

Why Can't I Delete an Allocation Code?

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Administrators within SIPS have the ability to add and delete allocation codes. However, if an allocation code is being used in a client's plan, SIPS will not allow it to be deleted. You can tell which allocation codes are in use by looking for the green Del button on the Allocation Codes list.

The screenshot shows the 'Allocation Code List' interface. A red box highlights the table of allocation codes. The table has columns: Allocation Id, Code, Color, Default %, Maximum %, Risk level, and Replace With Id. The 'Replace With Id' column contains a green 'Del' button for each row. The codes listed are: 10903 none, 10904 non Qual, 10905 Qualified, 10906 green, 13097 yellow, 10908 red, 10909 safe, 10910 risk, 10911 Fixed Interest, 10912 Indexed Annuity, 10913 Conservative, 10914 Moderately Conservative, 10915 Moderate, 10916 Moderately Aggressive, 10917 Aggressive, and 12370 Test. The 'Del' button is present for all codes, indicating they are in use and cannot be deleted.

Allocation Id	Code	Color	Default %	Maximum %	Risk level	Replace With Id
10903	none	Blue	0.00	5.00	n/a	0
10904	non Qual	Blue	0.00		n/a	0
10905	Qualified	Red	0.00		n/a	0
10906	green	Green	0.00		n/a	0
13097	yellow	Yellow	0.00		n/a	0
10908	red	Red	0.00		n/a	0
10909	safe	Green	0.00		Fixed Interest	0
10910	risk	Red	0.00		Aggressive	0
10911	Fixed Interest	Green	0.00		Fixed Interest	0
10912	Indexed Annuity	Blue	0.00		Indexed Annuity	0
10913	Conservative	Red	2.00		Conservative	0
10914	Moderately Conservative	Blue	0.00		Moderately Conservative	0
10915	Moderate	Yellow	3.50		Moderate	0
10916	Moderately Aggressive	Orange	0.00		Moderately Aggressive	0
10917	Aggressive	Green	6.00		Aggressive	0
12370	Test	Yellow	0.00		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.

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

The allocation codes that do not have the green del button next to them are allocations codes that are in use and cannot be deleted.

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10906	green	Green	0.00		n/a	0
13097	yellow	Yellow	0.00		n/a	0
10908	red	Red	0.00		n/a	0
10909	safe	Green	0.00		Fixed Interest	0
10910	risk	Red	0.00		Aggressive	0
10911	Fixed Interest	Green	0.00		Fixed Interest	0
10912	Indexed Annuity	Blue	0.00		Indexed Annuity	0
10913	Conservative	Red	2.00		Conservative	0
10914	Moderately Conservative	Blue	0.00		Moderately Conservative	0
10915	Moderate	Yellow	3.50		Moderate	0
10916	Moderately Aggressive	Orange	0.00		Moderately Aggressive	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.

The allocation codes that do have the green del button next to them can be deleted.

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		0.00	5.00	n/a	0	
10904	non-Qual		0.00		n/a	0	
10905	Qualified		0.00		n/a	0	
10906	green		0.00		n/a	0	
13097	yellow		0.00		n/a	0	
10908	red		0.00		n/a	0	
10909	safe		0.00		Fixed Interest	0	
10910	risk		0.00		Aggressive	0	
10911	Fixed Interest		0.00		Fixed Interest	0	
10912	Indexed Annuity		0.00		Indexed Annuity	0	
10913	Conservative		2.00		Conservative	0	
10914	Moderately Conservative		0.00		Moderately Conservative	0	
10915	Moderate		3.50		Moderate	0	
10916	Moderately Aggressive		0.00		Moderately Aggressive	0	
10917	Aggressive		6.00		Aggressive	0	
12370	Test		0.00		Opportunistic	0	

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- Enter this id into the "Replace with id" field of the code you would like to be removed.

Press save.

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

Related Articles: [Deleting an Allocation Code](#), [Adding an Allocation Code](#), [Having trouble accessing the Preferences under Settings?](#)

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.