

Tutorial

Objective: Saving a Word Template Document Using FTP (File Transfer Protocol)

Note: For this example we will be using the +Custom Attendee Name Badge in the Register/Reports tab. When updating your Default Word Template, you may use any Word +Custom report. (Your FTP account must be set up before using this function. See WEB Tracker Tutorial: Setting up your FTP to upload Word Template Documents.)

Step 1: Open your WEB Tracker.

- a. Click the **Register icon**.
- b. Click the **Reports tab**.
- c. Click to highlight the **+Custom Attendee Name Badge**.
- d. Click the **Word Process icon**. (Fig. A)

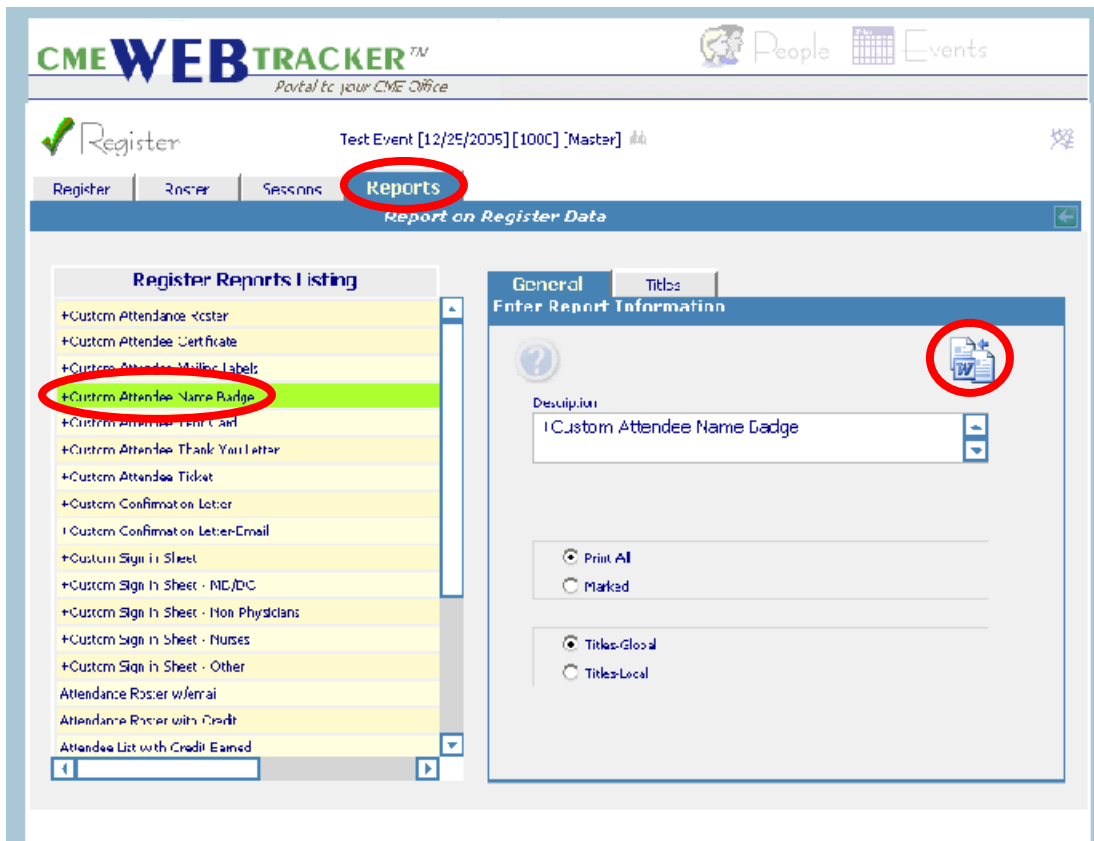


Fig. A

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Step 2: The **File Download** popup appears.

- a. Click **Save**. (Fig. B)

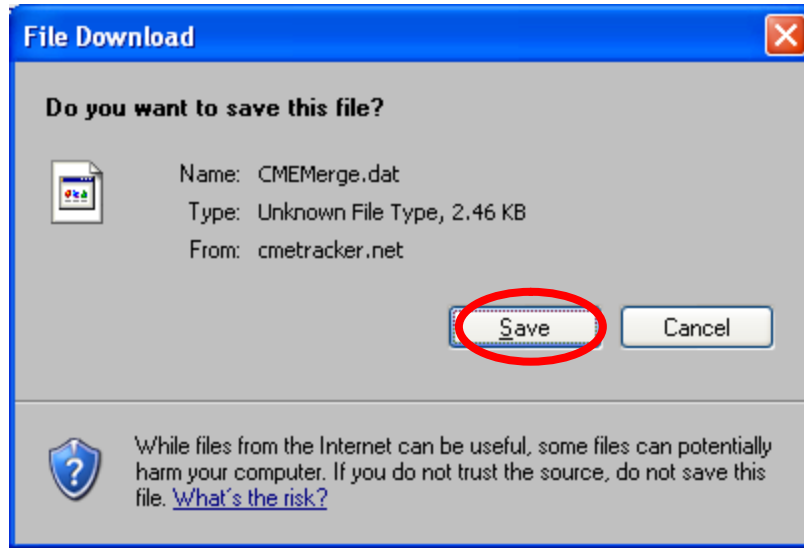


Fig. B

Step 3: The **Save As** popup appears.

- a. Click to access the **dropdown list**.
- b. Click **Local Disk (C:)**.
- c. Click **My Documents**.
- d. Click **Save**. (Fig. C)

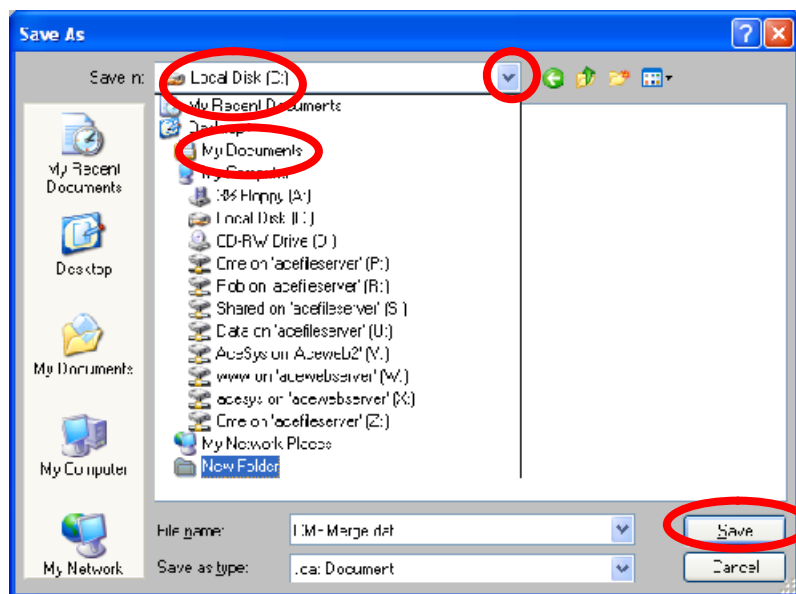


Fig. C

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Step 4: Click the **WORD Merge Document Launch** icon. (Fig. D)

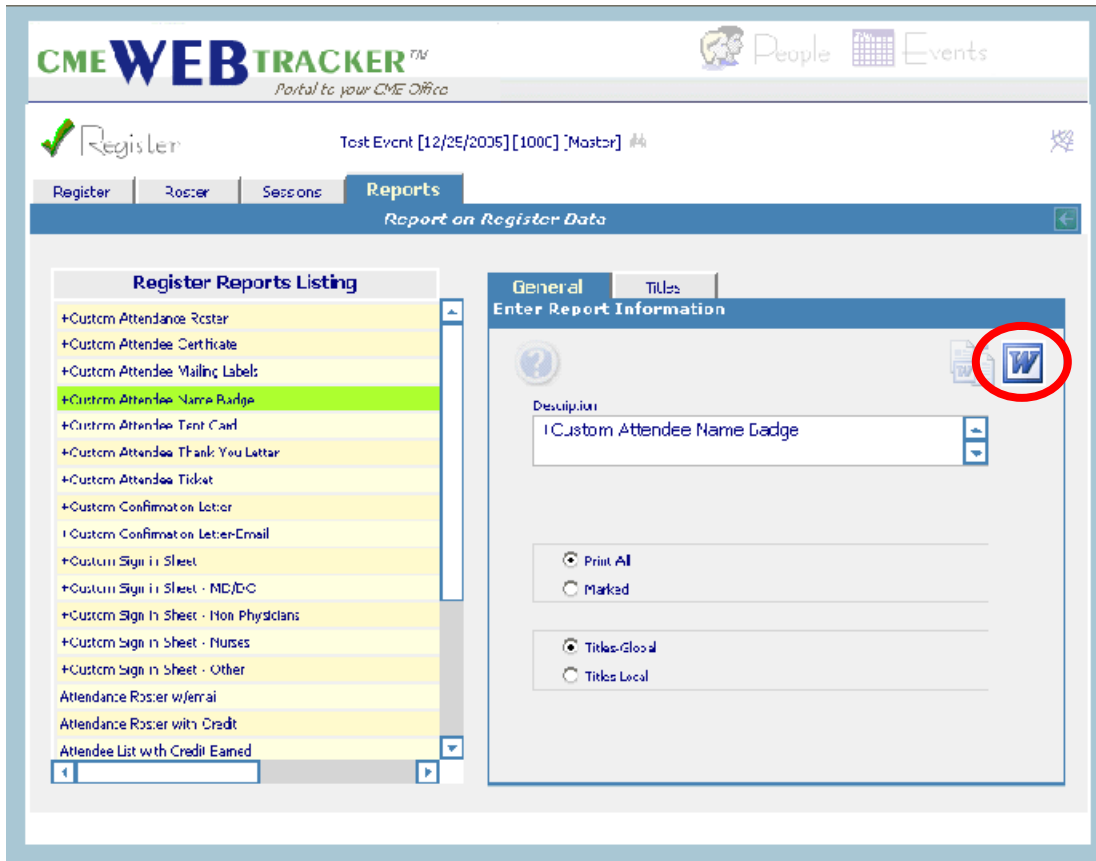


Fig. D

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Step 5: The Word +Custom Attendee Label Merge Document now appears

- a. Click **File**.
- b. Click **Save As**. (Fig. E)

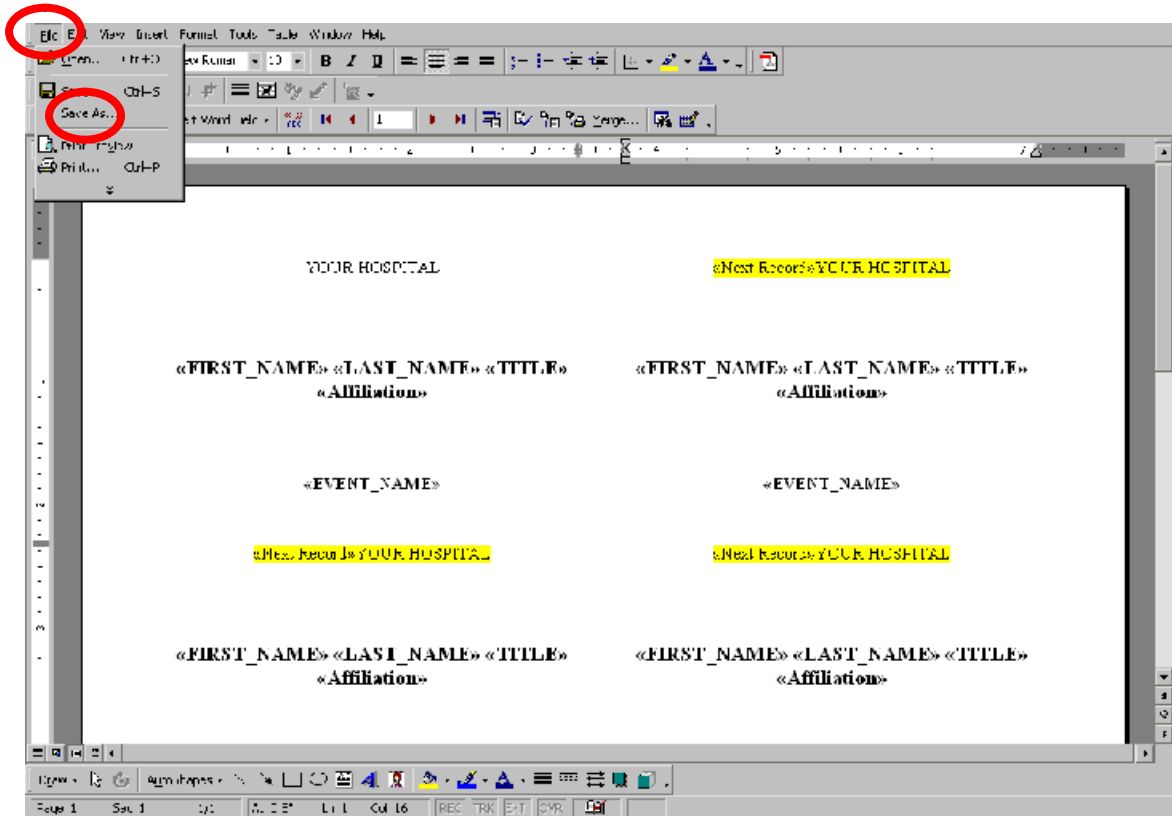


Fig. E

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Step 6: The **Save As** popup appears.

- a. Click to access the **Dropdown list**.
- b. Double click the **FTP location** where you choose to save your Template. **ftp://cmetracker.net**
- c. Click **Save**. (Fig.F)

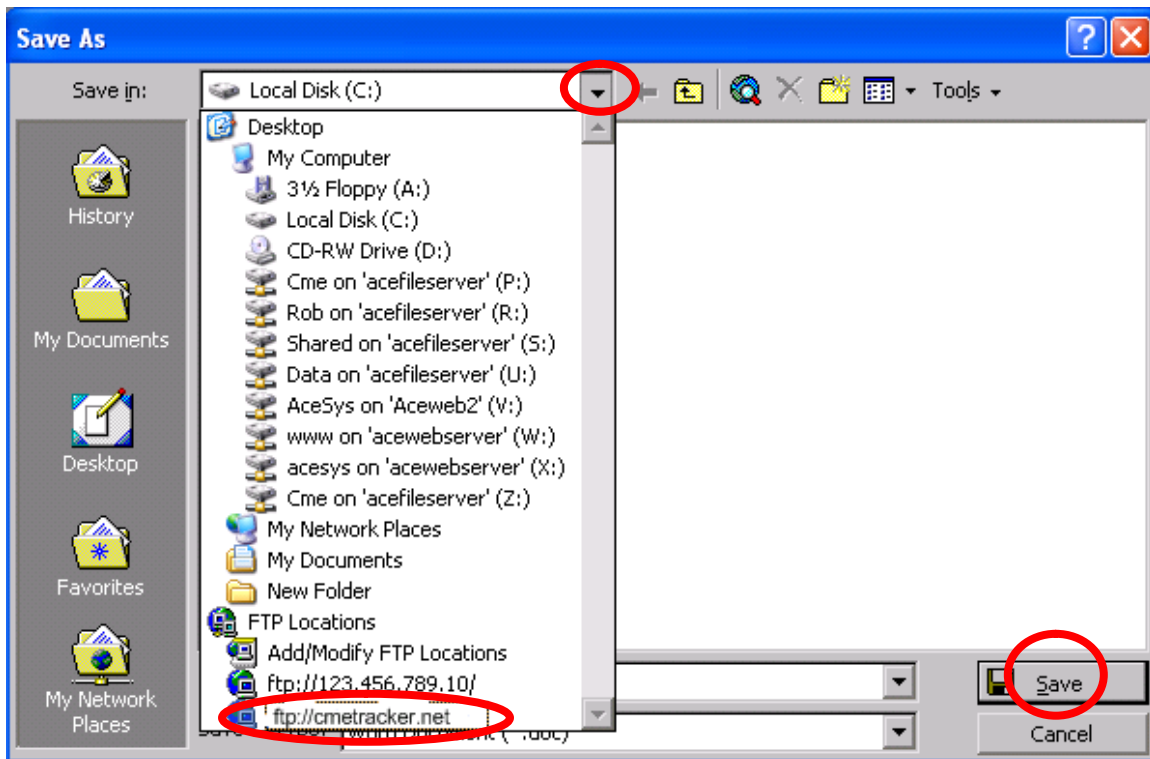


Fig. F

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- Step 7:** The **FTP Log On** popup appears.
- Enter your **User Name and Password**.
 - Click **OK**.
 - Your Template will now be saved to this **FTP location**. ([Fig. G](#))

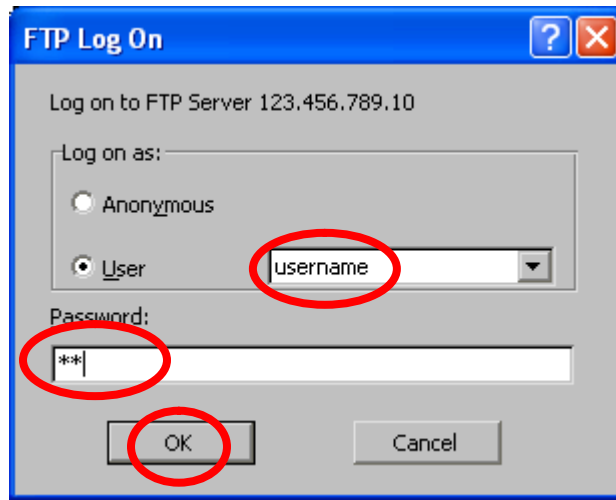


Fig. G