Invesco EMEA		
FIELD	**INSTRUCTION**	**ADDITIONAL NOTES**
Task Description and Comments	If the recording/note if from the HD App or click the + sign beside Task Description and Comments and type the FA name under Task Description. If there are multiple FAs or multiple notes under 1 task, type in the 1st FA name, et al.	
Type	Default: Normal - New	
Internal Comment	Type in any observation, clarification, instruction that could be useful for the person who will enter the note	
Special Instructions	As specified	
Date	As specified or use recording date if not provided	
Time	Skip if not provided	
Name	Copy/Paste from CRM	
Organization	As specified or copy/paste from CRM	
Subject	As specified or use default	DEFAULTS: Meeting Phone Call Webinar or Virtual Meeting
Text	Verbatim	
Meeting Type	As specified	
Meeting Subtype	As specified	**Commonly used Subtype:** Investment Strategy Update
Related to/Campaign:	Copy/Paste from CRM	**RELATED TO:** Firm name **CAMPAIGN:** Search in CRM. If multiple listing, clarify.

Meeting Forum:	As specified or use default.	Meeting – Client Site Phone Call – Virtual
Topic	Leave blank if not specified	
Product	As specified	
Other Products	Copy/paste from CRM	
Status	As specified	DEFAULT: Completed
Meeting Location	As specified	