# Switching - Creating within a client record

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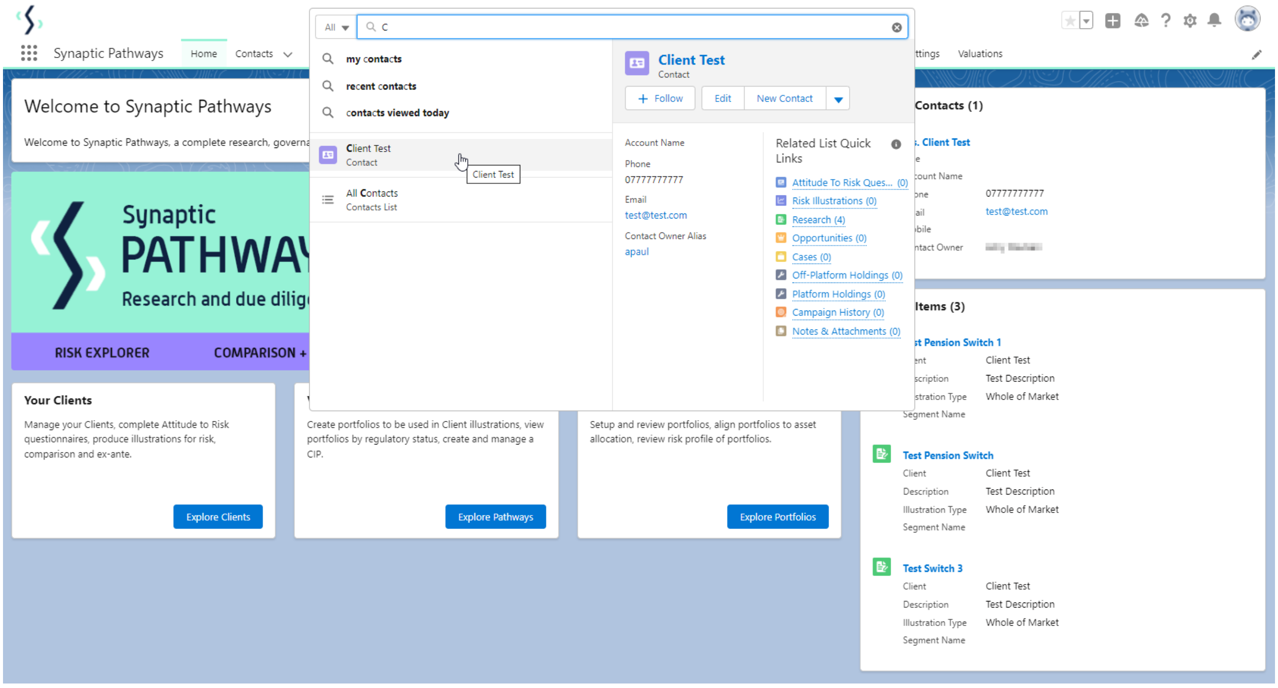
This article is a continuation of Switching - Creating in the research tab

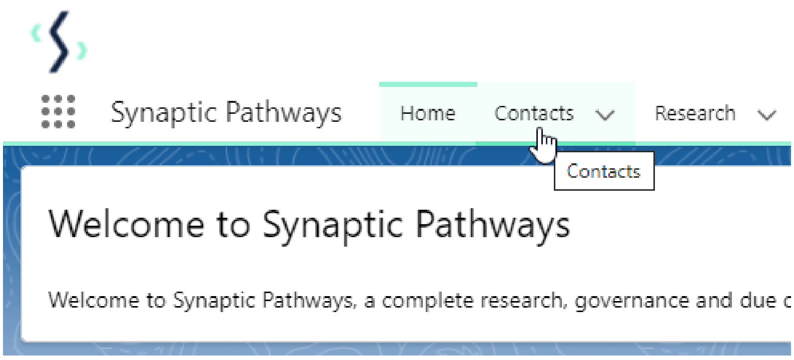
Switching Research can be created directly from the Pathways homepage, through the Research tab and within a Contact record.

To create switching research within a contact record, either:

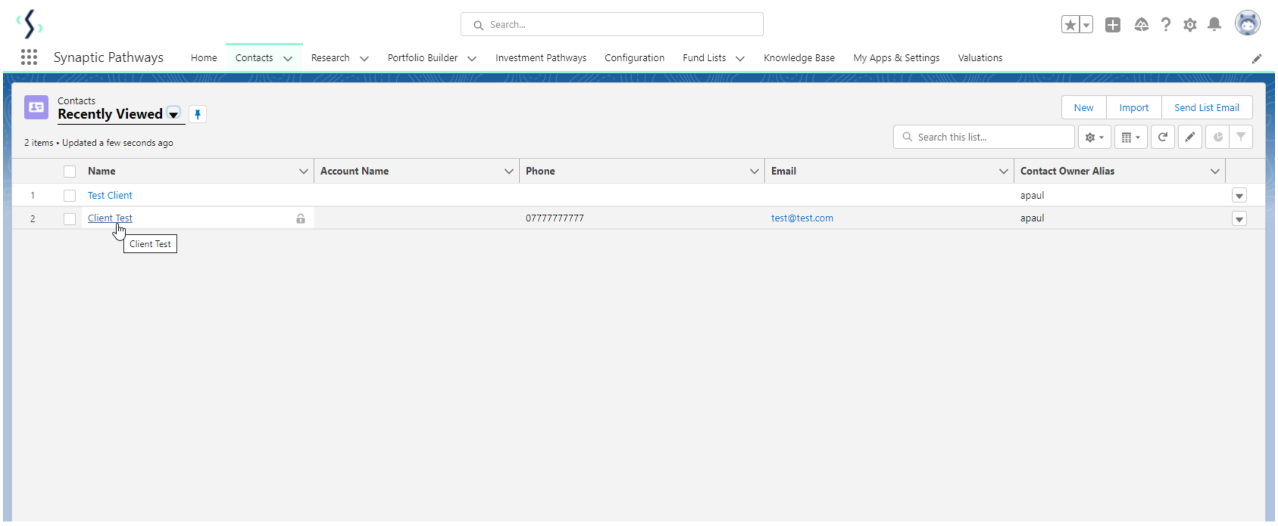
Search for the client in the top search bar:



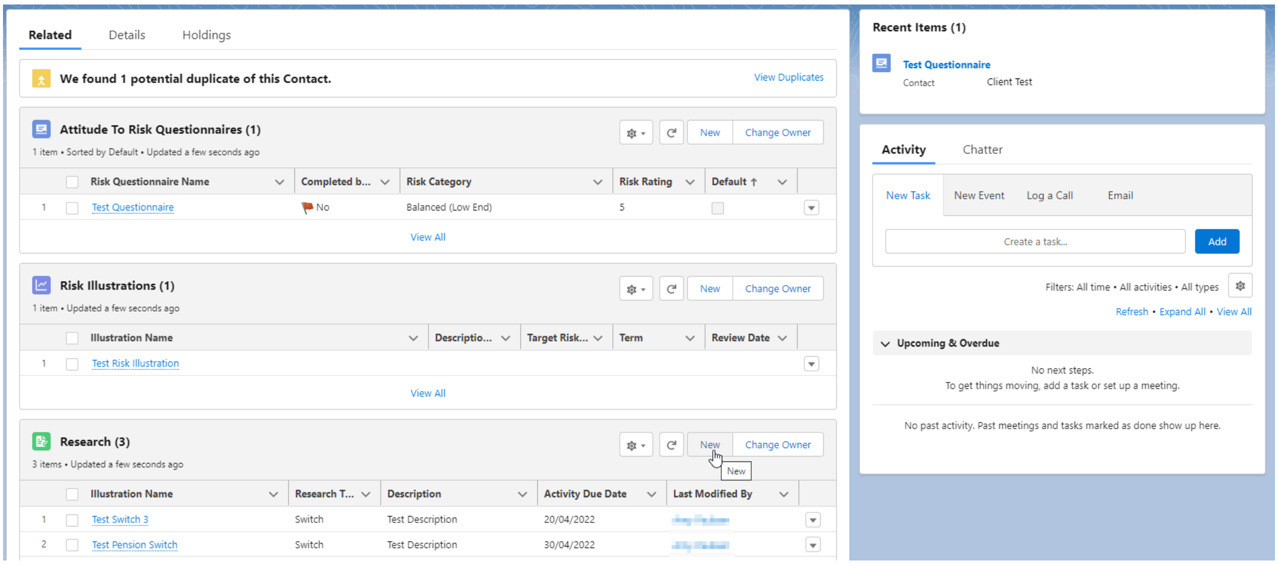

Alternatively, find the client within the **Contacts** tab:



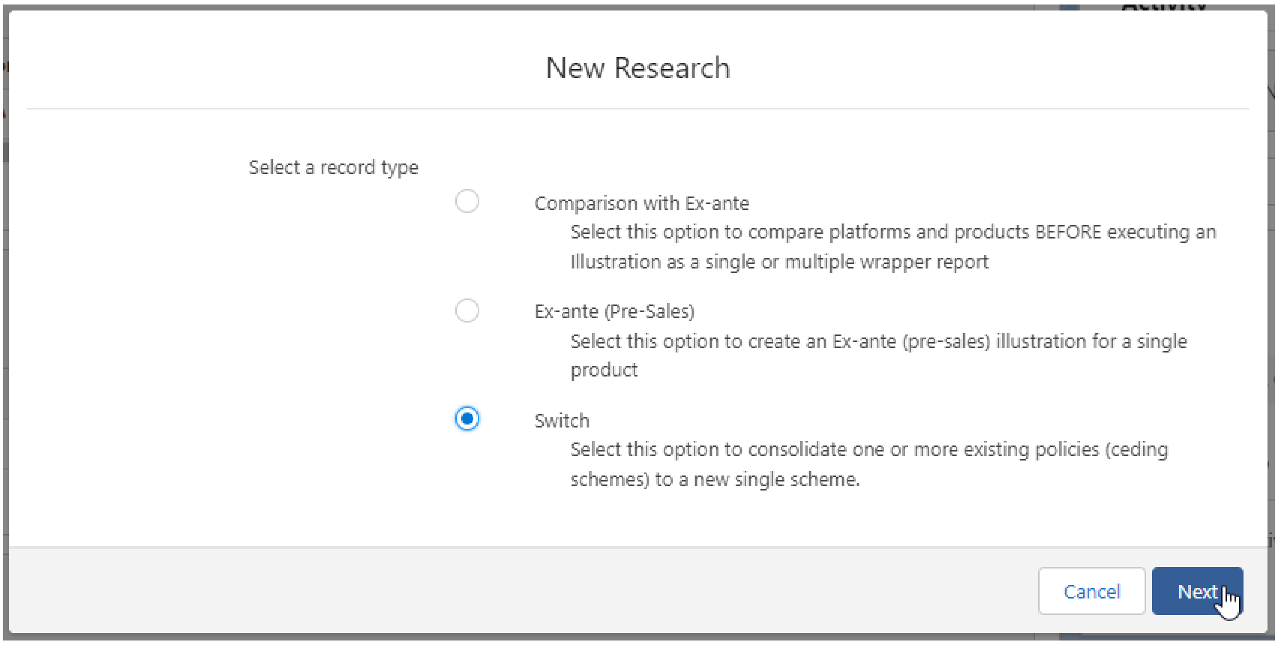

Select the client from the contact list:



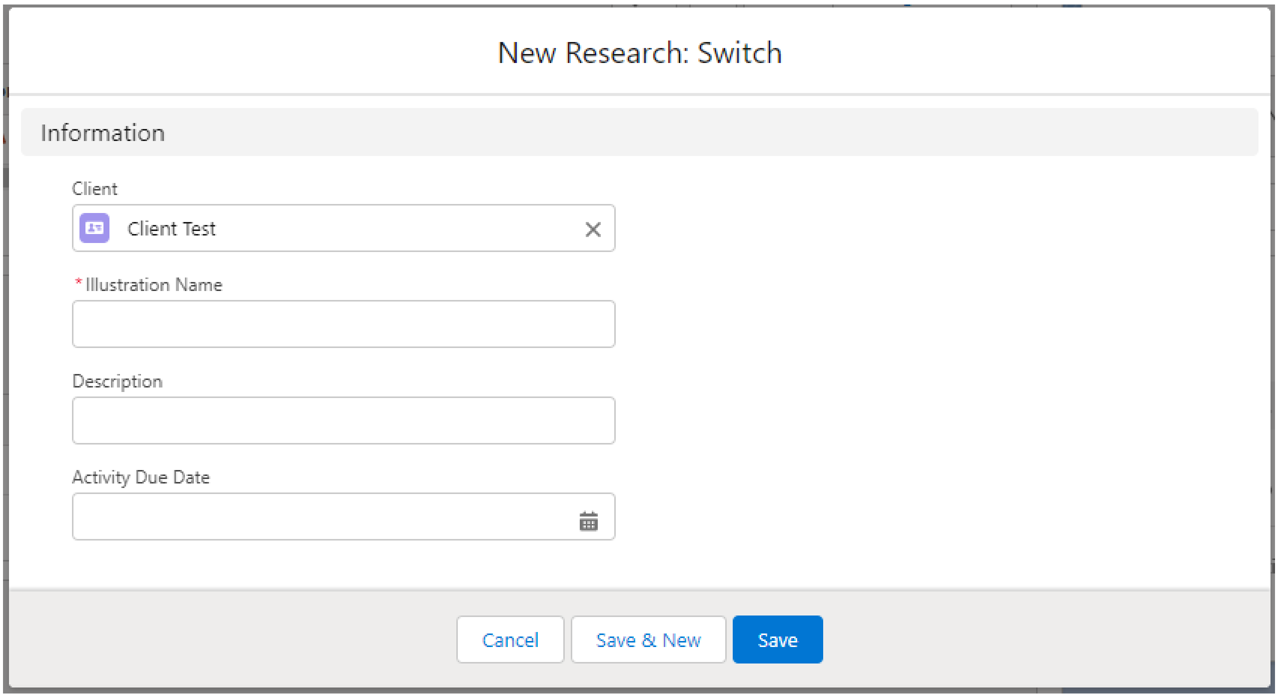

Click **New** within the Research area:




Click **Switch:**

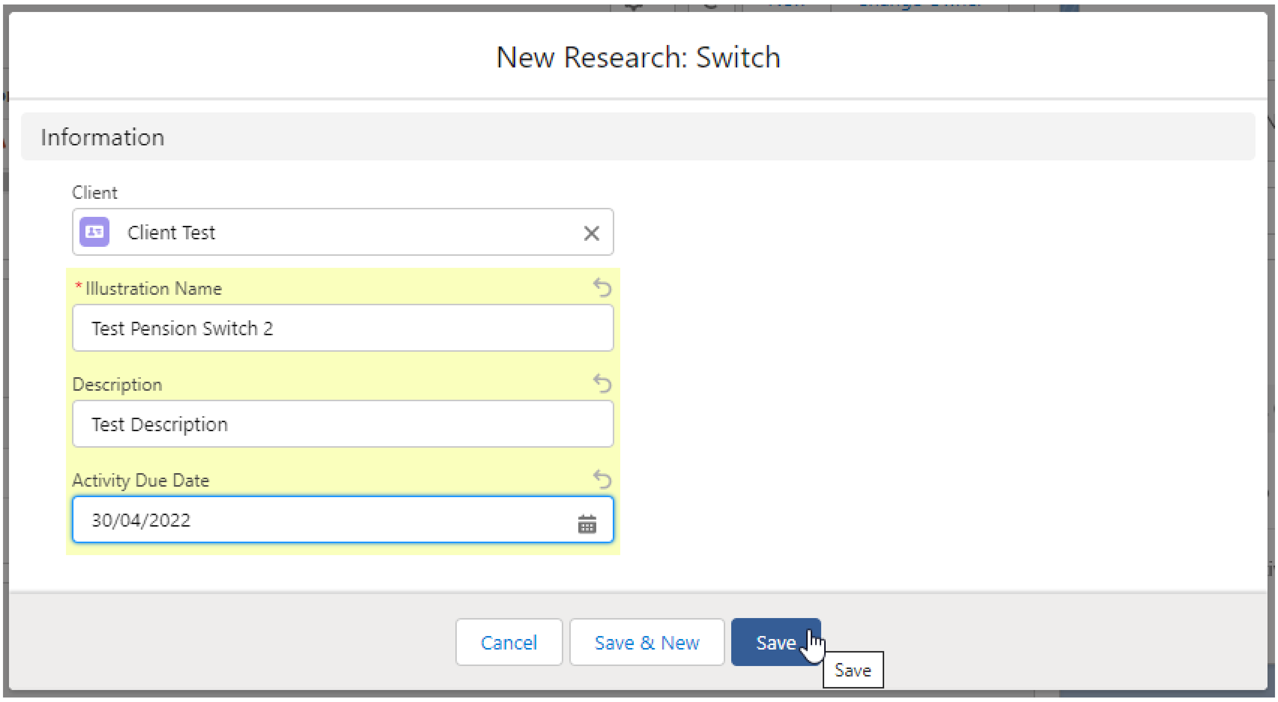


The client field will be populated automatically:

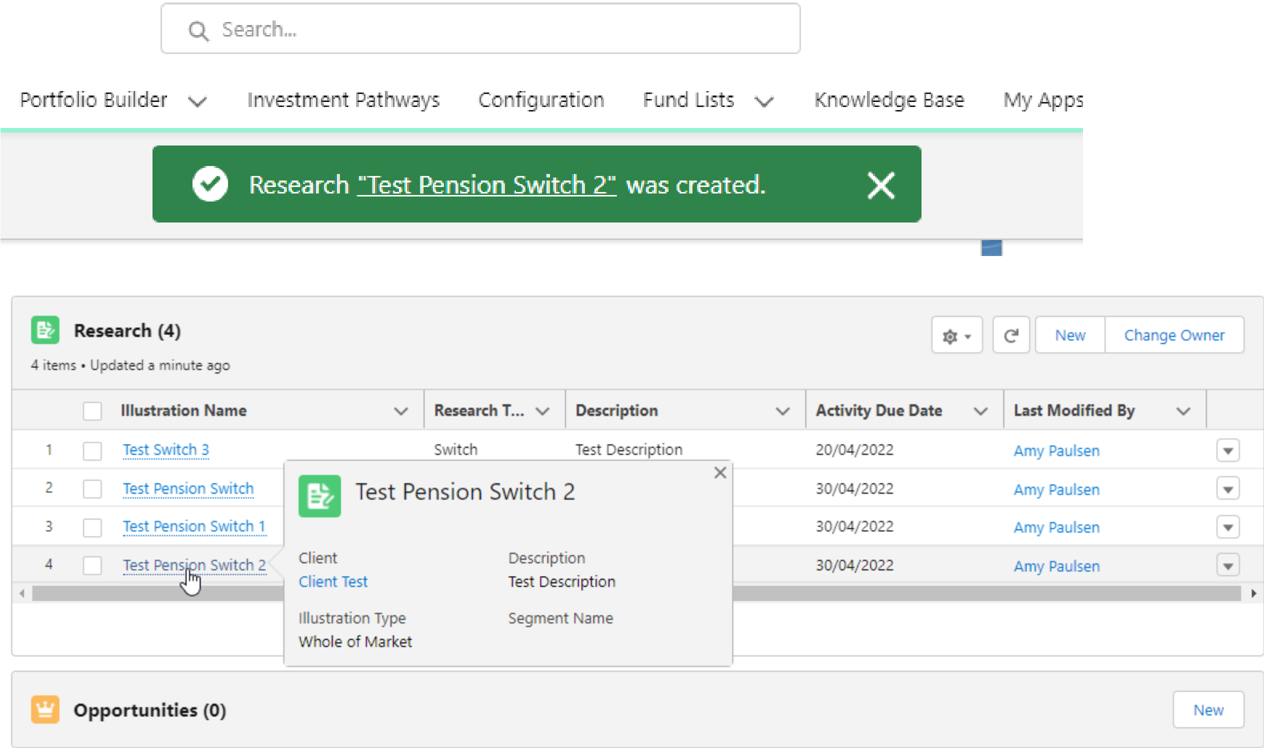



Note - **Client** field will not be completed if research has been created through the Research tab or Homepage.

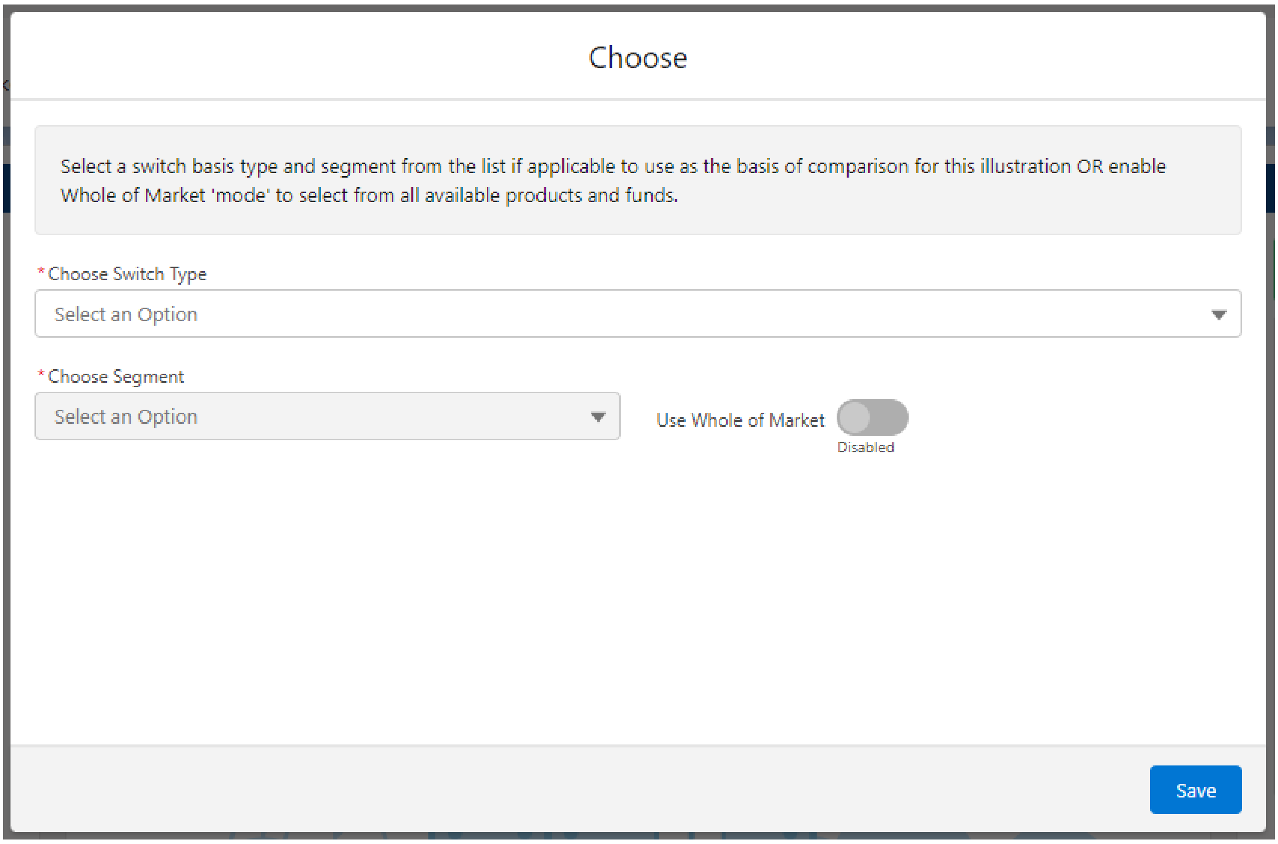
Complete the remaining fields & **Save**:



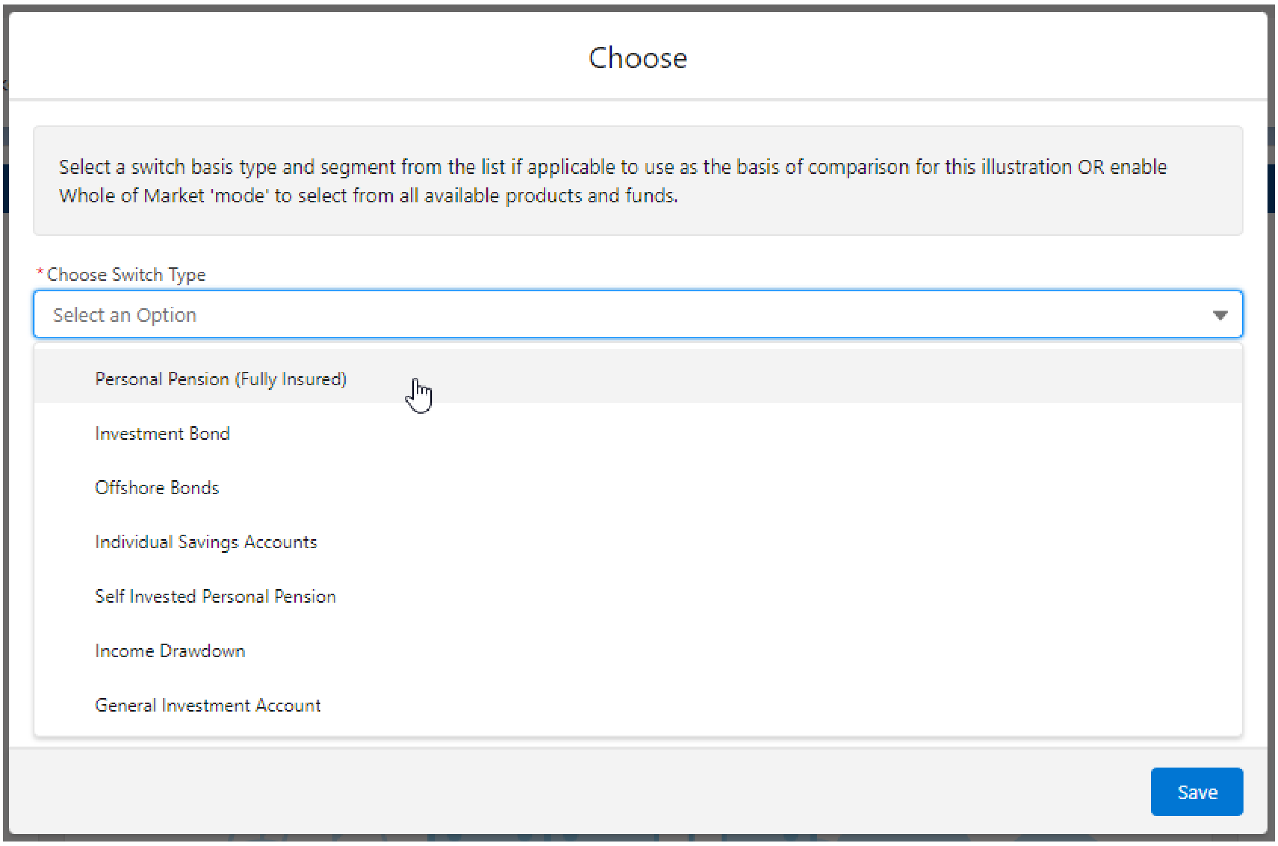

Click into the Research:




This will take you to the Choose screen:

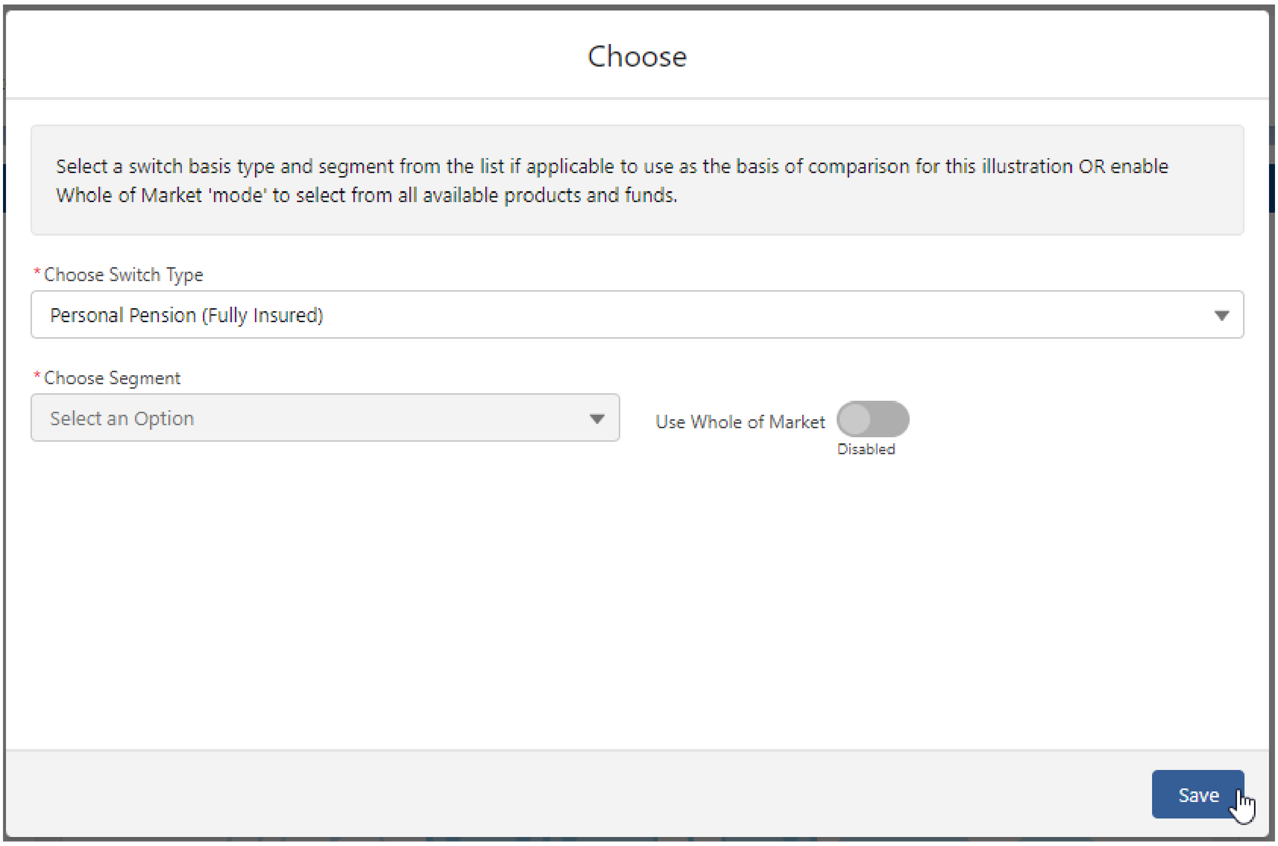



Choose a **Switch Type:**

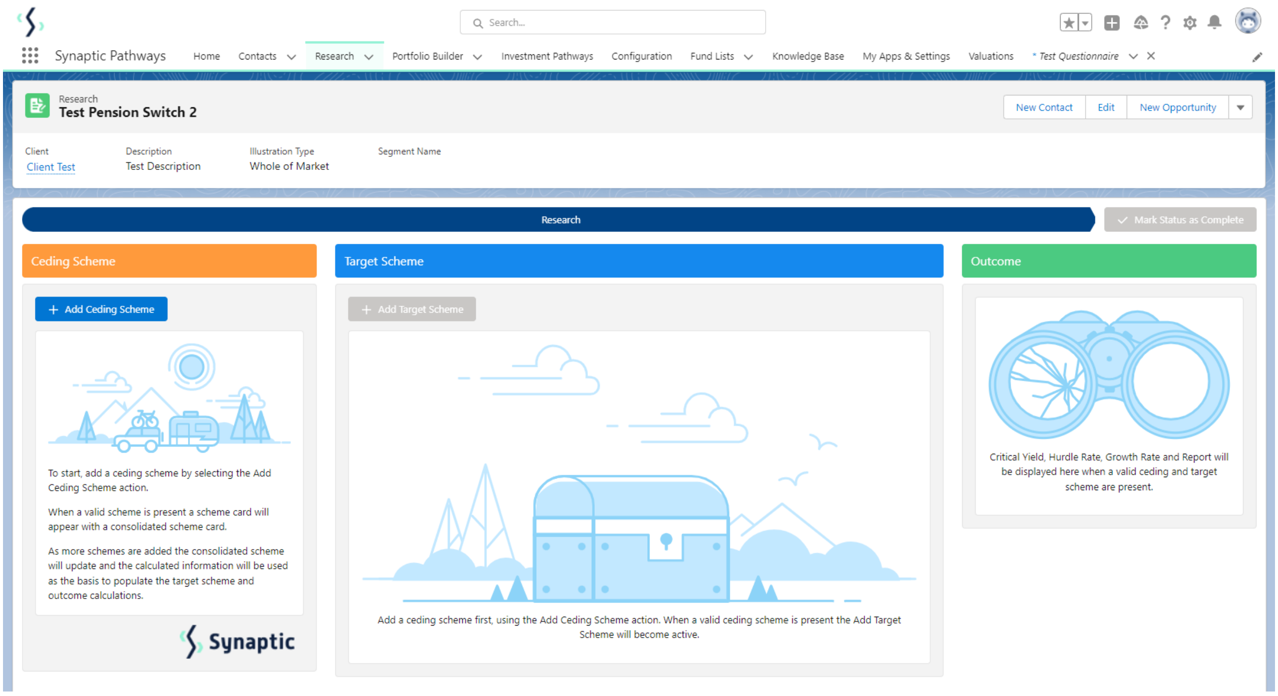



If using a Central Investment Proposition, select a segment or click the **Use Whole of Market** button.

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 article Switching - Research Screen