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Recording a Missed Appointment [1]



February 16, 2023 by jennifer.mortensen [2]

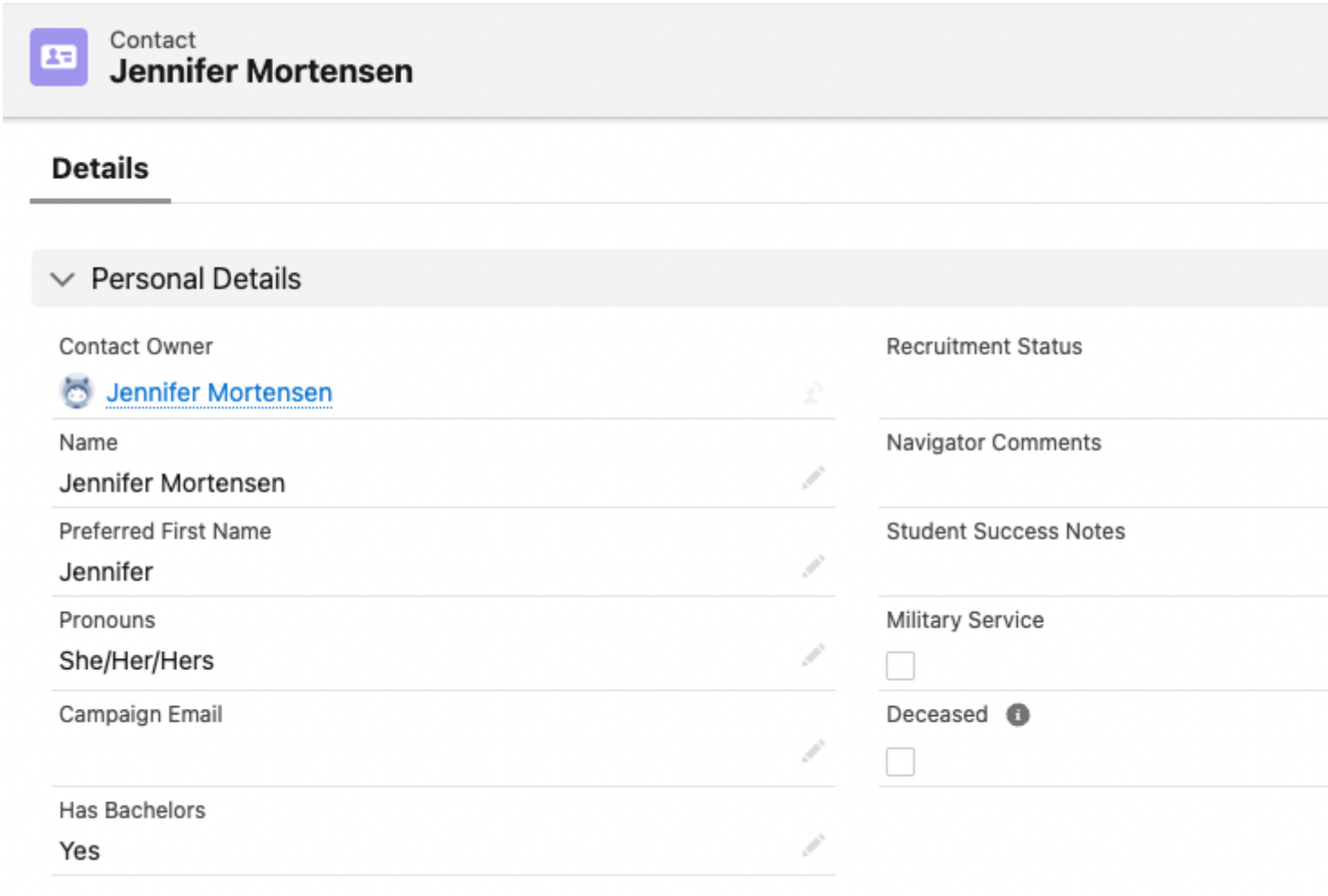
Once a lead schedules an appointment with an enrollment navigator, we hope that the recruitment process will proceed as planned. However, not all leads are able to attend the appointments they schedule. If you notice a lead who missed an appointment and want to ensure they aren't forgotten, follow the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

View All No Shows

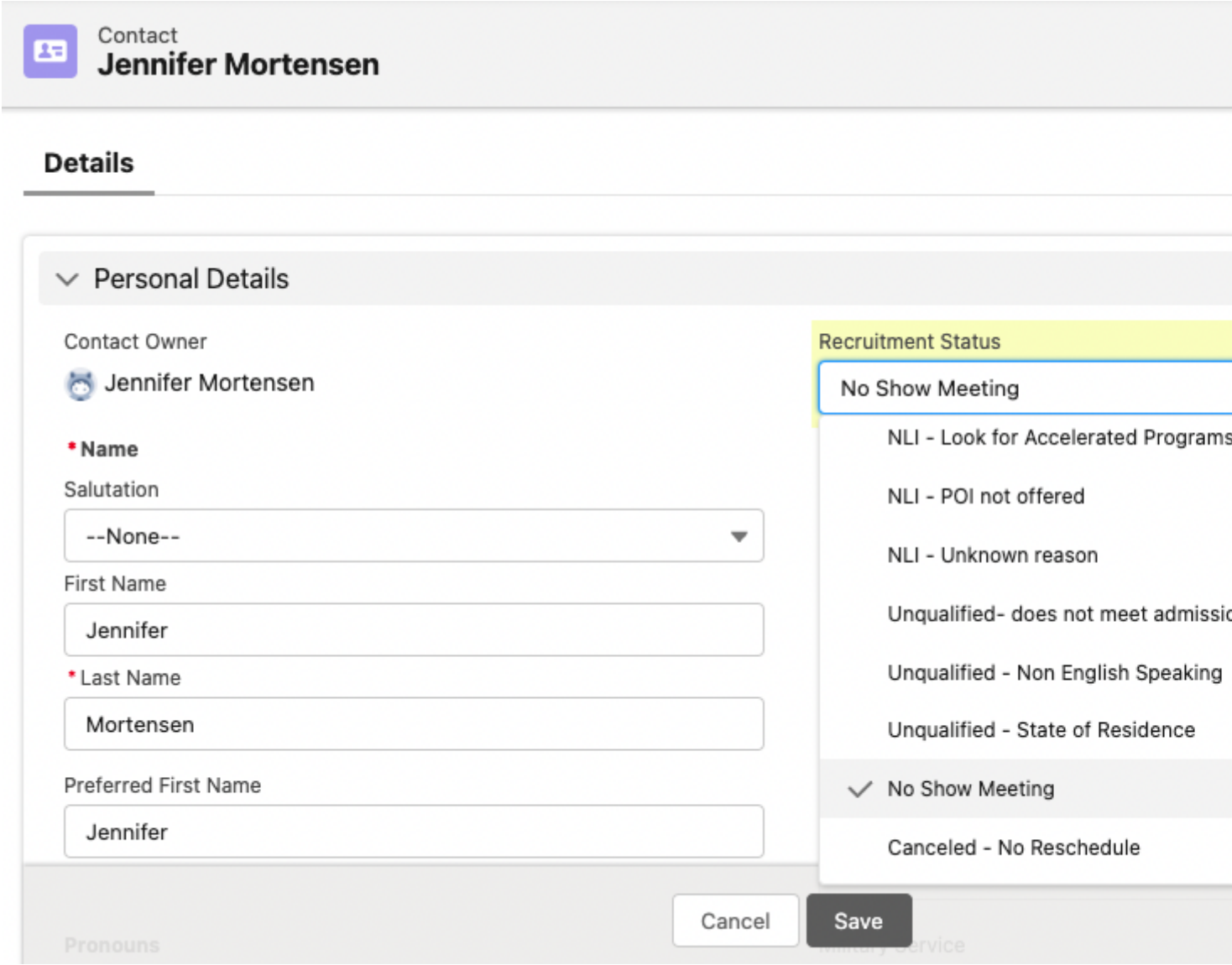
After you begin recording you appointment no shows, it's easy to view them in the Salesforce report Prospects with Missed Appointments [3]. If you are able to successfully meet with a lead, be sure to update the Recruitment Status field accordingly so the data in the report remains accurate.

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

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



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 [4]

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