Producer Portal Manual

Contents

Midsumma Festival uses Red61 for ticketing.

You will be able to process producer complimentary tickets (if applicable) and pull and schedule your event reports via the Producer Portal.

You were emailed your login information by Midsumma's Presenter Services team (events@midsumma.org.au).

We recommend that you bookmark the following link:

Midsumma Festival Producer Portal msf.reports.red61.com.au

There are 3 logins you can use to access the Producer Portal:

1. COM + PRO logins - these logins are able to process comps and pull/schedule full reports. These are assigned to the Primary and Secondary contacts provided in Eventotron at registration.
2. ORG logins - these logins have access to limited reports, ideal for Front of House members or for your venue. They will be able to see a total sales number for tickets sold for your event/sessions as well as pull a Seat Listing report to see customer names and access requirements.

Reports Available (COM + PRO logins)

- **Customer Access Information** - shows a list of access requirements for your customers per session. You should ensure your venue is aware of any customers attending the event who have access requirements
- **Customer Listing Export by Third Party** - shows a list of customers who have opted in to third party marketing (from you or your venue)
- **Full Sales** - Shows a list of ticket sales including type (e.g. Concession or Group) and your gross income
- **Full Sales with Inside Fees** - shows your net income (after inside fees)
- **Performance Promotion Checking** - shows any uptake of promotions added to your account. It also includes an update on how many Producer Comps you have used (if applicable) and how many you have left in your contracted allocation.
- **Performances Selling Out** - shows you a list of your events that have low availability
- **Sales Period Comparison** - gives you the ability to compare ticket sales within set periods

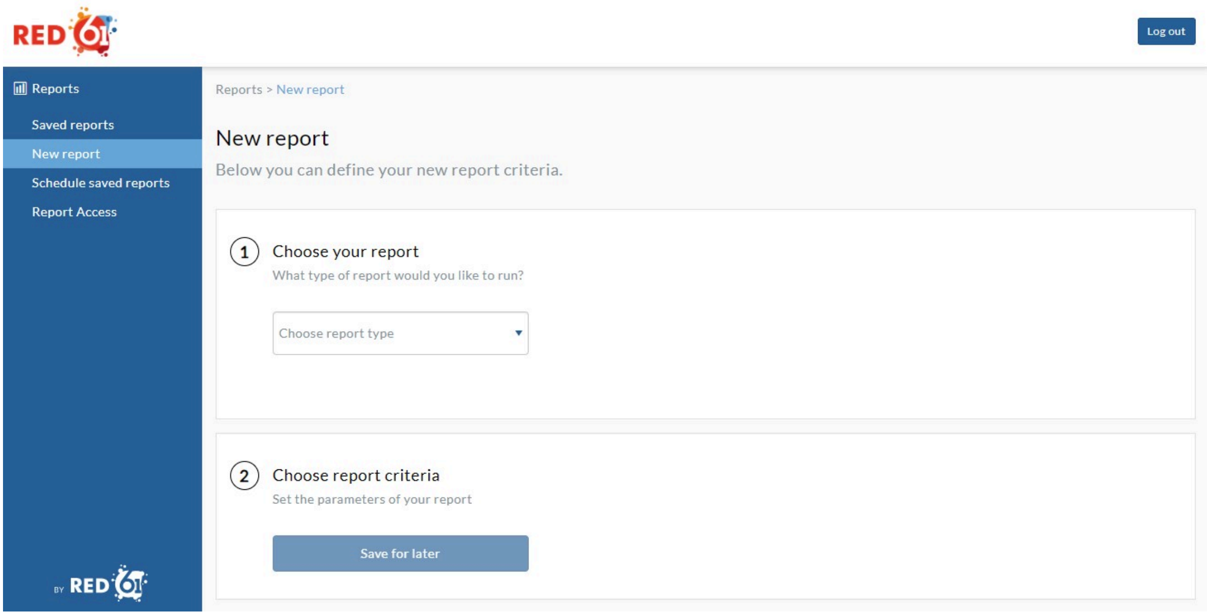
- **Seat Attributes Summary** - shows you what holds are in place on your event for complimentary ticket types e.g. Producer Holds / Midsumma Holds
- **Seat Listing with Access Requirement** - A customer list you can provide to your venue as a **Door List**, including customer access requirements.
- **Ticket Sales Per Day Cumulative** - a cumulative report of your ticket sales

Reports Available (ORG logins)

- **Customer Access Information** - shows a list of access requirements for your customers per session. You should ensure your venue is aware of any customers attending the event who have access requirements
- **Customer Export by Third Party** - shows a list of customers who have opted in to third party marketing (from the event producer or the venue)
- **Sales Summary** - shows the total number of sales by event and session
- **Seat Listing with Access Requirement** - A customer list you can use for your **Door List**, including customer access requirements.

Generating New Reports

To generate a report within the Dashboard after logging in, first select **New report** from the list on the left-hand side of the screen. This screen provides the option of downloading a one-off report, as well as saving a customised report which can be scheduled to run when required.



Choose a report type from the dropdown and fill out the required fields.

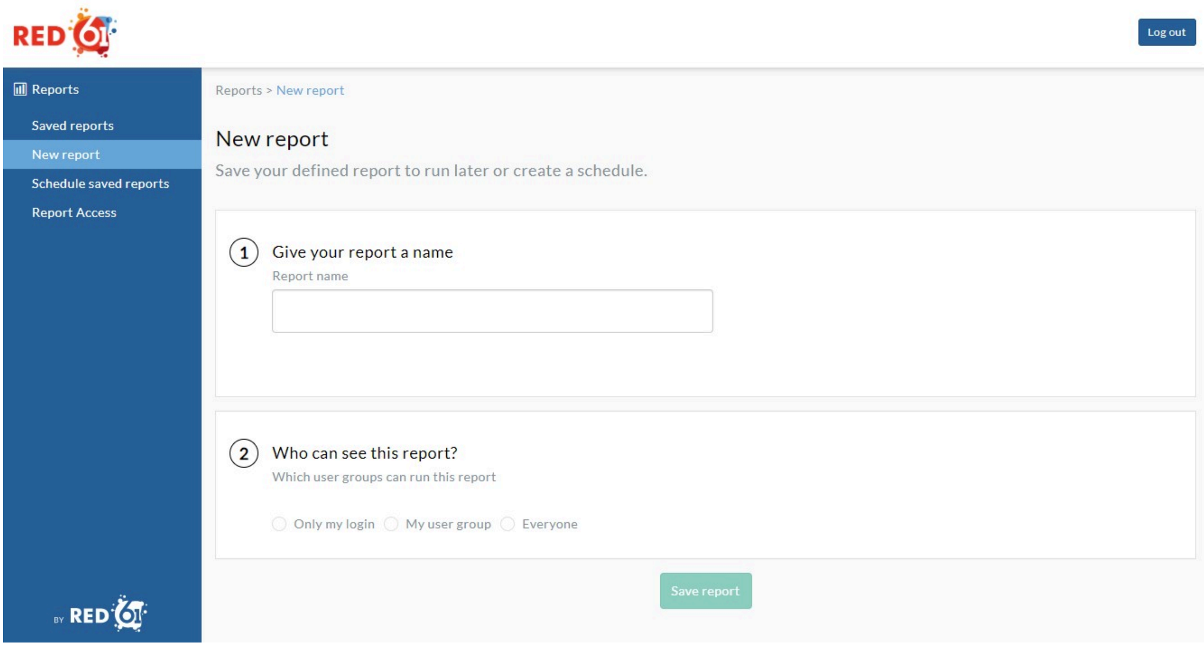
Choose a file type (usually **PDF** or **CSV**). A CSV report may contain more data than a PDF, as there is more space available for information in that format, compared with a truncated PDF document.

Finally, click the **Generate report** button to download the new report.

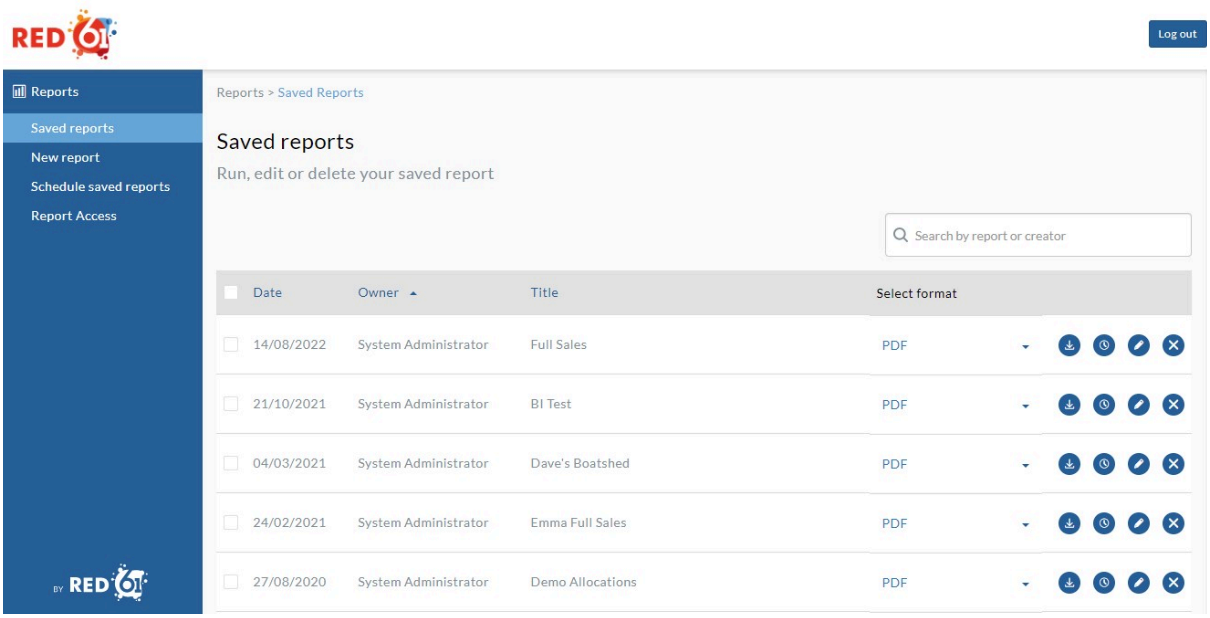
Saving a Custom Report

To save a custom report, you'll first need to create a new report, making sure the correct parameters are defined to reflect the information you need most, before clicking the **Save for later** button.

The following screen allows a name to be entered for the custom report, and permissions to be set around who can access the saved report. It is recommended to select "Only My Login".



Once you've named the report and specified who can access it, click **Save report**. The custom report will now be included in the list of **Saved reports**, which can be viewed from the left-hand side of the screen.



Saved reports can be edited using the options on the right-hand side of the list. The format of a report can be changed by clicking on the available dropdown in the **Select format** column. Other icons displayed work as follows (from left to right):

- Download your report in the selected format

- Schedule your report to be sent at a specific time

- Edit the parameters of your saved report

- Delete your saved report

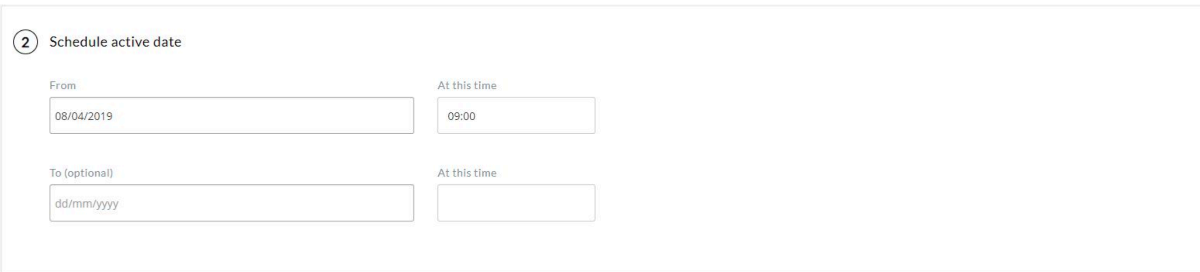
Scheduling a Custom Report

After saving a custom report with the required parameters, it can be scheduled to send at specific time intervals, and to any active email address, on a regular basis. This section of the Dashboard provides a wide range of flexibility, but it's important to use the parameters correctly to ensure reports arrive as and when expected.

Follow the steps outlined below to create a new report schedule.

1. Choose the saved report to be scheduled from the available dropdown.

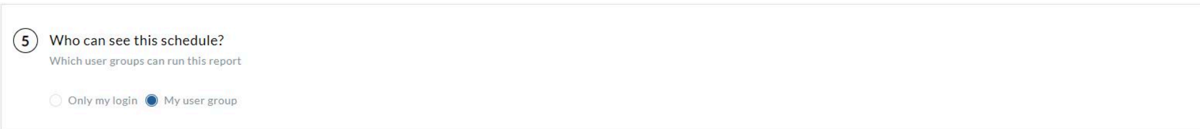
2. Set the timeframe when the schedule will be 'active'. The **From** section must contain a date and time, while the **To** section is optional, depending on whether the schedule requires an end date and time.



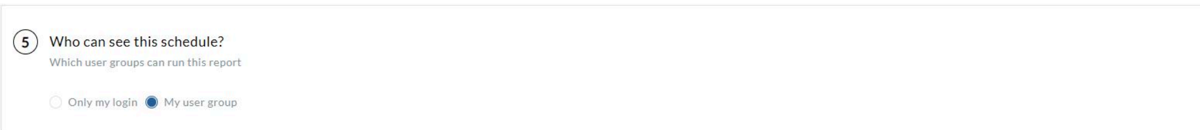
3. Determine the times that the schedule will run, and the intervals at which they are sent. A **Start runtime** is required for the schedule, which is the time of day the report will be delivered. The **End runtime** should be left blank, unless the report is scheduled to be sent more than once per day. You can then choose how frequently the report is sent by selecting an option from the **Run Time Interval** dropdown.

4. Add the **Email Address** of each recipient the report should be sent to, using a semi-colon **;** to separate multiple email addresses. The **Format** of the report that is delivered can also be set here.

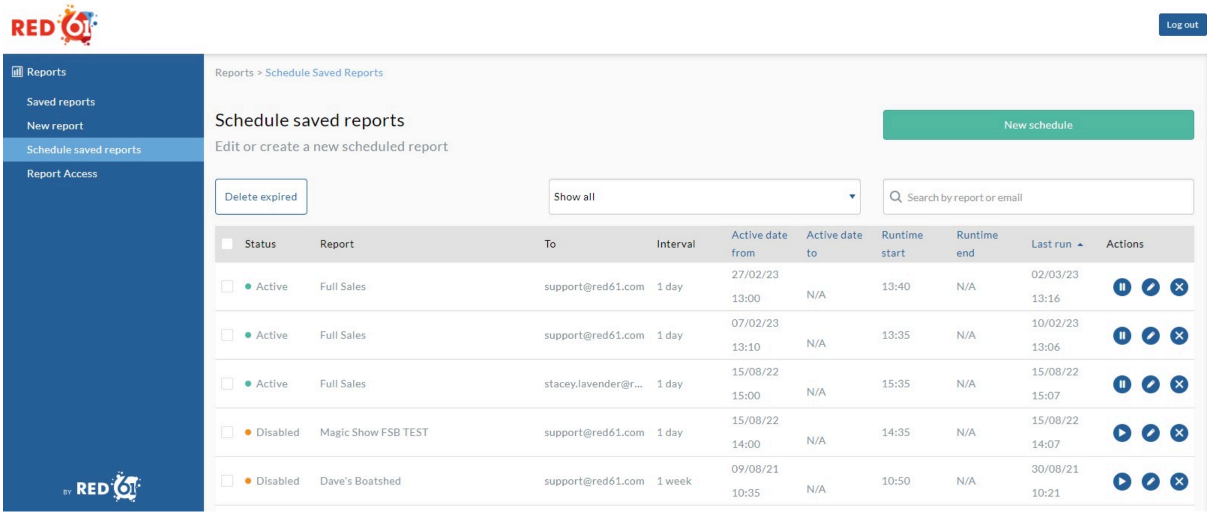
5. Finally, determine which Users and Groups are able to manage this schedule.
   NOTE: This access level must be the same as the permissions set when saving the custom report, in order for the schedule to run successfully. We recommend using ***Only my login*** *or* ***My user group*** *for this setting, as the* ***Everyone*** *option will cause the schedule to be hidden from the* ***Schedule saved reports*** *list.*



6. Click the **Add schedule** button to save the schedule.

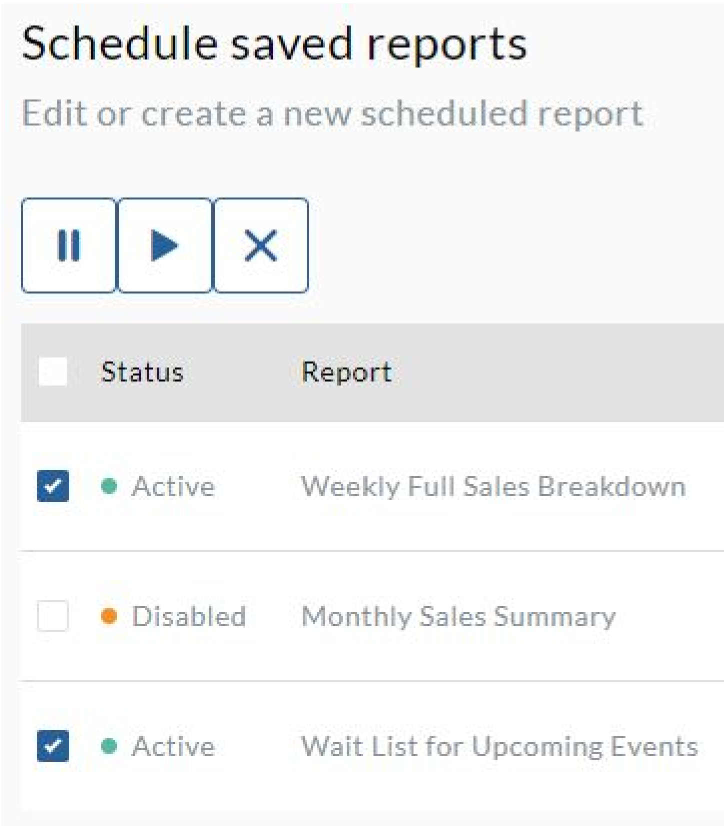


Once the schedule is set up, it will appear in the list of scheduled saved reports.



This screen provides relevant information regarding when the schedule was created, and when it is set to run. The list can be filtered by Active Dates, Runtime, or the times they were Last Run, and you can search for your report or a specific email address by using the search bar above the list. Clicking the **Show all** dropdown allows the list to be filtered based on Active, Disabled, or Expired schedules.

The status of a scheduled report can be changed by ticking the box to the left of each report, then using the available icons to either Enable, Disable, or Delete the schedule.



Schedules can be edited using the options available in the **Actions** column. The icons displayed work as follows:

 - Disable your scheduled report

 - Enable your scheduled report

 - Edit the parameters of your scheduled report

 - Delete your scheduled report