Note Type	Normal – New or Normal – Existing
Task Description	**Only for notes from the App* *If recording only has one meeting:* *FA Name – Firm* *Group Name – Firm* *If recording has several meetings:* *Coverage Date of activity.*
Special Instructions	Any instructions or notes from the wholesaler to DAN
Internal Comments	Use as needed. ****For Hey DAN purposes, put CSID: [CSID of FA in SF) ****
Date & Time	Capture as dictated. Default is DOR when not provided. Check Preferences.
Contacts	***Use First Name field only. Capture as dictated. If with CRM access, use the name provided in SF.* ***Last Name field for nickname or name otherwise listed in the CRM – for reference purposes – enclosed in parentheses.* *[None Provided] if not specified*
CRD	Not required. Can input for reference from FINRA.
Account Name (B/D)	Capture as dictated. Leave blank if not specified. Can input for reference from FINRA/SF
Location	Capture as dictated. *State abbrev if only state is dictated. *City, ST if both provided. *If only city is provided, provide the state abbrev as well. *** As per Incapital manual version 2020***
1 on 1	**Tick for meetings with more than 1 attendee when the wholesaler mentioned that they are individual meetings/have the same note or when they did not specify it as a group meeting. **Choose appropriate Sub-type based on number of attendees.**
Group	**Tick for meetings with more than 1 attendee when WS specifies meeting is to be logged as a group activity.
Event Type	Default is Meeting: **During COVID, activities conducted virtually are considered in-person. So, conference calls, webinars, Zoom meetings, etc., use Meeting as event type NOT Call.
Subject	As specified or use the default – SP Meeting SP Breakfast Meeting /SP Lunch Meeting or based on note context.
Text	Clean verbatim. Use the word bank for new terms. *First sentence when not the generic kind like, "had a meeting…, met with…" are included in the notes. Ex. Had a brief meeting with …… Include "no follow-up notations" such as No follow-up needed. ****Include the follow-up note in the main note separated by a space.**** Donec rutrum diam non augue eleifend, ac imperdiet massa hendrerit. Suspendisse venenatis, est ac sagittis commodo, dolor dui venenatis nisl…… Follow-up for [Internal Name]: …… (Use the Follow-up tick box to create the follow-up note. See below for follow-up note specifics.)
Asset Class	Structured Products (default)
Meeting Sub-Type	During COVID, all interactions are considered in-person. Choose only: Face-to-Face (1-4) Group (5-24) Conference (25+) Digital Meeting (Tick when specifically dictated by WS)
Purpose	Leave blank if **none** MLP Rate ETF Private Credit Annuities
Joint Meeting (as appropriate)	Marone/Maltby Coates/Reed
Referral Source	Related to a campaign
SIMON	As requested by WS. Tick when applicable. SIMON education or training happened.
For Blank Recordings/Pocket Dials	Internal Comments: Blank recording/Pocket Dial (copy paste duration here) First Name Field: [Blank Recording] / [Pocket Dial]

Note Type	Follow-up
Event Type	Call Email *Call takes precedence if the follow-up has both call and email as task.
Assigned To	Internal name *** If follow-up is not for internal, leave blank.
Due Date	Next working day or as otherwise specified.
1 on 1	**Tick for ff-ups with more than 1 rep wherein the wholesaler mentioned that they are to be logged as 1-1s
Subject	SP Follow-up
Comments	Copy-paste follow-up note only. Use POV of whoever the follow-up is assigned to or address it to whoever will be reading the follow-up note. Remove day reference and change to actual date.
Assign to Other	For follow-ups other than Internal (select from drop down)
Referral Source	If follow-up is related to a campaign – when ticked in the main note, no need to tick in the follow-up note.
SIMON	Tick when requested in the follow-up notes.

Note Type	Tasks
	**Used for logging "sent emails" or "left voicemail" activities **This note will also allow you to log multiple 1-1 follow-ups.
Date & Time	Actvity date or follow-up due date
Contacts	***Use First Name field only. Capture as dictated. If with CRM access, use the name provided in SF.* ***Last Name field for nickname or name otherwise listed in the CRM – for reference purposes – enclosed in parentheses.* *[None Provided] if not specified*
1 on 1	**Tick for activities with more than 1 rep wherein the wholesaler mentioned that they are to be logged as 1-1s
Event Type	Meeting (not used) Call Email *Call takes precedence if the follow-up has both call and email as task.
Subject	Sent Email Left Voicemail SP Follow-up
Text	**Clean verbatim. **For multiple, 1-1 ff-ups: Copy-paste follow-up note only. Use POV of whoever the follow-up is assigned to or address it to whoever will be reading the follow-up note. Remove day reference and change to actual date.
Assign to Other	For follow-ups other than Internal (select from drop down)
Referral Source	If follow-up is related to a campaign – when ticked in the main note, no need to tick in the follow-up note.
SIMON	Tick when requested in the follow-up notes.