

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.

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

Step 5: Code: Enter in Code Name.

Step 6: Sel: Select a color.

Allocation Code List

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none		0.00	5.00	n/a	0
10904	non Qual		0.00	10.00	n/a	0
10905	Qualified		0.00	10.00	n/a	0
10906	green		0.00	10.00	n/a	0
10908	red		0.00	10.00	n/a	0
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	Very 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 7: Default %: Select default percentage.

Allocation Code List

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none		0.00	5.00	n/a	0
10904	non Qual		0.00	10.00	n/a	0
10905	Qualified		0.00	10.00	n/a	0
10906	green		0.00	10.00	n/a	0
10908	red		0.00	10.00	n/a	0
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	Very Aggressive	0

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3. Press save.

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Step 8: Maximum %: Select maximum percentage.

Allocation Code List

Save Cancel Add Allocation Code

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none		0.00	5.00	n/a	0
10904	non Qual		0.00	10.00	n/a	0
10905	Qualified		0.00	10.00	n/a	0
10906	green		0.00	10.00	n/a	0
10908	red		0.00	10.00	n/a	0
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		5	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 9: Risk Level Dropdown Caret Arrow: In the Risk level text box select the drop down caret arrow and select a risk level.

Allocation Code List

Allocation Id Code Color Default % Maximum % Risk level Replace With Id

10903	none		0.00	5.00	n/a	▼	0
10904	non Qual		0.00	10.00	n/a	▼	0
10905	Qualified		0.00	10.00	n/a	▼	0
10906	green		0.00	10.00	n/a	▼	0
10908	red		0.00	10.00	n/a	▼	0
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		5	10	n/a	▼	0

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

Allocation Code List

Allocation Id Code Color Default % Maximum % Risk level Replace With Id

10903	none		0.00	5.00	n/a	▼	0
10904	non Qual		0.00	10.00	n/a	▼	0
10905	Qualified		0.00	10.00	n/a	▼	0
10906	green		0.00	10.00	n/a	▼	0
10908	red		0.00	10.00	n/a	▼	0
10909	safe		0.00	10.00	Fixed Interest	▼	0
10910	risk		0.00	10.00	Aggressive	▼	0
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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		5	10	Opportunistic	▼	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 12: Allocation Code List: The new allocation code should be added to the list.

Allocation Code List

Allocation Id Code Color Default % Maximum % Risk level Replace With Id

10903	none		0.00	5.00	n/a	▼	0
10904	non Qual		0.00	10.00	n/a	▼	0
10905	Qualified		0.00	10.00	n/a	▼	0
10906	green		0.00	10.00	n/a	▼	0
10908	red		0.00	10.00	n/a	▼	0
10909	safe		0.00	10.00	Fixed Interest	▼	0
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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		5	10	Opportunistic	▼	0

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3. Press save.

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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.

