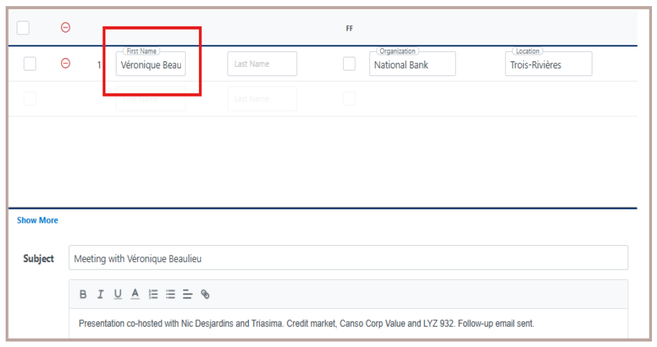
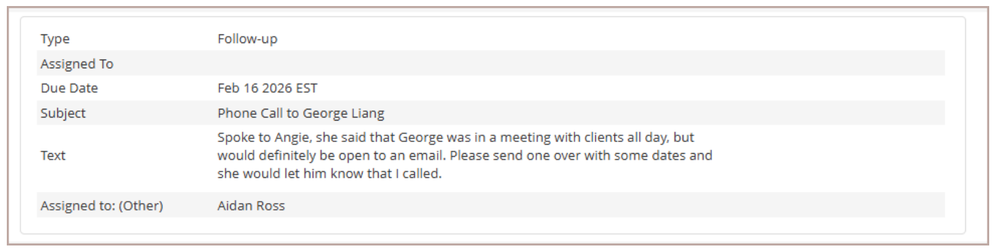
Type	• Normal-New – Default note type for recordings. • Normal-Existing – This is used for notes from recordings that have an existing placeholder in the CRM. • Normal-New (Handwritten) – This is the default note type for screenshots of handwritten notes. • Normal-Existing (Handwritten) – This is used for screenshots of handwritten notes that have an existing placeholder in the CRM. • Follow-up – For follow-up tasks creation. • CRM Modification – For profile creation/update.
Task Description	• Populate this field for activities submitted through the Hey DAN app such as recordings, images/pictures and texts. • For one FA, indicate the [FA Name] only. Example: Lea Seydoux • For two or more FAs, indicate [FA Name], et al. Example: Lea Seydoux, et al.
Date	Capture meeting date as specified by wholesaler. Otherwise, follow the current date.
Time	• Capture as specified. • No time assumptions. • If not specified and no existing placeholder in the CRM, leave blank but send clarification email. • If an existing placeholder is found in the CRM, no need to copy or adjust the time.
Reps	• Check the name in the CRM and copy. • Put the advisor's complete name in the **First Name** field to copy/paste names faster during CRM entry.
Organization	Capture as specified. Skip if none but place it in the Internal Comments.
Location	Capture as specified. Otherwise, leave blank.
Activity Type	**Appointment:** • Appointment - Meeting – the default activity type for face-to-face meetings. • Appointment - Video Call – the default for video conference calls, or WebEx, or Teams meeting • Appointment - Conference Call – select if specified. **Phone Call:** • Phone Call – Sales Call – select if specified. • Phone Call – Voicemail – select if specified. Default for email activities as well. • Phone Call – Update Call – select if specified. • Phone Call – Coordinator Call – select if specified.
Subject	*Copy the subject if an existing placeholder is found in the CRM. *If no existing placeholder found in the CRM, follow the defaults below: • Appointment - Meeting — Meeting with [Advisor Name] for one FA. • Appointment - Video Call — Teams/WebEx/Virtual Meeting with [Advisor Name/s] • Appointment - Conference Call — Phone Meeting with [Advisor Name] • Phone Call - Sales Call — Phone Call to [Advisor Name] • Phone Call - Voicemail — Voicemail to [Advisor Name] or Email to [Advisor Name] for email activities. • Phone Call - Update Call — Phone Call to [Advisor Name] • Phone Call - Coordinator Call — Meeting with [Advisor Name] *Note: • For two FAs, Meeting with/Phone Call to/Teams/WebEx [Advisor Name and Advisor Name] • For three or more FAs, Meeting with/Phone Call to/Teams/WebEx [Advisor Name and Others]
Text	• Clean, verbatim. • Follow-up task/ To-Dos should be in separate paragraph.
Call Quality	• Select 2 as default. • Capture if specified.
Regarding	• Always populated for both Appointment and Phone Call activities. • Populate with only one FA name. • If multiple notes or multiple attendees, select the first FA name.
Sales Campaign	**• Prospect Sales Call** **• No** — • Select **Prospect Sales Call** only if wholesaler specified or if mentioned in the notes as "Prospect". • If none, leave blank.



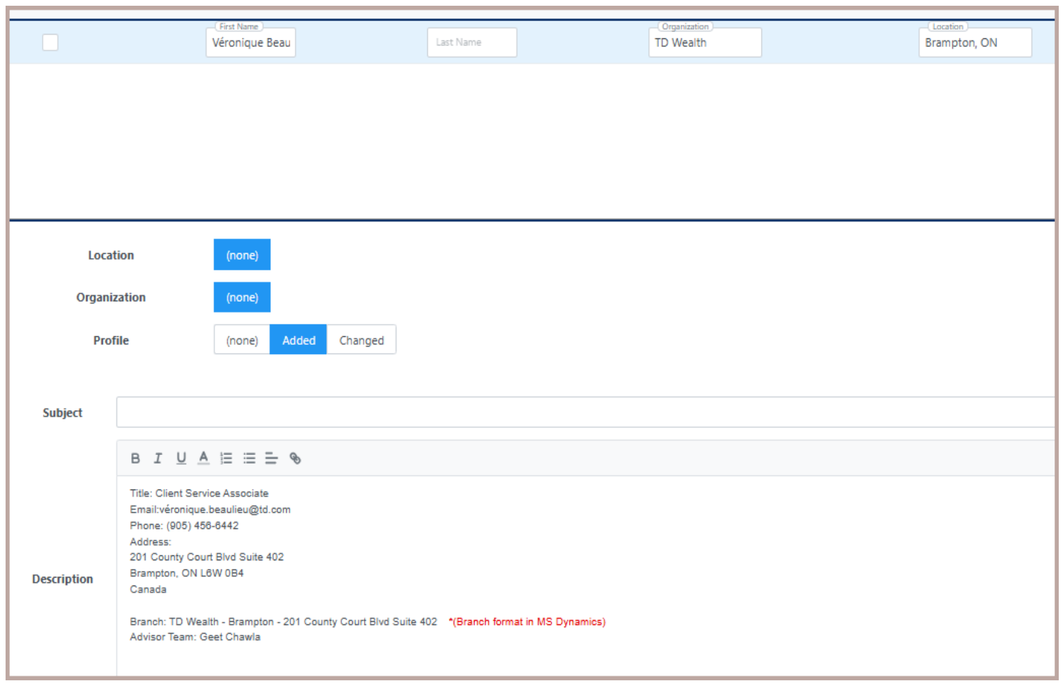
FOLLOW-UP TASK

Type	**Select Follow-up from the drop-down list.**
Subject	**• For existing activities, copy the subject found in CRM.** **• For new activities, copy the subject from the main note.**
Text	**• Clean, verbatim.** **• Copy the task provided in the main note.**
Due Date	**Next business day unless specified.**
Assigned To	**• Assign to Internal partner as default.** **• Capture as specified.**

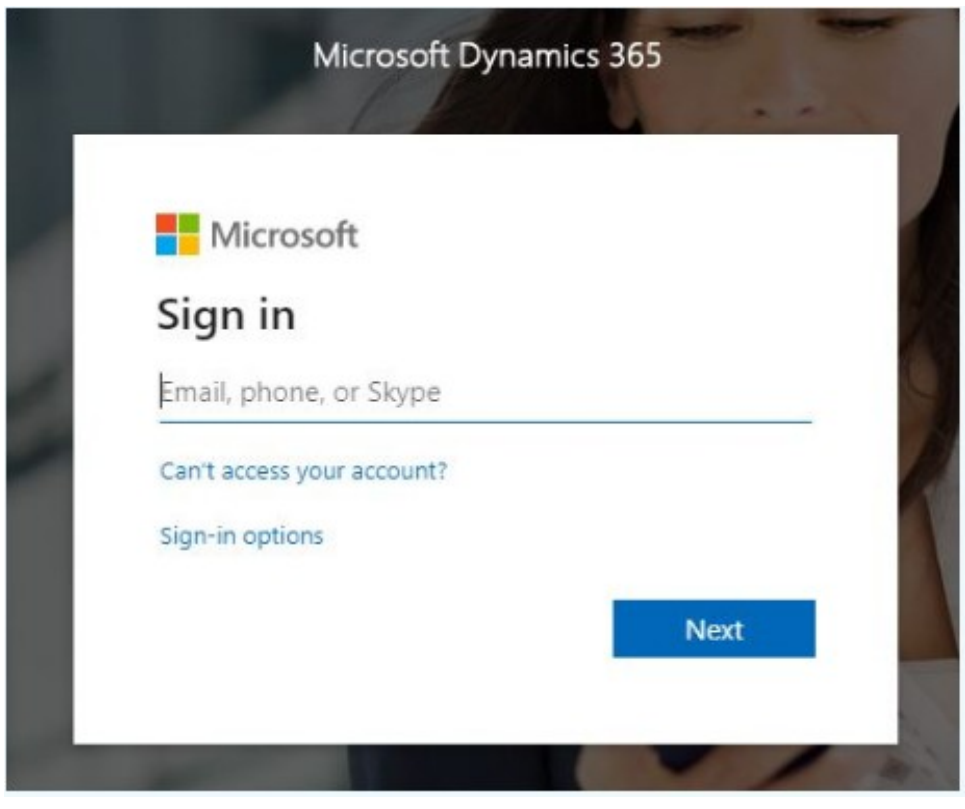


CRM MODIFICATION

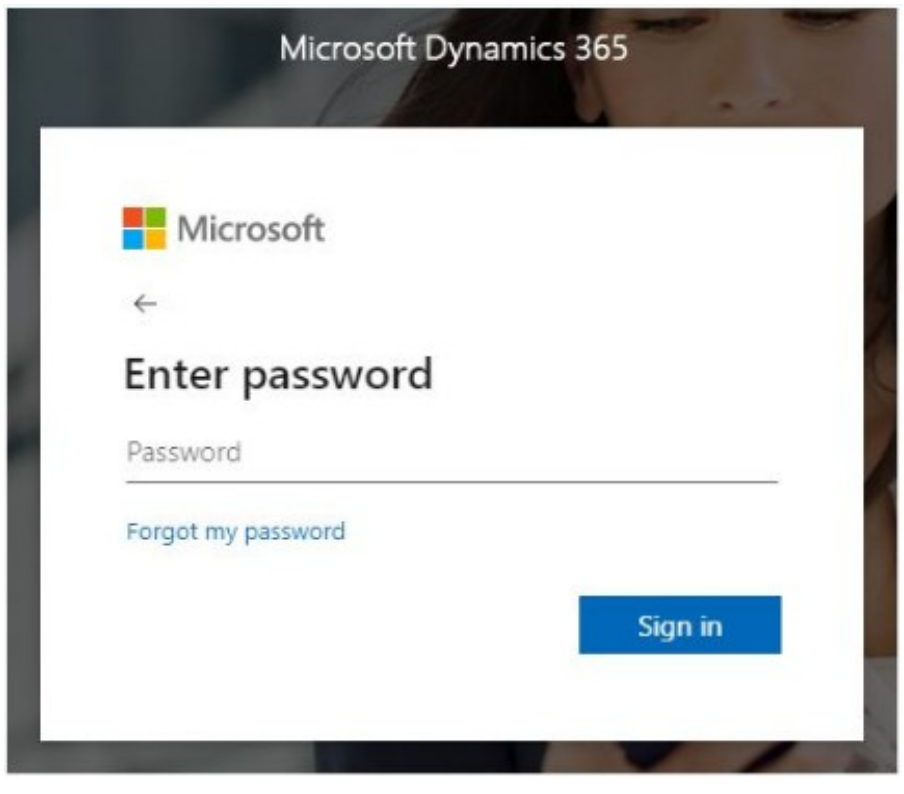
Type	**Select CRM Modification from the drop-down list.**
Profile	*Select the appropriate action when creating or changing **Profiles** in the CRM. • **Added** – used when you create/add a profile in SF. • **Changed** – utilized when updating infos in the profile.
Subject	**Skip**
Text	**Provide the following information:** • Title • Email • Phone • Address • Branch, if need to create one. Otherwise, copy from the their teammate's profile in MS Dynamics. • Advisor Team, if any. * For Michelle Drouin, we don't create the profiles. If unable to find the FA, send a clarification email to let her team know. Either Santo Certo or Gabriel Bourassa will create the profile on their end.



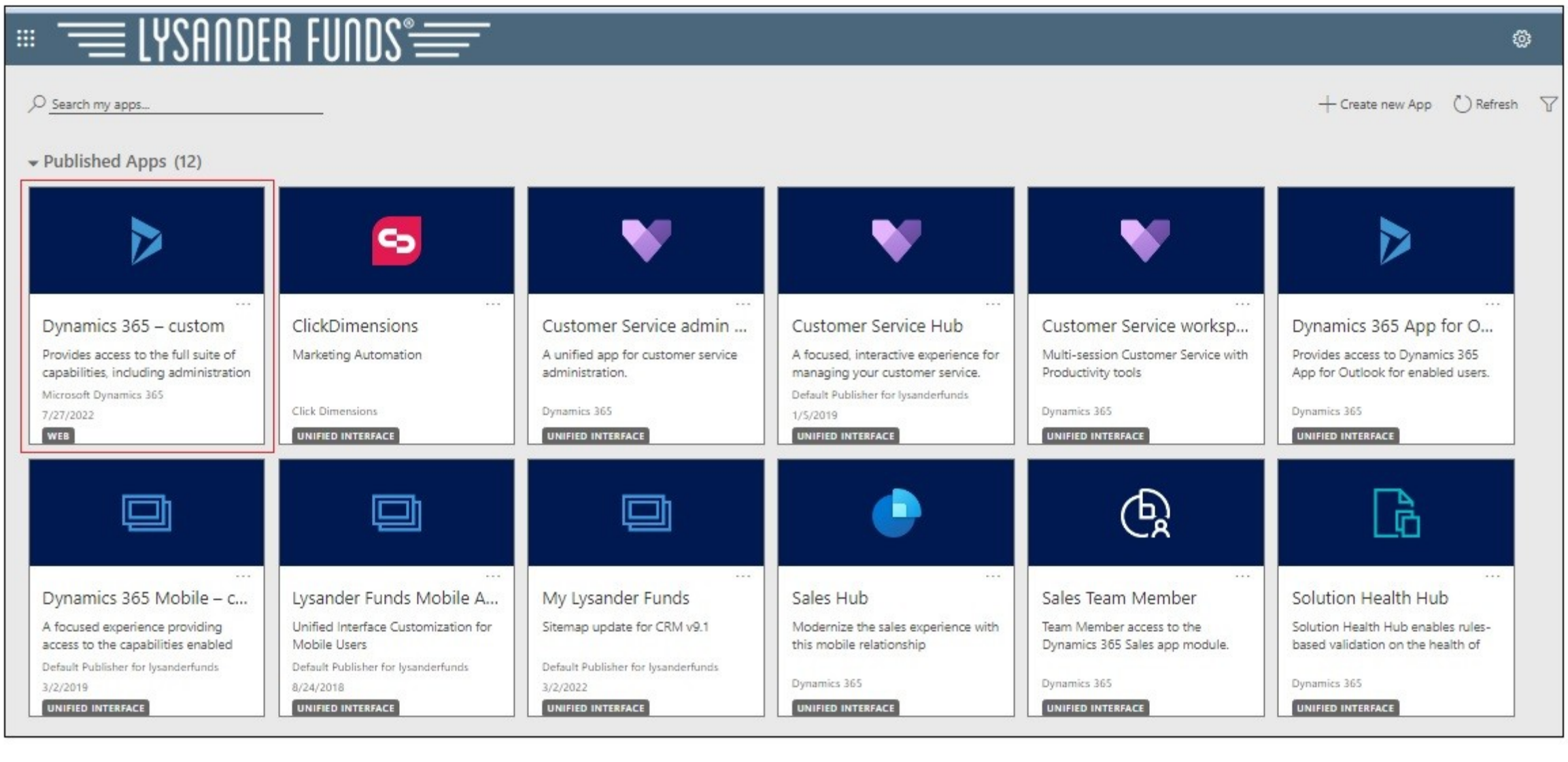
Will be directed to the Microsoft Dynamics 365 login page. Supply your username and click on **Next**.

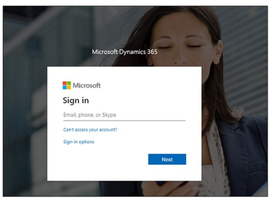


Supply your password and click on **Sign In**.



After successfully logging in, you will be redirected to this page. Under the Published Apps, select **Dynamics 365 – Custom**.

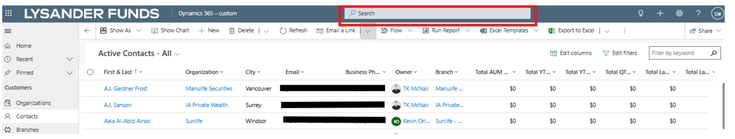




> When correct login details are provided, user will be directed to Lysander CRM home page. Click on the button beside **Workspace** and choose **Contacts**.

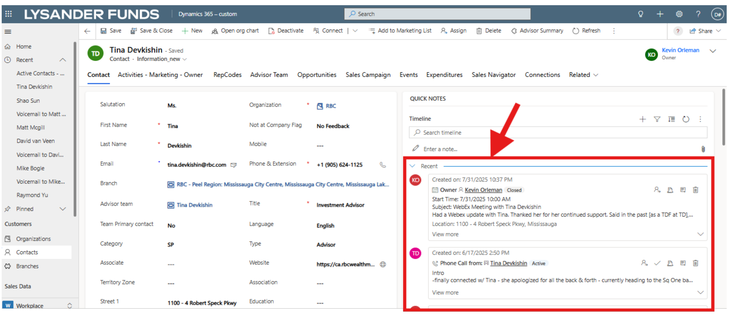


> On the **Search Box** type-in the contact name. From the results generated, click on the name to select.

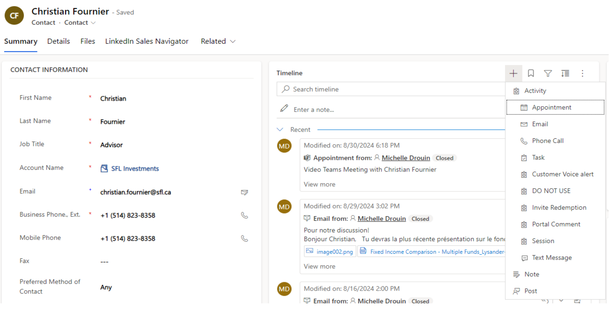


> In the contacts page, search for existing activities marked as **Active**.
> Click the **Open Record** icon to edit the activity and check if the date and time specified by the wholesaler are correct.

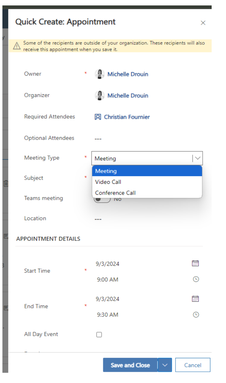


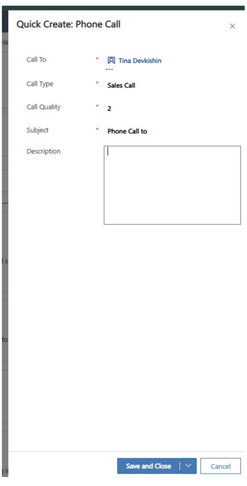


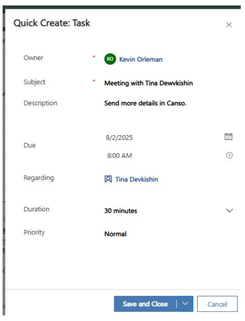
> If unable to find the existing activity with the date and time specified by the wholesaler, click (+) icon and choose **Appointment or Phone Call** to create a new note, or select **Task** to create follow-up tasks.



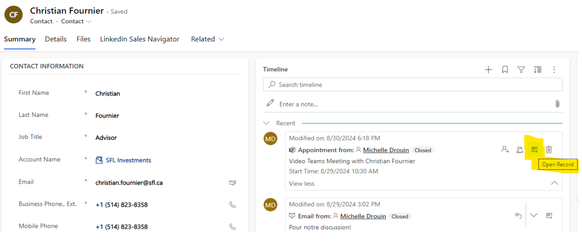
> After selecting Appointment/Phone Call, a **Quick Create** window will display.
> For Appointments, enter the meeting details such as Owner, Organizer, Meeting Type, Subject, Date and Time. Hit on **Save and Close**.
> For Phone calls, enter the meeting details such as Call Type, Call Quality, Subject, and Description. Hit on **Save and Close**.
> For Tasks, enter the meeting details such as Owner, Subject, Description, and Due Date. No need to revise the time, 8:00 AM is default. Hit on **Save and Close**.







After hitting Save and Close, the page will redirect to the profile main page. The created note should appear at the top of the activities panel as most recent.
Open the note by clicking on **Open Record**.



> Check if the meeting details entered are correct. Paste the meeting notes in the **Post Meeting Notes** box. Hit on **Save**.
> Don't forget to hit **Mark Complete**.

