

# How do I add a Platform?

Last Modified on 23/11/2017 3:23 pm GMT

You can input a Platform as a holding. It works in the same way that SIPPs do in the sense that it is made from Plans, Assets and Accounts but also SIPPs.

To add a platform, you would click on the **Add** button on following screen:

The screenshot shows the Synaptic software interface. The top navigation bar includes 'Clients', 'Risk Rating', 'Modeller', 'Analyser', 'Comparator', 'Webline', 'Product & Fund', 'Tools & Calculators', and 'Settings'. The main content area is divided into sections: 'Platforms (0)', 'SIPPs (1)', 'Assets (0)', 'Accounts (0)', 'Plans (1)', and 'Plans (1)'. The 'Platforms (0)' section has a table with columns: Name, Provider, Product, Status, Value, Assigned To, and an 'Add' button. The 'SIPPs (1)' section has a table with columns: Name, Provider, Product, Status, Value, Assigned To, and an 'Add' button. The 'Plans (1)' section has a table with columns: Name, Provider, Product, Status, Value, Assigned To, and an 'Add' button. The 'Add' button in the 'Platforms (0)' section is highlighted with a red box.

Input the platform details.

When inputting the provider and platform, a drop down menu will appear to make a selection from, as shown below:

The screenshot shows the 'Platform Details' form in the Synaptic software. The form has fields for Name, Provider, Platform, Contract Number, Status, and Start Date. The 'Name' field is filled with 'Test Platform'. The 'Provider' field has a dropdown menu open, showing a list of providers: Allianz Global Investors, Allianz Worldwide Care, Cazenove Capital Management Ltd, Zurich Assurance Ltd, Zurich Intermediary Platform, and Zurich Life Assurance Plc. The 'Platform' field is filled with 'Allianz Global Investors'. The 'Contract Number' field is empty. The 'Status' field is filled with 'In Force'. The 'Start Date' field is empty. The 'Add' button is highlighted with a red box.

Once completed, you can click on the **Platform Holdings** tab and input **SIPP, Plans, Assets and Accounts** by using the **Add** button, as shown below in the following screens:

Clients Risk Rating Modeller Analyser Comparator Webline Product & Fund Tools & Calculators Settings

Example Test New Platform

Delete Revert

### Platform Details

Name: Test Platform \*

Provider: Sample Provider

Platform: Test Platform

Contract Number: 3464567567

Get details via Contract Enquiry

Status: In Force

Start Date: [Calendar Icon]

Clients Risk Rating Modeller Analyser Comparator Webline Product & Fund Tools & Calculators Settings Example Test Help

Example Test Test Platform

Delete Revert

### Platform Holdings

Get policy valuation by: Manual SIPPs, Plan and Asset Entry

SIPPs (0)

Name	Provider	Product	Status	Value	Assigned To	Add
Total value of SIPPs						£0.00

Plans (0)

Name	Provider	Product	Status	Value	Assigned To	Add
Total value of Plans						£0.00

Assets (0)

Name	Type	Value	Assigned To	Add
Total value of Assets				£0.00

Accounts (0)

Name	Provider	Product	Account #	Value	Assigned To	Add
Total value of Accounts						£0.00

You also have the option of accessing the **Underlying Assets** tab from here.

Clients Risk Rating Modeller Analyser Comparator Webline Product & Fund Tools & Calculators Settings Example Test Help

Example Test Test Platform

Delete

### Platform Underlying Assets

Asset Classes derived from underlying holdings

Asset Class	% Allocated	Value
UK Equities	95.24	£30,143.93
Global Equities (ex UK)	4.42	£1,816.63
Emerging Markets Equities	0.21	£86.31
Cash	0.13	£53.43
Total value:		£41,100.30

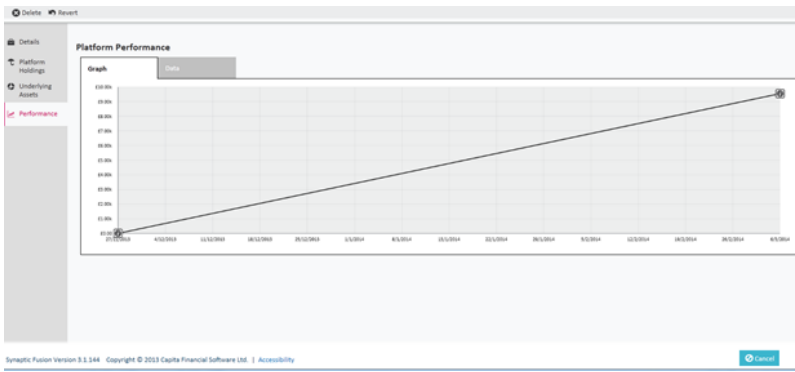
Asset Mix

UK Equities (95.24%)  
Global Equities (ex UK) (4.42%)  
Emerging Markets Equities (0.21%)  
Cash (0.13%)

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And also access the **Performance** tab. As with SIPPs the underlying asset data and valuation points are created in the underlying plans, assets and accounts. The view you





see on these screens is everything “added” together to represent the holistic position.



Once completed, click on **Save and Close**



The platform will then show as follows:

▼ Platforms (1)						
Name	Provider	Product	Status	Value	Assigned To	Add (+)
Test Platform	Sample Provider	Test Platform	In Force	£41,100.30		   
▶ Assets (0)						
▶ Accounts (0)						
▶ Plans (1)						
▶ SIPPs (0)						
				Total value of Platforms £41,100.30		