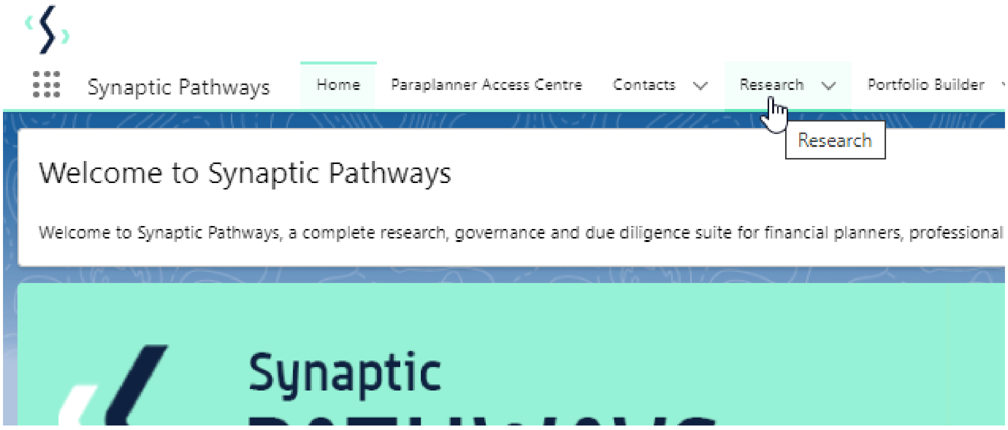
Switching - Creating in the research tab

Last Modified on 13/02/2024 3:34 pm GMT

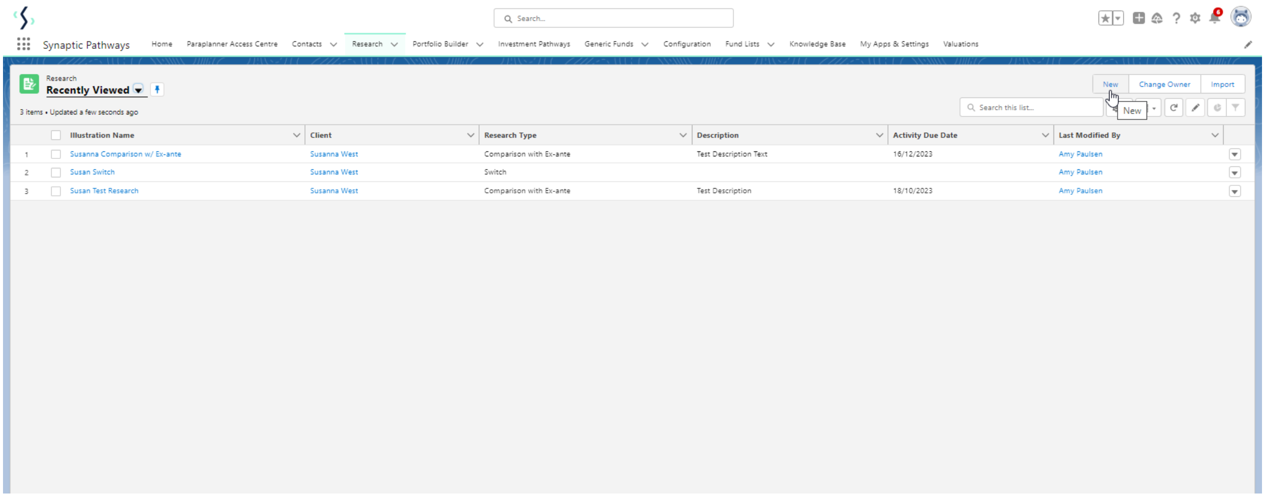
This article is a continuation of Switching - Creating through the homepage

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

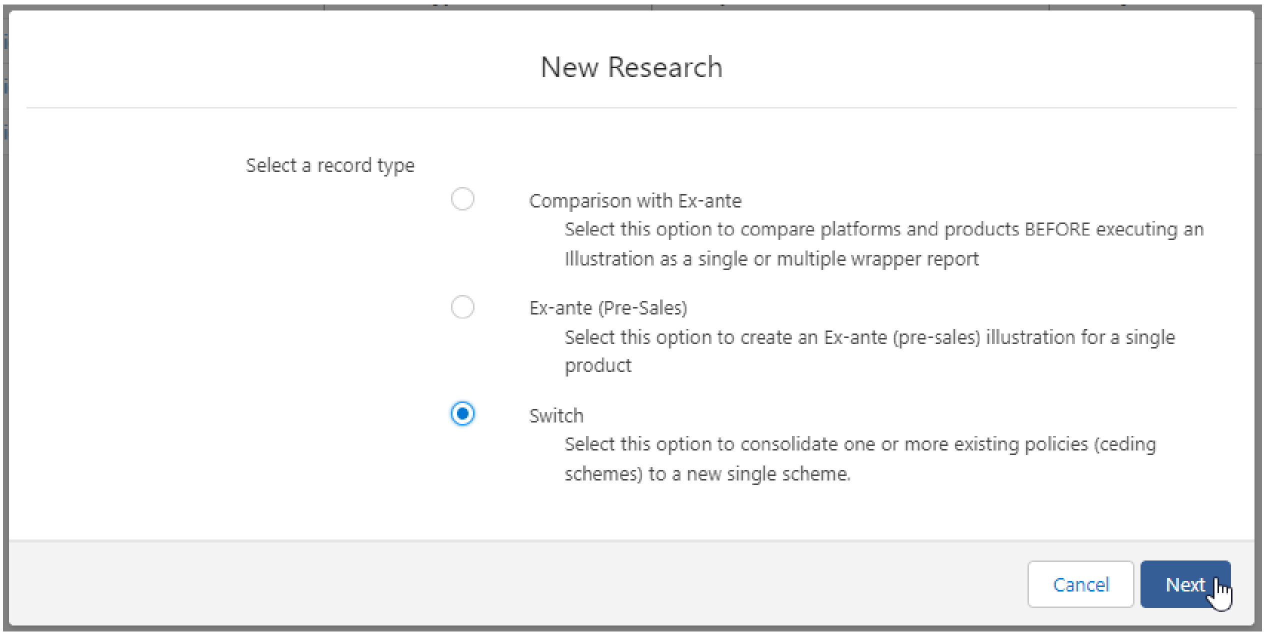
To create Switching research in the Research tab, click into the tab from the Homepage:



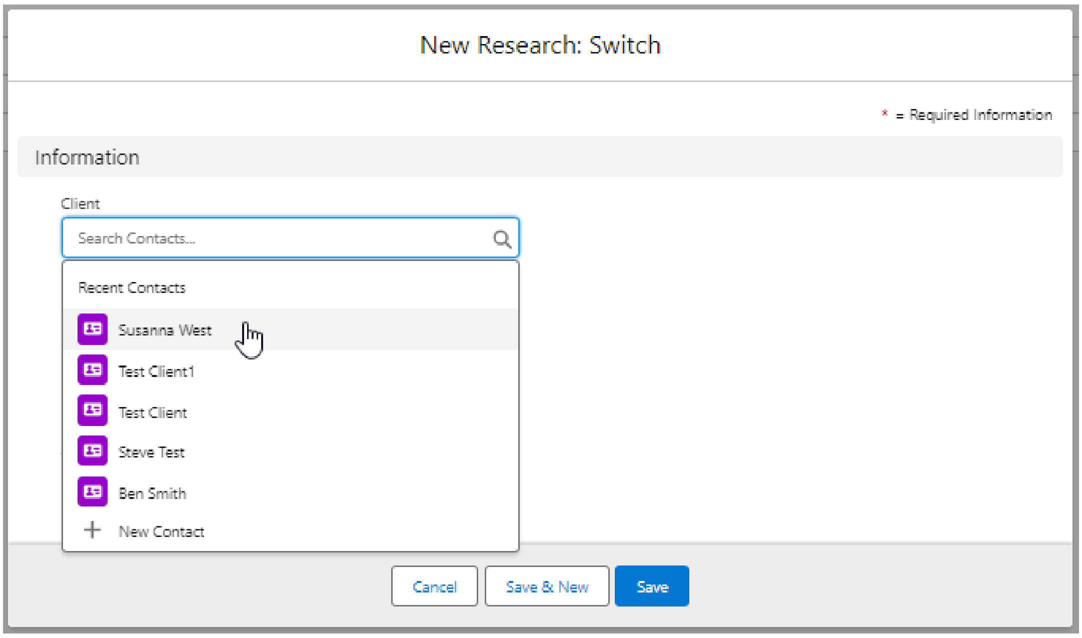
All existing research will be listed. Click **New** to create new research:



Select **Switch:**

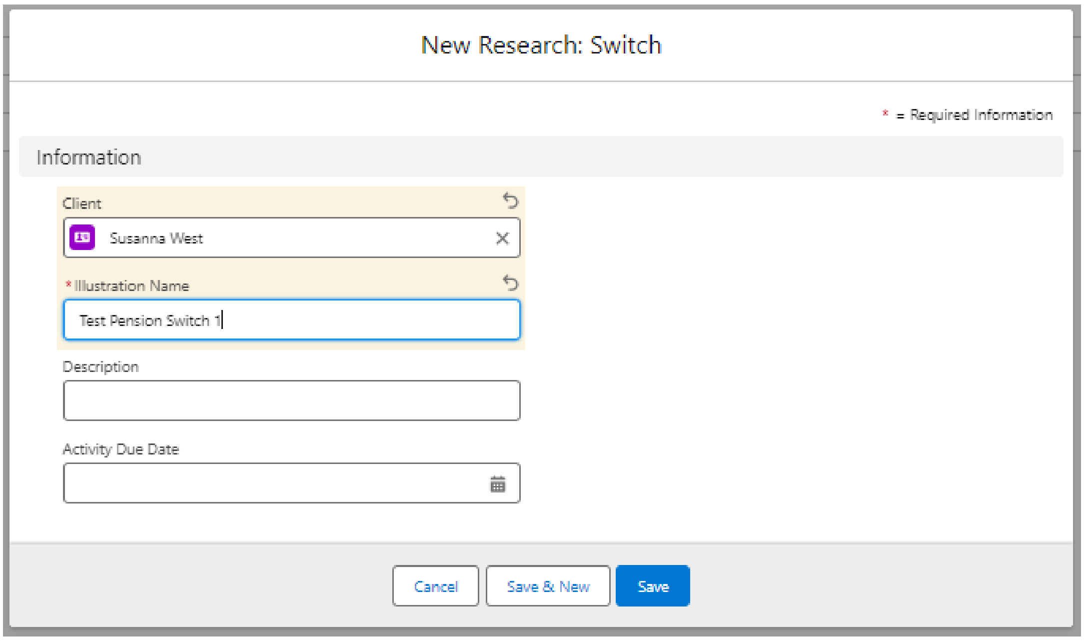


As we have created research within the Research tab, you will need to search for the client:

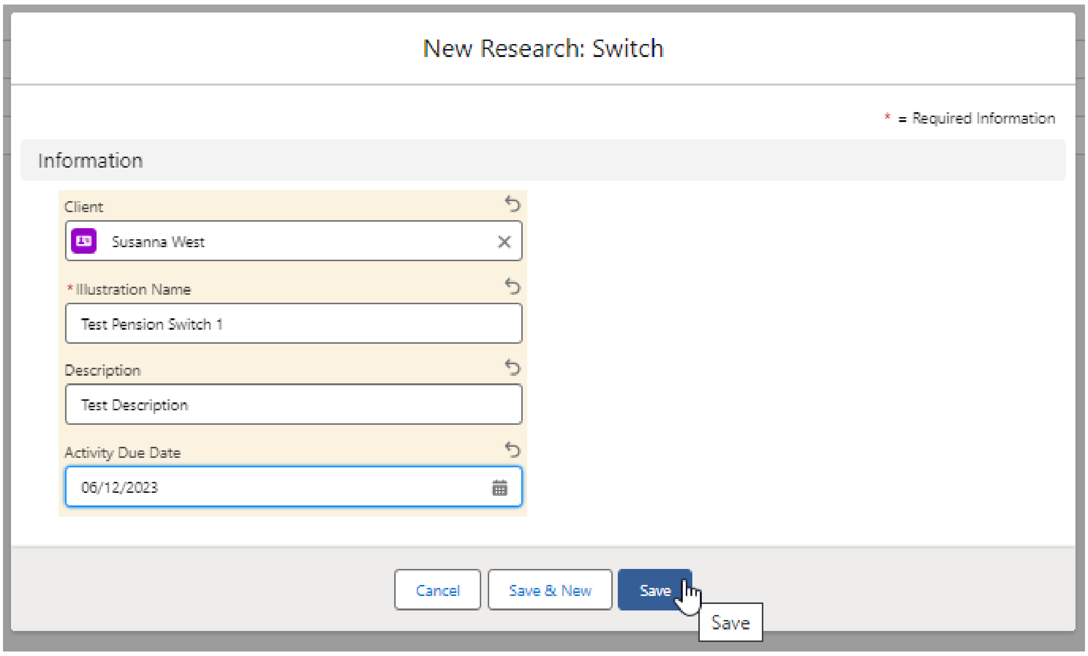


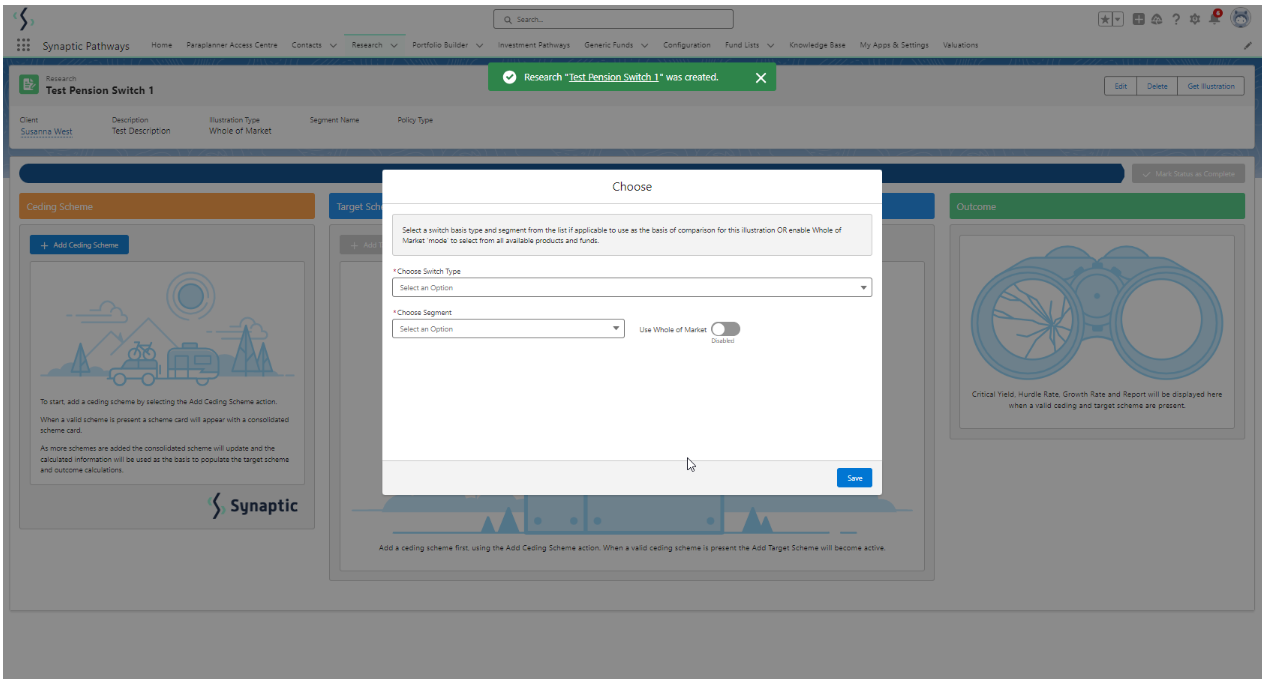
Note - **Client** field will already be completed if research is created in the contact record.

Complete the remaining fields:

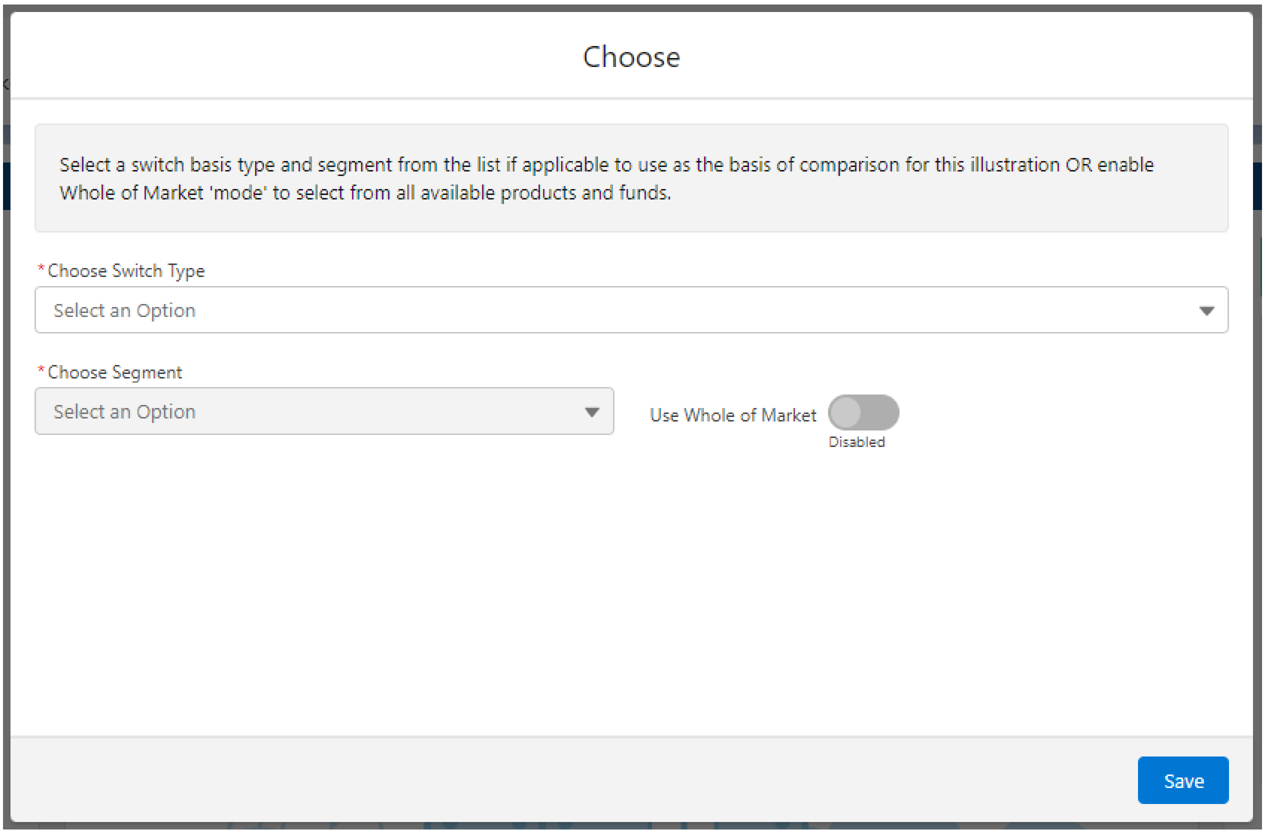

New Research: Switch
* = Required Information
Information
Client
Susanna West
* Illustration Name
Test Pension Switch 1
Description
Activity Due Date
Cancel
Save & New
Save

Save:

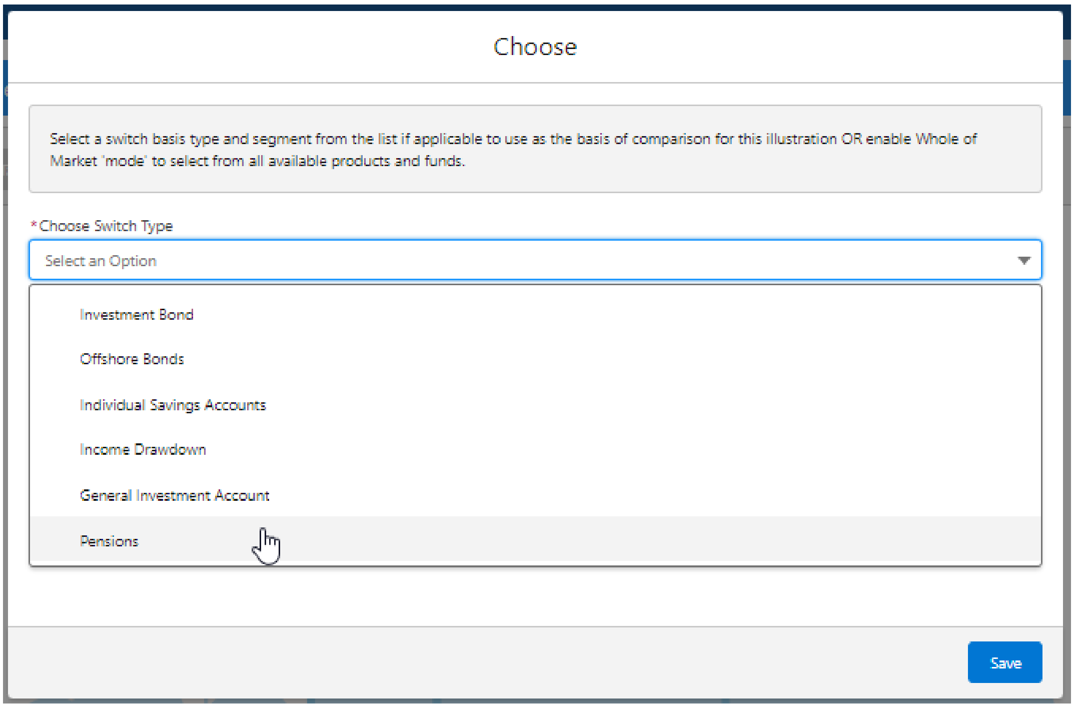

New Research: Switch
* = Required Information
Information
Client
Susanna West
* Illustration Name
Test Pension Switch 1
Description
Test Description
Activity Due Date
06/12/2023
Cancel
Save & New
Save
Save



This will take you to the Choose screen:

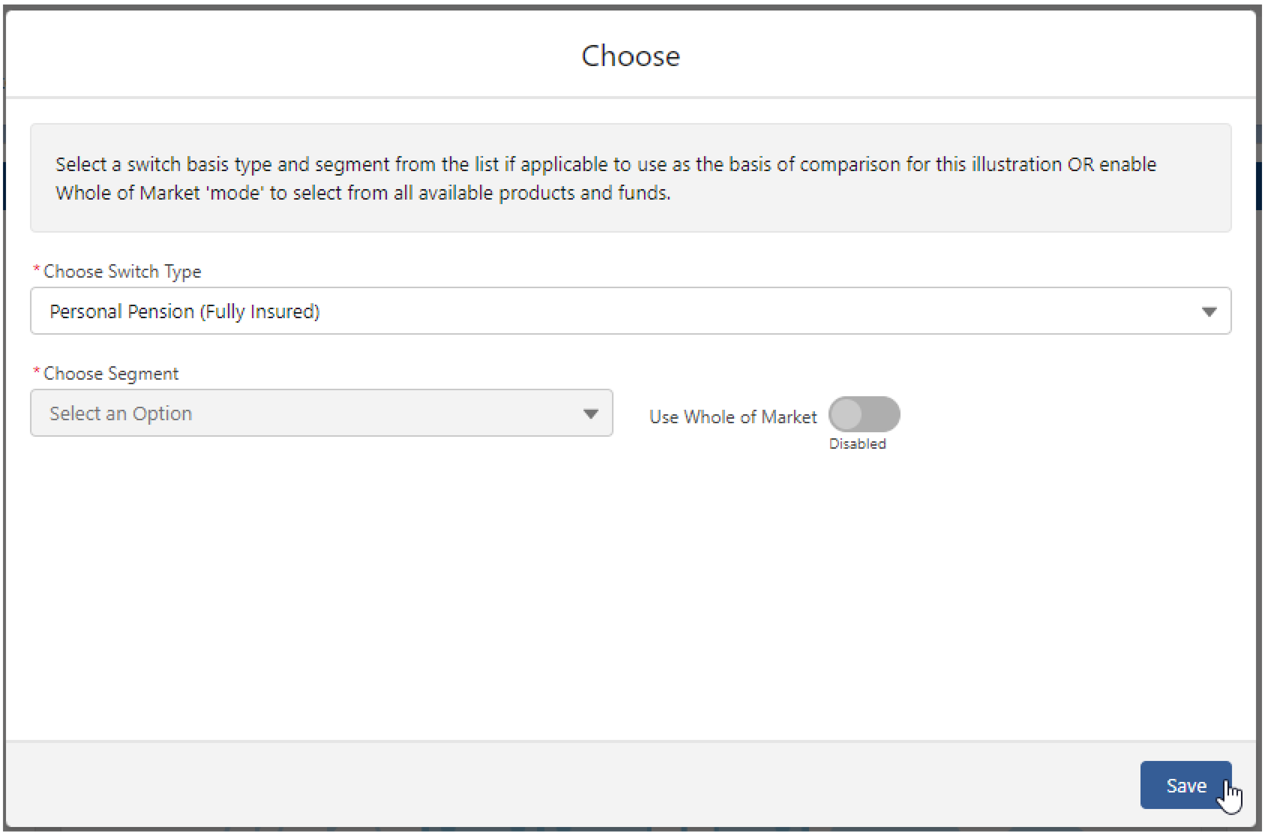


Choose a **Switch Type:**

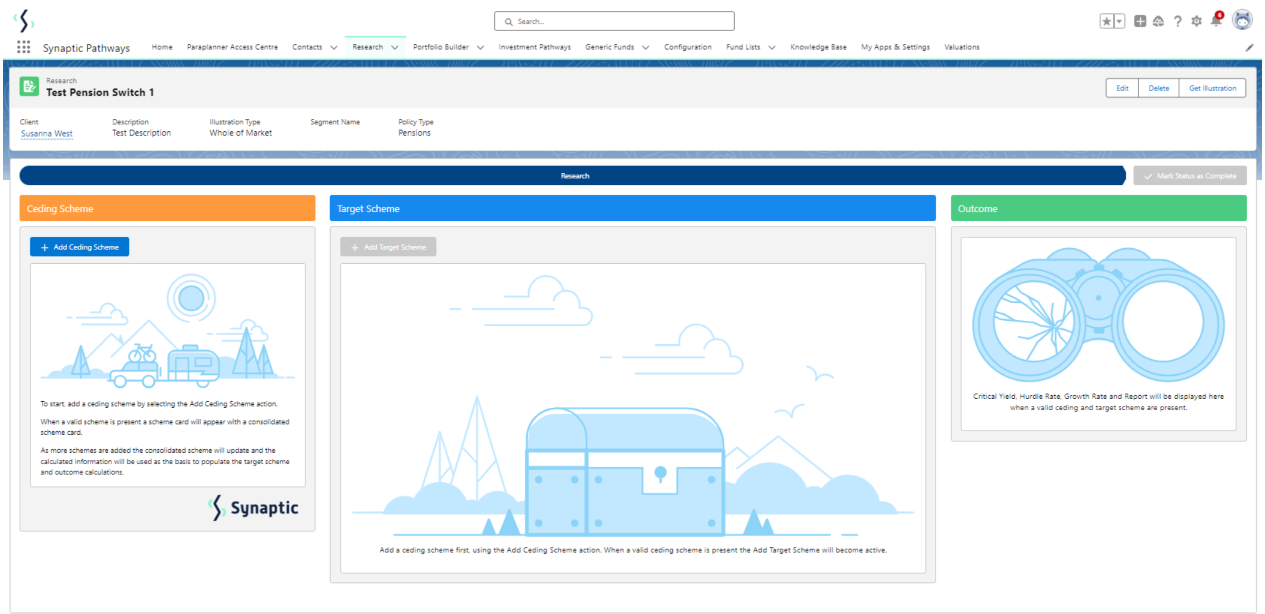


If using a Central Investment Proposition, select a segment or click the **Use Whole of Market** button.

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 articles

Switching - Creating within a client record

Switching - Research Screen