

## The Activity stream: Viewing activities [Classic]

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 rescheduled bookings, and cancellations. You can also perform actions such as cancelling a booking 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.

### 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.

The Details pane of each activity allows you to access additional information about the activity. 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.

#### The Free text filter

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

#### Advanced filter options

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

#### Custom filters

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

### 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.

## 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

And 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.
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**.
3. The **Reassign the booking** pop-up will appear.
4. Select the Booking link 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**.
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.

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**.

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. 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**. You can also access

additional filter options by selecting **Bookings**, **Session packages**, or **Transactions**.

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. For example, you could filter by using the name of a Booking 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.

## 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.
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 link 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 links 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 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.

## 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 guest 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**.
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.

## 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**.
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.

## 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**. 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.

### Tip:

You can share filters between members of your organization.

## 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. To share this filtered view, copy the page URL and send it to another team member via email.

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.