Invesco US_EXPENSE		
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	Expense	
Internal Comment	Type in any observation, clarification, instruction that could be useful for the person who will enter the note	
Special Instructions	Details of the Expense - Vendor name and other relevant information	
Date	As specified or use the appointment date if it is connected to an activity.	
Time	Skip	
Name	As specified or copy/paste contacts if it is connected to an activity	******No limit to the number of FAs that can be added for Expense items. If the expense item is tied to an activity and that activity has more than 50 contacts, copy the names from the other notes to the expense item.*** * 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).* * Make sure profiles added have **Active**

		status. * If profile is Inactive, you can still add the profile by clicking on it and add (last name)**; INACTIVE PROFILE** after the last name * Add employees on the Advisor Field
Expense Type	Select as specified.	DEFAULT: 09. Client/Advisor Entertainment
Expense Subtype	Select as specified.	DEFAULT: Client Meals
Text	Transcribe as dictated.	DEFAULT: Meeting
Amount	As specified or leave blank if not specified	