Create a Name Badge

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Want to jump to a particular section? Use the contents tab to the right of this article

This guide will walk you through how to create and print a simple name badge. You can find additional resources on this help site by search 'name badge'.

Creating your name badge

Navigate to the Setup panel.

On the right side, select the Name Badge Editor.

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2	MODULE SETUP			SYSTEM SETUP		
Ē	Contact	Enable optional contact fields and create followup actions and Agent groups group management	A	 Event 	Configure event settings such as modules enabled, access rights, contact store, event logo and analytics	
888 Inn	Votes	Create note categories to capture comments and special requests for attendee or contacts		- Brand	Configure the style and format of your Interactive sites, portals and apps, including colors, fonts, and font sizes	•
¢	 Ø Marketing 	Create marketing tags to categorize attendees with a variety of data, such as date, text, number and multiple option choices	<u> </u>	- Financial	Configure tax details, payment types, bank accounts and credit card gateways for your event	•
⊉ 3	🕑 😧 Survey	Create a variety of survey and live poll question types, including multiple choice, scales, ranking, and more	-	ADVANCED SETUP		
	Registrations	Create multiple registration types, fee structures, inventory levels, accompanying person types and discount codes	4	 Accounting 	Configure accounts and enable optional features	A
Ê	✓ ■ Functions	Create functions and activities with date/time, inventory levels, fee types, locations, and other function specific	4	Packages	Create module items to be included in a Package	•
© 4		details Create hotels with detailed descriptions, room types, room		Project Manager	Add team members used in the Project Manager	a
Setup	Accommodation	and hotel inventories and detailed rate information	<u> </u>	Run Sheet	Add team members and locations for use in the EventsAir run sheet function	a
	✓	Create travel types, sectors, transfers, thinerary information, and bommelvice-band aroup travel details		Name Badge Editor	Create custom name badge layouts for any kind of badge Merge data from any field in EventsAir, add graphics and QR codes	-
	Presentations	Create details to collect speaker information, presentation types, session info, room assignments, agendas, AV and speaker to-do lists	a	 Custom Fields 	Create custom field tabs and fields for inclusion in any module in EventsAir Fields can be required or optional	4

Click on the Plus symbol to create a new badge layout.

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			Name Badge Type*	Please select Create	~			
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¢ Setup								- 1
					Clone From	Clear	Save	

Enter a name for your new badge layout.

Next, choose the name badge type carefully, based on what data you want to include on the badge.

- NOTE: ALL badge types can pull data from the Contact module, but for other module data, you need to choose a matching badge type.
- For example, you can **only** pull Table Allocation/Table Number into a "Function Guest" badge type. You can't pull table numbers into a "Contact with Key Module Data" name badge type).
- If you don't see the data fields you need or you're having trouble getting an expression to work correctly in the Name Badge Editor, check that you have the right badge type.

Below are the different Name Badge types and which modules they can pull attendee data from:

- CE Course Attendee Contact module PLUS Registered Attendee Details (CE Courses module).
- Contact Contact module only.
- Contact (including all module data) Contact Module and any other module in EventsAir. Only use this type if you're unable to get the data into another badge type, because editing can be slower due to the amount of data. You may not be able to get all data from every module.
- Contact (including key module data) Contact Module and Registration and Functions modules (may not include ALL data from those modules).
- Exhibition Name Badges Contact Module and the Exhibitions module.
- Function Attendee Contact Module and Functions Module.
- Function Guest Contact Module and Functions Module Guest information, if available i.e. guests of attendees).
- Registered Attendee can pull information from the "PREFERRED NAME" fields in the Contact Module.

• Registered Partner — can pull information from the "PREFERRED NAME" fields in the Contact Module of a Guest.

Note: For most registration-focused name badges, you can use one of the Contact badge types.

Then, select which Registration types to associate with this badge (this is helpful if you want to have different badges for different registration types).

Select Create.

This will bring you to the Specify Page Settings page.

Specify page settings

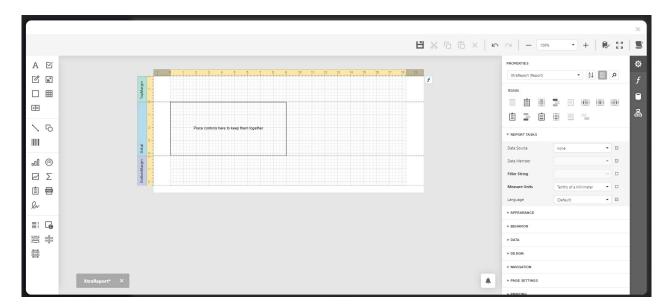
Specify Page Settings is an optional section that lets you select from hundreds of different name badge templates. This is useful if you're printing your name badges in advance, on sheets of six to ten name badges per page. These templates can be purchased in standard layouts, or you can use the page size and parameter settings on the right side to create a layout to a custom badge template.

	REPORT WIZARD	Specify Page Settir	ngs					
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	Specify Data Source Settings	Product Number:	28171 - Address	Label Width:	210.0 x 297.0 mm 90.2	•	+	
ab	Define Report Layout	Width:	90.2 mm	Label Height:	42.3	•	Price	
\mathbf{i}	Specify Page Settings	Height:	42.3 mm	Horizontal Pitch:	92.7	VERTICAL PITCH	+	→ не
		Paper Type: Paper Size:	A4 210.0 x 297.0 mm	Vertical Pitch: Top Margin:	42.3			
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It's very common to print badges individually as attendees are checking in. Alternatively, you might want to set up a layout where multiple badges print per page. In this example, we're creating a custom individual name badge layout, also called a "one-up" badge, so we just select the **Finish** button to bypass these options and continue to the name badge editor.

The name badge editor (similar to the Report Editor)

Normally, when you first access the name badge editor, you will see a default layout similar to this.



On the left menu, you will see a variety of formatting tools (icons) that let you add in a variety of content, including:

- Labels
- Images
- Tables
- Lines and shapes
- Other items not typically used for creating name badges

On top bar, you will see icons for important options such as:

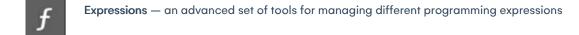
- Save changes
- Undo and redo
- Cut, copy, paste, delete
- Zoom
- Full Screen
- Other options

The right hand panel is where you create settings and manage content and label elements.

Properties - lets you manage a variety of design and content elements, including:

- Different bands (areas of your page or badge layout)
- Reporting options
- Appearance options, such as borders and colors
- Behavior options, such as showing margin lines, measurement unites, visibility and more
- Data options
- Design options, such as watermarks, snap to grid and more
- Navigation Options
- Page Settings, such as page width and height, paper size and margins
- Printing Options

You use these in a similar way in both the Name Badge Editor and Report Editor. We don't go into all these features in this article.





Field List - used to place content from the EventsAir database onto your name badge



Report Explorer — used by advanced users to navigate around a report or name badge layout

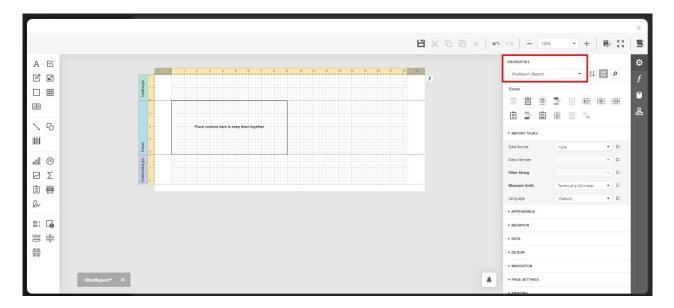
Building a name badge template

These are only the basic elements of a name badge. Your designs will be unique to your organization and if you have any questions, please reach out to our Support team for any questions you may have.

Step 1: Be sure you're editing "Properties" for the whole badge (measurement units & margins)

- 1. Make sure the Properties Menu is displayed on the right. If you don't see it, you'll need to select the cog icon to open it.
- 2. Make sure you're editing the entire layout and not a specific band or area of the template. To do this, check what's in the dropdown menu the top of the Properties window. You can see different elements of the layout highlighted when you choose different options from this dropdown menu. Look for one with (Report) listed after

the name; when selected, no particular section of the badge is highlighted.



Step 2: Set your units of measurement

The Name Badge editor can work in:

- Tenths of a millimeter
- Hundredths of an Inch
- Pixels

To do this:

- 1. Expand Report Tasks
- 2. Set Your Measure Units as required

For this example, we will work in tenths of a millimeter

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Bands		
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REPORT TASKS		
Data Source	none	•
Data Member		•
Filter String		
Measure Units	Tenths of a Millimeter	•
Language	(Default)	•
► APPEARANCE		

Step 3: Review/edit page settings

- 1. Expand Page Settings section
- 2. Expand Margins section
- 3. Set all margins to 0 (required for most one-up badge formats including roll type printers)

XtraReport (Report)		 ▲ ▲ ↓ 		Q
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Step 4: Review/edit panel (badge) dimensions

- 1. Back up at the top, change the dropdown selection of what's being edited to Panel 1 (you can also click in the blue badge area in the layout).
- 2. Expand the Layout section
- 3. Expand the Size section
- 4. Change height and width to the correct dimensions for your name badge.
- 5. For this example (a vertical badge): Change height to 1000; change width to 600

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Layout	Ξ 🔳	
Arranging		
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► STYLES		
► APPEARANCE		
► BEHAVIOR		
► DATA		
► DESIGN		
▼ LAYOUT		
► LOCATION		
▼ SIZE		
Height	1000	•
Width	600	\$

Step 5. Add an image header

To add a graphic image to the top of your badge:

1. Drag an Image element from the left menu...



...onto your badge. (You can also hover over an icon if you're not sure what it is).

On the right, in Picture Box Tasks (which will display when you select your new picture box):

- 2. Select what image will appear in your box using **Image Source** (click the three dots to open up files, or put a source URL into the Image URL box).
- 3. Set Sizing to Zoom Image
- 4. Resize picture box to the width of the badge

5. Resize the height as needed

HINTS: You can check the width of your picture box by selecting it, then checking the width in the Size section. Under "APPEARANCE", you can remove the **border on a picture box by** changing the Border Width option to Zero. You can also remove the border by clicking the "no border" option (the first of the border options shown).

Т

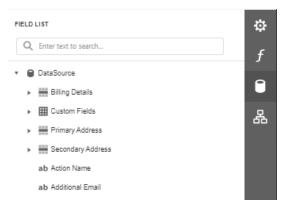
▶ STYLES			
▼ APPEARANCE			
Background Color	rgba(0, 0, 0, 0)	•	
Border Color	rgba(0, 0, 0, 1)	•	
Border Dash Style	Solid	•	
Border Width	1	\$	
Borders			

Step 6. Add data fields to your badge

The next step is where you decide what information you want to display on the badge. This is easily handled by dragging and dropping the needed fields onto the badge layout and formatting the content.

Please note we are building a sample badge; you can choose to use or not use any element described.

1. On the right, select the Fields icon (the silo/cylinder) to see Field Lists.



- 2. Expand Data Source
- 3. Expand Contact
- 4. Drag First Name and Last Name merge fields over to your badge design area
- 5. Drag over Organization
- 6. Drag over Country

Your sample badge may look a little like this:

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Step 7. Format your data/merge fields

- 1. Click on the Properties View on the right.
- 2. Expand the Appearance section.
- 3. As needed:
 - 1. Remove borders
 - 2. Set fonts and font sizes
 - 3. Set all fonts to Bold
 - 4. Change font colors (if needed)
 - 5. Drag your cursor to selection all of the merge fields
 - 6. Drag and set the width as needed
 - 7. Set the text alignment as needed (typically centered)
 - 8. Adjust spacing between fields as needed
 - 9. Select Save to save your settings

Now your example badge will start to look a little like this:



Advanced options

Once you build your basic name badge you can easily add to your template with a variety of advanced options.

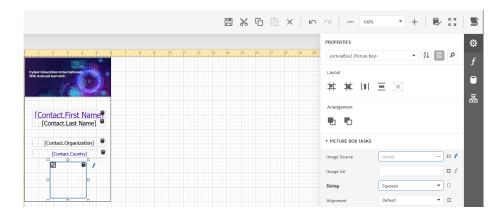
Images and photos

- Drop in photo or images simply by dragging over the Picture Box.
- Make an image into a background by selecting Send to Back from the Arranging options on the right.
- If you have collected headshots of attendees in advance, you can easily insert the "Photo Uploaded At" option found in the Field List.

• Remember, the onsite portal, used for onsite check in and badge printing also has a printing function, allowing you to take photos of attendees and insert them onto the badge and then print it.

Add a QR Code or Bar Code to a name badge

- 1. Click on the Field List view on the right.
- 2. Expand the Contact List.
- 3. Drag across either the Contact QR Code or the Contact Bar Code fields. For this example, we're using Contact QR code.
- 4. Position your Contact QR code below the "Country" field and drag the box size to fill the space appropriately.
- 5. Back in **Properties** on the right, in **Appearance**, remove the **border**.
- 6. Also in Properties on the right, in Picture Box Tasks, set the sizing to Squeeze.



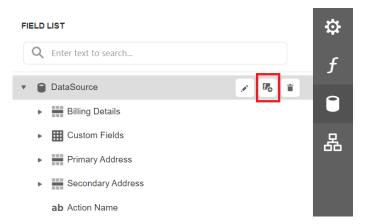
Calculated fields and expressions

There are times where you want two or more merge fields **shown on the same line**, usually either [City, State] or [First Name Last Name].

The challenge is how to set these up so they flow appropriately together without extra spaces. Fortunately, this is easy to do in EventsAir — using a feature called calculated fields and expressions.

In this example, we are going to create a First Name Last Name Expression so these will appear on the same line.

- 1. Open the Field List, using the Fields icon on the right (the silo/cylinder).
- 2. Click the DataSource field to see options, then click the Add Calculated Field icon (the second icon).



- 3. A new field called calculatedField1 will appear in the list.
- 4. Drag this field to the desired location on badge template.
- 5. Click on the new Calculated field to select it.
- 6. Be sure to **change the font and font size** as needed. [Because we're going to use this to replace separate FirstName and LastName fields, you can remove those from your badge.]
- 7. To edit the calculated field, go back to the Field List and expand DataSource. Scroll down until you find calculatedField1.

FIELD LIST	₽
Q Enter text to search	f
ab BillingNameAndCompanyAndAddress	•
🖍 calculatedField1	
Checked-in	品
Checked-out	
ab City	
ab Comments	
ab Contact Bio	

- 8. Select the edit icon, and then find the Expression field at the bottom.
- 9. Click on the three dots on the right to edit it (this will make the Expression Editor window appear).

FIELD LIST

f calculatedFiel	, det	1	
Name	calculatedField1		
Display Name			
Field Type	None		•
Data Source	DataSource		•
Data Member			•
Expression			÷.

The Expression Editor window looks like this:

Expression Editor			×
1			
Fields Constants Functions Operators	 田 BillingDetails 		
		Save	Cancel

- 1. To create your expression and combine fields, select **Fields** in the left window.
- 2. For our example, in the second window, locate the Contact section, then click the arrow to expand it.
- 3. Look for First Name and Last Name fields (again, you'll need to locate the fields that suit your task).

	Expression Editor		×
Cyber Education International Bib Annuel Summit			
G [Contact.Organization]	Fields Constants > Functions Operators	A Enter text to search ab First Name ab Google+ URL ab Group Contact ab Group Contact ID	
			OK Cancel

4. Double click one at a time on **First Name** and then **Last Name**. The two fields will appear together at the top of the editing window.

Expression Editor	×
X 1 [Contact.First Name] [Contact.Last Name]	

5. Next, you will need to insert a space between the two fields. To do so, enter the following code between each field:

+ ' ' +

The code is: a **plus symbol**, followed by a **space**, a **single quote mark**, followed by a **space**, **another single quote mark** followed by a **space**, then finally a second **plus symbol**.

6. Remove any other spaces on either side of this code, so that your expression now looks like this:



Save and close. Your badge will combine the first two fields on the same line, like this:



You'll need to use this method if you want to join two or more expressions on the same line, automatically adjusted so there's just one space between the first and second fields.

You can use this technique for many different reasons.

If you want to insert a comma, enter it between the two single quotes. (You might do this if creating a calculated field that combines City with Country, for example.)

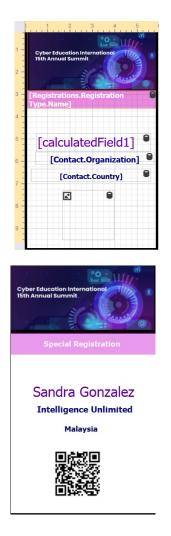
You can also give each calculated field a "Display Name" to help you find it easily when editing.

Registration type bands

Another popular addition to name badges is to display a color band with the attendee's registration category displayed.

This way, the registration type, such as Attendee, Exhibitor or Presenter are displayed and be easily viewed by other attendees.

- 1. From the left menu, drag across a Label (the capital A icon).
- 2. Pull to the width of the name badge or resize as needed.
- 3. Position the label as needed.
- 4. Set the font, font weight and alignment as needed.
- 5. Click on the Expressions icon (the italicized F) just to the right of the label.
- 6. Click on Fields, then navigate to the registration section.
- 7. Expand Registrations and then expand Registration Type.
- 8. Double click on Name, Apply, and Save ["OK"].
- 9. Finally, under Appearance, you can set the background color of the label as well as the font color.



Using expressions for registration type colors

You can use the Expression Editor to automatically display specific color bands based on what registration type is shown for a specific attendee.

This allows you to have specific color bands for each different registration type, (e.g. blue for regular attendees, orange for exhibitors and red for presenters) that are automatically displayed based on the registration category.

- 1. Create and add a registration type band with color for each registration type as shown in the previous section.
- 2. Then, click on the expression icon to open the expression editor for that field.
- 3. Navigate to the visibility tab and enter the following code entering the name of the registration this band is for. *lift[[Registrations.Registration Type.Name]=='(registration name)',TRUE,FALSE)*

Please note, expressions can be case sensitive. You will need to enter the name of the registration exactly how it is entered in EventsAir.

- 4. Repeat this for each registration band.
- 5. Finally, select your registration bands and in the properties to the right, expand the behavior section and untick visible. This will make so that only the specific registration band will turn on and be visible.

Testing your name badge

It is quite easy to test your name badge as you go through and customize the design and format.

Locate a test attendee record and from Attendee Tools, select Name Badge to preview what the badge will look like.

Printing badges onsite

When planning for onsite check-in at your event, you will typically prepare a name-badge template that will let you print name badges one at a time "on-demand."

In other words, when attendees check in via self-check-in, auto event check-in or assisted check-in using the Onsite Portal, their **name badge prints at that time** ready to be placed in a name badge holder and given to the attendee.

There are a variety of printers you can use for printing one badge at a time, and these can be thermal (black print only) or full color using ink jet or other technology.





You can purchase these printers or rent them as needed, and many companies provide both a printer and a touch

screen kiosk using either a PC computer or a Microsoft Surface Tablet (also using Windows), making it easy to integrate with EventsAir.

For more information on printing badges and going onsite, search our help resources for these topics.