How do I put my custom fields into my name badge?

HOW-TO:

> NOTE: Custom fields let you create your own data fields, so you can add information to a name badge or report even when there's no default field for it. A custom field can include things like an ID number from your system, a preferred name, or in fact any information attendees give during registration.

Setup Panel — Custom Fields

1. In Custom Fields, review the name of your custom field.

> 📄 NOTE: Before adding this to a name badge or report, you need to have already set up the custom field and captured the data. Because you need to add the **exact name of the custom field including any capital letters, punctuation etc.,** to use in the name badge or report editor, go back to Set Up, select the Custom Field you want, and note down the exact name. In this example, we're using **'Industry Sector'.**

Set up Panel – Name Badge Editor

2. In **Name Badge Editor**, select the badge template and click edit.

3. In the Editor, select the **Fields** (cylinder icon) from the right-hand side 4. Click the **DataSource** heading (or **Component 1** heading if you have it) and then the "Add calculated field" symbol.

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NOTE: The **Add calculated field** icon appears at the right of the DataSource heading (or Component1 heading), when you click the heading. It's a function symbol with a plus sign.

If your badge has both Component1 and DataSource under the Fields icon, (for example, an Exhibitor Name Badge), your Calculated Field MUST go under Component1, not DataSource.

Name Badge Editor — Edit the Calculated Field

5.   Scroll down to see the new field you just created. It will be called calculatedField and a number (e.g. calculatedField1).

6.   Click on it and select edit (the **pencil icon**).

7.   **Rename it** to something suitable (for our example, *Industry Sector*).

8.   Next to **Expression**, select the three dots to open the Expression Editor.

Expression Editor

1.   Select **Functions > Aggregate** and then double-click *Sum()*

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NOTE: In the Editor box, an expression appears, with your cursor sitting in between round brackets. The Sum operator is there to make sure all required data will   be searched.

   3.   Select **Functions > Logical** and then double-click *Iif(„)*

4.   Select **Fields** from the lower left-hand box (it's at the top of the list).

5.   In the lower middle box, look under the module where   you added the Custom Field (for example, Contact), and then expand **Custom   Fields** and double-click on *"ab Name".*

> ⓘ   NOTE: The **ab** icon just means it's a text field. The expression now looks similar to the below — we've added some spaces to make it easier to read. If your custom field isn't under Contact, there'll be another module name there instead.]

[ ].Sum(Iif ([Contact.Custom Fields.Name] , ,))

6.   With your mouse still immediately after [Contact.CustomFields.Name], insert two of these = (equals sign) with no space between then, then the **exact name** (capitals, spacing etc.) of your custom field, in single quote marks.

7.   Place the cursor between the two commas.

8.   Under **Fields**, expand the module your custom field is under (such as Contact), then expand **Custom Fields>Values** and double-click **GetValue**.

9.   Finally, after the second comma, we add a text string that means 'empty/null'. We do this by putting two single quotation marks '' with nothing between them.

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NOTE: The whole example expression now says:

[].Sum(Iif([Contact.Custom Fields.Name] =='Industry Sector', [Contact.Custom Fields.Values.GetValue] ,''))

Save the **Expression Editor** to go back to the **Name Badge** Editor.

While still in Name Badge Editor — Add your new field to a label

10. Click and drag your new calculated field (from the right-hand Field List) onto badge.

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NOTE: If you want to change the appearance, go to Settings (the cog icon on the far right). For example, under Appearance, you may want to center your text.

11. Save and close the layout editor.
12. Save changes to the Name Badge Setup.

You should also always test your new name badge by opening an Attendee Record and using the Tools (spanner icon) to check the name badge you edited, making sure the content you want in your calculated field has pulled in correctly.