## **Deleting an Allocation Code**

12/20/2024 3:52 pm EST

From the settings page you have the ability to delete an allocation code if you are at administrator status. Below are the step-by-step guidelines for deleting an allocation code starting from the login page.

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					
Preferer	nces	PREFERENCES   RECOMMENDATIONS   CUSTOM RETURN RATES   CUSTOM GROUPING OPTIONS   DISCLOSURE	ALLOCATION CODES					
Save Cancel	Select New Logo User Id Old password New password Please re-enter new password Email address	(*.gif, *.png, *.bmp, *.jpg, *.jpeg) Upload						
	Company Name Company Address Company Phone Company Website Company Email							

## Step 4: Del: Click on the green Del button next to the Allocation Id you would like to delete.

								YOUR CASE LIST   SETTINGS   HELP   SIGN OUT
Allocat Save Cancel	ion Code List				PREFERENCES   RECOM	MENDAT	IONS   CUSTOM R	ET I'RN RATES   CUSTOM GROUPING OPTIONS   DISCLOSURE   ALLOCATION CODES
Allocation Id	Code	Color	Default %	Maximum %	Risk level	F	Replace With Id	Combining Allocation Codes
10903	none	Sel	0.00	5.00	n/a	~	0	V
10904	non Qual	Sel	0.00	10.00	n/a	~	0	You can merge one allocation code into another code by doing the following:
10905	Qualified	Sel	0.00	10.00	n/a	$\sim$	0	Del 1. Find the id of the code you would like to keep which is located at the left
10906	green	Sel	0.00	10.00	n/a	$\sim$	0	Del side of the code.
10907	yellow	Sel	0.00	10.00	n/a	$\sim$	0	Del 2. Enter this id into the "Replace with id" field of the code you would like to be removed.
10908	red	Sel	0.00	10.00	n/a	$\sim$	0	Del 3. Press save.
10909	safe	Sel	0.00	10.00	Fixed Interest	$\sim$	0	Del All of the allocation codes on accounts using the "removed" code will be
10910	risk	Sel	0.00	10.00	Aggressive	~	0	Del changed to use the "replace with" code.
10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	~	0	
10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	~	0	
10913	Conservative	Sel	0.00	10.00	Conservative	~	0	
10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	~	0	
10915	Moderate	Sel	0.00	10.00	Moderate	~	0	
10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	~	0	Del
10917	Aggressive	Sel	0.00	10.00	Aggressive	~	0	

Step 5: Permanent Deletion: After clicking on the green Del button a sipsplanning.net text box will come up and ask, "Are you sure you would like to permanently delete this recommendation?" Click the OK button to confirm and permanently delete the allocation code.

SIPS States Restard			www.sip	splanning	g.net says			YOUR CASE LIST SETTINGS HELP SIGN OUT
Allocation Code List				ire you wou	d like to permanently delet	e this a	llocation	URN RATES   CUSTOM GROUPING OPTIONS   DISCLOSURE   ALLOCATION CODES
Save Cancel Add Allocation Code						ок	Cancel	
Allocation Id Code Color								Combining Allocation Codes
10903	none	Se	0.00	0.00	10.0		v	Management of the state of the
10904	non Qual	Sel	0.00	10.00	n/a	4	0	You can merge one allocation code into another code by doing the following:
10905	Qualified	Sel	0.00	10.00	n/a	~	0	Del 1. Find the id of the code you would like to keep which is located at the left
10906	green	Sel	0.00	10.00	n/a	~	0	Del side of the code.
10907	yellow	Sel	0.00	10.00	n/a	~	0	Del 2. Enter this id into the "Replace with id" field of the code you would like to
10908	red	Sel	0.00	10.00	n/a	~	0	Del 3. Press save.
10909	safe	Sel	0.00	10.00	Fixed Interest	~	0	Del All of the allocation codes on accounts using the "removed" code will be
10910	risk	Sel	0.00	10.00	Aggressive	~	0	Del changed to use the "replace with" code.
10911	Fixed Interest	Sel	0.00	10.00	Fixed Interest	~	0	
10912	Indexed Annuity	Sel	0.00	10.00	Indexed Annuity	~	0	
10913	Conservative	Sel	0.00	10.00	Conservative	~	0	
10914	Moderately Conservative	Sel	0.00	10.00	Moderately Conservative	~	0	
10915	Moderate	Sel	0.00	10.00	Moderate	~	0	2000-00
10916	Moderately Aggressive	Sel	0.00	10.00	Moderately Aggressive	~	0	Del
10917	Aggressive	Sel	0.00	10.00	Aggressive	$\sim$	0	

Step 6: Allocation Code List: The deleted allocation code should no longer appear in the list.

Save Cancel	tion Code List	ļ			PREFERENCES   RECOMM	MENDAT	IONS   CUSTOM RETUR	YOUR CASE LIST   SETTINGS   HELP   SIGN OUT
Allocation Id 10903 10904 10905 10906 10908 10910 10911 10912 10913 10914 10915 10916 10917	Code none non Qual Qualified green red safe risk Fixed Interest Indexed Annuity Conservative Moderately Conservative Moderately Aggressive Aggressive	Color Sel Sel Sel Sel Sel Sel Sel Sel Sel Sel	Default % 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.	Maximum % 5.00 10.00	Risk level       n/a       n/a       n/a       n/a       n/a       Fixed Interest       Aggressive       Fixed Interest       Indexed Annuity       Conservative       Moderately Conservative       Moderately Aggressive       Aggressive		Replace With Id           0	Combining Allocation Codes You can merge one allocation code into another code by doing the following: 1. Find the id of the code you would like to keep which is located at the left side of the code. 2. Enter this id into the "Replace with id" field of the code you would like to be removed. 3. Press save. All of the allocation codes on accounts using the "removed" code will be changed to use the "replace with" code.

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