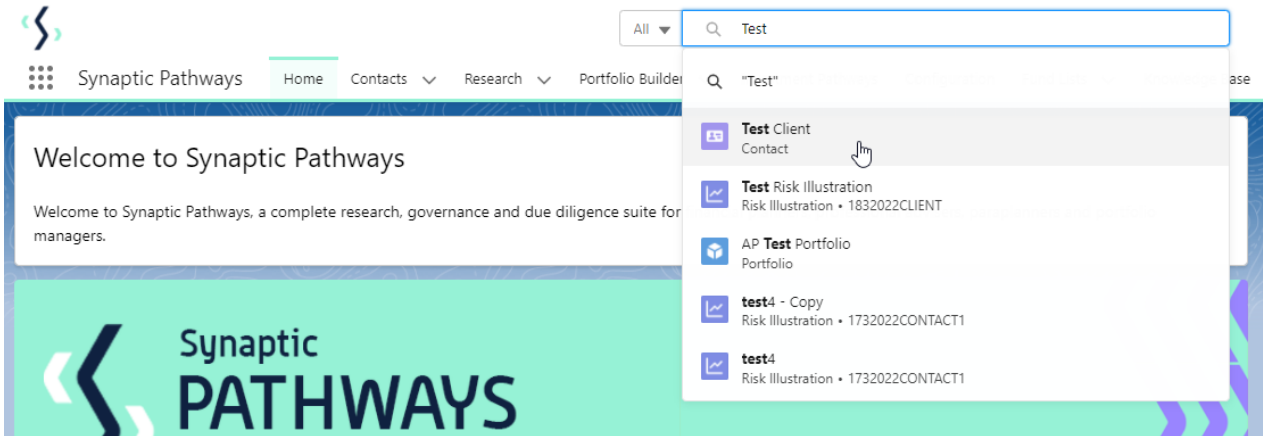


# Creating a Platform Holding

Last Modified on 27/04/2022 2:54 pm BST

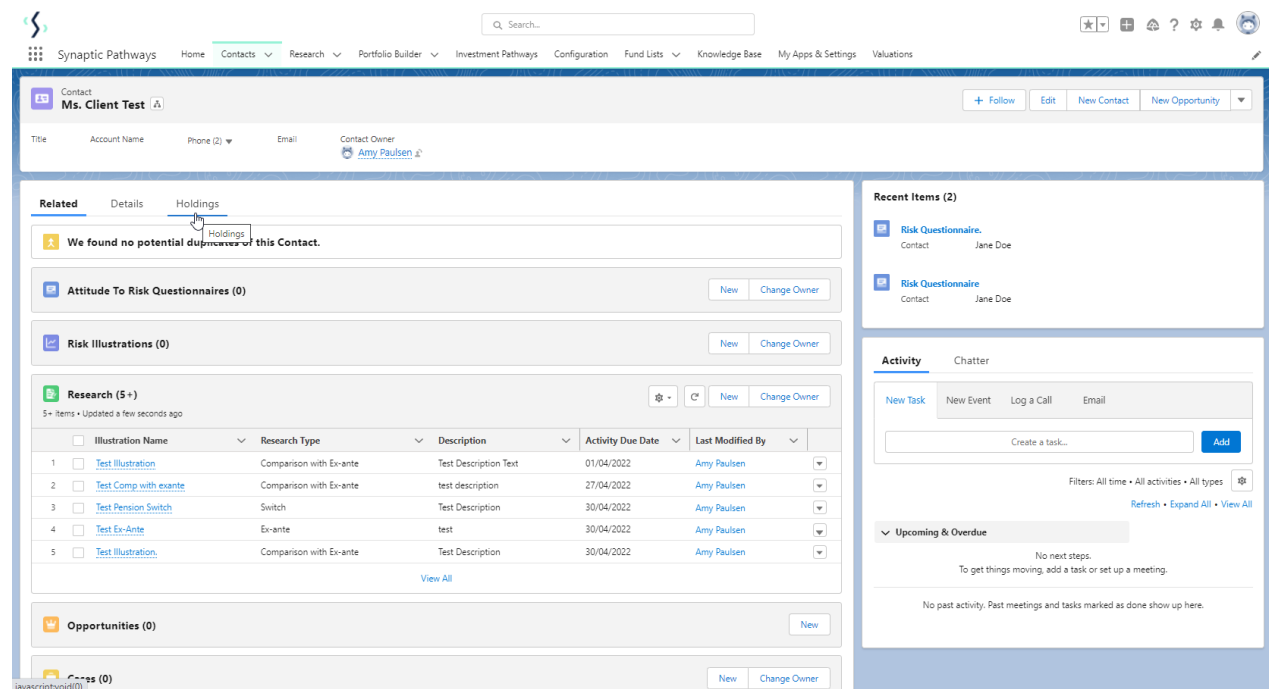
This article is a continuation of [Risk Rate Holding](#)

Create a [New Contact](#) or load an existing record:



This will open the contact record.

Click into the **Holdings** tab and click **New** under the Platform Holdings area:



Enter the details of the holding.

Start by entering the provider & platform. As you start typing, a list of options will appear in a drop down box:

Home   Contacts   Research   Portfolio Builder   Investment Pathways   Configuration   Fund Lists   Knowledge Base   My Apps & Settings   Valuations

## New Platform

To create a platform holding, choose the holding type, select platform to create holdings held on a specific platform or select off platform products for everything else, if you can't find your product then enter the holding details manually.

\* Provider

\* Platform

\* Platform Holding Name

Status

Contract Reference

Description

Start Date

\* Provider

- synaptic
- Praemium**  
Synaptic
- Premier Fund Managers Limited**  
Synaptic
- Quilter**  
Synaptic
- Raymond James Investment Services Ltd**

+ New Provider

\* Platform

\* Provider

\* Platform

- Quilter**  
Synaptic

+ New Platform

If you cannot find the provider or platform, add manually:

\* Provider

Q Select a Provider

- Synaptic
- Praemium**  
Synaptic
- Premier Fund Managers Limited**  
Synaptic
- Quilter**  
Synaptic
- Raymond James Investment Services Ltd**

+ New Provider

\* Platform

Q Search by Platform Name

### Add New Record

Provider:

Platform:

Complete further details of the holding:

### New Platform

To create a platform holding, choose the holding type, select platform to create holdings held on a specific platform or select off platform products for everything else, if you can't find your product then enter the holding details manually.

\* Provider:  x

\* Platform:  x

\* Platform Holding Name:

Status: 

- .....
- Notional
- Proposed
- In force**
- Paid Up
- Transferred

Contract Reference:

Description:

Start Date:

### New Platform

To create a platform holding, choose the holding type, select platform to create holdings held on a specific platform or select off platform products for everything else, if you can't find your product then enter the holding details manually.

**\* Provider**

**\* Platform**

**\* Platform Holding Name**

**Status**

**Contract Reference**

**Description**

**Start Date**

Cancel Save & New Save

## Save

{<

All Search...

+ ? ⚙️ 🔔 👤

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Holding Platform

Quilter

Edit Delete

Client  
Test Client

Current Value  
£0.00

Current Risk Rating

**Details** | Holdings | Cash Accounts | Assets | Performance

Name Quilter	Status In force
Provider Name Quilter	Start Date 23/03/2022
Platform Name Quilter	Contract Reference 7YT67HJ
Description Test Platform Description	Last Modified By <span style="font-size: 12px;">User User</span> , 23/03/2022, 11:56

**Performance Chart**

We can't draw this chart because there is no data.

View Report

As of Today at 11:56

For further information on Platform Holdings, see articles [Platform Holdings - Holdings](#)