

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.

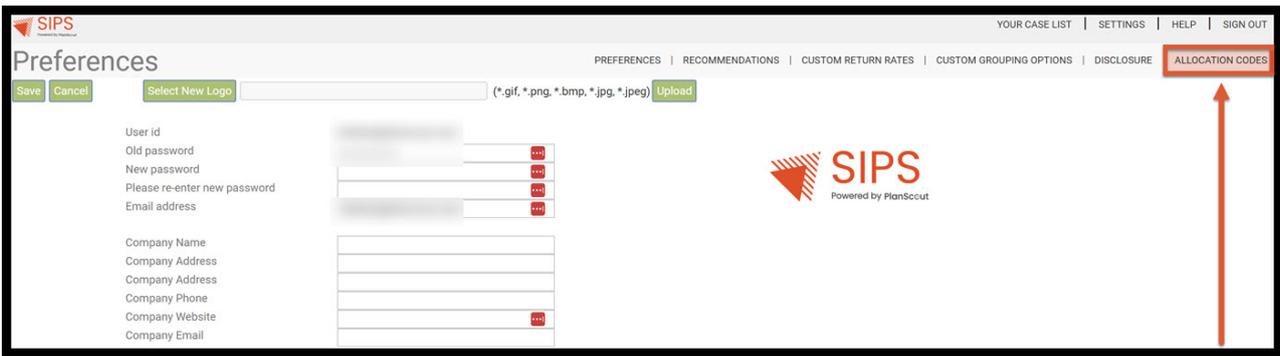
Step 1: Log In: Log in into SIPS.



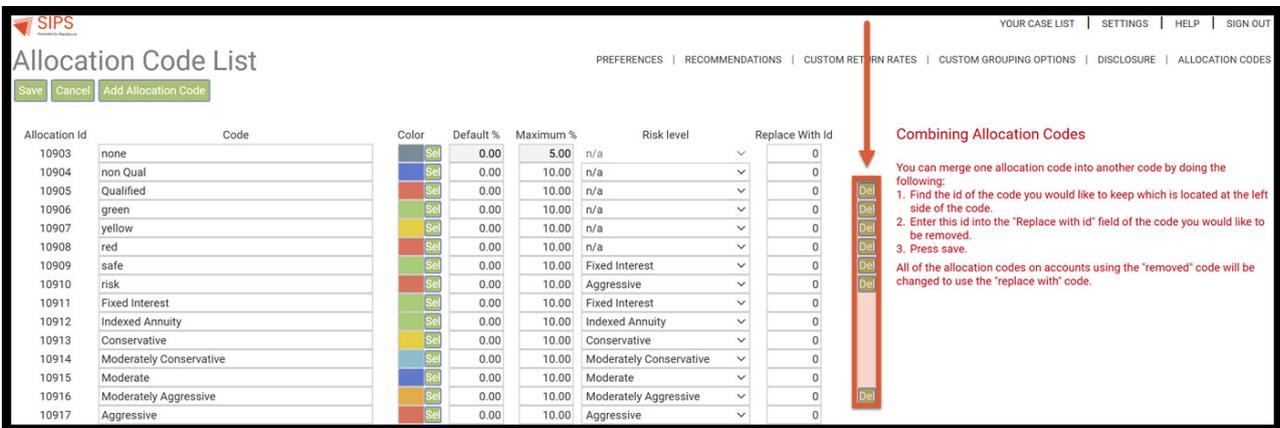
Step 2: Settings: Click on the settings button located on the right-hand side of your screen.



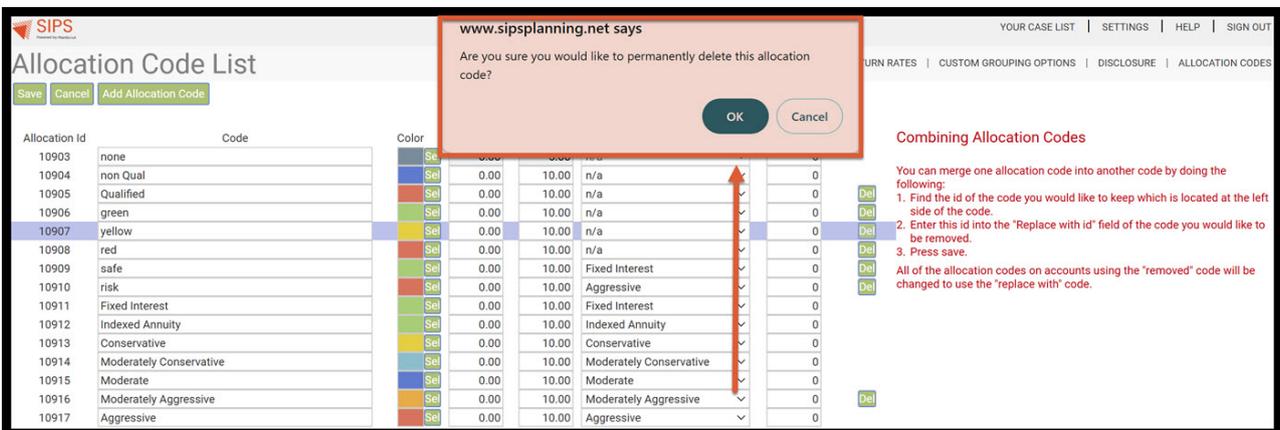
Step 3: Allocation Codes: Click on the Allocation codes button on the right-hand side of the screen.



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



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.



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

SIPS YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Allocation Code List

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

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Sel	0.00	5.00	n/a	0
10904	non Qual	Sel	0.00	10.00	n/a	0
10905	Qualified	Sel	0.00	10.00	n/a	0
10906	green	Sel	0.00	10.00	n/a	0
10908	red	Sel	0.00	10.00	n/a	0
10909	safe	Sel	0.00	10.00	Fixed Interest	0
10910	risk	Sel	0.00	10.00	Aggressive	0
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
10917	Aggressive	Sel	0.00	10.00	Aggressive	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