OnceHub Help Article

Customer reports [Legacy]

OnceHub reports cover all booking activity. Reports can be generated based on different dimensions: by Customer, by Booking page, by Event type, by Master page, and by User.

In this article, you'll learn about Customer reports. Access your Customer reports by going to Setup -> OnceHub setup -> Hover over the left sidebar -> Reports -> Customer reports.

In this article:

Customer summary report

Customer reports help you understand booking activity by Customer. For each Customer, you can see how many bookings have been **Scheduled**, **Rescheduled**, **Completed**, **Canceled**, or set to **No-Show**. This gives you insight into how many bookings and cancellations took place during a period of time.

Customers are grouped by their email address and name. If the Customer uses different names with the same email address, each email-name combination will be displayed separately.

By default, Customers in the summary report are sorted by **All activities**, meaning the Customer with the highest number of activities will be at the top of the list. To change how the report is sorted, click any of the column headers.

Note:

If you move an activity to the Trash, it will be included in reports until deleted. The activity will display as being **(In Trash)**. After they are permanently deleted, any fields related to this deleted activity will not show up in reports. Learn more

Customer detail report

To view a detailed report of the booking activity for a specific Customer, click on the Customer in the **Customer** column. Here, you can see a complete booking log for the specific Customer.

A Customer detail report may be useful for billing purposes, or to provide a schedule report to a Customer when they need to meet multiple providers.

By default, the bookings are sorted by **Meeting date and time**. To change how the report is sorted, click any of the column headers.

Note:

To customize the display columns in the detail report, click the **Display columns** button. Learn more about Detail report columns

Exporting a Customer report

You can export a Customer report as an Excel, CSV, or PDF file. To export a report, click on the **Excel**, **CSV** or **PDF** button in the top right corner of the report page (Figure 1).

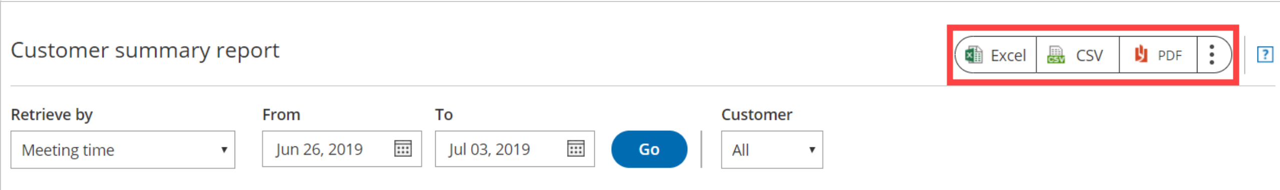

Figure 1: Export report buttons

