Filtering Your OnceHub Activities [New]

OnceHub provides a powerful filtering feature that enables you to easily find and analyze the activities of your guests who have interacted with your OnceHub products. Use filters to narrow down your search and save time by focusing on the most relevant activities.

Activities can be accessed by clicking on Activities in the left-hand navigation menu

Free Text Filter

The Free Text filter, located in the top-left corner of the **Activities**, allows you to search for activities like meetings or form submissions that include specific text.

How to Use the Free Text Filter

- Simply type any text into the filter box to find activities that match your query.
- For more precise filtering, use specific search operators as described below:

Search Operators for Free Text Filter:

• **OR Operator:** Use **OR** to search for multiple terms. Results will include activities containing either or both terms.

Example: "John@example.com **OR** Bob@example.com" will return matches for activities involving either email address.

• AND Operator: Use AND to combine filters and retrieve activities that meet all specified conditions.

Example: "Scheduled **AND** Reassigned" will return activities that are both scheduled and reassigned.

Advanced Filter Options

Advanced filters offer more specific criteria to narrow down your search.

How to Use Advanced Filters

- 1. Click the filter box next to the Free Text filter.
- 2. Select one or more filters to limit the results according to the chosen parameters.

Note: You can further refine your search by combining multiple advanced filters or applying the Free Text filter alongside them.

Custom Filters

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If you frequently use certain filter combinations, you can save them as Custom Filters for quick access in the future. Saved filters allow you to reproduce the same search criteria without needing to manually re-enter the details every time.

Saving a Custom Filter:

- 1. Apply the desired filters in Activities.
- 2. Click the **Save as** link next to the applied filters.
- 3. Enter a name for your new filter in the pop-up window.
- 4. Click Save new filter to finalize.

Accessing Custom Filters:

Your saved filters are stored in the Custom Filters section on the left-hand menu of the Activities page.