

Steps to update name tags to use database fields

- 1. When opening the P-touch Editor, choose Open and then browse to the Name Tag Template you saved/downloaded from Box.
- Make sure that the Label List is turned on by going to File/Database/ Label List. IMPORTANT: Once this is turned on, do NOT turn that view off or it will lose the links you have created in step 3 below.
- 3. The template will open and if the first time setting up the Name Tag, you will need to link the following database fields to the Name Tag. The options will be under Insert / Database Field.
 - Memo 1 for First Name
 - Memo 2 for Last Name
 - Memo 3 for Organization
 - Memo 4 for Local Chapter Member (that is not an Ann Arbor member)
 - Title field is shown as number 5 in the illustration.



Now that you have the label updated. Save the label.

Steps to print name badges for an Event

- 1. Open the P-touch Editor and Name Tag Template if you haven't already.
- 2. Be sure your Label List is showing and you database fields are still present.
- 3. To obtain the Registrant List, go to a2atd.org and login.
- 4. Choose the Admin view and then on the Dashboard select the event that you need for creating name badges.

N	lext 3 events				
	Date	Title	Confirmed	Pending	Tota
_	04 Apr 2019	Twist in Talent Developm	1	-	1
	01 May 2019	Demystifying Gamification	1	-	1
	06 Jun 2019	Night of Networking	-	-	



5. Once the event opens up there will be an Export Registrants option at the top of the screen.

Dashboard	Contacts	Website	Events	Members	Store	Donations	Finances	Email	Settings
Event list Eve	ent emails								
Edit 🔹 Add registrant Email registrants Export registrants Reports •									
Back									
Twist in Talent Development: Personal Strategic Plans									
04 Apr 2019, 5:30 PM – 7:30 PM @ Washtenaw Community College, Morris Lawrence Building, Room 150, 4800 E. Huron River Dri 48105									
Visible to: Public Allow registration: Registration is enabled.									
Event details <u>Registration form</u> <u>Registration types & settings</u> 🚥 <u>Emails</u> <u>Registrants & Invitees</u> Waitlist & settings									

- 6. In the Export Registrants dialog, choose to Export to CSV (Comma Separated Values).
- 7. Unmark Export All Fields and clear all fields except:
 - a. First Name
 - b. Last Name
 - c. Organization
 - d. Title
 - e. Local Chapter Member (other than Ann Arbor)

Registration form

- Member ID
- 🗷 First name
- 🕑 Last name
- Organization
- 🗌 e-Mail
- Phone
- State
- 🗌 Zip
- 🕑 Title
- 🗌 Area Code
- Company
- Address 1
- Address 2
- Company Name
- Zip/Postal Code
- Local Chapter Member (other than Ann Arbor)
- Select all / Clear all
- 8. Click Export. It will generate an CSV file to be imported into the P-touch Editor. Normally this will download directly to your computer in the Downloads folder.
- 9. Then bring the P-Touch Editor back up to import the CSV file. With the Label List active, choose File / Import. (IMPORTANT: The Import option will not show in the File menu if the Label List is



not the active area of the screen. Do NOT turn the Label List off as you will lose the link to your database fields.)

10. A screen will open for you to choose the CSV file to be imported.

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Videos	2018-12-06 Night of Networking A2ATD.csv 2018-02-01 Influence without Authority. Creating a Positive Culture from th	12/6/2018 2:25 PM 2/1/2018 5:08 PM	Microso Microso				
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• • • •	([]		4				
File nar	me: 2019-03-18 Twist in Talent Development_ Personal Strategic Plans A2ATD.c 👻	CSV File (*.csv)	Cancel				

11. The attendees should appear in the next screen based on Comma Separated Values.

Ne	pen	
[Delimiter Replacement	
	elect the delimiter for the source code.	
	riginal File Conversion Delimiter: Comma 🔻	
	¿First name Organization Title Local Chapte	
	eborah Meyers DTE Energy Manager, Or	
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	< Back Next > C	Cancel



12. Click Next and assign the fields as follows.

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13. Click OK and the attendees will automatically be added to the database at the bottom of the screen. Records that were already there will remain unless deleted. (Tip: always leave one line, even a blank record so that the Label List is never gone. If the Label List is turned off, it will lose the link to the database fields.

P-touch Editor - [Name Tag Template	e2.lbx]								3 23
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- 14. You can add or modify any of the records as needed.
 - a. Right click to add new records (example: a name tag for a walk-in)
 - b. You can print All records, only Marked records or the currently selected record.
 - c. To delete multiple records at a time click in the Row Number field and drag down to choose all records to be deleted (But always leave at least one behind.)

P-touch Editor - [Name Tag Template	2.lbx]	
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