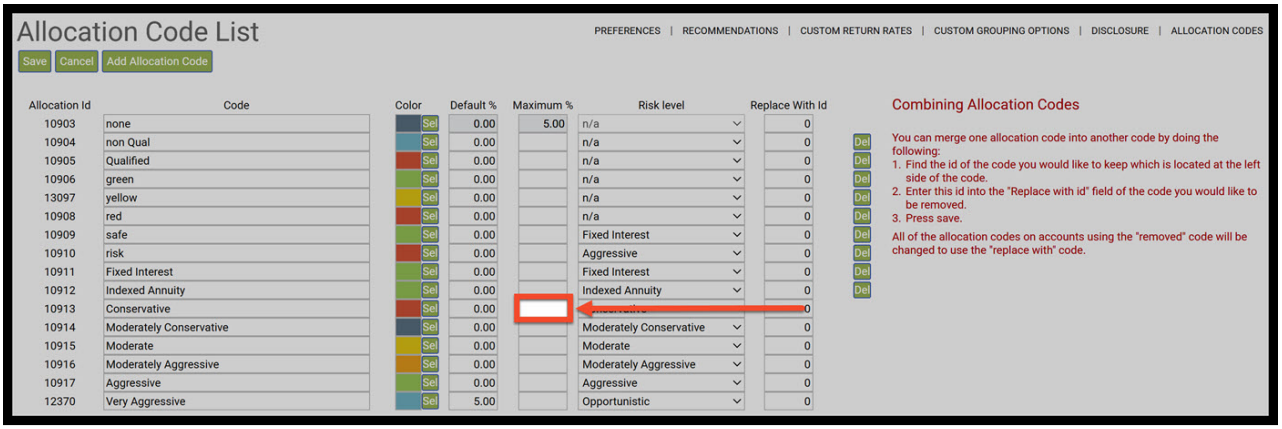
Step 1: Settings: Click on the Settings button located on the right-hand side of your screen.



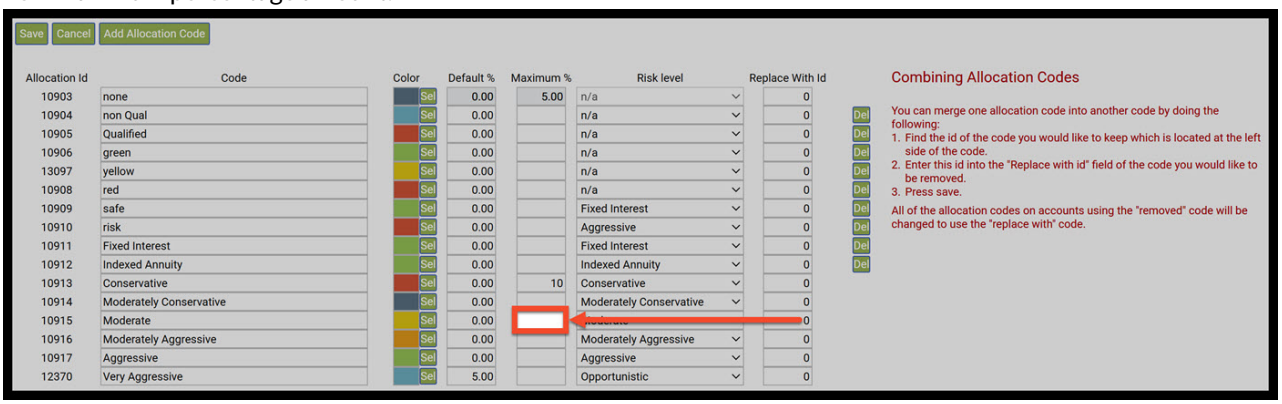
Step 2: Allocation Codes: Click on the Allocation Codes button on the right-hand side of the screen. Not seeing this option? Check *Having Trouble Accessing the Preferences Under Settings?* to confirm your permission level.



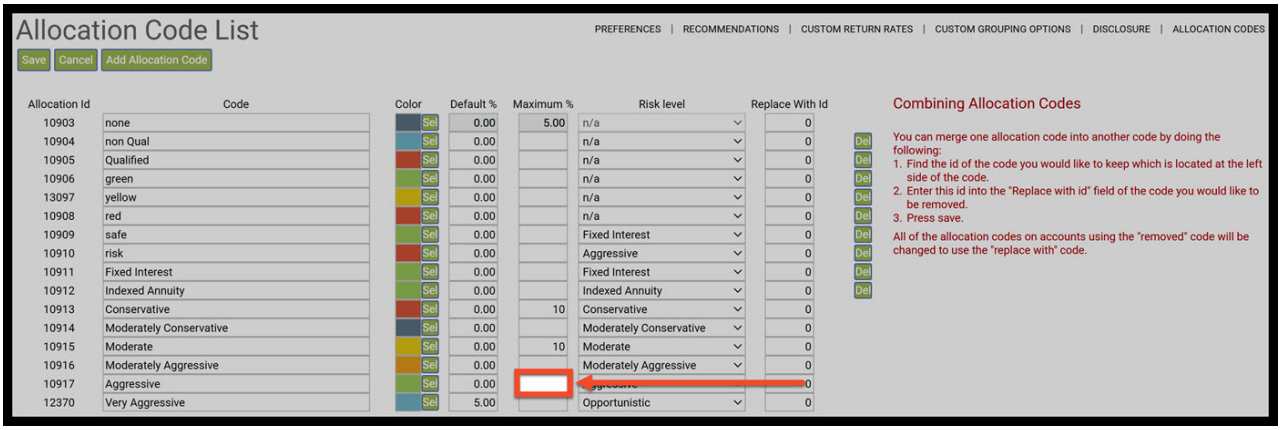
Step 3: Conservative Maximum % Textbox: Move your cursor into the Conservative Maximum % textbox and enter the new maximum percentage amount.



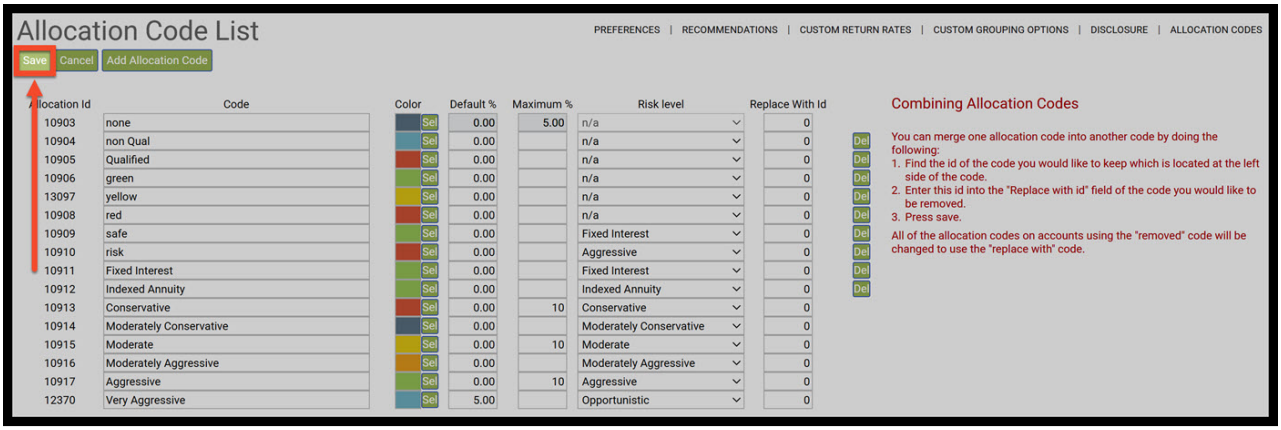
Step 4: Moderate Maximum % Textbox: Move your cursor into the Moderate Maximum % textbox and enter the new maximum percentage amount.



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



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



Your new Maximum % amounts are now saved throughout SIPS.

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.