Recording a Missed Appointment [1]

February 16, 2023 by jennifer.mortensen [2]

Once a lead schedules an appointment with an enrollment navigator, we hope that the recruitment process will proceed as planned. However, not all leads are able to attend the appointments they schedule. If you notice a lead who missed an appointment and want to ensure they aren't forgotten, follow the steps below to capture the missed appointment in Salesforce.

View All No Shows

After you begin recording you appointment no shows, it's easy to view them in the Salesforce report Prospects with Missed Appointments [3]. If you are able to successfully meet with a lead, be sure to update the Recruitment Status field accordingly so the data in the report remains accurate.

1. Navigate to the **contact record** of the lead who missed the appointment.

2. Scroll to the **Personal Details** section of the contact record.

Contact
Jennifer Mortensen

Details

∨ Personal Details

Contact Owner
🐻 Jennifer Mortensen

Name
Jennifer Mortensen

Preferred First Name
Jennifer

Pronouns
She/Her/Hers

Campaign Email

Has Bachelors
Yes

Recruitment Status

Navigator Comments

Student Success Notes

Military Service
☐

Deceased ⓘ
☐

3. Select the **pencil icon** to the right of the **Recruitment Status** field. From the drop down menu that appears, select **No Show Meeting**.

4. Click **Save**.

Related Content

- [Viewing All Missed Appointments](https://www.cu.edu/blog/integrated-online-services/viewing-all-missed-appointments) [4]

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Recording a Missed Appointment
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