

Platform Holdings - Contributions

Last Modified on 13/02/2024 3:35 pm GMT

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 shows the Synaptic Pathways web application interface. At the top, there is a navigation menu with options like 'Synaptic Pathways', 'Home', 'Paraplanner Access Centre', 'Contacts', 'Research', 'Portfolio Builder', 'Investment Pathways', 'Generic Funds', 'Configuration', 'Fund Lists', 'Knowledge Base', and 'More'. A search bar is located in the top right. The main content area is titled 'Collective Retirement Account | Fully Insured' and includes a 'Risk Rate Holding' button and 'Review', 'Edit', and 'Delete' options. Below this, there is a table with columns for 'Client', 'Holding Platform', 'Current Value', and 'Current Risk Rating'. The 'Details' tab is selected, showing a table of account information. The 'Contributions (0)' section has a 'New' button. A 'Weighting By Funds' donut chart shows 100.00% in Vanguard LifeStrategy 60% Equity A Shares Acc. A 'Performance Chart' shows a single data point at 1.4k.

Select either Regular, Single or Transfer:

The 'New Contribution' dialog box is shown. It has a title 'New Contribution' and a section 'Select a record type' with four radio button options: 'Initial', 'Regular', 'Single', and 'Transfer'. The 'Regular' option is selected. At the bottom right, there are 'Cancel' and 'Next' buttons.

Complete the details of the Contribution:

New Contribution: Regular

Contribution Details

* Frequency: --None--

* Amount:

Indexation ⓘ: --None--

* Start Date:

* Holding: Collective Retirement Account | Fully Insured

End Date:

Contribution Details

* Frequency: --None--

- ✓ --None--
- Monthly
- Annually
- Single

* Amount:

* Start Date:

End Date:

New Contribution: Regular

Contribution Details

* Frequency: Monthly

* Amount: £200.00

Indexation ⓘ: --None--

- ✓ --None--
- None
- Average Weekly Earnings (AWE) 7.8%
- Consumer Price Index (CPI) 6.8%
- Retail Price Index (RPI) 9%
- Other

Performance Ch 1.4k

New Contribution: Regular

Contribution Details

*** Frequency** ↶

Monthly ▼

*** Amount** ↶

£200.00

Indexation ⓘ ↶

Retail Price Index (RPI) 7.8% ▼

*** Start Date** ↶

*** Holding**

Collective Retirement Account | Fully Insured ✕

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 ▼

*** Amount** ↶

£200.00

Indexation ⓘ ↶

Retail Price Index (RPI) 9% ▼

*** Start Date** ↶

28/03/2023

*** Holding**

Collective Retirement Account | Fully Insured ✕

End Date ↶

01/03/2024

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

Synaptic Pathways Home Paraplanner Access Centre Contacts Research Portfolio Builder Investment Pathways Generic Funds Configuration Fund Lists Knowledge Base More

Search...

Collective Retirement Account | Fully Insured Contribution C-000166 was created. Risk Rate Holding Review Edit Delete

Client: Test Client Holding Platform: Quilter Current Value: £1,313.69 Current Risk Rating

Details Underlying Assets Performance Charges History

Name	Collective Retirement Account Fully Insured		Start Date	22/09/2022	End Date	21/09/2033
Description	Test Personal Pension Description		Remaining Term	10	Review Date	22/08/2024
Provider Name	Quilter	Type (Basis) Name	Personal Pension (Fully Insured)	Product Name	Collective Retirement Account	
Status	In force	Contract Reference		Rolling Term Basis	Last Modified Date 21/09/2023, 15:29	
Valuation Type		Surrender/Transfer Value	148,523.00			

Weighting By Funds

Performance Chart

Reports View **Tabular View**

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

Contribution...	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
Waiting for synapticpathways-999166@testing-force.co.uk	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	28/03/2023	01/03/2024

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

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

Type	Frequency	Amount	Indexation	Indexation...	Start Date	End Date
	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	28/03/2023	01/03/2024

View All

Edit Delete Edit

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