

Central Investment Proposition - Adding On Platforms to a Segment

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This article is a continuation of [Central Investment Proposition - Creating Segments](#)

After creating the segment, On platform products will be the first screen to complete.

Click on the On platform product you would like to add to the segment:

The screenshot shows the 'Platforms' interface with a navigation bar at the top containing 'Platforms', 'Off Platform Products', 'Portfolios', 'Fund Lists', 'Adviser Fees', and 'Assign Users'. Below the navigation bar is a blue header with the text 'Add / Remove Platforms in CIP from Segment'. On the left, an orange box titled 'What's shown here' contains the text: 'Select which Platforms should be included in the Segment. Including Platforms will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.' The main area is divided into two columns: 'Platforms Available in CIP' and 'Platforms in Segment'. In the 'Platforms Available in CIP' column, 'Aegon Platform' is highlighted with a mouse cursor, and 'AEGON Retirement Choices' is listed below it. The 'Platforms in Segment' column is currently empty.

Once selected, click the arrow to move the platform over to **Platforms in Segment**

This screenshot is identical to the previous one, but the 'Aegon Platform' in the 'Platforms Available in CIP' column is now highlighted in blue, and a mouse cursor is clicking the right-pointing arrow next to it. The 'Platforms in Segment' column remains empty.

This screenshot is identical to the previous one, but the 'Aegon Platform' has been moved to the 'Platforms in Segment' column. The 'Platforms Available in CIP' column now only contains 'AEGON Retirement Choices', and the 'Platforms in Segment' column contains 'Aegon Platform'.

Multiple platforms can be moved at once. Click on the first platform, type CTRL A to select all the

platforms in the list.

The screenshot shows the 'Platforms' section of a software interface. At the top, there is a navigation bar with icons and labels for 'Platforms', 'Off Platform Products', 'Portfolios', 'Fund Lists', 'Adviser Fees', and 'Assign Users'. Below this, there is a blue header bar that reads 'Add / Remove Platforms in CIP from Segment'. On the left, an orange box titled 'What's shown here' contains a grey box with the text: 'Select which Platforms should be included in the Segment. Including Platforms will allow them to be used to provide illustrations for reduction in yield (RIY), Ex-ante and Ex-Post reviews.' The main area is divided into two columns. The left column, titled 'Platforms Available in CIP', contains a list of platform names: '7IM Platform', 'abrdn Wrap', 'Advance by Embark Platform', 'Aegon Platform', 'AEGON Retirement Choices', and 'AJ Bell Investcentre'. The right column, titled 'Platforms in Segment', is currently empty.

If you don't wish to move all platforms, click the first platform, hold CTRL and click the remaining platforms you would like to move.

This screenshot is similar to the one above, but it shows the result of selecting multiple platforms. In the 'Platforms Available in CIP' list, the items '7IM Platform', 'Advance by Embark Platform', 'AEGON Retirement Choices', and 'AJ Bell Investcentre' are highlighted in blue, indicating they are selected. The 'abrdn Wrap' and 'Aegon Platform' items are not highlighted. The 'Platforms in Segment' box remains empty.

Once done, move onto [Central Investment Proposition - Adding Off Platforms to a Segment](#)