

The Activity stream: Viewing activities

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The Activity stream is the central hub where you can manage all of your chat, booking, and payment activities. The Activity stream provides advanced filtering options to give you quick access to the information you require.

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Introduction to the Activity stream

When you view a specific activity, you'll be able to view related activities, such as payments, rescheduled bookings, and cancellations. You can also perform actions such as refunding a payment or requesting to reschedule. You will have full insight into your organization's bookings and be able to manage all activities easily in one place.

The screenshot displays the 'Stream' interface with 10 activities. The 'List' pane shows activities with their status (Canceled, Rescheduled, Completed, Scheduled) and dates. The 'Details' pane for the selected 'Product Management Meeting' shows its status as 'Completed (Set by System)', the booking owner as 'John Smith', and the booking page time as 'Thu, Oct 11, 2018, 10:15 AM - 10:30 AM'.

Name	Email	Status	Date/Time
Harry Baker	emailaddress23239@example.com	Canceled	Tue, Oct 30, 2018, 09:45 AM - 10:00 AM
Henry Noah	emailaddress23239@example.com	Rescheduled	Wed, Oct 24, 2018, 12:45 PM - 01:00 PM
Henry Noah	emailaddress23239@example.com	Rescheduled	Wed, Oct 24, 2018, 12:45 PM - 01:00 PM
Harry Baker	emailaddress23239@example.com	Completed	Thu, Oct 11, 2018, 10:15 AM - 10:30 AM
Joan Jet	emailaddress23239@example.com	Scheduled	Tue, Oct 23, 2018, 10:00 AM - 11:00 AM

Figure 1: The Activity stream

Activity stream features

By default, the Activity stream shows your upcoming activities. The list of activities is organized based on your profile's time zone. You can adjust the filter to view all activities or search by another method.

The Activity stream lists all the activities that you have access to. You'll see all the Bookings for which you are the Booking owner, reassigned Booking owner, Editor, or Viewer. Learn more about Booking page access permissions

The Details pane of each activity allows you to access additional information about the activity, such as activity status, Session package status, and Payment transaction status. You can also perform specific actions, such as Cancel/request reschedule.

Filter options in the Activity stream

To find information in your Activity stream, you have four main options: Default filters, the Free text filter, Advanced filter options, and Custom filters.

Default filters

OnceHub provides Default filters for **My upcoming meetings**, **My booking requests**, **My activity**, and **All activity**. These filters can be found in the left sidebar of the **Activity** page (Figure 2).

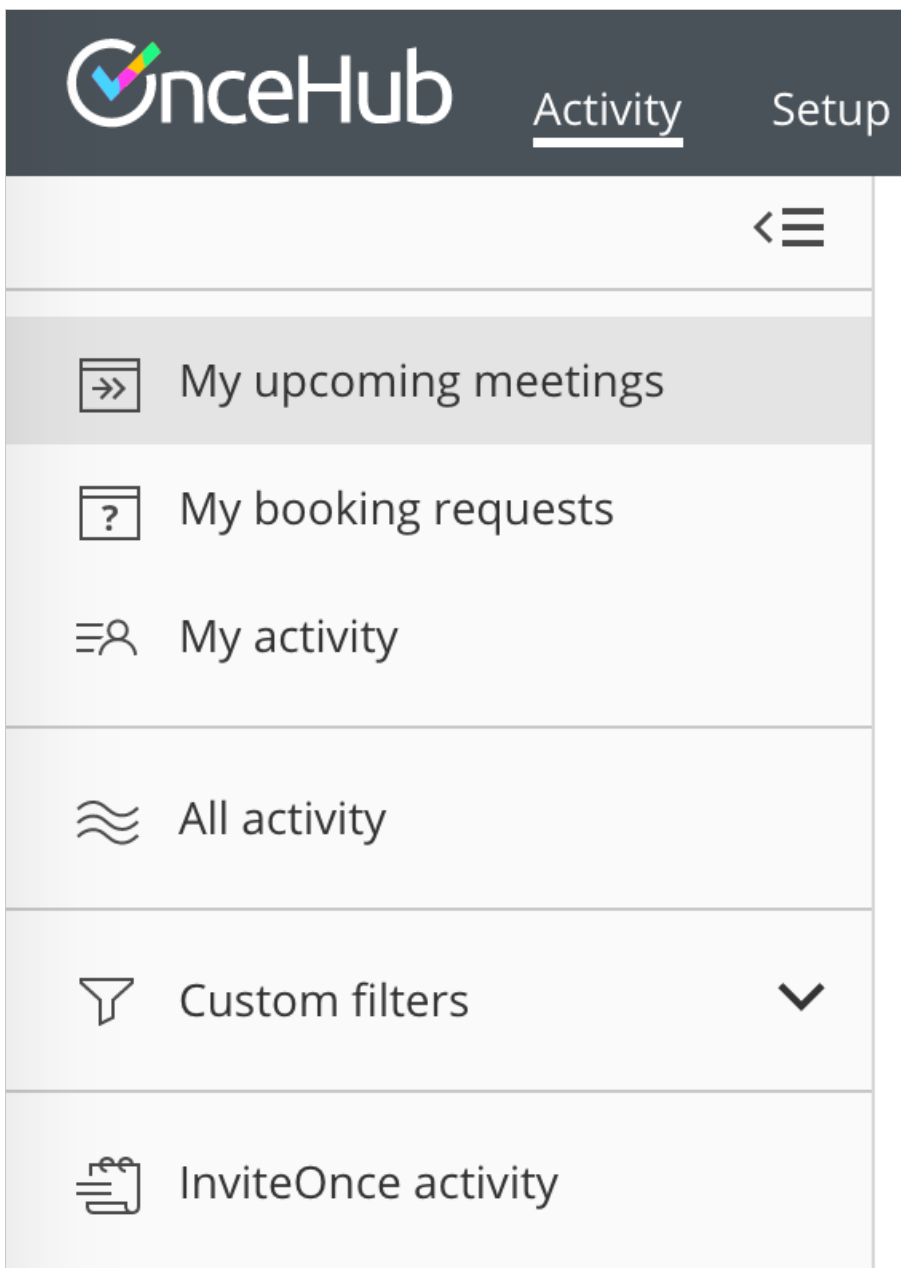


Figure 2: Default filters in the left sidebar

The Free text filter

The Free text filter allows you to find activities by typing in any information included in the activity details (Figure 3). For example, you could search by a Customer's name, a Customer's email address, or an Activity ID.

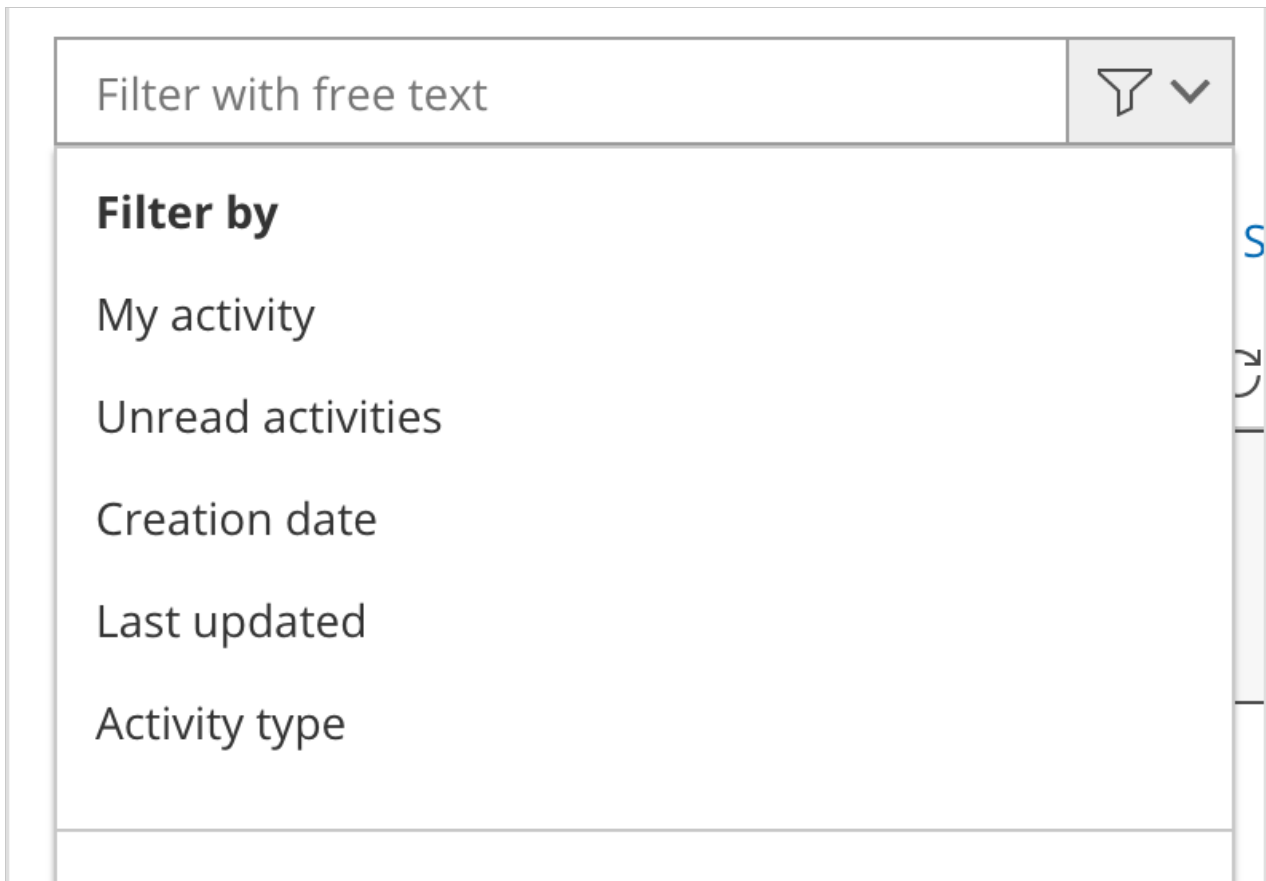


Figure 3: The Free text filter

Advanced filter options

Advanced filter options allow you to filter according to specific parameters (Figure 4). The list of parameters appears when you click the drop-down arrow next to the Free text filter box.

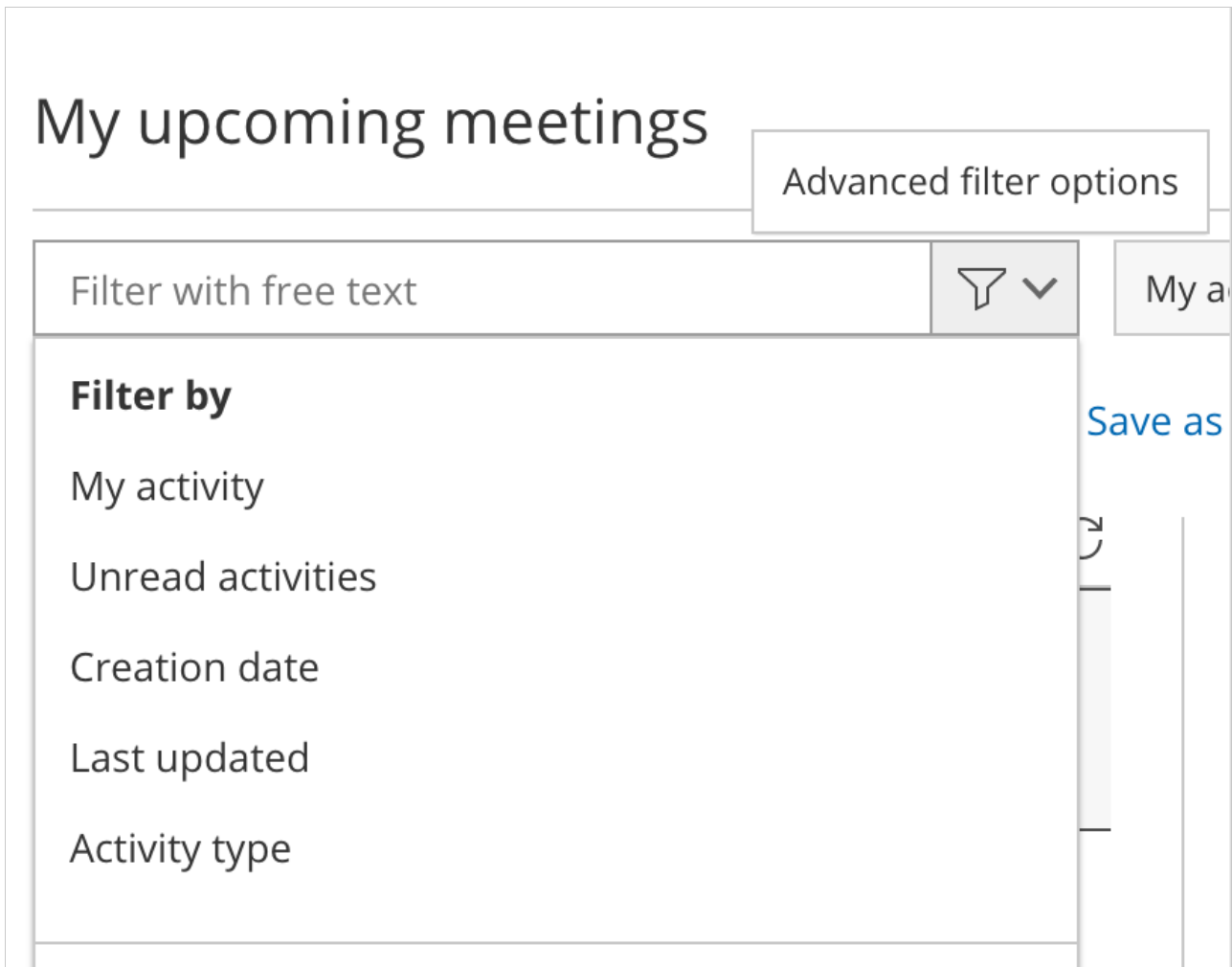


Figure 4: Advanced filter options

Custom filters

Custom filters allow you to create and save a selection of filters for quick and convenient access (Figure 5).

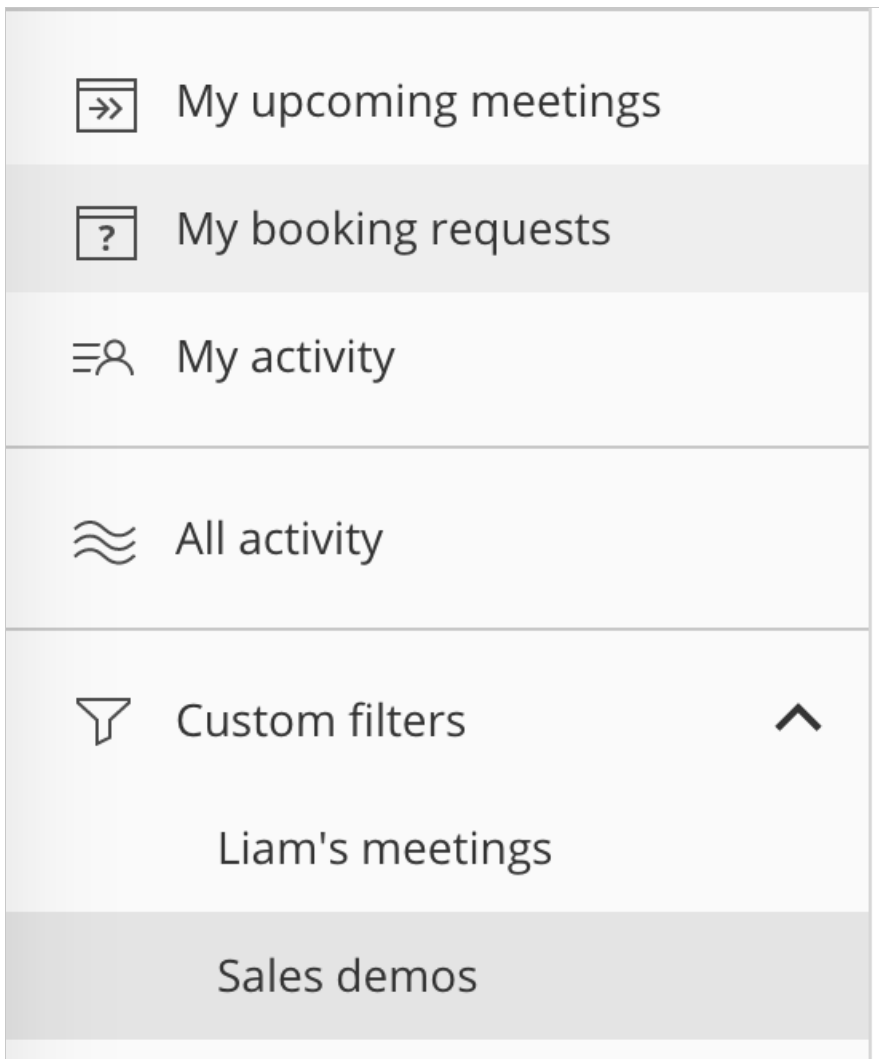


Figure 5: Accessing your Custom filters

Exporting reports from the Activity stream

You can export the activities you're viewing by clicking on **Export** and selecting to export a CSV or Excel file.

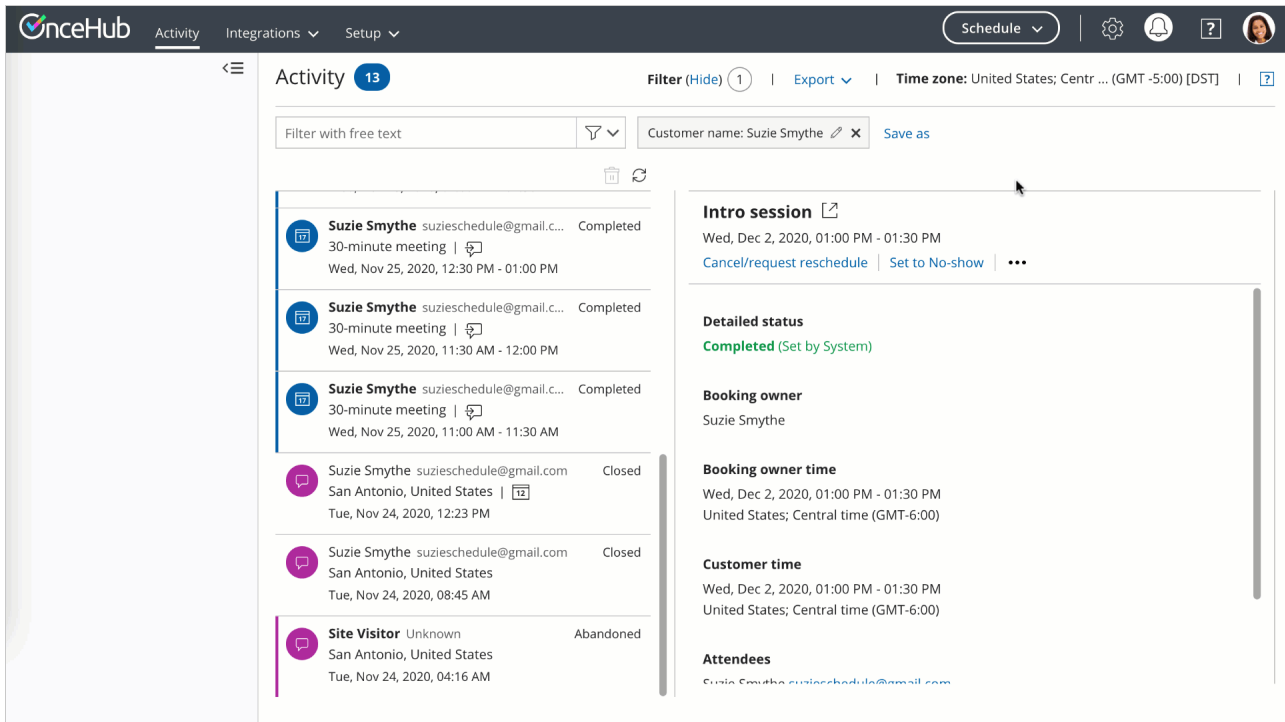


Figure 6: Export activity stream report

Booking pages with and without Event types

Booking pages **with** Event types

If the Booking page is linked to Event types, you have the following options:

- Cancel the booking and send a reschedule request for the **same** Event type.
- Cancel the booking and send a reschedule request for **any** Event type.
- Cancel the booking.

Booking pages **without** Event types

If the Booking page is not linked to any Event types, you have the following options:

- Cancel the booking and request reschedule.
- Cancel the booking.

Issuing a refund

If you're using our payment integration, you can choose to issue a manual refund when you cancel a booking or request a reschedule for any bookings made using an Event type. You can issue manual refunds directly from the Activity stream.

To issue a refund via OnceHub, you must meet the following requirements:

- Be the Owner or the Editor of the activity.
- Have the permission to refund via OnceHub.
- Enable the manual processing of refunds via OnceHub.

To issue a refund, follow these steps:

1. Click on the Transaction from your Activity stream (Figure 4).

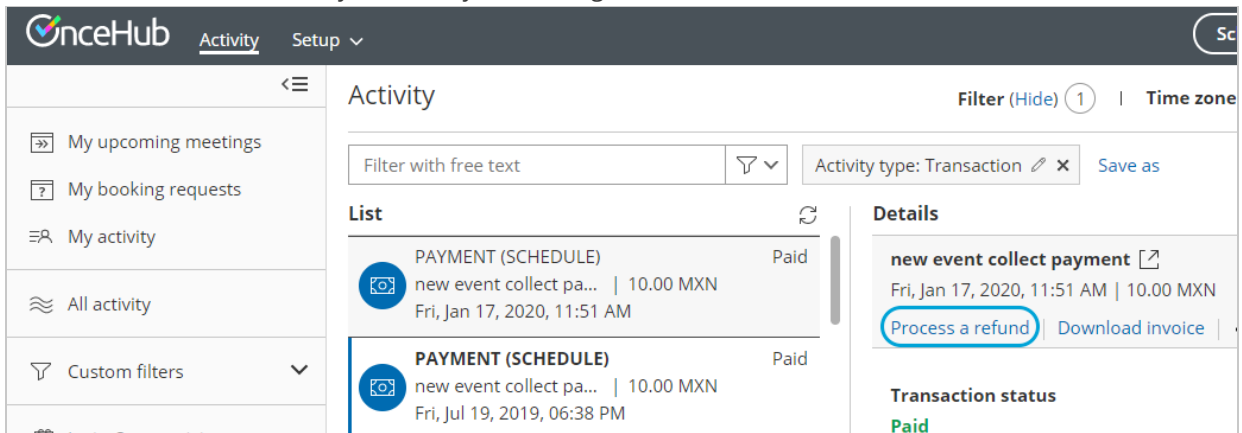


Figure 4: Issuing a manual refund

2. In the **Details** pane, click **Process a refund**.
3. Then, enter the amount to refund and click **Refund**.

Reassigning a booking

Booking reassignment lets you reassign bookings from one Team member to another. This is useful if a Team member is sick, or if a different Team member is better able to serve a specific customer.

Booking reassignment from one User to another is available to Users who are both connected to Google Calendar, or Users who are both not connected to any calendar.

Note:

You can only reassign bookings between Users with **similar calendar configurations**. For example, you can reassign a booking from a User connected to Google Calendar to another User who is also connected to Google Calendar.

You cannot reassign a booking from a User who is **not connected** to any calendar to a User who **is connected** to Google Calendar, and vice versa.

To reassign a booking, follow the steps below.

1. Select the activity in the Activity stream.
2. In the **Details** pane, select **Reassign the booking** (Figure 5).

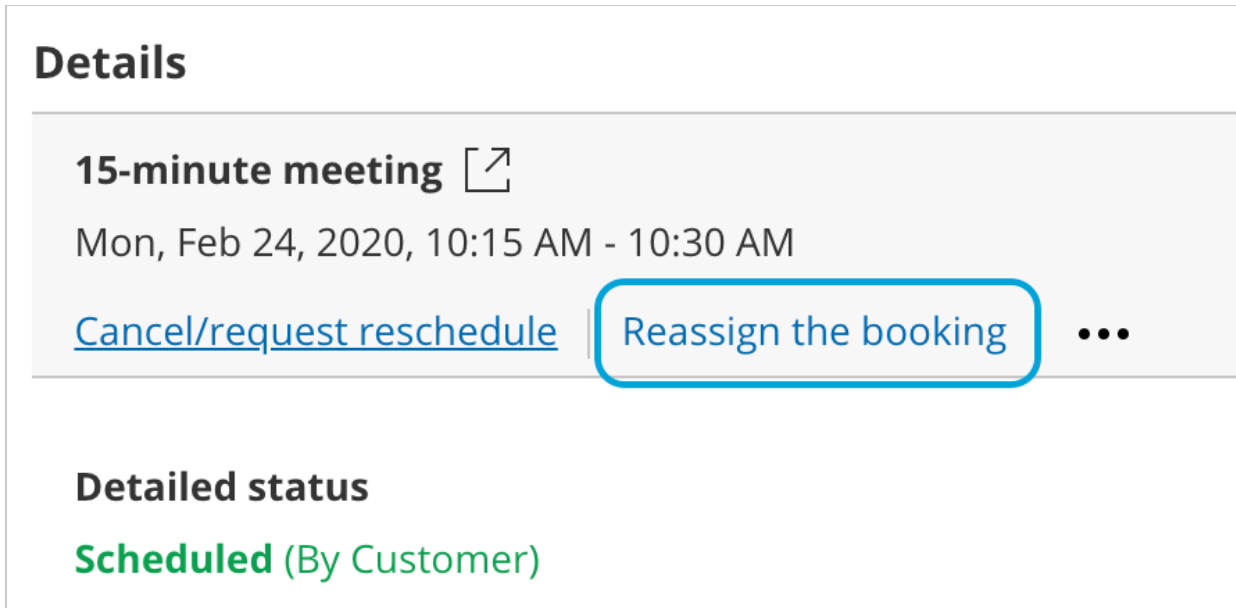


Figure 5: Reassign the booking

3. The **Reassign the booking** pop-up will appear.
4. Select the Booking page to which you'd like to reassign the booking.

Tracking and reporting of No-shows

When an activity has passed its scheduled time, the status of the activity is automatically set to **Completed**. If your Customer did not attend the meeting, you can change the **Completed** status to **No-show**.

To change the status to **No-show**, follow the steps below.

1. Select the activity in the Activity stream.
2. In the **Details** pane, select **Set to No-show** (Figure 6).

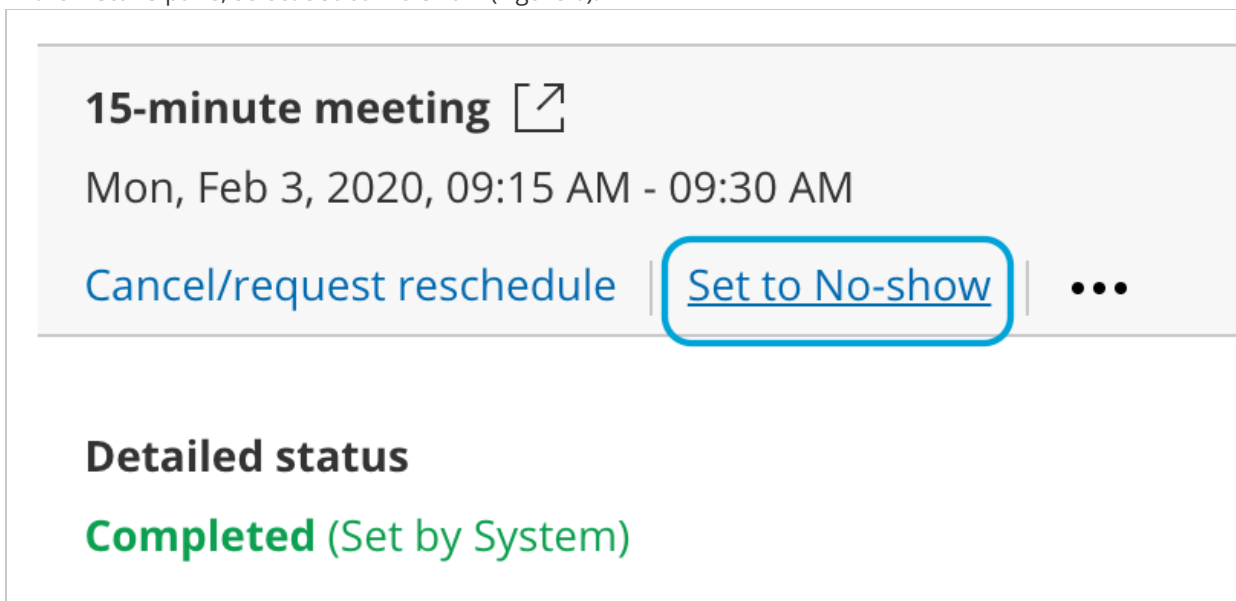


Figure 6: Set to No-show

3. The **No-show status** pop-up will appear.
4. Click **Yes** to set the status to **No-show**.

 **Note:**

You cannot change the status back to **Completed**, so please be sure before you mark a booking as **No-show**.

Filtering the Activity stream

Your Activity stream is a central hub where you can view and manage all your activities, sorted by the last updated date. These include Bookings, Session packages, and Transactions.

There are four ways to filter the Activity stream: Default filters, Advanced filter options, the Free text filter, or Custom filters which you create.

Default filters

You can quickly filter your stream using OnceHub's out-the-box Default filters to show **My upcoming meetings**, **My booking requests**, **My activity**, and **All activity**. (Figure 1).

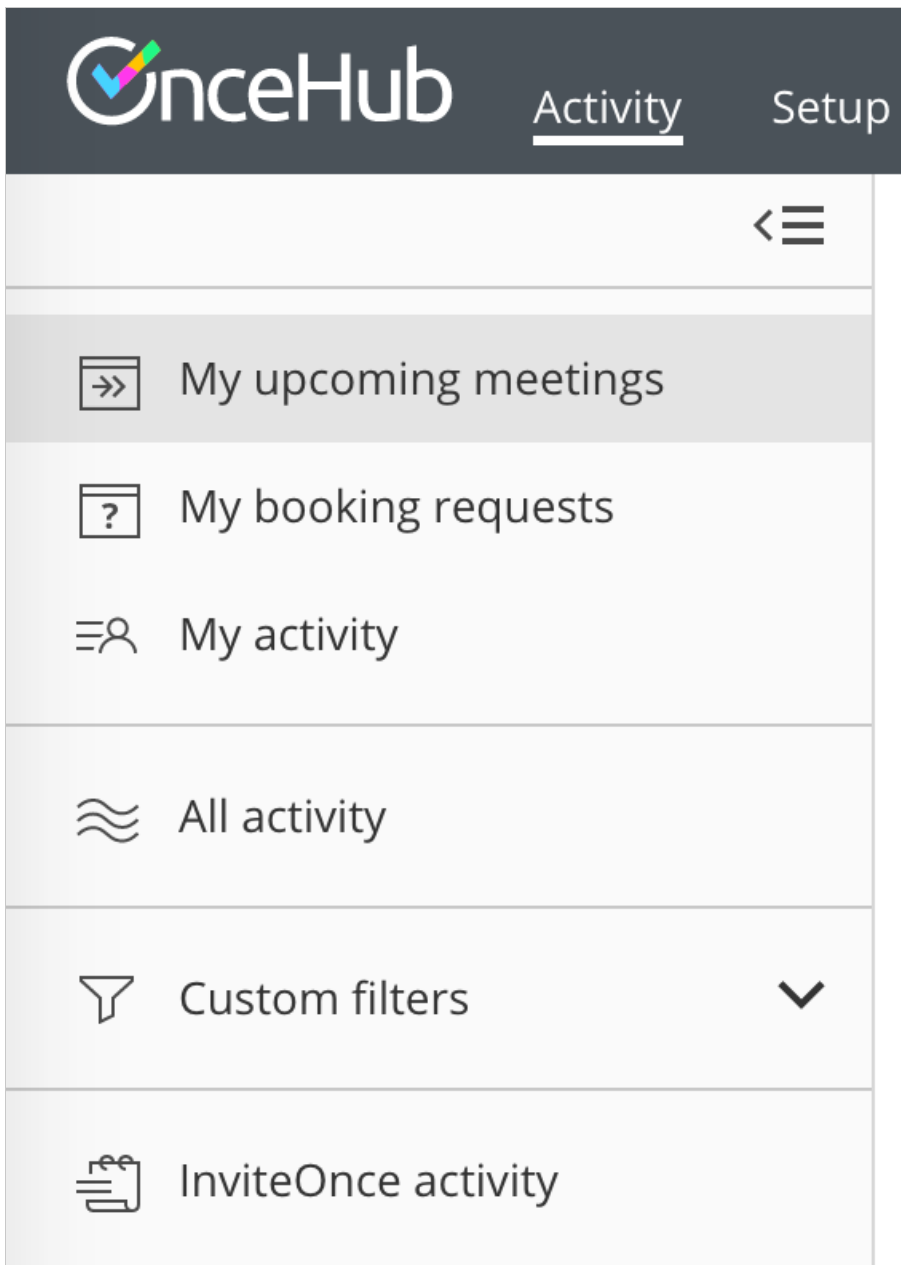


Figure 1: Default filters in the left sidebar

To use a Default filter, open the left sidebar and select it from the list. After you've selected your choice, the Activity stream will automatically update to show only relevant activities.

Advanced filter options

Advanced filter options allow you to filter activities according to specific parameters. Learn more about advanced filtering [here](#).

Custom filters

You can also choose to save Custom filters that show specific activities that you may need to access often. There are a number of ways to create a Custom filter.

- Filter the Activity stream using the Free text filter, a collection of selected Advanced filter options, or both. Then,

click **Save as**.

- Select a Default filter, then add additional Free text filters or Advanced filter options. Then, click **Save As** to create a new Custom filter.
- Edit an existing Custom filter by adding or removing filters, then click **Save**.

Default filters

You can filter your Meetings inbox with a single click using our out-the-box Default filters. The Default filters available are **My upcoming meetings**, **My meetings**, **My booking requests**, and **All meetings**.

Note:

Only one Default filter can be applied at a time.

Applying Default filters

1. In the **Meetings** inbox, select a filter (Figure 1).

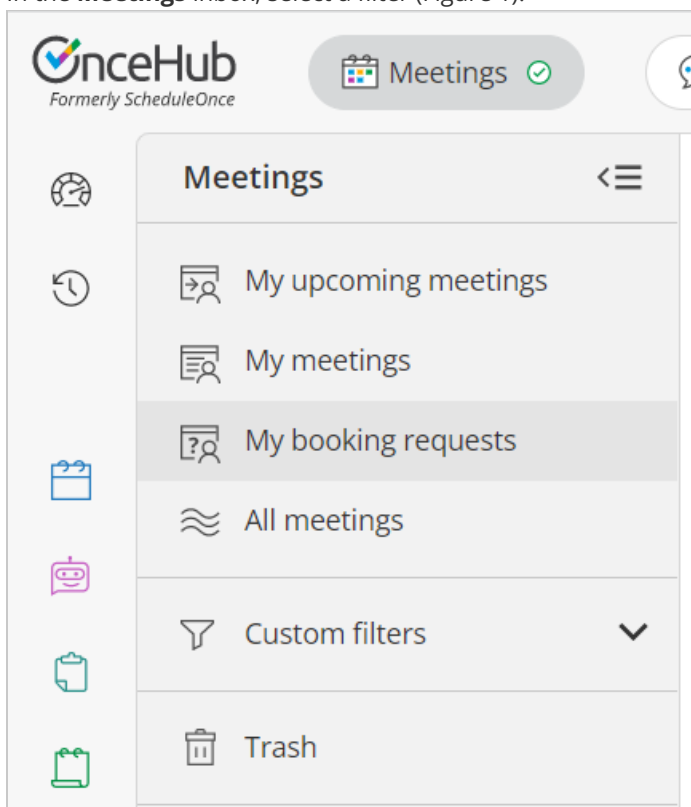


Figure 1: Select a default filter

2. After you select your choice, the inbox will automatically update to show only relevant activities.

Types of Default filters

You can select from three different Default filters. Default filters cannot be renamed, deleted, or modified.

- **My upcoming meetings:** This filter displays only scheduled, rescheduled, and canceled meetings with a date

and time in the future, sorted by the meeting date. This allows you to focus on meetings that are coming up which you may need to prepare for, rather than meetings that have already happened. The current date is based on your time zone.

- **My meetings:** This filter displays all meetings booked on a Booking page for which you are the Owner, Editor, or Additional team member.
- **My booking requests:** This filter only shows you booking requests that you need to approve. This filter lets you see which actions require responses on your part, all in the same place.
- **All meetings:** This filter displays all meetings within the OnceHub account for which you have the relevant permissions. Members see bookings from all pages where they are Owner, Editor, or an Additional team member in a panel. Admins see all bookings throughout the account.

If you want to filter the activities in your Meetings inbox by other characteristics, you can select a filter from the predefined list of [Advanced filter options](#), or use [the Free text filter](#).

 **Tip:**

If you often make use of a particular default filter with a specific combination of free text filters and advanced filters, you can save the entire combination as a custom filter. [Learn more about creating custom filters](#)

Using the Free text filter

The Free text filter allows you to find specific activities in your [Activity stream](#). To use the Free text filter, type in any information that appears in the details of an activity, such as the name of a [Booking page owner](#), a Customer's name, a Customer's email address, or an [Activity ID](#).

In this article, you'll learn about using the Free text filter.

Activity type fields

Each activity type has specific fields included in the activity details. When you enter information into the Free text filter, it filters through the following fields per Activity type.

Activity type	Fields
Customer	Customer name, Customer email, Customer company
Bookings	Meeting time, Booking status, Detailed booking status, Event type name, Booking page name, Master booking page name, Booking page owner
Session packages	Session package status, Event type name, Booking page name, Master booking page name, Booking owner
Transactions	Refund transaction date, Payment transaction date, Transaction status, Transaction type

* Note that Custom fields are not supported.

Using operators

To make your Free text filter more precise, you can use specific search operators. Below is the list of search operators that you can use with the Free text filter.

" " Phrase search operator

Put multiple keywords or a phrase inside quotes " ". For example, "John Smith" filters all Activities that include exactly the full name John Smith. This is useful if you are looking for a specific company name or an Event type name.

* Suffix operator

Put an asterisk at the end of your word. For example, dan* returns all activities that have a term that starts with "dan", ignoring case.

OR operator

Put "OR" between each item of your filter. For example, John@example.com OR Bob@example.com searches for activities containing either John@example.com or Bob@example.com, or both of them.

AND operator

Put "AND" between each filter. For example, Scheduled AND Reassigned returns activities that are both scheduled and reassigned.

Creating Custom filters

If you often use a specific combination of filters to view activities in your [Activity stream](#), you can save the entire combination as a Custom filter for quick and convenient access.

Custom filters that you have created and saved will only show up in your account. They are not shared with other team members. When an activity is updated or a new activity is created, it will automatically be reflected in Custom filters if relevant.

In this article, you'll learn how to create Custom filters from the Activity stream.

Possible filter combinations

Custom filters can be made up of any combination of [Advanced filter options](#), [Free text filters](#), and a [Default filter](#). Or, you can choose to save a single unique Free text filter as a Custom filter.

Using Custom filters enables you to have custom predefined views in your Activity stream. For example, you might want to quickly access all bookings created by a top prospect, or view all reassigned bookings.

Note:

Only one Default filter can be applied at a time, and only one Default filter can be saved as part of a Custom filter.

Saving filters as a Custom filter

1. In the **Activity stream**, apply the [specific combination of filters](#) you require.

2. Then, click **Save as** (Figure 1).

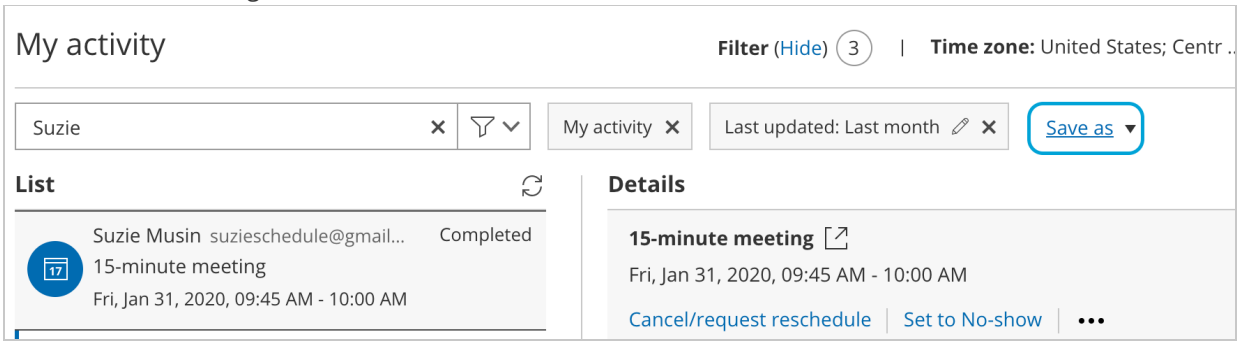


Figure 1: Click Save as to create a Custom filter

3. The **Save filter** pop-up appears. Enter a name for your Custom filter and click **Save new filter**.

Accessing Custom filters

To access a saved Custom filter, open the left sidebar and select the saved filter from the **Custom filters** list (Figure 2).

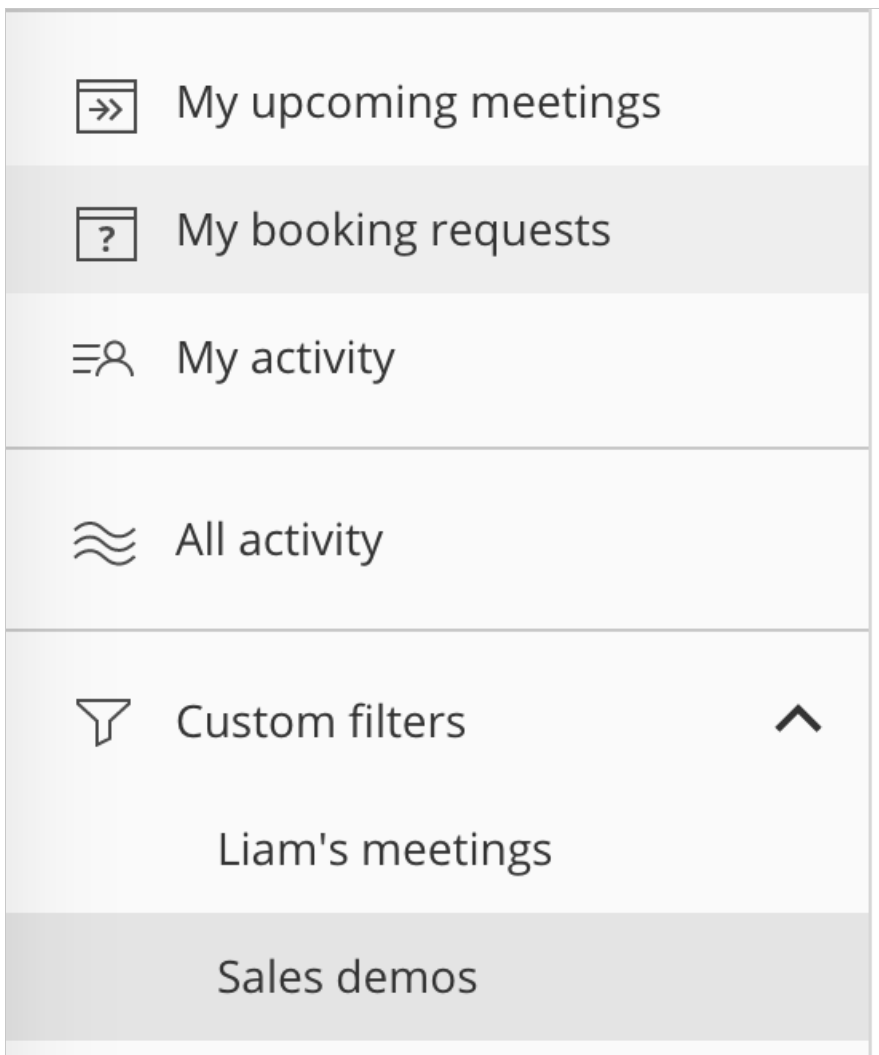


Figure 2: Access Custom filters

Editing existing Custom filters

You can edit any existing Custom filter by following the steps below.

1. In **Custom filters** in the left sidebar, select the Custom filter you want to edit.
2. Then, add or remove the filters you require.
3. Click **Save** (Figure 3).

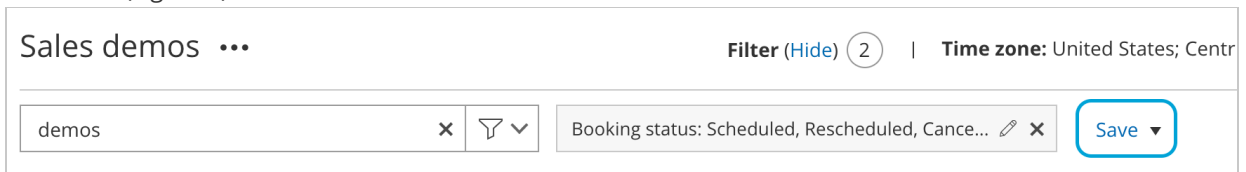


Figure 3: Click Save to save changes made to your Custom filter

4. If you want to save your adjusted filter as a new Custom filter, click the arrow next to **Save** and select **Save as**.
5. The **Save filter** pop-up appears. Enter a name for your Custom filter and click **Save new filter**.

You can also rename or delete any Custom filter. To do this, click action menu (three dots) next to the Custom filter name and select the relevant option from the menu (Figure 4).

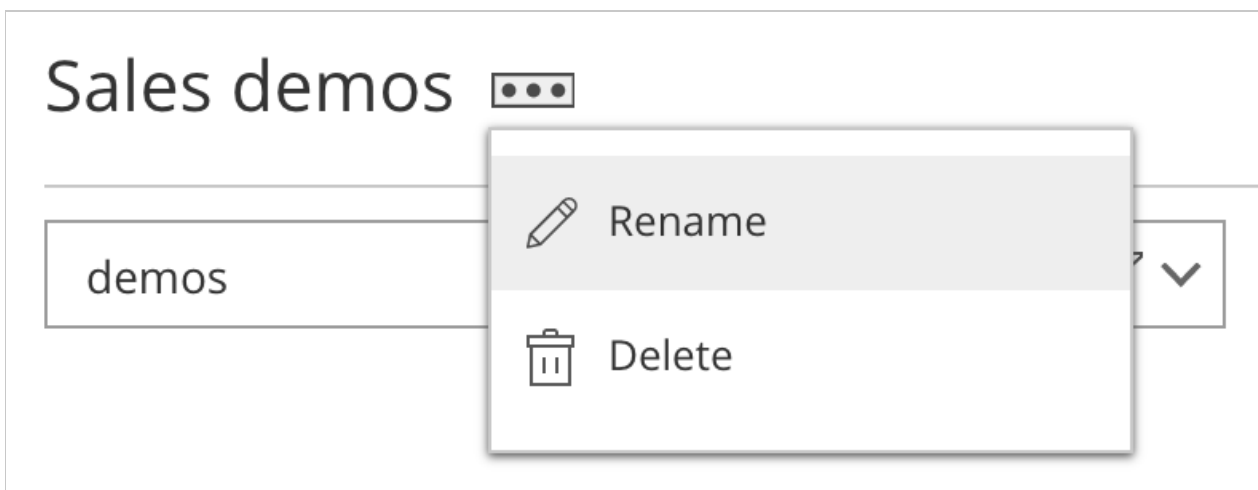


Figure 4: Rename or delete a Custom filter

Using Advanced filter options

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

To view the list of parameters, click the filter box at the top of the Activity stream. 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**, and **Contact status**.

You can also access additional filter options by selecting **Customer**, **Bookings**, **Session packages**, **Transactions**, **Conversations**, **Forms**, **UTM parameters**. Inside each of these folders are options for additional filters. Find the full breakdown of filter options [here](#).

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.

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

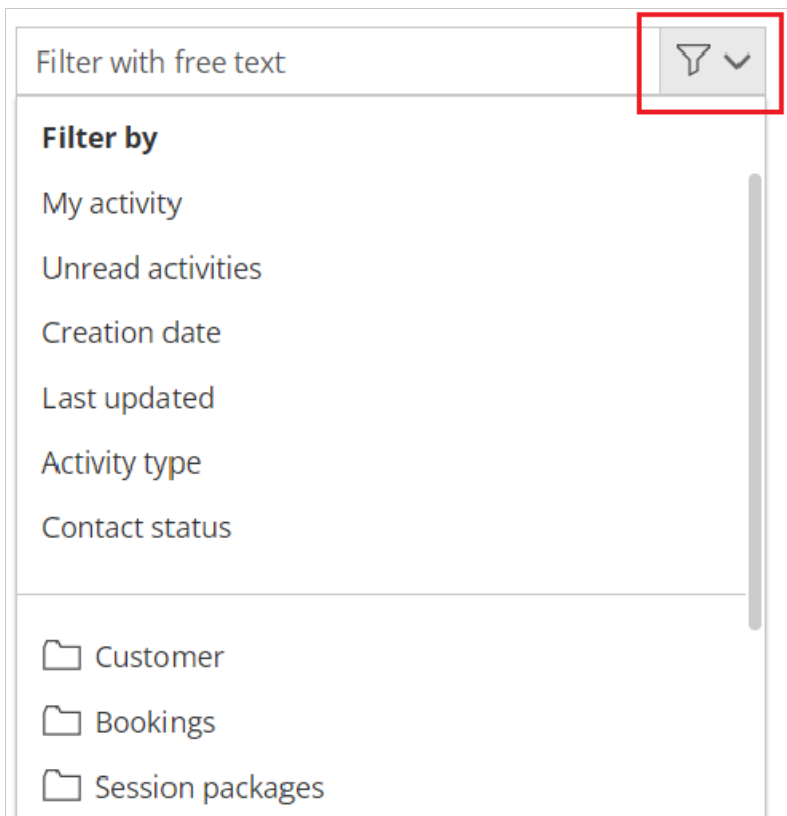


Figure 1: Advanced filter options box

Tip:

You can share filters between members of your organization.

After you've selected a filter, you can further refine the results by selecting additional filters, or by using the Free text filter:

The Free text filter

The Free text filter allows you to find activities by typing in any information included in the activity details (Figure 3). For example, you could filter by using the name of a Booking page Owner, a Customer's name, a Customer's email address, or an Activity ID.

Operators such as AND/OR can be used to refine your search. For example, you might want to look for two different activities based on Booking IDs, or retrieve the bookings scheduled by two Customers.

There is no limit to the number of Free text filters you can use to filter the Activity stream.

Advanced filter options list

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

Filter name	Description
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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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 , Transactions, Conversations, or Forms.
Contact status	Filter the Activity stream by a contact's status: Qualified, Marketing qualified, Sales qualified, Disqualified, or No status

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.

Bookings filter name	Description
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 Calendar Name	Filter bookings by Booking Calendar name. If you update the Master page name, it will be reflected in the filter and in the Activity stream.
Meeting Owner	Filter bookings by the meeting owner's name. If you update the meeting 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.
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Transaction status	Filter bookings to show Paid, Refunded, Refund pending, Refund failed, or Pending activities.
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Transaction type	Filter bookings to show PAYMENT (SCHEDULE), PAYMENT (RESCHEDULE), PAYMENT PENDING (SCHEDULE), AUTOMATIC REFUND (CANCELLATION), AUTOMATIC REFUND PENDING (CANCELLATION), MANUAL REFUND VIA ONCEHUB, or MANUAL REFUND VIA PAYPAL.
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Conversations filters

Conversations filter types	Description
Chatbot	View conversations from selected Chatbots.
Booking in conversation	Filter by chatbot conversations that received or did not receive a booking.
Started from URL	Provide a URL and filter by chatbots that were accessed from that URL.
AI usage	Choose between: At least [X] AI messages – Users can adjust this to any number between 0 and 999. No AI messages – Filter for conversations that include no AI interaction. Apply the filter to view only conversations matching the specified AI message criteria.

Completed time	<ul style="list-style-type: none"> • Today: search all conversations completed today. • Next 3 days: search all conversations completed in the next 3 days from today's date and time. • Next week: search all conversations completed in the next 7 days from today's date and time. • This month: search all conversations completed in the current month. • Future dates: search all conversations completed in the future from today's date and time. • Specific dates: search for conversations completed in the date range you have selected.
Transcript	Use free text to filter transcripts by words used in the conversation.
Conversation status	Filter by whether the conversation was Closed or Abandoned . "Closed" means that the conversation progressed to the last interaction in the chatbot; "Abandoned" means that the chatbot was interacted with one or more times, but did not reach the final interaction within a certain timeframe.
Conversation rating	Filter by the rating left by the visitor, from 1 to 5 stars.
Live chat in conversation	Did the conversation result in a live chat conversation? Yes, No, or Timed out.

Forms filters

Forms filter types	Description
Form name	Choose from a list of your forms to filter by.
Booking in form	Filter by form conversations that received or did not receive a booking.

Completed time	<ul style="list-style-type: none"> • Today: search all conversations completed today. • Next 3 days: search all conversations completed in the next 3 days from today's date and time. • Next week: search all conversations completed in the next 7 days from today's date and time. • This month: search all conversations completed in the current month. • Future dates: search all conversations completed in the future from today's date and time. • Specific dates: search for conversations completed in the date range you have selected.
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Transcript	Use free text to filter transcripts by words used in the conversation.
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Form status	Filter by whether the conversation was Closed or Abandoned. "Closed" means that the conversation progressed to the last interaction in the form; "Abandoned" means that the form was interacted with one or more times, but did not reach the final interaction within a certain timeframe.
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Live chat in form	Did the conversation result in a live chat conversation? Yes, No, or Timed Out.
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UTM parameters

UTM parameters filter types	Description
Source	Filter by Source parameter with free text.
Medium	Filter by Medium parameter with free text.
Campaign	Filter by Campaign parameter with free text.
Term	Filter by Term parameter with free text.
Content	Filter by Content parameter with free text.

How to share a filtered view of the Activity stream with another team member

Your Activity stream is where you can view and manage all your activities. The Activity stream shows all Booking, Session package, and Transaction activities that have been created in your account, sorted by last updated date. You can use filters to display only relevant activities in the stream.

In some cases, you may want to send a filtered view of the Activity stream to another team member. For example, you might need to ask another OnceHub Administrator to reassign a list of bookings appropriately.

When you add filters to the Activity stream, parameters are added to the page URL (Figure 1). To share this filtered view, copy the page URL and send it to another team member via email.

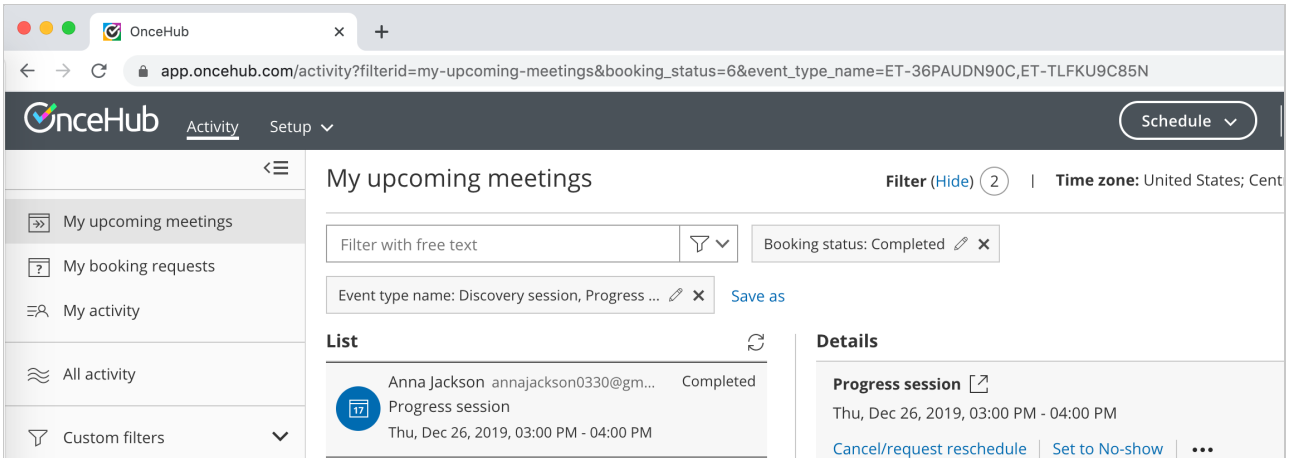


Figure 1: Selected filters added to the page URL

When the team member clicks the link, the Activity stream will open and display the filters applied in the URL. The team member can then create a Custom filter from this filtered view for easy access in the future.

Available parameters

Below is the list of URL parameters available for the Activity stream.

Field available	Parameter
Creation date	creation_date
Last updated	last_updated
Activity type	activity_type
Activity ID	activity_id
Unread activities	unread_activities
Sort by	sort_by
Bookings	
Meeting time	meeting_time
Booking status	booking_status
Booking detailed status	booking_detailed_status
Event type name	event_type_name

Booking page name	booking_page_name
Master page name	master_page_name
Booking page Owner	booking_page_owner
Customer name	customer_name
Customer email	customer_email
Customer company	customer_company
Session packages	
Session package status	session_package_status
Event type name	event_type_name_sp
Booking page name	booking_page_name_sp
Master booking page name	master_page_name_sp
Booking page Owner	booking_page_owner_sp
Customer name	customer_name_sp
Customer email	customer_email_sp
Customer company	customer_company_sp
Transactions	
Payment transaction date	payment_transaction_date
Refund transaction date	refund_transaction_date
Transaction status	transaction_status
Transaction type	transaction_type
