

Platform Holdings - Contributions

Last Modified on 27/04/2022 2:56 pm BST

This article is a continuation of [Platform Holdings - Underlying Assets](#)

To add contributions to an Platform Holding. Click **New** in the Contributions area:

The screenshot displays the Synaptic Pathways interface for a 'Collective Retirement Account | Fully Insured'. The top navigation bar includes 'Synaptic Pathways', 'Home', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Configuration', 'Fund Lists', 'Knowledge Base', 'My Apps & Settings', and 'Valuations'. A search bar is located in the top right. The main content area is divided into several sections:

- Client Information:** Client: Amy Test, Holding Platform: Quilter, Current Value: £135,000.00, Current Risk Rating.
- Details:** A table with the following data:

Name	Description	Start Date	End Date
Collective Retirement Account Fully Insured	Test Personal Pension Description	28/03/2022	11/03/2032

Provider Name	Type (Basis) Name	Product Name
Quilter	Personal Pension (Fully Insured)	Collective Retirement Account

Status	Contract Reference	Remaining Term	Review Date
In force	8JBN90L	10	15/03/2033

Rolling Term Basis	Last Modified Date	Surrender/Transfer Value
	28/03/2022, 12:16	
- Contributions (0):** A section with a 'New' button.
- Withdrawals (0):** A section with a 'New' button.
- Weighting By Funds:** A donut chart showing 100.00% Vanguard LifeStrategy 60% Equity A Acc.
- Performance Chart:** A message stating 'We can't draw this chart because there is no data.'

Select either Regular, Single or Transfer:

The 'New Contribution' dialog box is displayed, allowing the user to select a record type. The options are:

- Regular
- Single
- Transfer

At the bottom right of the dialog, there are 'Cancel' and 'Next' buttons.

Complete the details of the Contribution:

New Contribution: Regular

Contribution Details

<p>* Frequency</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> --None-- ▼ </div>	<p>* Amount</p> <div style="border: 1px solid #ccc; height: 20px;"></div>
<p>Indexation ⓘ</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> --None-- ▼ </div>	<p>* Start Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div>
<p>* Holding</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> Collective Retirement Account Fully Insured ✕ </div>	<p>End Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div>

Cancel Save & New Save

Contribution Details

<p>* Frequency</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> --None-- ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>✓ --None--</p> <p>Monthly 👉</p> <p>Annually</p> <p>Single</p> </div>	<p>* Amount</p> <div style="border: 1px solid #ccc; height: 20px;"></div> <p>* Start Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div> <p>End Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div>
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Contribution Details

<p>* Frequency</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center; background-color: #ffff00;"> Monthly ↻ </div>	<p>* Amount</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center; background-color: #ffff00;"> £200.00 ↻ </div>
<p>Indexation ⓘ</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> --None-- ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p>✓ --None--</p> <p>None</p> <p>Average Weekly Earnings (AWE) 3.7%</p> <p>Consumer Price Index (CPI) 5.5%</p> <p>Retail Price Index (RPI) 7.8% 👉</p> <p>Other</p> </div>	<p>* Start Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div> <p>End Date</p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; justify-content: space-between; align-items: center;"> 📅 </div>

Save & New Save

Performance

250k

New Contribution: Regular

Contribution Details

*** Frequency** ↶

Monthly ▼

Indexation ⓘ ↶

Retail Price Index (RPI) 7.8% ▼

*** Holding**

Collective Retirement Account | Fully Insured ✕

*** Amount** ↶

£200.00

*** Start Date** ↶

End Date ↶

March 2022

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Today

Once all fields are complete, **Save**

New Contribution: Regular

Contribution Details

*** Frequency** ↶

Monthly ▼

Indexation ⓘ ↶

Retail Price Index (RPI) 7.8% ▼

*** Holding**

Collective Retirement Account | Fully Insured ✕

*** Amount** ↶

£200.00

*** Start Date** ↶

28/03/2022

End Date ↶

01/03/2032

The Contribution can be found on the details screen of the holding:

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

Search...

Collective Retirement Account | Fully Insured Contribution "C-000008" was created. Risk Rate Holding Review Edit Delete

Client: Amy Test Holding Platform: Quilter Current Value: £135,000.00 Current Risk Rating:

Details Underlying Assets Performance History

Name: Collective Retirement Account | Fully Insured Description: Test Personal Pension Description

Provider Name: Quilter Type (Basis) Name: Personal Pension (Fully Insured) Product Name: Collective Retirement Account

Status: In force Contract Reference: 8/BN90L

Start Date: 28/03/2022 End Date: 11/03/2032

Remaining Term: 10 Review Date: 15/03/2023

Rolling Term Basis: Last Modified Date: 28/03/2022, 12:16

Surrender/Transfer Value:

Weighting By Funds

100.00% - Vanguard LifeStrategy 60% Equity A Acc

Performance Chart

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

Contributions (1) 1 item • Updated a few seconds ago

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 C-000008	Regular	Monthly	£200.00	Retail Price Inde...	7.80%	28/03/2022	01/03/2032

View All

Withdrawals (0) New

If you would like to edit the details, select 'Edit' under the drop down arrow:

Contributions (1) 1 item • Updated a few seconds ago

Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
1 C-000008	Regular	Monthly	£200.00	Retail Price Inde...	7.80%	28/03/2022	01/03/2032

View All

Edit Delete Edit

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