

Using Advanced filter options

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Advanced filter options allow you to filter activities according to specific parameters. In this article, you'll learn about using Advanced filter options.

Using Advanced filter options

To view the list of parameters, click the filter box at the top of the Activity stream (Figure 1).

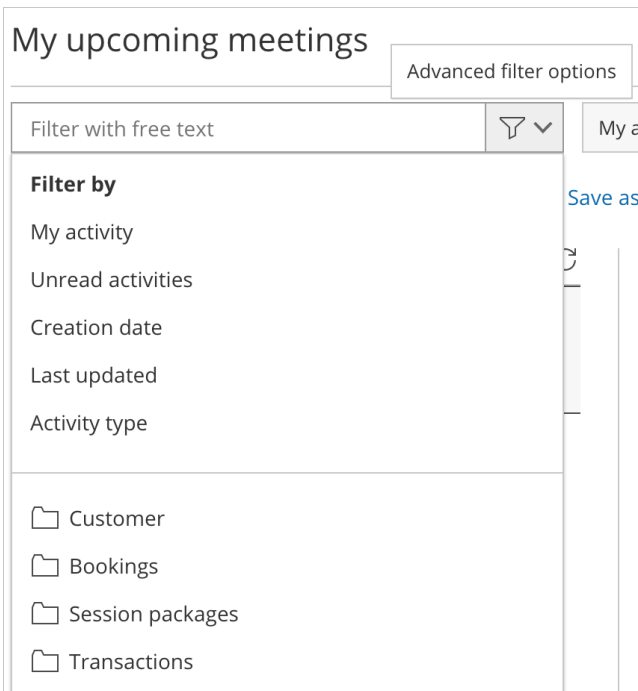


Figure 1: Advanced filter options box

You'll be presented with a list of available filters to choose from including **My activity**, **Unread activities**, **Creation date**, **Last updated**, and **Activity type**. You can also access additional filter options by selecting **Bookings**, **Session packages**, or **Transactions**. Once you have selected a parameter to filter by, you can refine your results by selecting additional filters. You can also save a combination of filters if you want to reuse it. This can be useful when only certain activities are relevant to you. [Learn more about creating Custom filters](#)

Tip:

You can share filters between members of your organization. [Learn how to send a filter to another User](#)

Advanced filter options list

The following filters allow you to filter through all activities in the Activity stream.

Filter name	Description
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Free text filter Filter the Activity stream based on any information you type in.

My activity Filter the Activity stream to show all bookings for which you are the Owner, Editor, or Additional team member.

Unread activities Filter the Activity stream to show unread activities for Bookings, Session packages, and Transactions.

Creation date

- Today: search all activities created today.
- Last 3 days: search all activities created in the last 3 days from today's date and time.
- Last week: search all activities created in the last 7 days from today's date and time.
- Past dates: search all activities created in the past from today's date and time.
- Last month: search all activities created in the previous month from today's current month.
- Specific dates: search for activities created in the date range you have selected.

Last updated date

- Today: search all activities updated today.
- Last 3 days: search all activities updated in the last 3 days from today's date and time.
- Last week: search all activities updated in the last 7 days from today's date and time.
- Last month: search all activities updated in the previous month from today's current month.
- Past dates: search all activities updated in the past from today's date and time.
- Specific dates: search for activities updated in the date range you have selected.

Activity type Filter the Activity stream to show Bookings, [Session packages](#), or Transactions.

Customer filters

Customer filters name	Description
Customer name	Filter bookings by Customer name
Customer email	Filter bookings by Customer email
Customer company	Filter bookings by Customer company

Bookings filters

The following filters allow you to filter the Activity stream for bookings only.

Description

Bookings filter name	
Meeting time	<ul style="list-style-type: none"> • Today: search all activities created today. • Next 3 days: search all activities created in the next 3 days from today's date and time. • Next week: search all activities created in the next 7 days from today's date and time. • This month: search all activities created in the current month. • Future dates: search all activities created in the future from today's date and time. • Specific dates: search for activities scheduled or rescheduled in the date range you have selected.
Booking status	Filter bookings to show Requested, Scheduled, Rescheduled, Canceled, No-show, or Completed activities.
Detailed booking status	Filter bookings to show Requested (By Customer), Requested (Initiated by User), Scheduled (Approved by User), Scheduled (By Customer), Scheduled (Reassigned by User), Rescheduled (Approved by User), Rescheduled (By Customer), Rescheduled (Initiated by User), Rescheduled (Reassigned by User), Canceled (New times requested by User), Canceled (By Customer), Canceled (By User), Canceled (Reschedule requested by User), No-show (Set by User), or Completed (Set by System) activities.
Event type name	Filter bookings by Event type name. If you update the Event type name, it will be reflected in the filter and in the Activity stream.
Booking page name	Filter bookings by Booking page name. If you update the Booking page name, it will be reflected in the filter and in the Activity stream.
Master page name	Filter bookings by Master page name. If you update the Master page name, it will be reflected in the filter and in the Activity stream.
Booking page Owner	Filter bookings by Booking page Owner name. If you update the Booking page Owner, it will be reflected in the filter and in the Activity stream.

Session packages filters

The following filters allow you to filter the Activity stream for Session packages only.

Session packages filter name	Description
Session package status	Filter Session packages to show created, updated, or completed activities.
Event type name	Filter bookings by Event type name. If you update the Event type name, it will be reflected in the filter and in the Activity stream.

Booking page name	Filter bookings by Booking page name. If you update the Booking page name, it will be reflected in the filter and in the Activity stream.
Master page name	Filter bookings by Master page name. If you update the Master page name, it will be reflected in the filter and in the Activity stream.
Booking page Owner	Filter bookings by Booking page Owner name. If you change the Booking page Owner, it will be reflected in the filter and in the Activity stream.

Transactions filters

The following filters allow you to filter the Activity stream for payment transactions only.

Transactions filter name	Description
Refund transaction date	<ul style="list-style-type: none"> • Today: search all transactions refunded today. • Last 3 days: search all transactions refunded in the last 3 days from today's date and time. • Last week: search all transactions refunded in the last 7 days from today's date and time. • Last month: search all transactions refunded in the previous month from today's current month. • Past dates: search all transactions refunded in the past from today's date and time. • Specific dates: search all transactions refunded in the date range you have selected.
Payment transaction date	<ul style="list-style-type: none"> • Today: search all transactions paid today. • Last 3 days: search all transactions paid in the last 3 days from today's date and time. • Last week: search all transactions paid in the last 7 days from today's date and time. • Last month: search all transactions paid in the previous month from today's current month. • Past dates: search all transactions paid in the past from today's date and time. • Specific dates: search all transactions paid in the date range you have selected.
Transaction status	Filter bookings to show Paid, Refunded, Refund pending, Refund failed, or Pending activities.
Transaction type	Filter bookings to show PAYMENT (SCHEDULE), PAYMENT (RESCHEDULE), PAYMENT PENDING (SCHEDULE), AUTOMATIC REFUND (CANCELLATION), AUTOMATIC REFUND PENDING (CANCELLATION), MANUAL REFUND VIA SCHEDULEONCE, or MANUAL REFUND VIA PAYPAL.