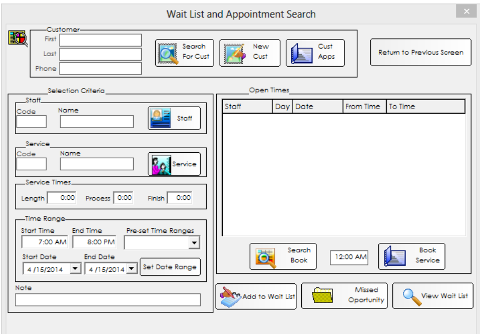
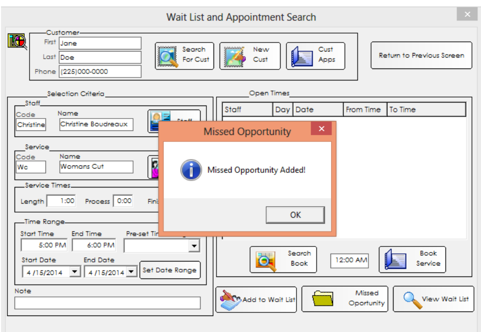
Missed Opportunities

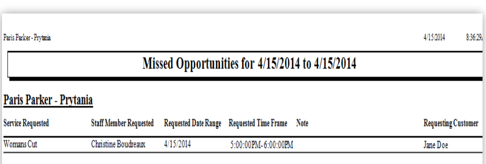
Use this guide to familiarize yourself with the new feature in the Wait List that allows you to track and report missed opportunities for appointments.





Logging a Missed Opportunity

1. Launch the Wait List by using the F5 hot key, or clicking the Wait List button on the Appointment Book.
2. Enter the following information:
   - Customer Name
   - Requested Staff (if applicable)
   - Requested Service
   - Requested Date and Time Range
   - Notes (if applicable)
3. Click the Search Book button if you wish to double check for openings.
4. If you wish to add the customer to the Wait List for the requested appointment, click the Add to Wait List button.
   - This will also add the information to the database so that it can later be pulled on the Missed Opportunities report.
5. If the customer does not wish to be added to the Wait List, you can still choose to log the missed opportunity by clicking the Missed Opportunity button. You will be alerted with a pop up stating that it was added.



Paris Parker - Prytania 4/15/2014

Missed Opportunities for 4/15/2014 to 4/15/2014

Paris Parker - Prytania

Service Requested	Staff Member Requested	Requested Date Range	Requested Time Frame	Note	Requesting Customer
Womans Cut	Christine Boudreaux	4/15/2014	5:00:00PM-6:00:00PM		Jane Doe

Viewing the Missed Opportunities Report

1. From the SalonBiz®/SpaBiz® menu bar, click on the Reports icon.
2. Expand the Management category.
3. Either double-click the Missed Opportunities report, or single click and click the Run Report button.
4. Input your desired date range, and click OK.
5. The report fields are:
   - Service Requested
   - Staff Member Requested
   - Request Date Range
   - Requested Time Frame
   - Note
   - Requesting Customer