Switching - Creating through the homepage

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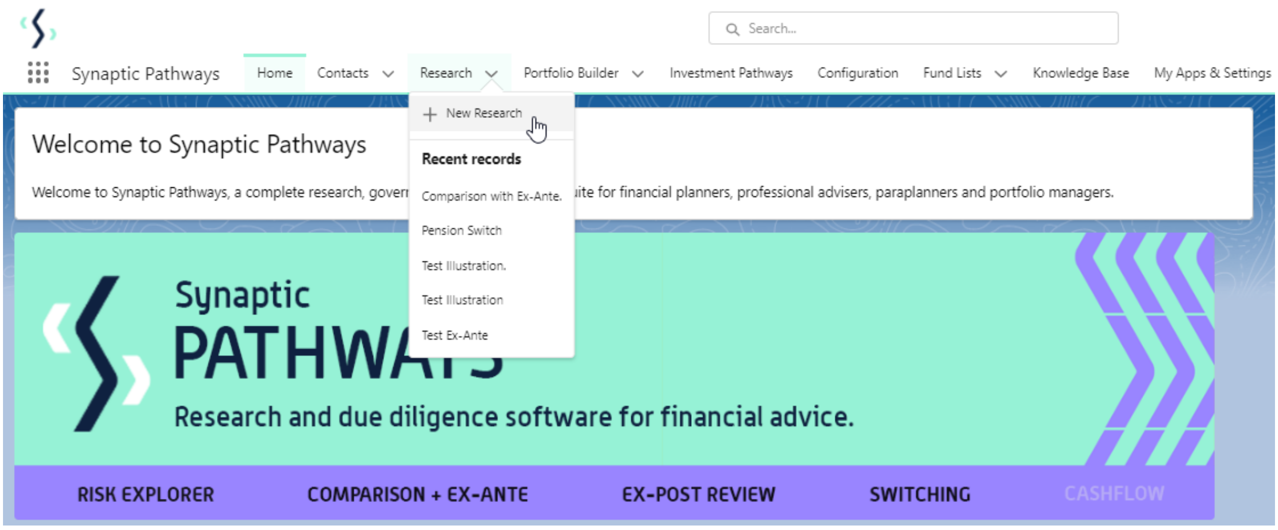
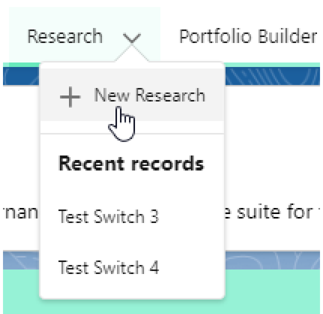
Switching research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

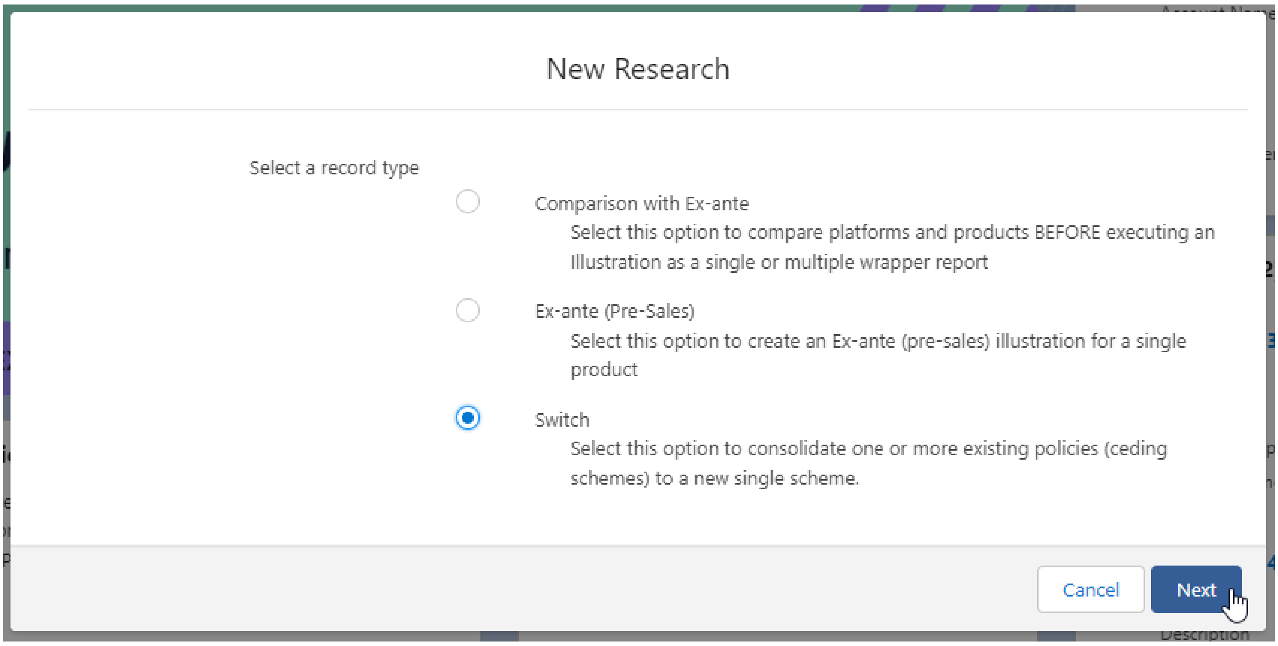
To create switching research directly from the Homepage, hover over the Research tab and select the down arrow:



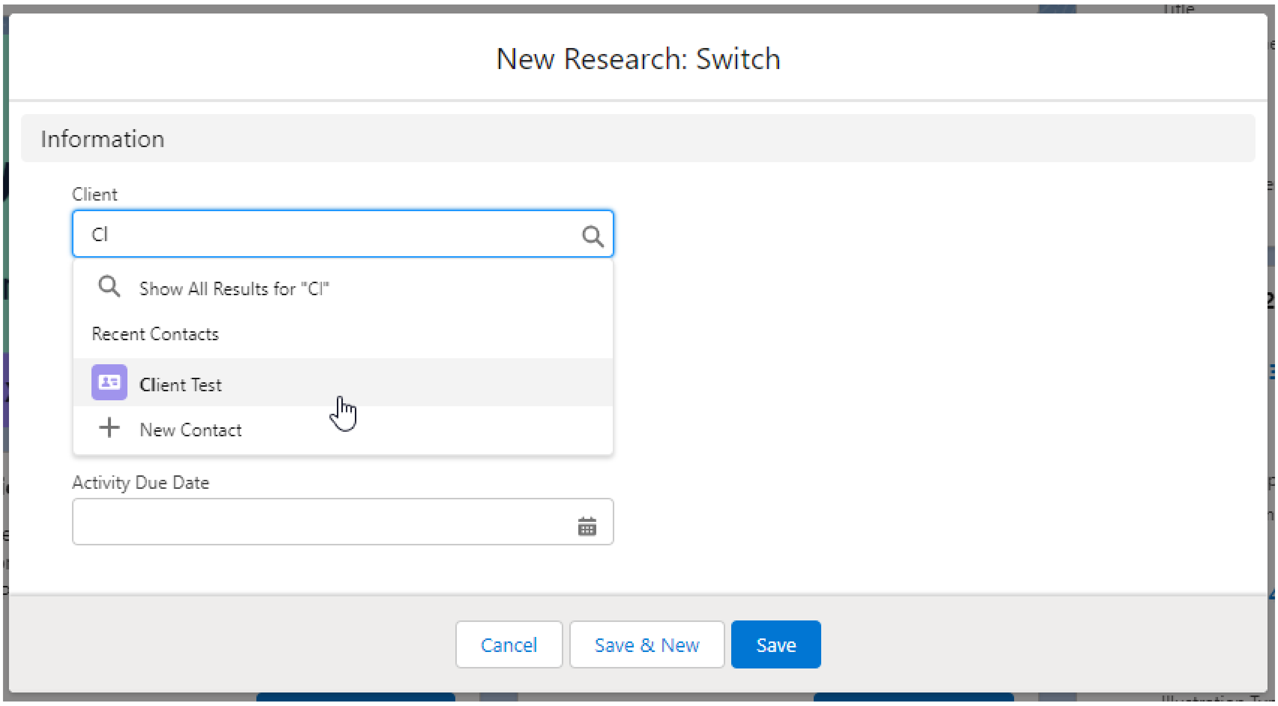
Select **New Research**



Select **Switch:**

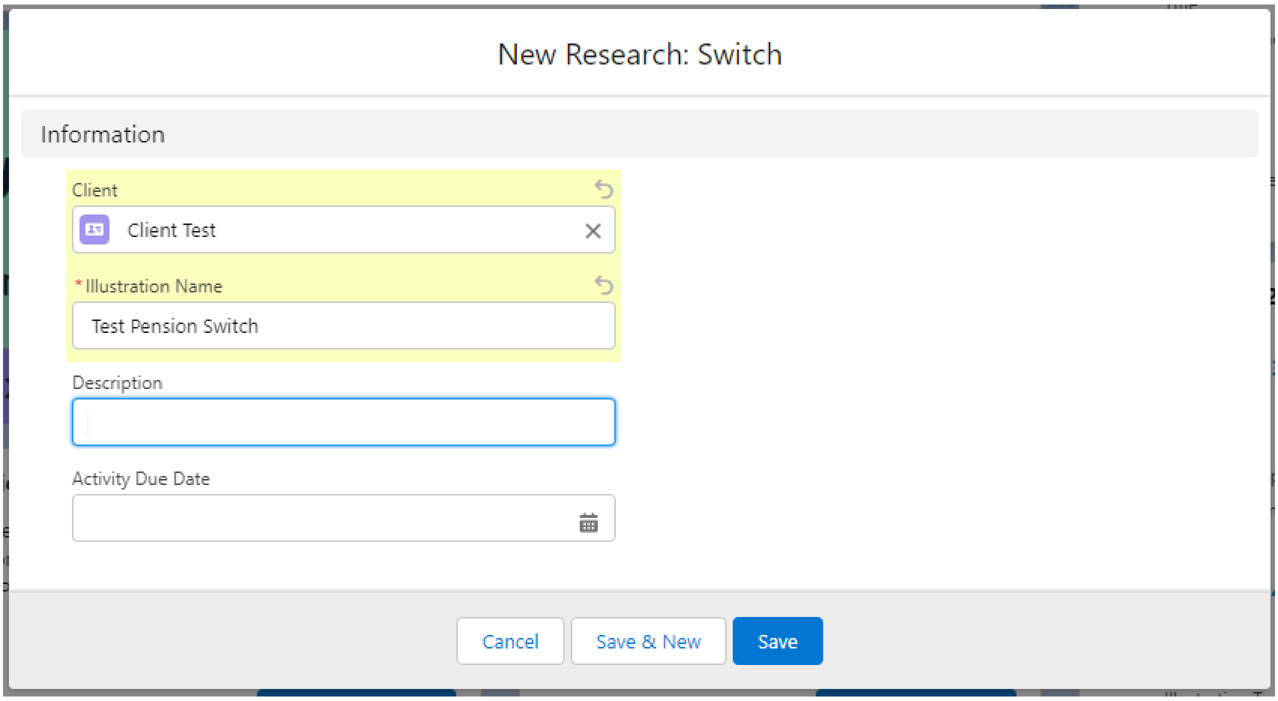


As we have created the research directly from the homepage, you will need to search for the client:

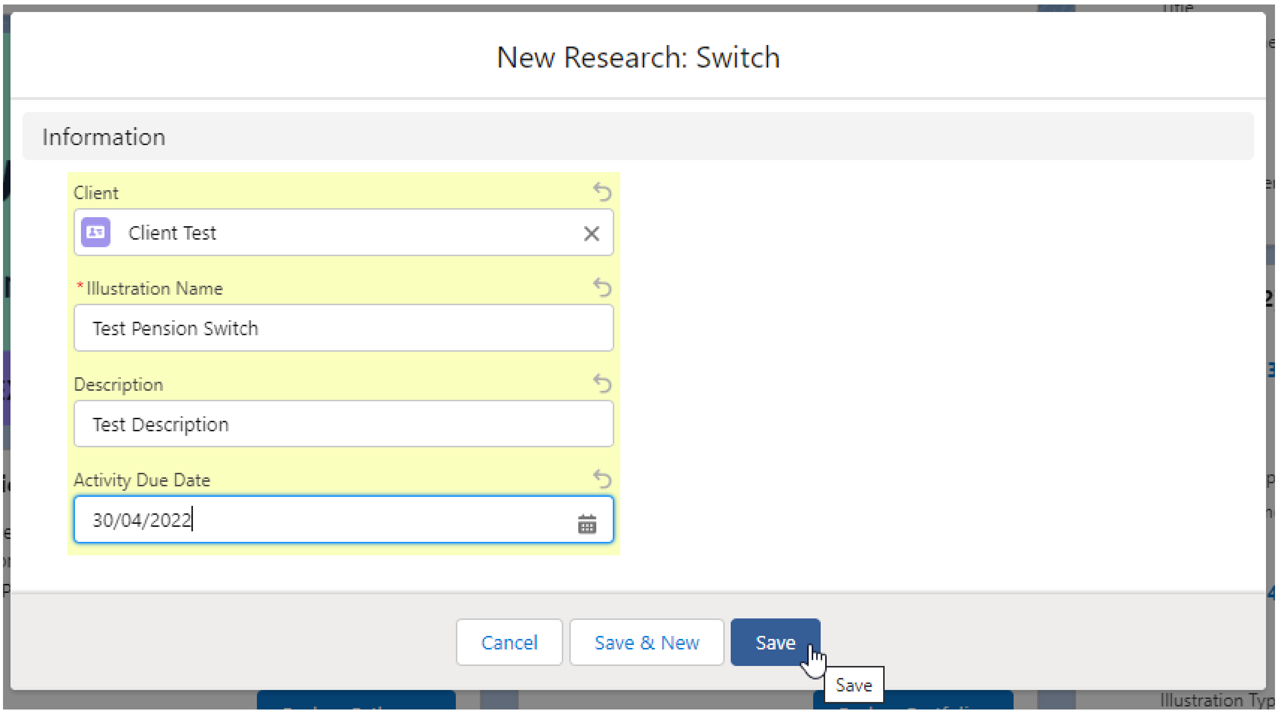


Note - **Client** field will already be completed if research is created in the contact record.

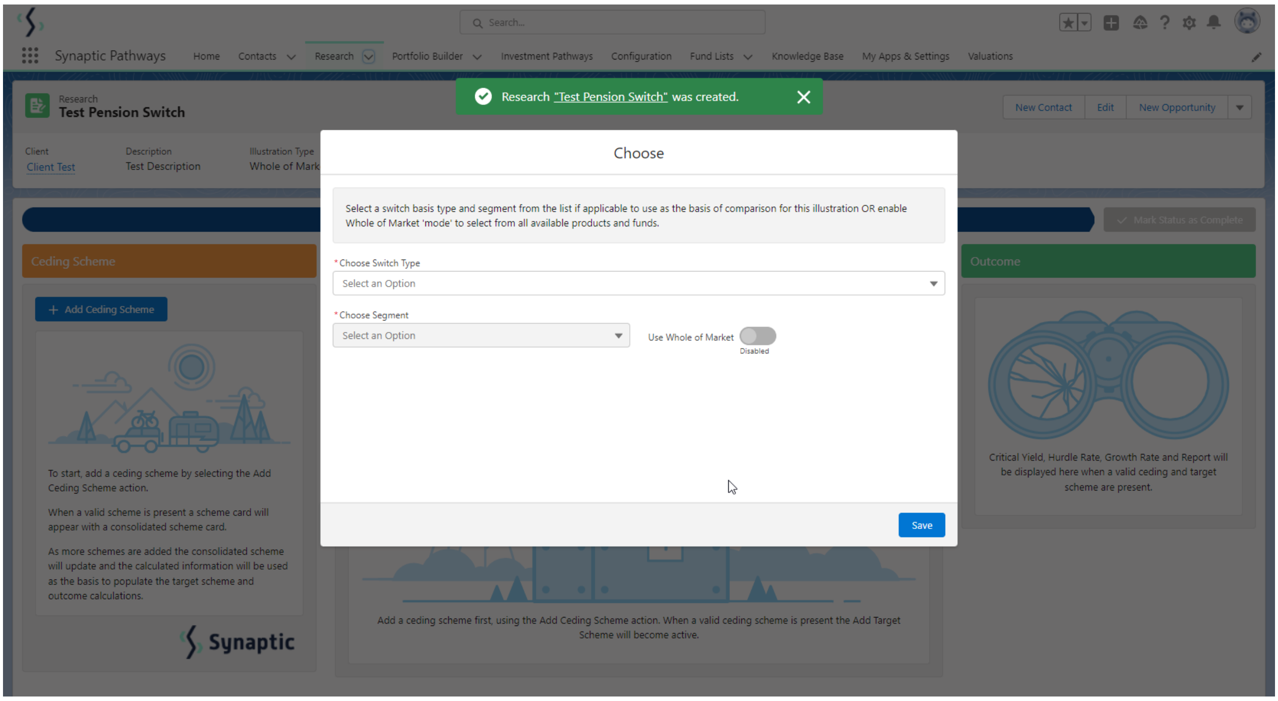
Complete the remaining fields:



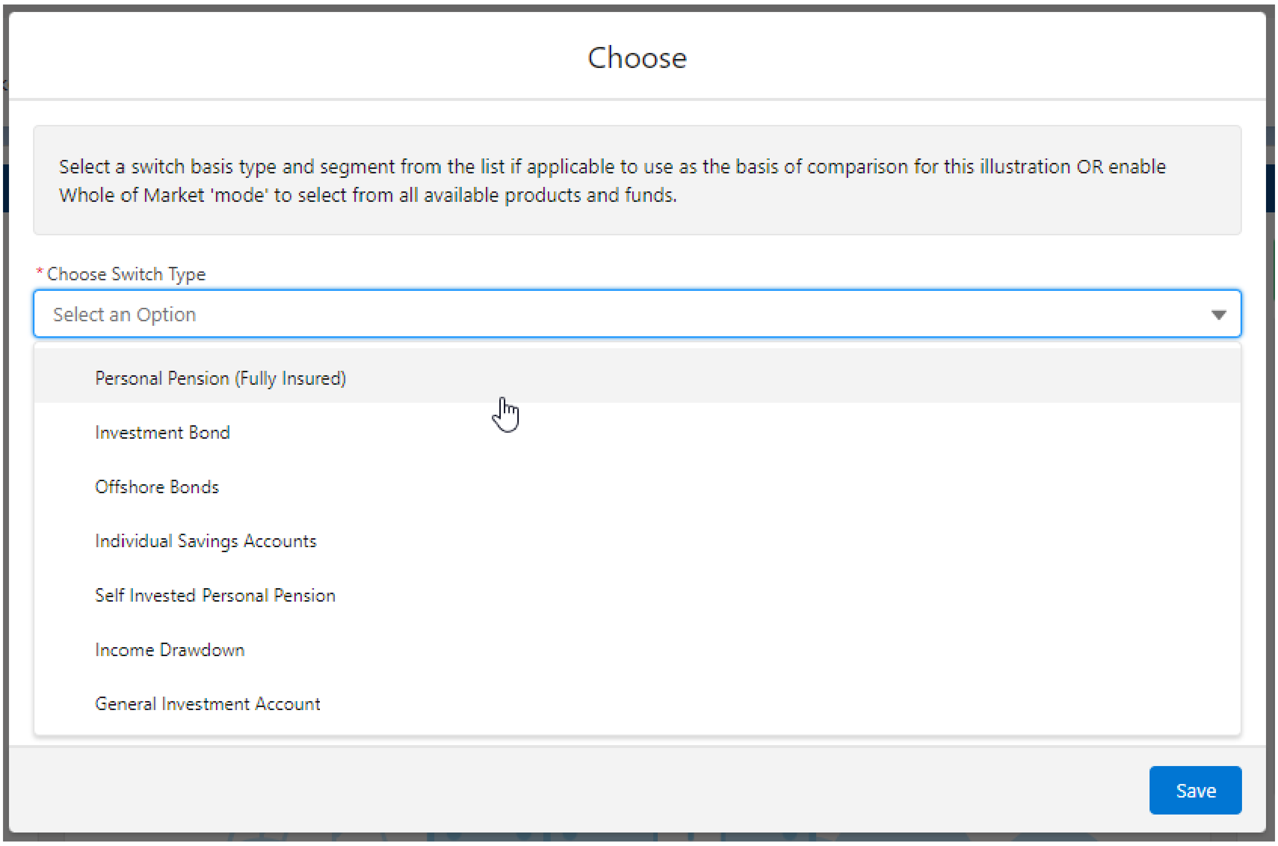
Save:



This will take you to the Choose screen:

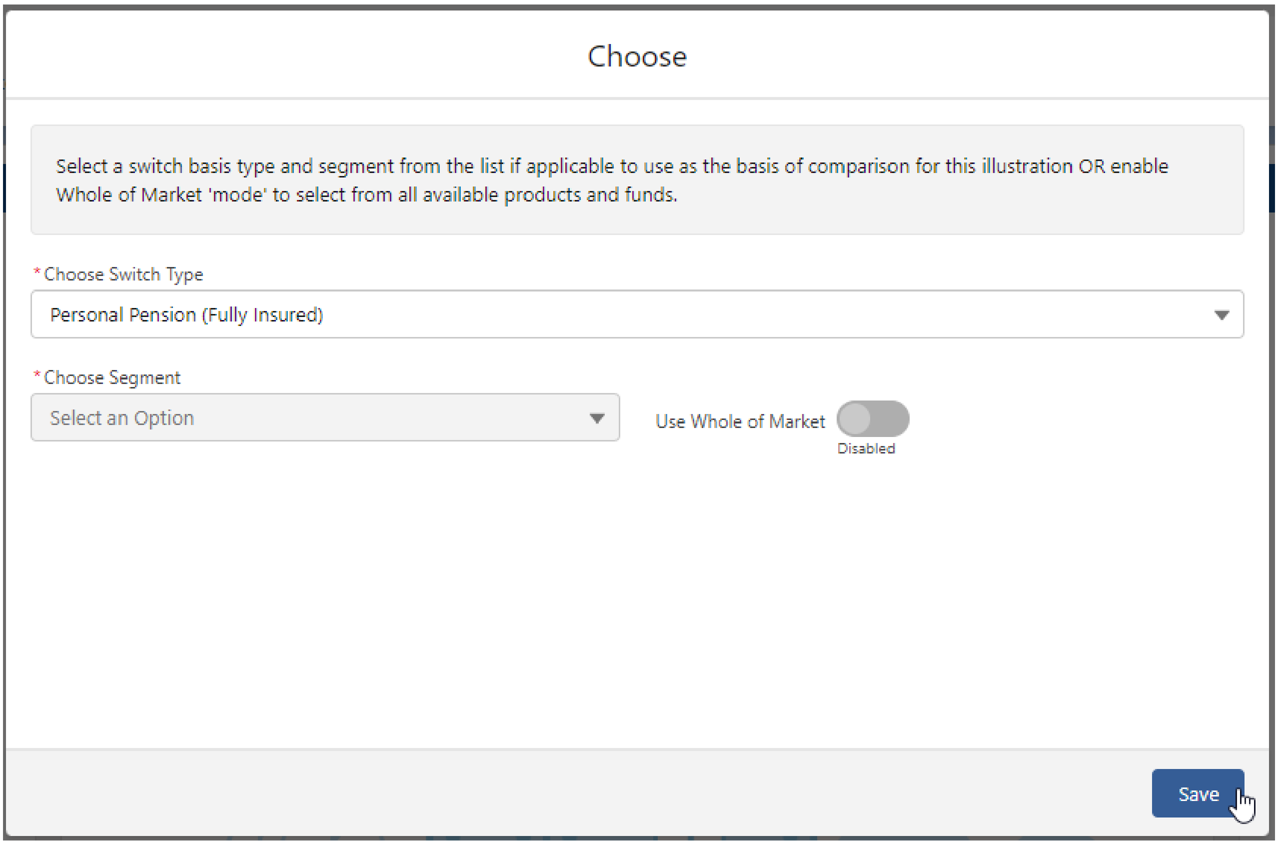


Choose Switch Type:

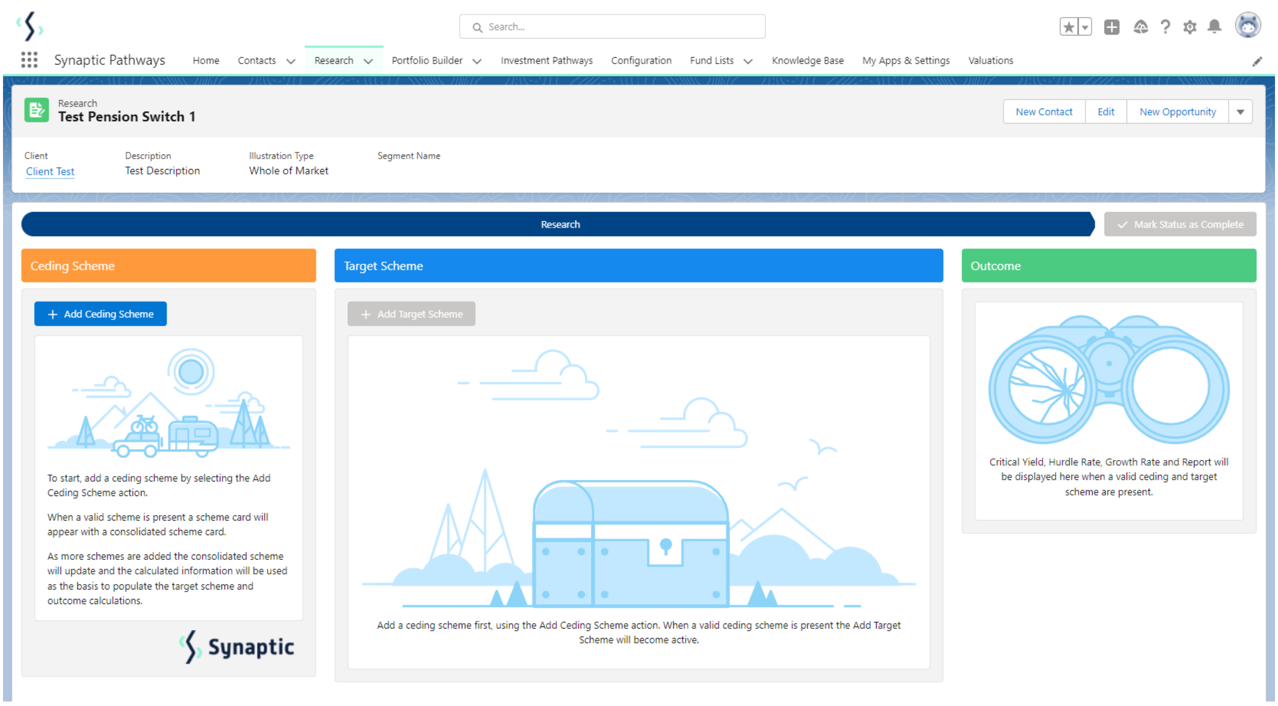


If using a Central Investment Proposition, select a segment or click the **Use Whole of Market** button.

If both fields are greyed out (as see below) a CIP is not in use and whole of market will be used by default.



This will take you into the Research screen:



For further information on Switch research, see articles:

Switching - Creating in the research tab

Switching - Creating within a client record

Switching - Research Screen