How to Handle Canceled Appointments

TOOLS:
NOTE CATEGORY
NOTES
ACTIVITIES
REPORTS

Observation: It happens too often; your office takes the time to schedule a client appointment just to have them cancel or not show up. Rather than deleting the activity or adjusting the activity for the new or rescheduled meeting, we recommend tracking those cancellations. By using a cancellation process, offices can see where the issues may be coming from. Is it your process or do you have a few frequent offenders?

Directions:

1. Create a note category for "Canceled/ No Show". Consider adding multiple Categories based on what will be reported on. "Canceled", "Rescheduled", "No Show", vs. "Canceled/ No Show".
   MANAGE YOUR ACCOUNT > MANAGE DATABASE LISTS > NOTE AND ACTIVITY CATEGORIES > ADD
2. When a meeting is Canceled, open the Activity and add a Linked Note.
   ACTIVITY > LINKED NOTES > ADD
3. Save and Clone the Activity.
   ORIGINAL ACTIVITY > SAVE AND CLONE
4. Change the Category in the cloned Activity to "Canceled/ No Show". Save and Complete the Activity. This will retain the original appointment time and record that it was Canceled. The CRM will redirect back to the original Activity.
   CLONED ACTIVITY > EDIT CATEGORY > SAVE AND COMPLETE
5. Adjust the Subject and select "All Day" in the original Activity to indicate if it needs to be rescheduled, or edit to move to the newly rescheduled time.
   ORIGINAL ACTIVITY > EDIT
6. Report on Canceled or rescheduled activities throughout the month, quarter, or year.
   REPORTS > ACTIVITY REPORTS > ACTIVITIES BY CONTACT

Result: When an activity is rescheduled or Canceled, it is important to maintain the original activity so there is a full history and any linked workflows are not disconnected. Reporting on Canceled activities can also be used to see who the biggest offenders are or help an office determine if their scheduling process leads to more cancellations.

Helpdesk Link: *http://bit.ly/howtoRTU*