Invesco US		
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: Meeting	For Existing activities: 1. Tick Existing check box only if activity is in SF calendar 2. Put in activity date to populate list of existing activities on top 3. Select existing activity. Activity will be highlighted in orange once selected.
	For Existing activities: 1. Tick Existing check box only if activity is in SF calendar 2. Put in activity date to populate list of existing activities on top 3. Select existing activity. Activity will be highlighted in orange once selected.	***IMPORTANT: Check the existing activity if there is an Invesco Employee added. If yes, untick Existing check box and create a new activity. Copy the Start and End Time and Subject. Do not update the existing activity per POC instruction.
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	***DEFAULT APPOINTMENT TIME: (you can leave it blank but make sure to manually adjust it in Salesforce after SIT) Breakfast - 8AM Lunch - 12PM

		Dinner - 6PM Happy Hour – 4PM
Product	As specified Tick + button and put 'None Provided' if no product was provided or if product provided is not listed in Salesforce	MAXIMUM OF 5 PRODUCTS. If more than 5, add the rest under comments section. PRODUCTS NOT ADDED (More than 5) * Type in product name under Name field if product name was provided. Add * before and after the name if it does not show any result. * Type in Ticker Symbol if ticker symbols were provided. If it does not show any result, search for the ticker symbol in Google. (Not all ticker symbols are listed in Salesforce) -- Tick the corresponding product on the results field (will be highlighted in orange).
Name	As specified	MAXIMUM OF 50 CONTACTS. If more than 50 contacts, create a new note and under subject (Part 1 of ?) * Best to use Regions + Last Name when searching for contacts to filter correct profiles. (Once profile has been selected, it will be highlighted in orange and will automatically be added to the table below). *If WS provides the Team name only, type it in the Advisors field. Then search for the team name in SF and add the names individually. * Make sure profiles added have Active status.

Employee	As specified. Skip if not provided.	***ADD ALL EMPLOYEES on the ADVISOR FIELD DO NOT ADD EMPLOYEES HERE AS PER POC INSTRUCTION (From 10/11/22 Email - Called in Hey DAN Notes and system resent all calendar invites) IMPORTANT: ------ FOR EXISTING ACTIVITIES ONLY Please refrain from adding additional employees to the activities. If consultants ask to do that – add them as contacts for the time being. ****** **If the meeting was with another Invesco employee, add their contact profiles in Contacts field and add corresponding program based on Invesco Employee's designation** ***CEO Coach - add program CEO Business Coaching** *** ETF Specialist - add program Specialist- ETF** ***Private Markets Specialist – add program Specialist – Private Markets** *** SMA Specialist – add Specialist – SMA** ***Model Consultants – add Specialist – Models** ***PM/CPM - add program PM Visit or CPM Visit**
Campaign	As specified. Skip if not provided.	*If the WS wants a campaign added to the activity, search for the corresponding campaign here. *If WS wants the contacts mentioned added to a campaign, send the names, campaign name and recording link to DM team.
All Day Event	Use All Day Event check box if WS mentions that it is an all day event	
Activity Type	Select as specified.	Defaults: Meeting for in-person meetings Webinar / Virtual for Zoom, Microsoft Team Meetings, etc. Telephone for phone calls

		**For Existing Activities, you can copy the Activity Type from the existing appointment or use the default.*
Activity Subtype	Select as specified.	Defaults: Meeting 1:1 for one contact Branch for 2 or more contacts under the same firm Cluster for 2 or more contacts from different firms Webinar / Virtual 1:1 for one contact Cluster for 2 or more contacts from same firm Seminar for 2 or more contact from different firms Telephone Outbound - Live for one contact Conference Call for 2 or more contacts **For Existing Activities, you can copy the Activity Subtype from the existing appointment or use the default.*
Subject	As specified or check WS Preference for default subject. If there's none, use Meeting, Phone Call or Virtual Meeting	*For Existing Activities, you can copy the Subject from the existing appointment or use the default. *Subject preference does not apply to existing activities unless otherwise specified
Text	Transcribe as dictated.	
Programs	* Select as specified. * If Program was not mentioned, go over the meeting notes and add accordingly. Check the WS Preference for DEFAULT programs **Do NOT FORGET to automatically add default programs if an EMPLOYEE was added to the activity (See employee field for default programs)	

Program Not Listed	Use if PROGRAM specified is not listed	
Record Type	Check WS Preference for correct Record Type	
Activity Status	As specified.	Default : COMPLETED
Activity Priority	Default: Normal	
AL Status	As specified or leave blank	
Meeting Location	As specified or check WS Preference. (This is different from the Location under Advisor fields)	
VA	As specified or leave blank if not provided	
Purpose		
Retirement Platform		
Tool		
Tool Subtype		
Outcome	If Investment Solutions - Models has been added as Program, add Outcome. If Outcome was not provided - select --None-- then send clarif	
Outcome Feedback	As specified or leave blank if not provided	
Opportunities		
Cases		
Financial Accounts		
Firms		
Count Cross-check	New = 2 All other Meeting Types = 1	