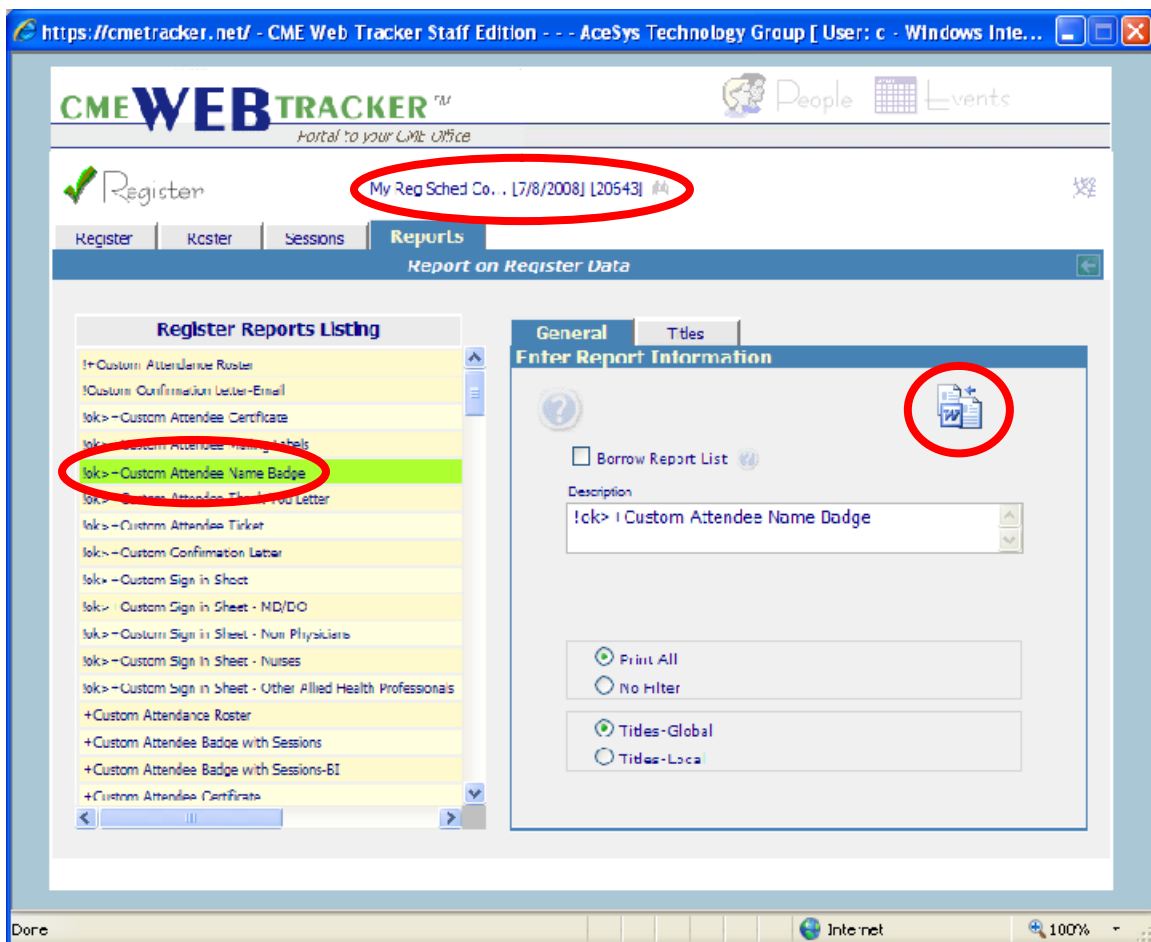


# Tutorial

**Objective:** Customizing Name Badges for Your Institution in the Register Reports Listing using the +Custom Attendee Name Badge as your Default.

**Step 1:** Choose an **Event** that has People **Registered**.

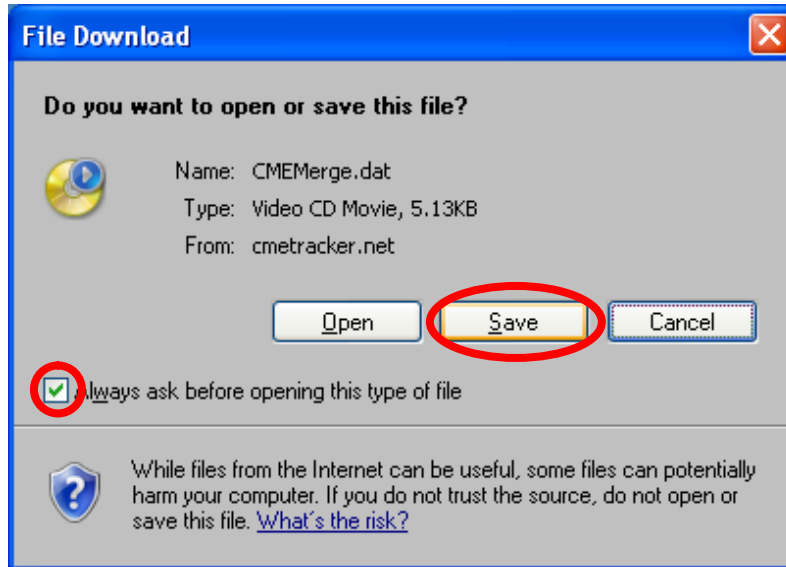
- a. Click the **Register/Report** tab.
- b. Click to highlight the **+Custom Attendee Name Badge Report**.
- c. Click the **Microsoft Word Process Doc Icon** to save the data source.  
(Fig. A)



**Fig. A**

# Tutorial

- Step 2:** The **File Download** dialog box appears.
- Click to **check** “Always ask before opening this type of file”
  - Click **Save**. (Fig. B)

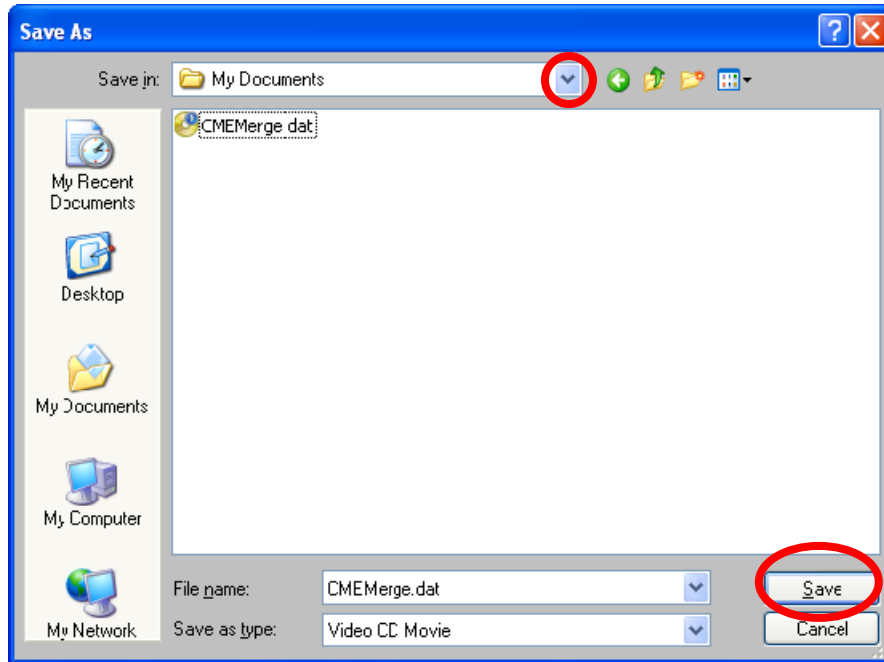


**Fig. B**

# Tutorial

**Step 3:** The **Save As** dialog box appears.

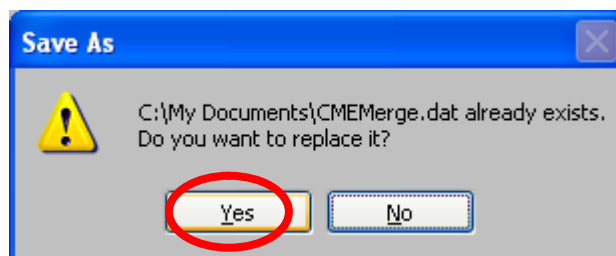
- a. Save the Data Source to Local Disk C: **My Documents**.
- b. Click **Save**. (Fig. C)



**Fig. C**

**Step 4:** The **Save As** dialog box appears.

- a. Click **Yes**. (Fig. D)

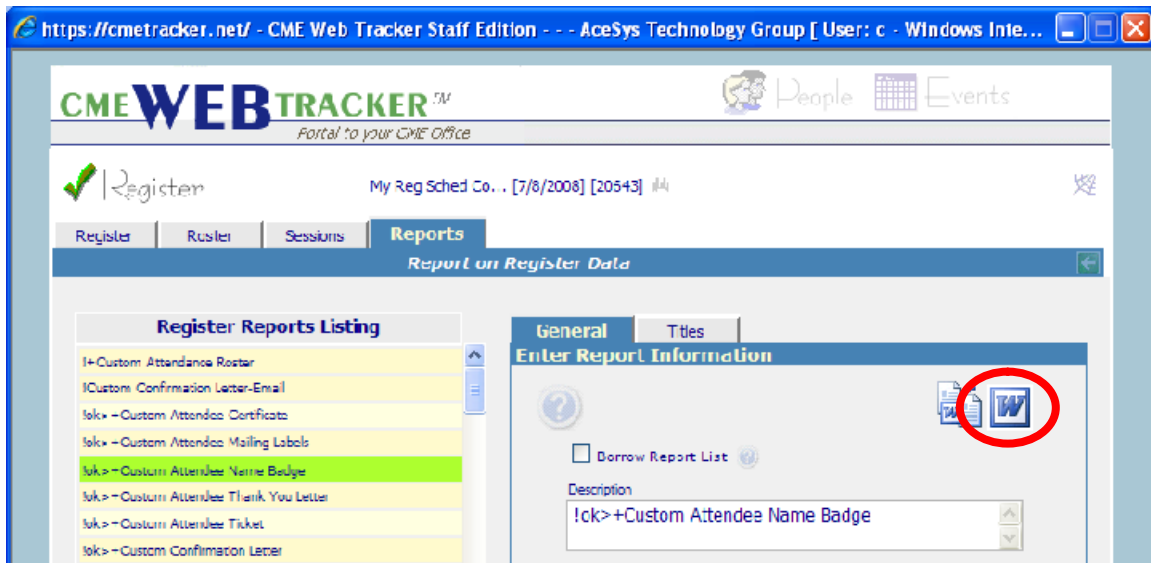


**Fig. D**

# Tutorial

## Step 5:

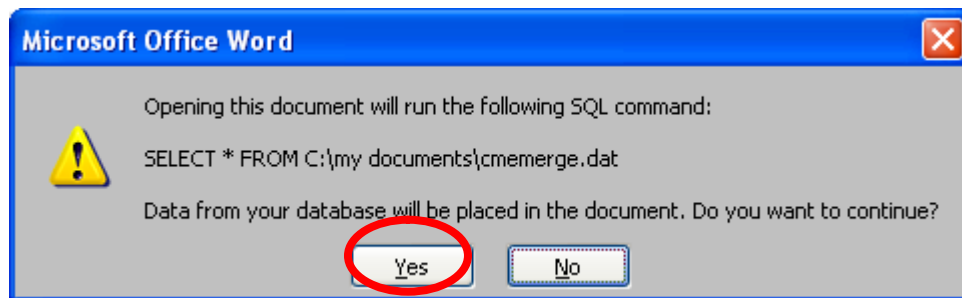
- a. Click the **Launch Word Doc icon**, which is now active. (Fig. E)



**Fig. E**

## Step 6: The following Microsoft Office Word dialog box may appear.

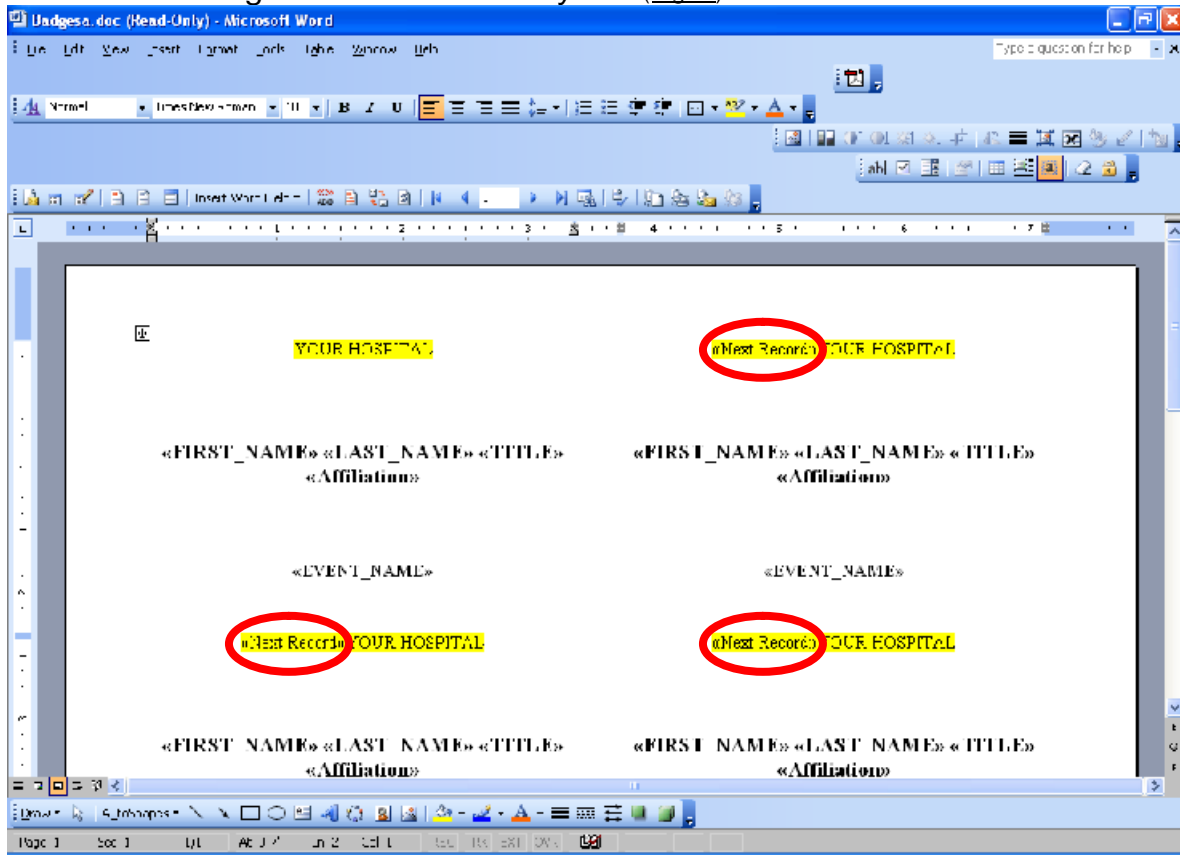
- a. Click **Yes**. (Fig. F)



**Fig. F**

# Tutorial

**Step 7:** The **Name Badge Merge Document** appears with a typical selection of merge fields inserted for you. (Fig. G)



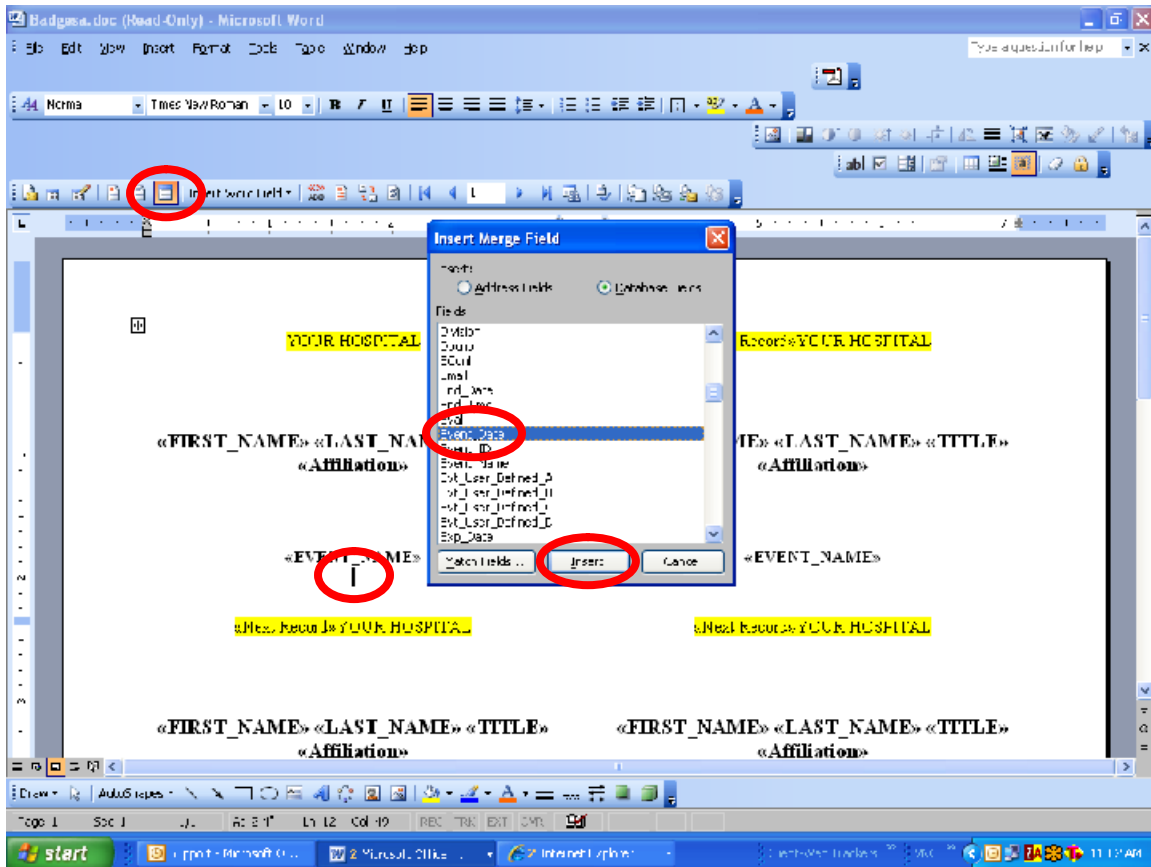
**Fig. G**

**Note:** The “Next Record” field on successive name badges is inserted to tell the program to advance to the next record in the database when merging the documents. DO NOT delete this field when customizing.

# Tutorial

**Step 8:** To add additional information on the name badges.

- a. Click on the **location of the first name badge** that you would like to insert the additional field. (Your cursor will blink in this location)
- b. Click the **Insert Merge Field** icon. The **Insert Merge Field** dialog box appears.
- c. Click the **desired field** to place in your name badge. For this example, we will be adding an **Event Date**. You may place additional fields on the first badge by repeating the process. (Fig. H)

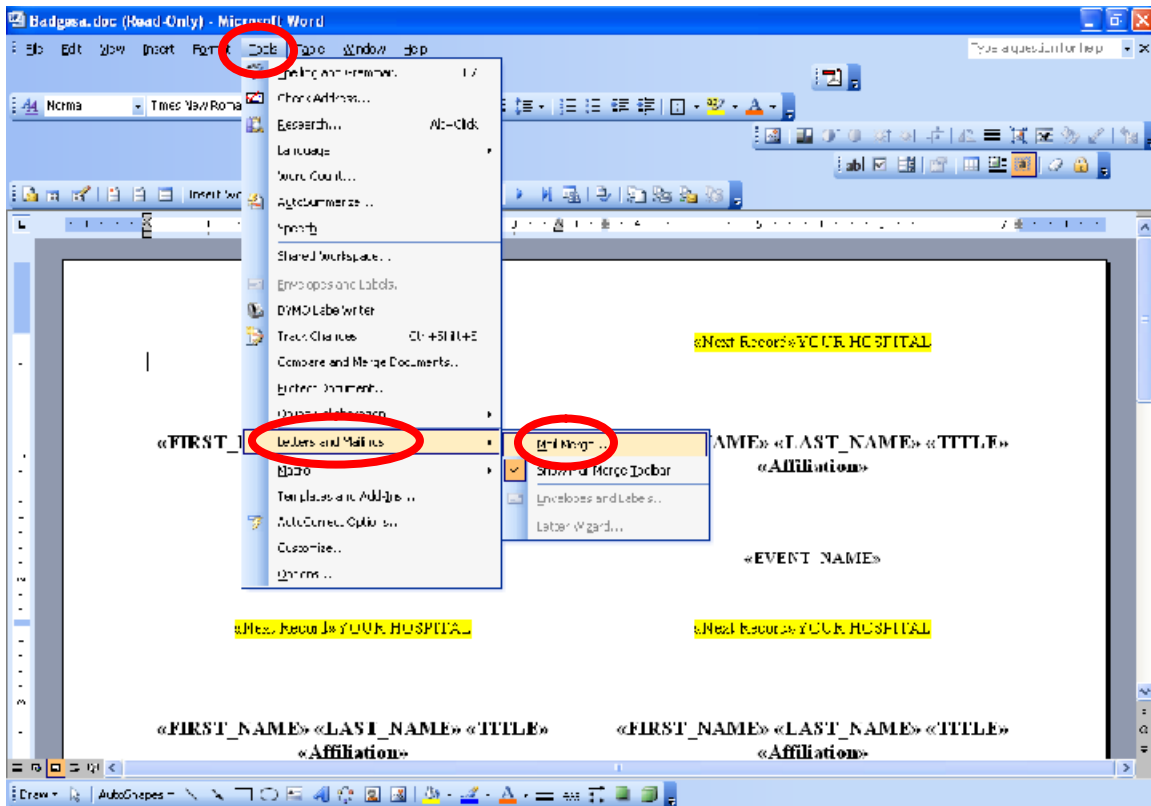


**Fig. H**

# Tutorial

**Step 9:** The next step is to update the labels with the new changes.

- a. Click **Tools**.
- b. Move your cursor down to **Letters and Mailings**.
- c. Click **Mail Merge**. (Fig.1)



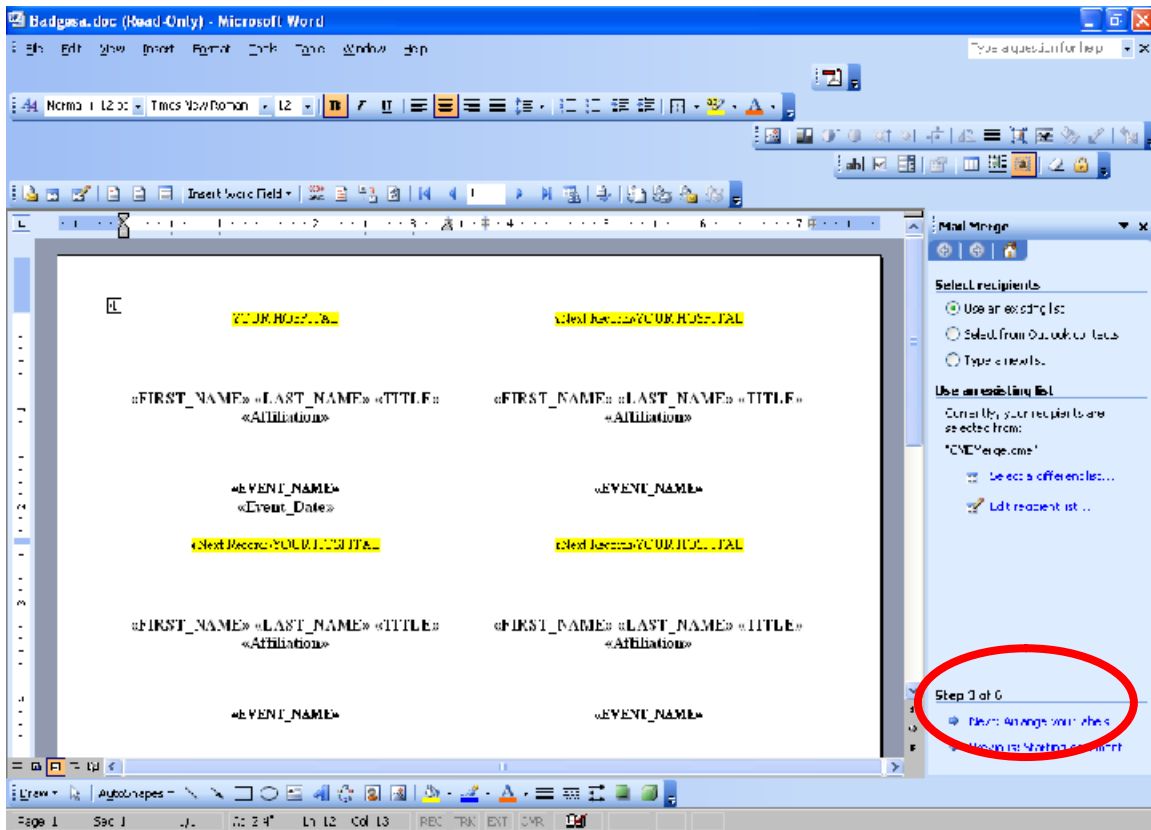
**Fig. 1**

# Tutorial

**Step 10:** The **Mail Merge** window now appears.

- a. Click **Next: Arrange your labels**-Step 3 of 6. (Fig. J)

**Note:** For this example, we are starting at Step 3 of 6. Your ultimate goal is to reach Step 4 of 6.



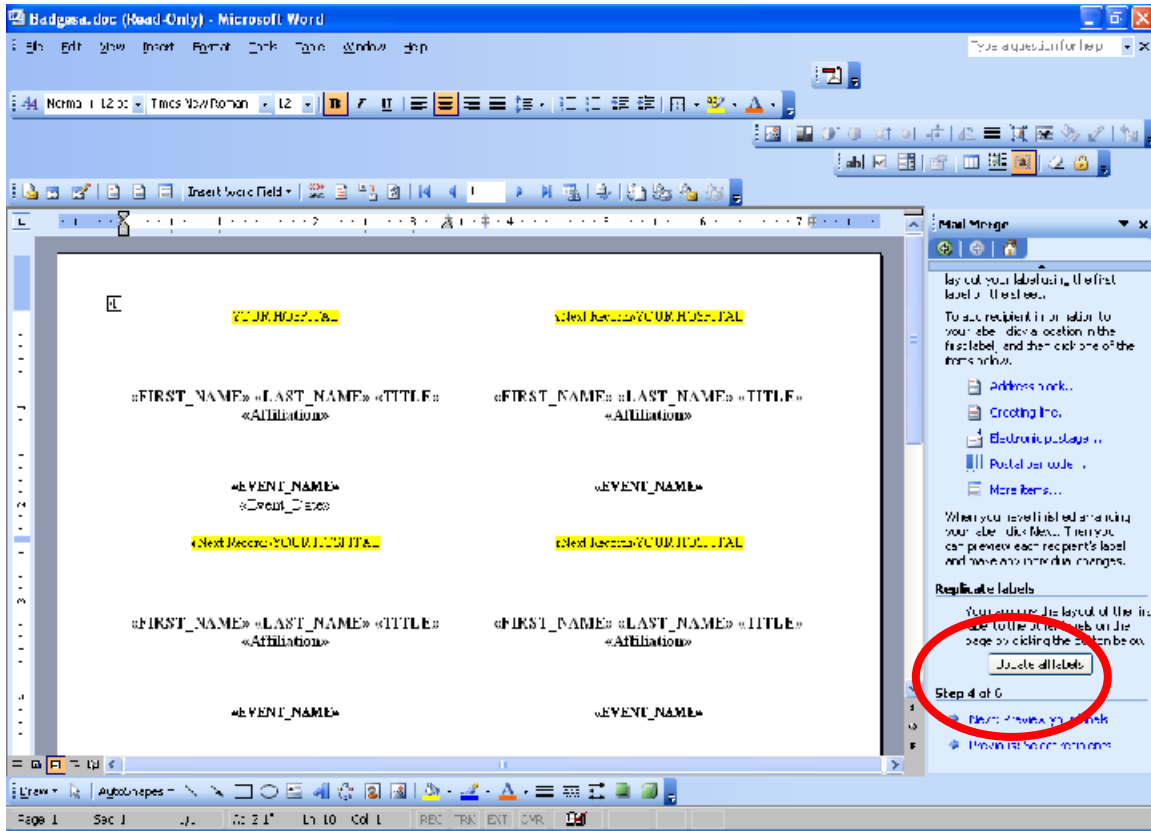
**Fig. J**



# Tutorial

## Step 11:

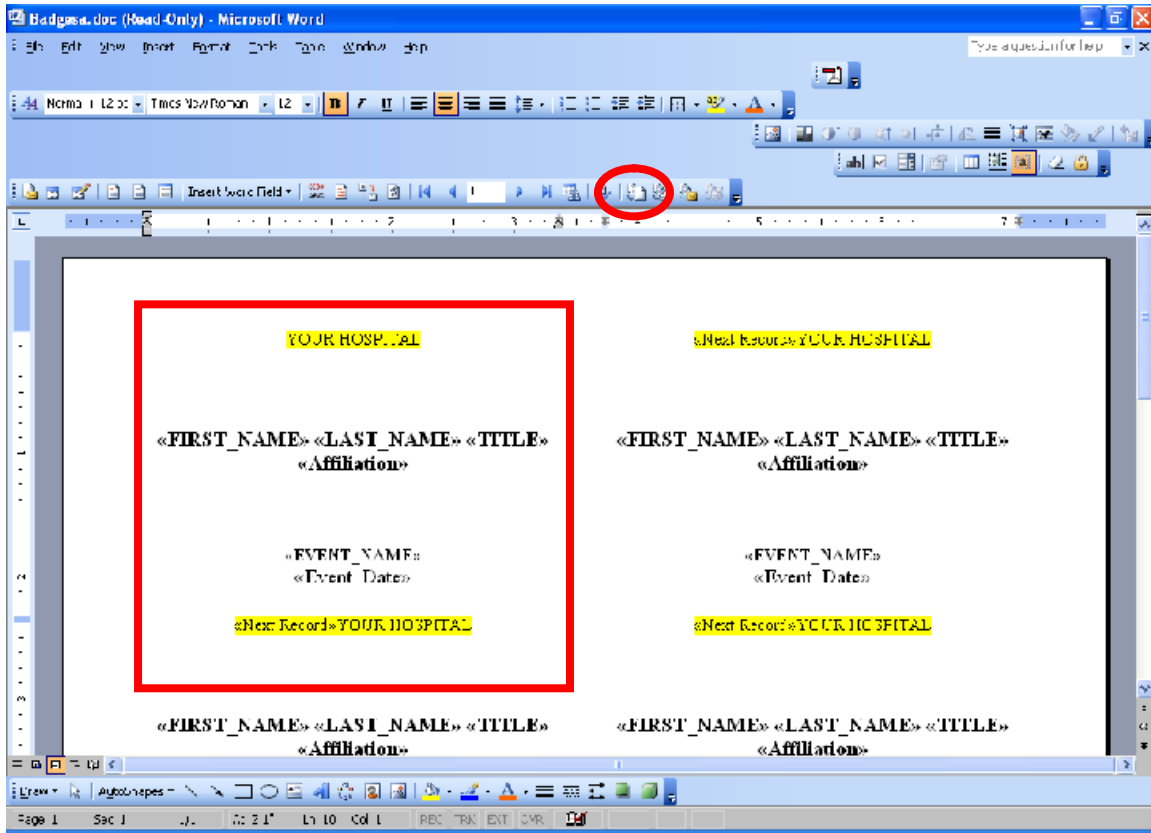
- a. Click **Update all labels**-Step 4 of 6. (Fig. K)



**Fig. K**

# Tutorial

- Step 12:** Your Labels have now been updated with the new merge field(s).  
a. Click the **Merge to New Document icon** to view and print. (Fig. L)



**Fig. L**

**Note:** When you make any changes to the badges, (Adding and Deleting Merge Fields, Editing the size of your Badge, Fonts etc.) you may want to save the changes. If you want to save this Report and to have access to this report for all user's, save this to your ftp site in the Shared Documents folder. See Tutorial: Saving a Word Template Document using FTP. (File Transfer Protocol) or if viewing online, simply click the following link!

<http://www.cmetracker.com/WTSE%20Tutorial-Saving%20a%20Word%20Template%20Using%20FTP.pdf>