Managing Guest Activities [New]

Activities is the centralized hub where you can manage all guests' activities. It provides advanced filtering options to quickly locate the information you need and create valuable datasets that can serve as the foundation for creating comprehensive reports.

Furthermore, **Activities** allows you to execute various actions, including managing meetings, reviewing chatbot conversations, and viewing routing form responses.

Accessing Activities and Viewing Details

To access **Activities** click on **Activities** in the left-hand navigation menu.

Once inside the **Activities** section, you'll see a list of all guest interactions. Each activity contains details such as activity type, time, and status.

- By clicking on any activity, you'll open the Details pane, which shows all information captured for that specific activity.
- Any attachments uploaded by your guests will appear here and can be downloaded as a zip file in the Details pane.
- The Contact Details pane on the right displays a summary of the guest's information along with their recent activity history.

Viewing Related Activities

Sometimes you'll need to trace how an interaction evolved, such as seeing a rescheduled meeting or a cancellation associated with a specific activity. Here's how to do that:

1. Click on the activity you'd like to investigate.
2. Click on the three-dot menu at the top of the activity's Details pane .
3. Select **View related activities** from the dropdown menu.

This will display any connected activities, providing you with a clearer context of the guest's interaction timeline.

Managing Meetings in Activities

Activities allows you to take several important actions to manage your meetings efficiently. For more information about each action, please take a look at the articles linked below:

- **Cancel Meetings:** Cancel a meeting directly from the Activities section if the meeting is no longer needed.
- **Reschedule Meetings:** Either reschedule a meeting on behalf of the guest or send them a request to choose a new time.
- **Reassign Meetings:** Assign the meeting to another user on your account to ensure the right team member handles the interaction.

- **Allow Meeting Overlap:** Select whether a specific meeting can be scheduled over to accommodate double bookings.
- **Mark Meetings as No-Show:** If a guest misses a meeting, you can mark it as a no-show to maintain accurate attendance and reporting records.

Using Activities for Reporting

Activities isn't just for managing interactions, it's also a powerful tool for reporting. Make use of the following features to generate and export data:

- **Advanced Filtering:** Apply filters to narrow down activities based on criteria like meeting type, date range, or status. This helps you focus on specific data quickly.
- **Export Datasets:** After applying filters, export a dataset containing all the relevant activities. You can use this for reports, record-keeping, or sharing with team members.

Frequently Asked Questions

Can I update guest details for a scheduled meeting?

No, you will need to cancel the booking and schedule the meeting again.