

NAME BADGES – ON-SITE PRINTING

All attendees and participants must wear a credentialed Name Badge at all times in order to have access to convention events and exhibit areas.

The following procedures are quite detailed. As with most detailed instructions, the actual process moves much faster than the written instructions. Once understood, the processes below are very straight-forward.

PRE-REGISTERED REGISTRATIONS:

1. When an attendee registers online and their credit card is processed, the attendee's name and other information is sent to our Member Site (DAP).
 - a. If the attendee already has a member account, the purchase is added to their account.
 - b. If the attendee does NOT already have an account, a new member account is created.
 - c. The member account products are used for file downloading and as a confirmation and online resource to verify purchases when we do not have access to our QuickBooks file.
2. Attendee's information is also kept as an Order transaction in our Merchant Account, Premium Web Cart (PWC).
3. When PWC transactions are downloaded and imported to QuickBooks, the individual products purchased are associated with the same items in Quickbooks.

CREATING NAME BADGES FROM QUICKBOOKS:

1. With QuickBooks open, click on the REPORTS menu tab.
2. A number of pre-designed Memorized Reports have been created for the purpose of providing lists of product purchases, email lists, and name badges.
3. Select the Memorized Report associated with Name Badges
 - a. Do not change any settings under the DISPLAY tab
 - b. Under the FILTERS tab, select ITEM in the Filter list at the left
 - c. Under the Item dropdown menu:
 - i. Select the specific product item for the badges to be printed, if only one item.
 - ii. Select Multiple Items, then check off the items to be included in the name badge printing.
 - d. Under the HEADER/FOOTER tab, change the fields to identify the badge list being created.
 - e. Click OK when satisfied with the name badge setup.
 - f. To change the setup later, click on Modify Report
4. Click EXPORT to send the list to an Excel spreadsheet
 - a. Select "a new Excel spreadsheet"
 - b. Click EXPORT at the bottom of the dialog box
 - c. This will open the data in an Excel spreadsheet
5. In the new Excel Spreadsheet
 - a. Make sure to keep the following columns
 - i. Name
 - ii. Name Contact

NAME BADGES – ON-SITE PRINTING

- b. Delete unneeded columns
 - i. Highlight the column
 - ii. Right-click and Delete to remove columns
 - c. Delete unneeded empty rows
 - d. Look for duplicated names, and delete duplicates
 - e. Create a new column named Type
 - i. Enter the following for those names associated with limited access registrations:
 1. Day Pass – Day – 1/1/20xx
 2. RCR – EXHIBITS – GP
 - a. For Red Carpet, Exhibits, and Garden Party access
 3. EXHIBITS ONLY
 - ii. Highlight the text and click on BOLD
 - iii. Highlight the text and change color to RED
6. When done, SAVE the spreadsheet under a new name as a .xls workbook file
- a. Save the file at a location you will remember
 - b. Close the Excel spreadsheet
7. Open MS Publisher
- a. Click on FILE – OPEN
 - b. Navigate to the folder where the VOICE Name Badge template is saved

VOICE 2012/!!!!__EVENT – REGISTRATIONS – NAME BADGES/VOICE20xx – MERGE Name Badges

- c. Click “NO” at the first dialog box to use a new data source
 - d. Click on TOOLS – MAILINGS & CATALOGS – MAIL MERGE
 - i. This will open a settings box at the left
 - e. Choose “Select an Existing List”
 - f. Click “YES” at the next dialog to use a new data source
 - g. Navigate to the Excel spreadsheet you created in step 4
 - h. At the “Select Table” dialog, click OK to bring up the list of names in the next dialog box.
 - i. Click “OK”
 - j. Click inside the first, large frame on the template to open the cursor
 - k. In the Mail Merge list at the left, click on the NAME CONTACT item to put that merge field in the template.
 - l. Click inside the bottom, smaller, frame on the template to open the cursor
 - m. Click on “Type” to add this merge field.
 - n. Use the arrows in the merge window at the left to step through the names to be printed.
8. Insert paper for name badge printing and PRINT

CREATING NAME BADGES ONSITE:

1. Process registration and print receipt from QuickBooks
 - a. Receipt will be used as the reference for Name Badge name and type
2. Open Avery DesignPro
 - a. Click on Open Existing Project
 - b. Navigate to the folder where the VOICE Name Badge template is saved.

NAME BADGES – ON-SITE PRINTING

- i. VOICE 20xx/OFFICE 20xx/Avery labels/
 - c. Open the file named ON-SITE Name Badge – Use Avery.zdl
 - d. This will open the template file.
3. Highlight the text that is labeled “First Lastname”
 - a. Type the correct name for this badge
 - b. Replace the “Day Pass – 0/0/20xx” with the appropriate registration type:
 - i. Day Pass (update the date using the format 00/00/20xx)
 - ii. EXHIBITS ONLY (all caps)
 - iii. RCR – EXHIBITS – GP (for access to these events)
4. To ADD a new badge
 - a. RIGHT CLICK on the yellow tab “Label 1”
 - b. Select “Copy Tab” to duplicate the current tab
 - c. Replace the fields with name and type for the next badge
5. When done adding names, insert pre-perforated paper for name badges
6. TO PRINT NAME BADGES:
 - a. Click on the PRINTER icon in the top menu bar
 - i. From the first dialog, select ALL to print all new badges
 - b. Click on OPTIONS to select the starting position for printing.
 - i. Use the “Starting Position” selection to position the start badge for printing.
 - ii. **IMPORTANT: THE IMAGE YOU SEE ON THE SETUP SCREEN IS DIRECTLY UPSIDE DOWN OF HOW YOU WILL INSERT THE PAPER IN THE PRINTER. POSITION #1 (TOP LEFT) WILL BE AT LOWER RIGHT WHEN INSERTING PAPER.**
 - iii. When position is verified, click “OK” to close this dialog box
 - iv. Click “OK” to start printing.
7. Separate pre-perforated labels carefully so as to not damage adjacent labels.
8. When printed, verify the information before handing label and other materials to attendee.