

A guide to...

Automated Reports

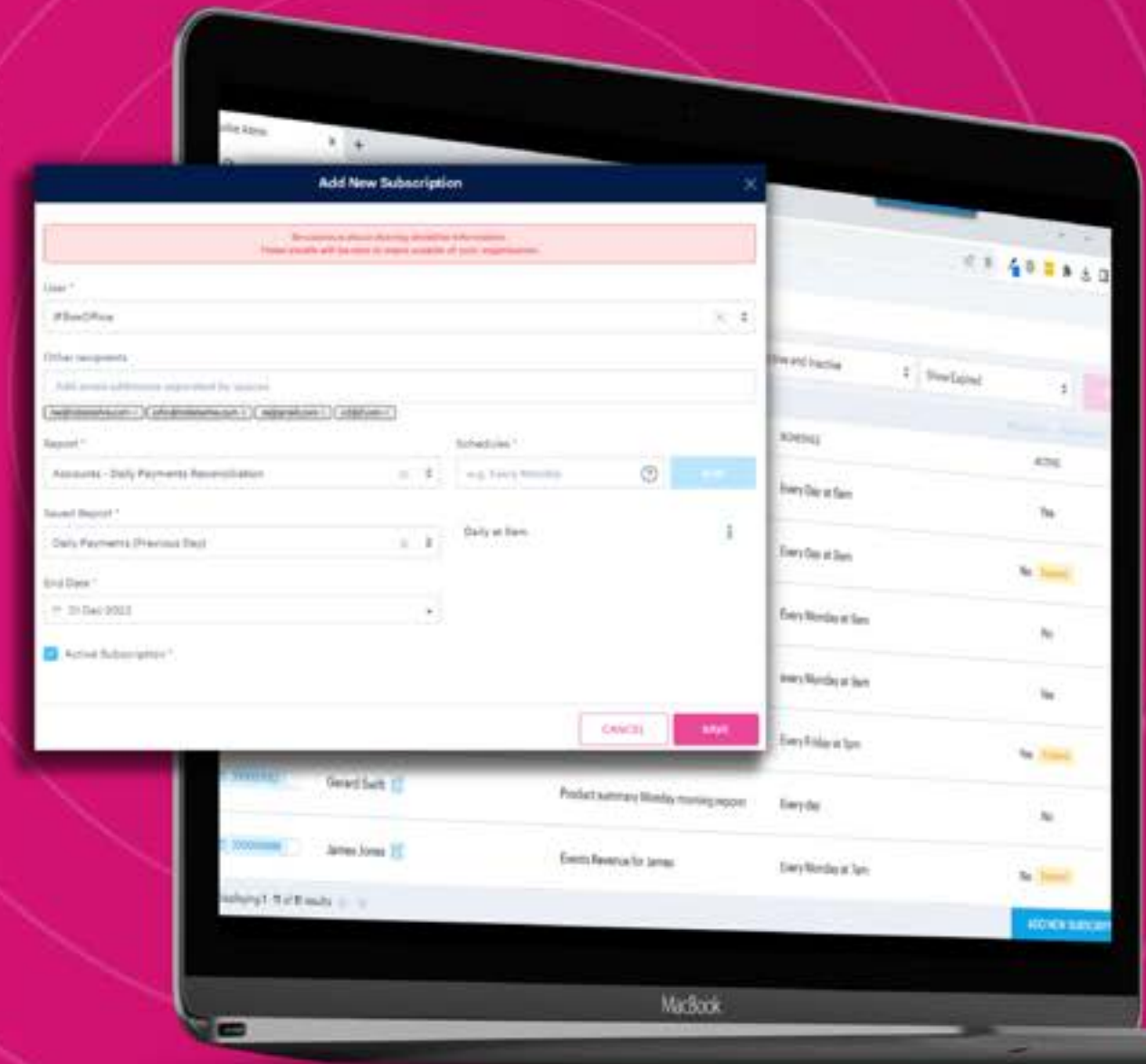
What we'll cover

- Fundamentals of Auto Reports
- Live demo
- Filter Tags
- Multiple Recipients
- Your Auto Reporting FAQs answered



What are Auto Reports?

- Automatically send any Sales Report (your pick of 49 options!)
- ...to chosen recipients...
- ...at a time and frequency you want



How Auto Reports work

- 1 Select and save a Sales Report
- 2 Create one User profile to send to (and the emails for additional recipients)
- 3 Build your sending schedule to tell the system who and when to send the report to

Demo time...



Filter Tags - Events Revenue

2 Saved Report filtered by Show Tag:
'tslive'



1 Show Tag:
'tslive'

3 User Profile Tag:
'filter:tslive'

Filter Tags

- Only one Filter Tag can be used per User Profile
- If you have one promoter with multiple events at your venue, use one generic Filter Tag on the User Profile for them e.g. 'filter:tsproductions' and then tag every Show with the matching 'tsproductions' tag
- Set up a separate User Profile that isn't used for logging into Ticketsolve (otherwise the Filter Tag will restrict what events are seen under that login)
- Filter Tags are only required for the Events Revenue and Sales Summary by Ticket Price reports

Multiple Recipients

- Requires 1 User Profile to send to - the email address associated with the User is viewed by all recipients so be aware
- All additional recipients are Bcc'd in to the auto report sending to the User Profile selected
- The 'Other Recipients' field will accept any valid format email address - so double check it is correct!

Multiple Recipients

- ✓ Good when multiple people need to receive the same report
- ✗ Cannot be used to send different report data to different people



Send Sales Reports to several people in your organisation e.g. the whole marketing team



A promoter has multiple contacts that need sales reports for the same events



Your show has multiple stakeholders e.g. external producer, internal marketing team, your Director

FAQs - Answered



Does the main User Profile need to be active for an Auto Report to send to them?

Nope! You can have the User Profiles as Inactive meaning that they do not appear on the User list by default.

FAQs - Answered

 **Why is my Auto Report sending at midnight when I specified a different time?**

The Auto Report Subscription schedule is not in the correct format. To check this, within the Subscription box, click the '?' icon to view a Help Article with suggested schedule phrases. If this doesn't work, get in touch with Support.

FAQs - Answered

? If I have tagged multiple shows to go to one User are they individual sales reports per show or are they all within the one sales report?

All shows will appear within the same sales report.

FAQs - Answered

What happens if my Filter Tags are incorrect?

The recipient(s) will receive an email with an attachment stating there is an error with the filter tags. You will need to check the filter tags and ensure that if the subscription has been deactivated, you reactivate it.

No Report Data

Currently, no events are associated with the creator of this report. Please ask the user charliecl who created the report to check the "filter tags" associated with their profile.

FAQs - Answered



Why am I only seeing certain events when I log into Ticketsolve?

You probably have a Filter Tag on the User Profile you are logging in under. Remove any Filter Tags from the profile, and create a new User Profile for the Auto Reports, and add the Filter Tag to that profile. You can use the same email address on multiple User Profiles.

Or, you could set a different User Profile (e.g. the promoter) for the Auto Report Subscription, and add yourself as an extra BCC'd recipient.

Ideas...

Sales Report	Who to send to	Saved Report criteria	Subscription schedule
Daily Payments Reconciliation	Finance Team to reconcile the previous days payments	From: yesterday To: yesterday	daily at 9am
Events Revenue	Promoter to view last 14 days of ticket sales	Show Tag Filter	every Monday at 9am every Friday at 5pm
Orders Containing Product	Ticket Protection company you are using to send monthly sales reports	From: first day last month To: last day last month Product Tag: [ticket protection product tag]	beginning of the month at 9am
Sales Summary Short	Marketing team to see the ticket sales for the next time period e.g. next month	From: today To: one month from now (Note that the From and To here are Event Dates and not sales dates)	every Monday at 8am

Thanks for listening!

Automated
Reports
Guide



Sales
Reports
Example



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