

Adding An Allocation Code

01/02/2026 9:13 am EST

From the settings page you have the ability to add an allocation code if you are at administrator status. Below are the step-by-step guidelines for adding 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.

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YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Preferences

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

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ALLOCATION CODES

Step 4: Add Allocation Code: Click on the green Add Allocation Code underneath the Allocation Code List heading.

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YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Allocation Code List

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Set	0.00	5.00	n/a	0
10904	non Qual	Set	0.00	10.00	n/a	0
10905	Qualified	Set	0.00	10.00	n/a	0
10906	green	Set	0.00	10.00	n/a	0
10908	red	Set	0.00	10.00	n/a	0
10909	safe	Set	0.00	10.00	Fixed Interest	0
10910	risk	Set	0.00	10.00	Aggressive	0
10911	Fixed Interest	Set	0.00	10.00	Fixed Interest	0
10912	Indexed Annuity	Set	0.00	10.00	Indexed Annuity	0
10913	Conservative	Set	0.00	10.00	Conservative	0
10914	Moderate Conservative	Set	0.00	10.00	Moderately Conservative	0
10915	Moderate	Set	0.00	10.00	Moderate	0
10916	Moderately Aggressive	Set	0.00	10.00	Moderately Aggressive	0
10917	Aggressive	Set	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.

Step 5: Code: Enter in Code Name.

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YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

Allocation Code List

Save Cancel Add Allocation Code

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10903	none	Set	0.00	5.00	n/a	0
10904	non Qual	Set	0.00	10.00	n/a	0
10905	Qualified	Set	0.00	10.00	n/a	0
10906	green	Set	0.00	10.00	n/a	0
10908	red	Set	0.00	10.00	n/a	0
10909	safe	Set	0.00	10.00	Fixed Interest	0
10910	risk	Set	0.00	10.00	Aggressive	0
10911	Fixed Interest	Set	0.00	10.00	Fixed Interest	0
10912	Indexed Annuity	Set	0.00	10.00	Indexed Annuity	0
10913	Conservative	Set	0.00	10.00	Conservative	0
10914	Moderately Conservative	Set	0.00	10.00	Moderately Conservative	0
10915	Moderate	Set	0.00	10.00	Moderate	0
10916	Moderately Aggressive	Set	0.00	10.00	Moderately Aggressive	0
10917	Aggressive	Set	0.00	10.00	Aggressive	0
0		Set	0.00	10.00	n/a	0

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Step 6: Sel: Select a color.

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Allocation Code List

Save

Cancel

Add Allocation Code

PREFERENCES

RECOMMENDATIONS

CUSTOM RETURN RATES

CUSTOM GROUPING OPTIONS

DISCLOSURE

ALLOCATION CODES

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10909	safe		0.00	10.00	Fixed Interest	0
10910	risk		0.00	10.00	Aggressive	0
10911	Fixed Interest		0.00	10.00	Fixed Interest	0
10912	Indexed Annuity		0.00	10.00	Indexed Annuity	0
10913	Conservative		0.00	10.00	Conservative	0
10914	Moderately Conservative		0.00	10.00	Moderately Conservative	0
10915	Moderate		0.00	10.00	Moderate	0
10916	Moderately Aggressive		0.00	10.00	Moderately Aggressive	0
10917	Aggressive		0.00	10.00	Aggressive	0
12370	Very Aggressive		0.00	10.00	Aggressive	0

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Step 7: Default %: Select default percentage.

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Allocation Code List

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10914	Moderately Conservative		0.00	10.00	Moderately Conservative	0
10915	Moderate		0.00	10.00	Moderate	0
10916	Moderately Aggressive		0.00	10.00	Moderately Aggressive	0
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12370	Very Aggressive		0.00	10.00	Aggressive	0

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3. Press save.

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Step 8: Maximum %: Select maximum percentage.

YOUR CASE LIST

SETTINGS

HELP

SIGN OUT

Allocation Code List

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10915	Moderate		0.00	10.00	Moderate	0
10916	Moderately Aggressive		0.00	10.00	Moderately Aggressive	0
10917	Aggressive		0.00	10.00	Aggressive	0
12370	Very Aggressive		5	10.00	Aggressive	0

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Step 9: Risk Level Dropdown Caret Arrow: In the Risk level text box select the drop down caret arrow and select a risk level.

SIPS
Allocation Code List

YOUR CASE LIST | SETTINGS | HELP | SIGN OUT

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

Save Cancel Add Allocation Code

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10908	red	Sei	0.00	10.00	n/a	0
10909	safe	Sei	0.00	10.00	Fixed Interest	0
10910	risk	Sei	0.00	10.00	Aggressive	0
10911	Fixed Interest	Sei	0.00	10.00	Fixed Interest	0
10912	Indexed Annuity	Sei	0.00	10.00	Indexed Annuity	0
10913	Conservative	Sei	0.00	10.00	Conservative	0
10914	Moderately Conservative	Sei	0.00	10.00	Moderately Conservative	0
10915	Moderate	Sei	0.00	10.00	Moderate	0
10916	Moderately Aggressive	Sei	0.00	10.00	Moderately Aggressive	0
10917	Aggressive	Sei	0.00	10.00	Aggressive	0
12370	Very Aggressive	Sei	5	10	n/a	0

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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.

Step 10: Save: Click on the green Save button underneath the Allocation Code List heading.

SIPS
Allocation Code List

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10915	Moderate	Sei	0.00	10.00	Moderate	0
10916	Moderately Aggressive	Sei	0.00	10.00	Moderately Aggressive	0
10917	Aggressive	Sei	0.00	10.00	Aggressive	0
12370	Very Aggressive	Sei	5	10	Opportunistic	0

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3. Press save.

All of the allocation codes on accounts using the "removed" code will be changed to use the "replace with" code.

Step 12: Allocation Code List: The new allocation code should be added to the list.

SIPS
Allocation Code List

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12370	Very Aggressive	Sei	5.00	10.00	Opportunistic	0

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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.

