

Generic Holdings - Contributions

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

This article is a continuation of [Creating a Generic Holding](#)

To add contributions to a Generic Holding, click **New** in the Contributions area:

The screenshot shows the Synaptic Pathways application interface for a holding named 'Test Personal Pension | Fully Insured'. The interface includes a navigation menu at the top, a search bar, and a main content area with several tabs: 'Details', 'Underlying Assets', 'Cash Accounts', 'Assets', 'Performance', 'Charges', and 'History'. The 'Details' tab is active, displaying a table of holding information. Below the table, there are sections for 'Contributions (0)' and 'Withdrawals (0)', each with a 'New' button. A mouse cursor is hovering over the 'New' button in the 'Contributions' section. On the right side, there are two charts: 'Weighting By Funds' and 'Performance Chart', both showing 'Chart not available' or 'We can't draw this chart because there is no data.' The bottom right corner shows a 'View Report' link and a timestamp 'As of Today at 10:26'.

Select either **Regular**, **Single** or **Transfer**:

The 'New Contribution' dialog box is shown, with the title 'New Contribution' at the top. Below the title, there is a section titled 'Select a record type' with four radio button options: 'Initial', 'Regular', 'Single', and 'Transfer'. The 'Regular' option is selected, indicated by a blue dot. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Next'. A mouse cursor is hovering over the 'Next' button.

Complete details of the contribution:

New Contribution: Regular

Contribution Details

* Frequency

--None--

* Amount

Indexation ⓘ

--None--

* Start Date

* Holding

Test Personal Pension | Fully Insured

End Date

Cancel

Save & New

Save

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

* Start Date

End Date

Save & New

Save

New Contribution: Regular

Contribution Details

* Frequency: Monthly

* Amount: £200.00

Indexation: Retail Price Index (RPI) 9%

* Holding: Test Personal Pension | Fully Insured

* Start Date: [Calendar]

End Date: [Calendar]

Buttons: Cancel, Save & New, Save

The screenshot shows a web form for creating a new regular contribution. The form is titled 'New Contribution: Regular' and has a section for 'Contribution Details'. The details include: Frequency (Monthly), Amount (£200.00), Indexation (Retail Price Index (RPI) 9%), and Holding (Test Personal Pension | Fully Insured). The Start Date and End Date fields are currently empty, and a calendar is open for selecting a date. The calendar shows the month of June 2023, with the 16th highlighted. The form has three buttons at the bottom: 'Cancel', 'Save & New', and 'Save'.

Once all fields are complete, **Save**

New Contribution: Regular

Contribution Details

* Frequency: Monthly

* Amount: £200.00

Indexation: Retail Price Index (RPI) 9%

* Holding: Test Personal Pension | Fully Insured

* Start Date: 16/06/2023

End Date: 16/06/2033

Buttons: Cancel, Save & New, Save

The screenshot shows the same web form as above, but now the Start Date is set to 16/06/2023 and the End Date is set to 16/06/2033. The 'Save' button is highlighted with a mouse cursor, and a tooltip with the text 'Save' is visible next to it. The other fields and buttons remain the same.

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



Holding

Test Personal Pension | Fully Insured



Contribution "C-000167" was created.



Client: Test Client
Current Value: £0.00
Current Risk Rating:

Details Underlying Assets Cash Accounts Assets Performance Charges History

Name	Description	Start Date	End Date
Test Personal Pension Fully Insured	Generic Provider/Product Test Description	05/04/2023	04/04/2033
Provider Name	Type (Basis) Name	Product Name	Remaining Term
			Review Date
			10
			07/06/2024

If you would like to edit the details, click **Edit** under the drop down arrow:

Contributions (1) Settings Refresh New

1 item • Updated a few seconds ago

<input type="checkbox"/>	Contribution Id	Record Type	Frequency	Amount	Indexation	Indexation...	Start Date
1	C-000167	Regular	Monthly	£200.00	Retail Price Index (RPI) 9%	9.00%	11/05/2023

[View All](#)

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