

# Welcome to the EasyBadge 3.0 Bundle.

**This quick reference guide is to help you familiarise yourself with the EasyBadge 3.0 bundle set up and using the Easy Badge software.**

**If you have only bought the EasyBadge software use the download link and registration code provided on your order and start from step 3 on page 3.**


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# Installation of EasyBadge 3.0 Bundle (Printer and Software)

**Please follow the instructions before plugging in your printer.**

Thank you for purchasing the EasyBadge 3.0 Card Printing Bundle.
Please read through this quick start guide to install the bundle and understand the main features of the EasyBadge software. The EasyBadge 3.0 Printer manual is found at this **URL ……..**



**Step 1.**
If you have bought the full EasyBadge 3.0 printer bundle, you need to complete the online form found at this web address.

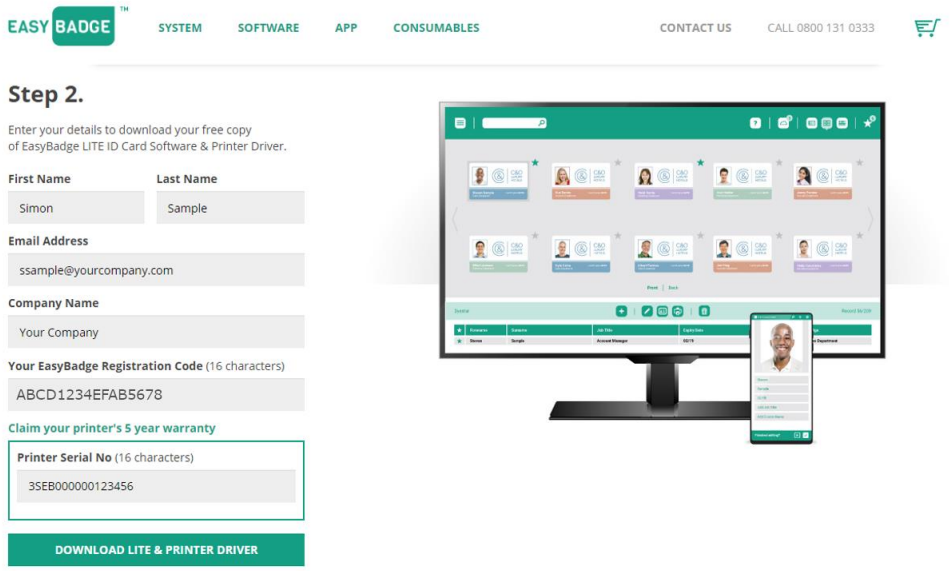
www.easybadge.com/install

Then you will be able to download the setup files you need to install the bundle. To do this you will need the 8-digit serial number of the printer you have (found on the printer box) and your EasyBadge registration code which is included on the flyer inside the box with the printer as below..

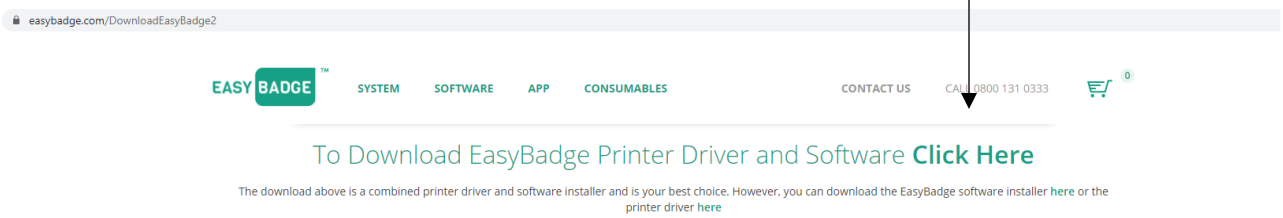



**Please keep your EasyBadge 3.0 "Step1" flyer safe. This includes your registration code and you will need it during the software installation as well as the registration process detailed next.**

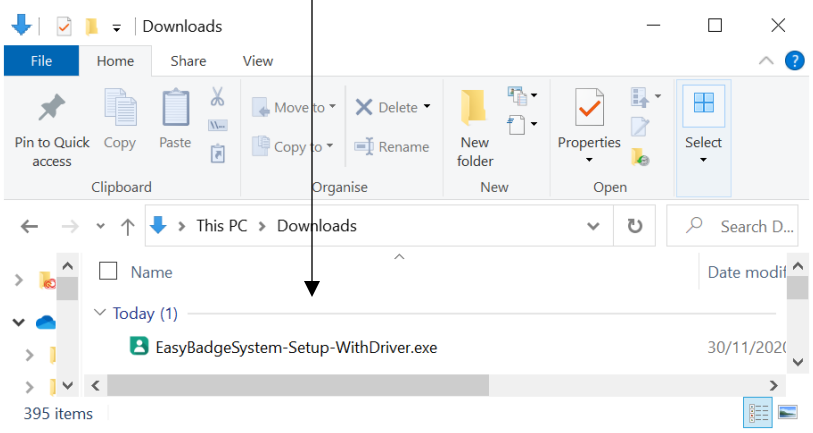
**Step 2.**
Complete the online form including your full name, email address, company name, EasyBadge registration code and the 8-digit Easy Badge 3.0 printer serial number.




Then click the “Click Here” text to download the EasyBadge system installer…



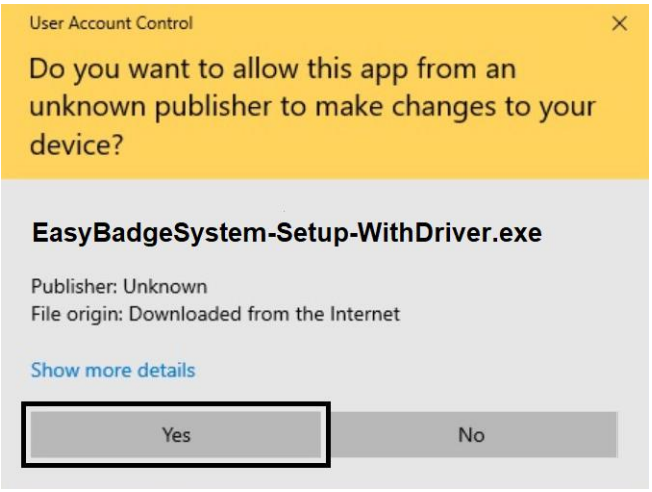

**Step 3.**
In Windows File Explorer, browse to your PC’s ‘Downloads’ folder and double click the **EasyBadgeSystem-Setup-WithDriver.exe** to start the installation process.

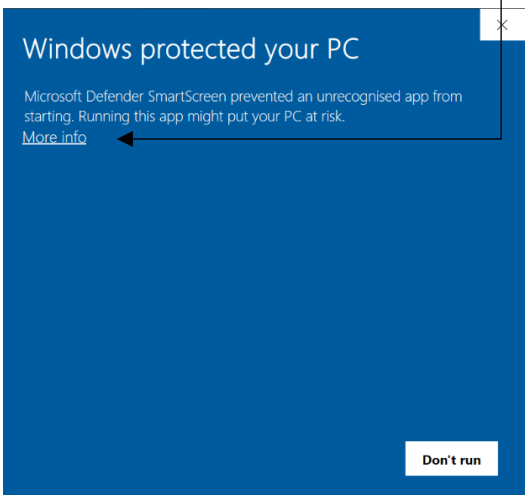



**NOTE:** If you only bought the EasyBadge software you will have downloaded the file **EasyBadgeSystem-Setup.exe**

**Step 4.**

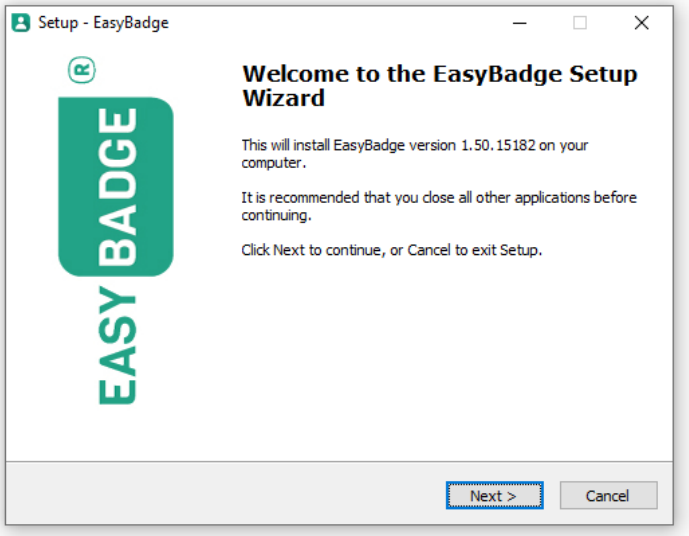
A Windows 'User Account Control' message may appear depending on your system configuration, click "Yes" to continue the installation. Windows may also prompt you with this a "Windows Protected Your PC" message, click "more info" then "run anyway" to continue...



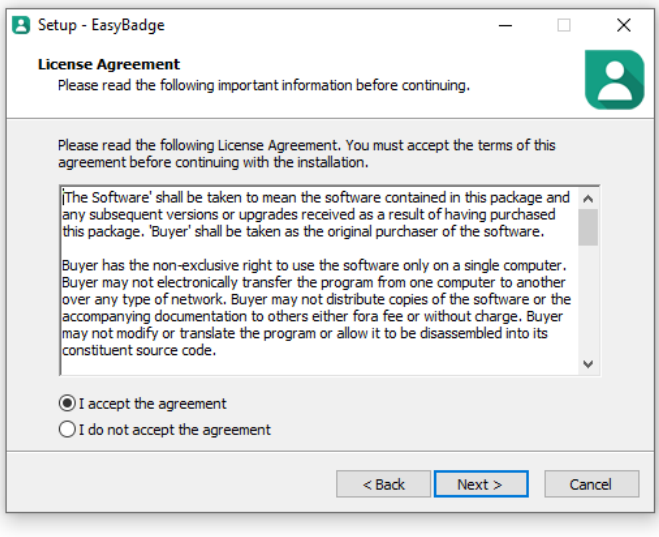

**Step 5.**

Click 'Next' to start the installation.

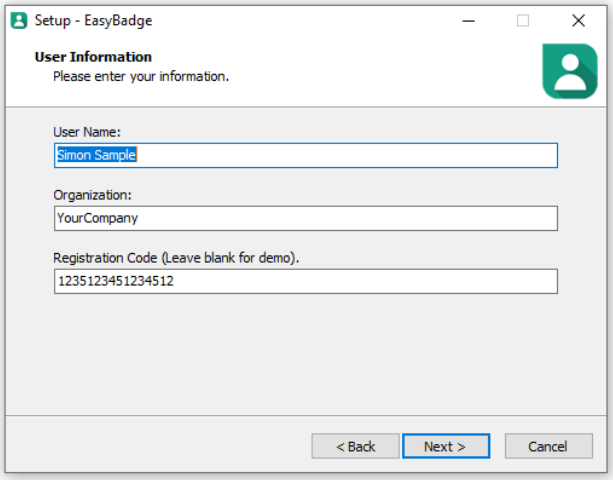



**Step 6.**

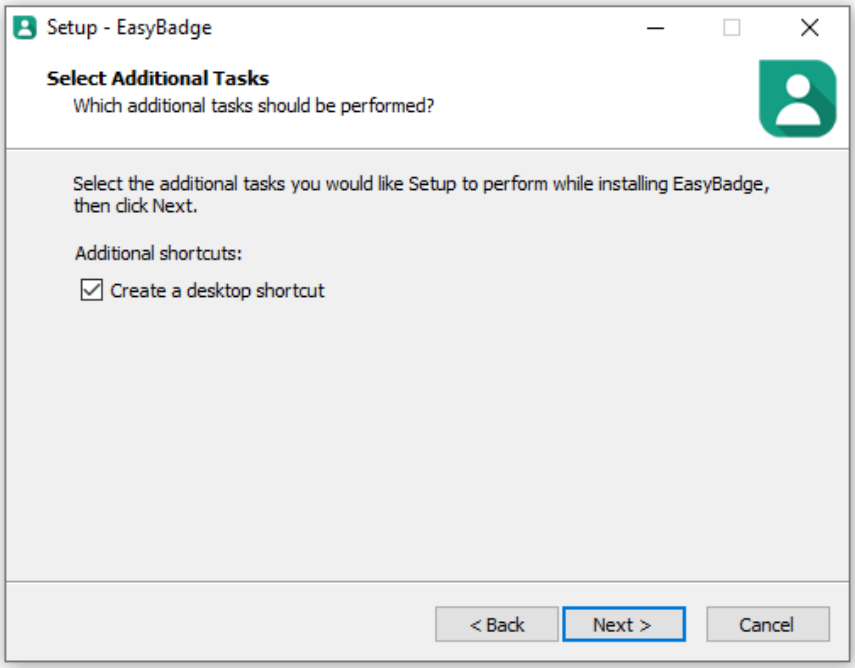
Please read the Licence Agreement, select "I accept the agreement" then click 'Next'.



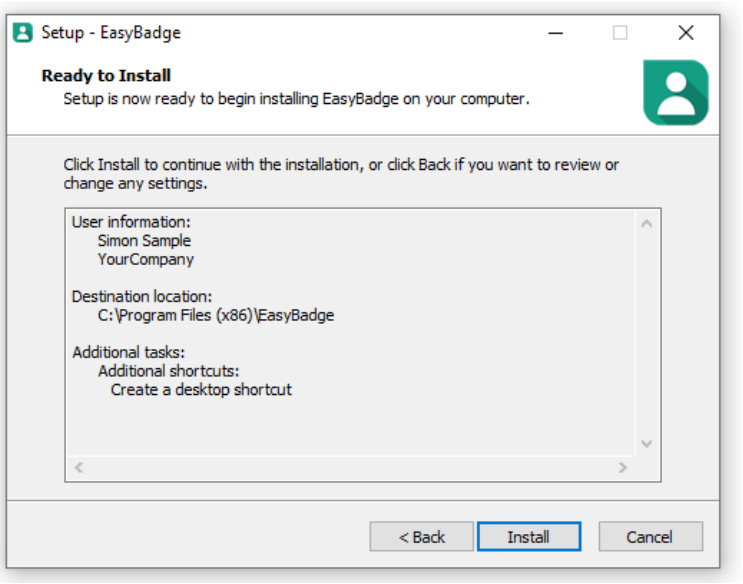
**Step 7.**
Complete the users name, organization and registration code details.



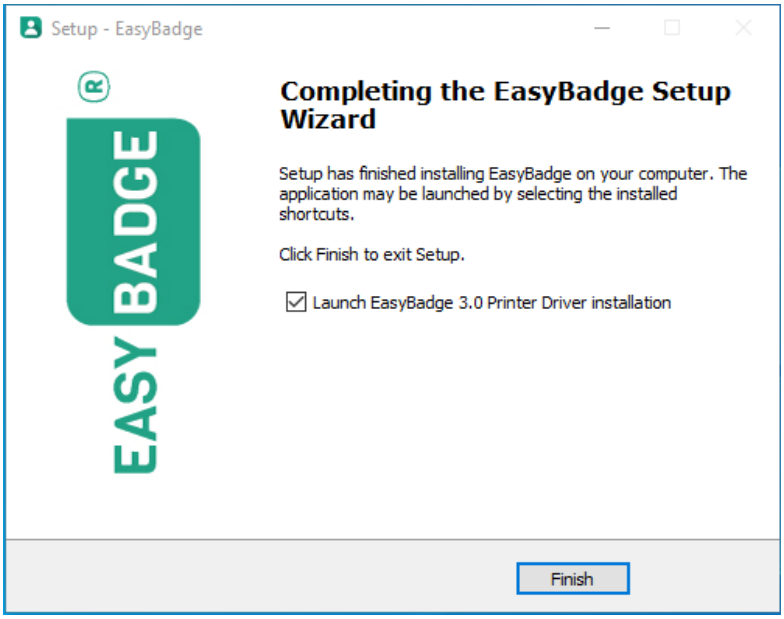

**Step 8.**
The installation will ask if you want to create a desktop shortcut, make your selection and click ‘Next’.



**Step 9.**
The installation will provide you with a summary of the actions it is going to take. Click 'Install' to complete the installation.



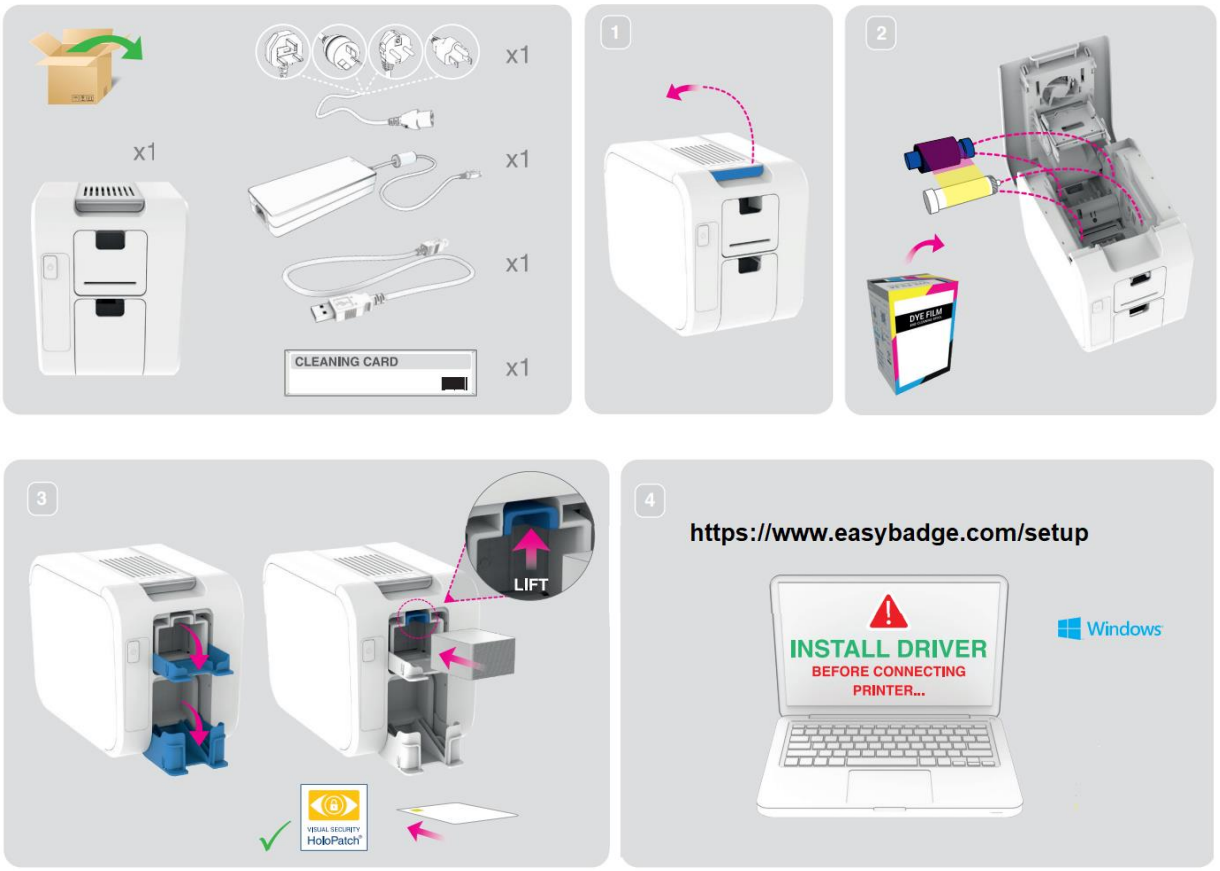

**Step 10.**
Upon finishing the EasyBadge software installation and clicking 'Finish' the installation of the EasyBadge 3.0 Card Printer Driver will begin.



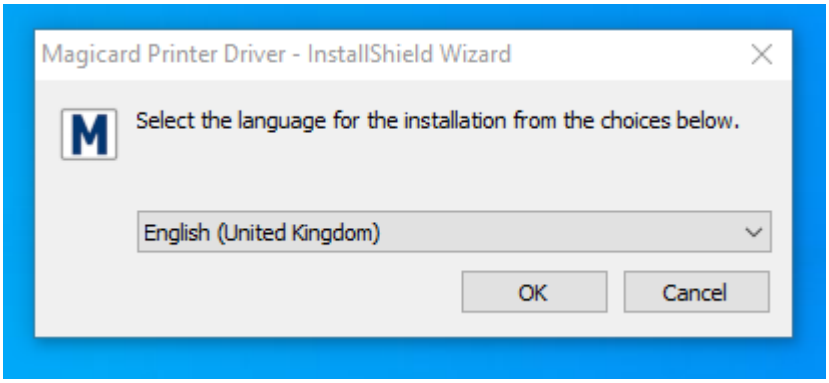

**If you have only bought the Easy Badge Software you will not be prompted to install any printer drivers. Please go to page 12 to learn about setting up the EasyBadge software.**

# Installation of your EasyBadge 3.0 Card Printer

**Please ensure the print ribbon is installed in the printer, it is powered on but <u>the printer USB cable is not plugged into the PC at this stage.</u>**

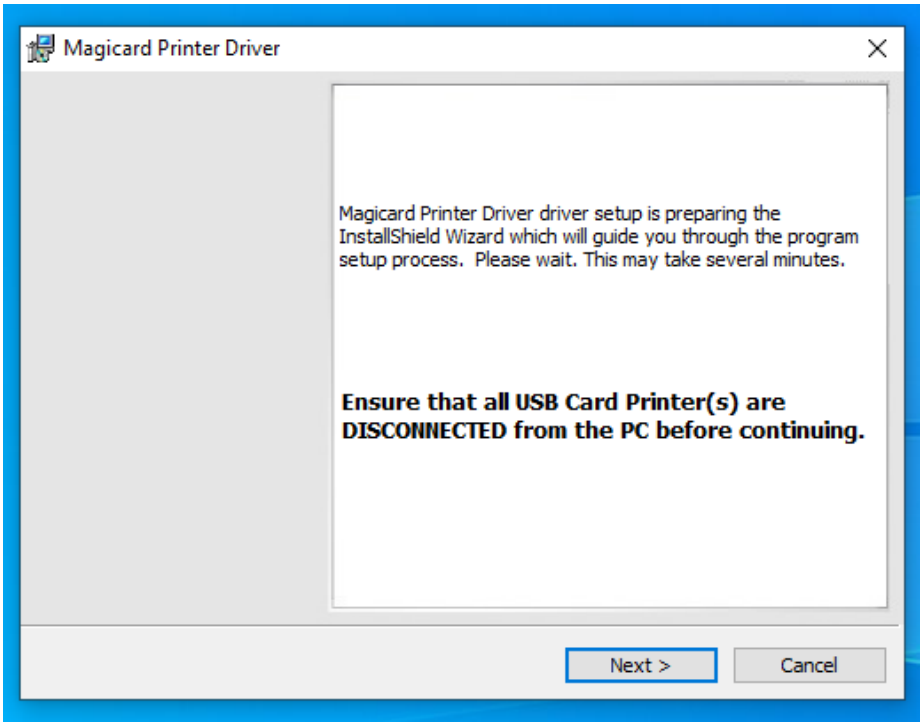



**Step 1 .**
You will be given the option to install the 'Magicard Printer Driver' which is used by the EasyBadge 3.0 bundle.
On the first step please select the language required for the installation.



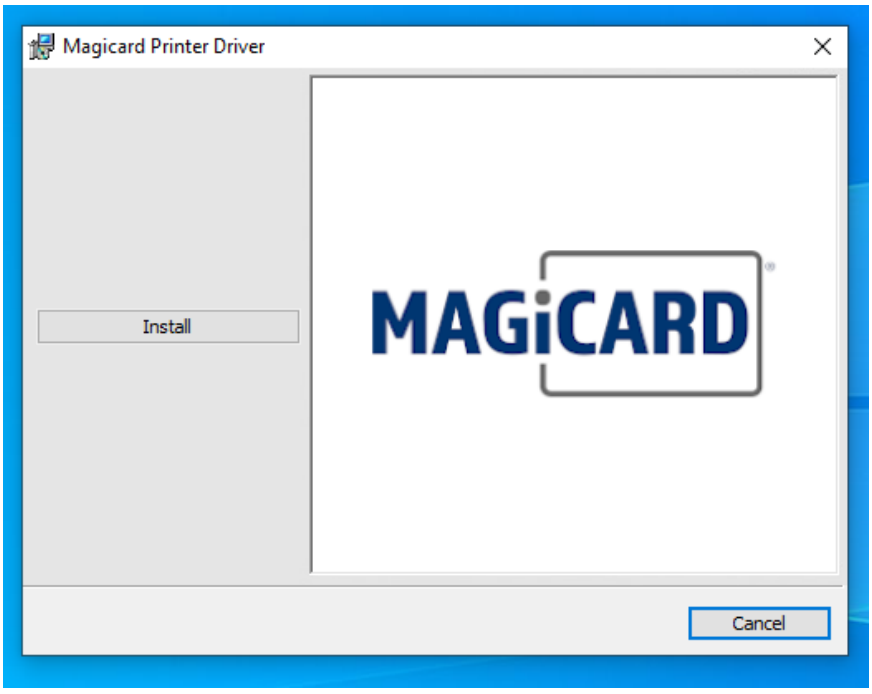
**Step 2.**
The Magicard driver install will prepare your system for the installation. Click ‘Next’ on this dialogue box.

**The printer must be disconnected at this stage.**

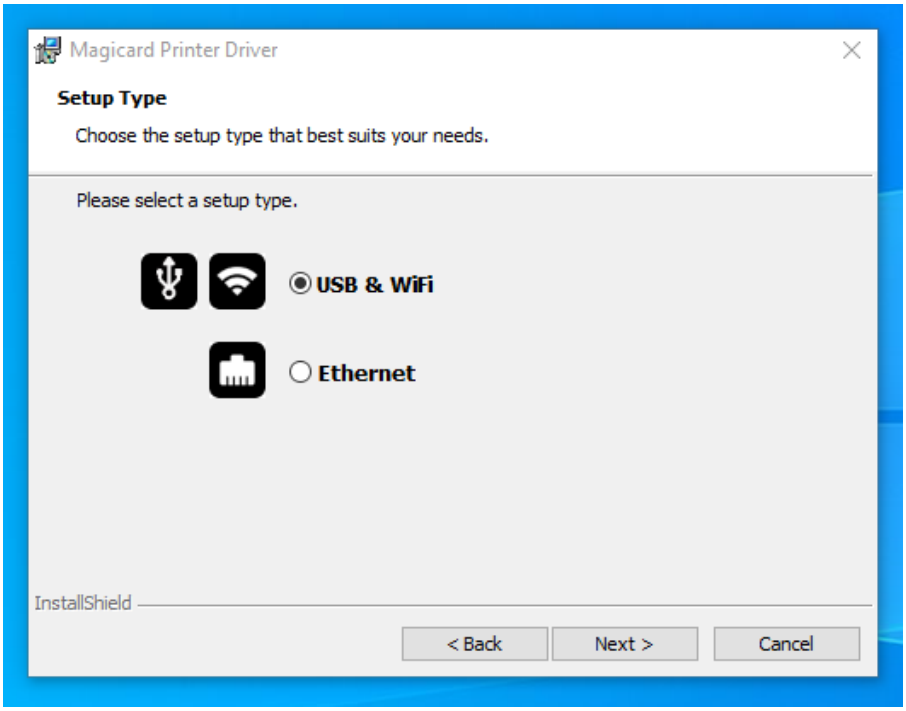



This part of the installation will install everything required to make your computer ready to connect to your printer. This can take several minutes depending on your computer’s speed. Click ‘Next’

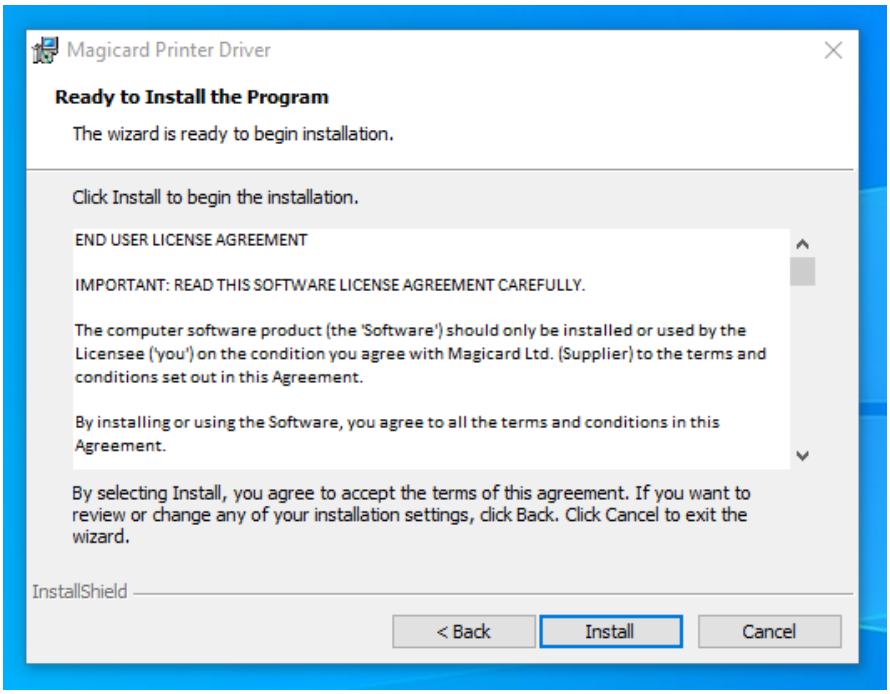
**Step 3 .**
When you see this dialogue box click “Install” to continue with the installation.



**Step 4 .**
When you see this dialogue box select USB & Wifi to continue with the installation.

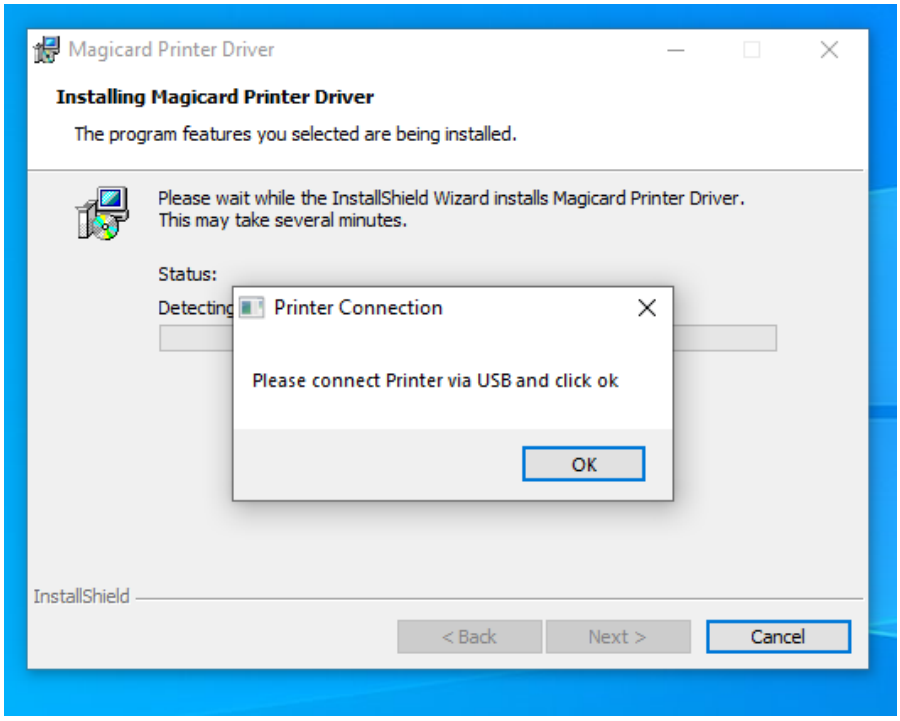



**Step 5**
When you see this dialogue box click ‘Install’ to continue with the installation. Some dialogue boxes will appear then disappear automatically after this.

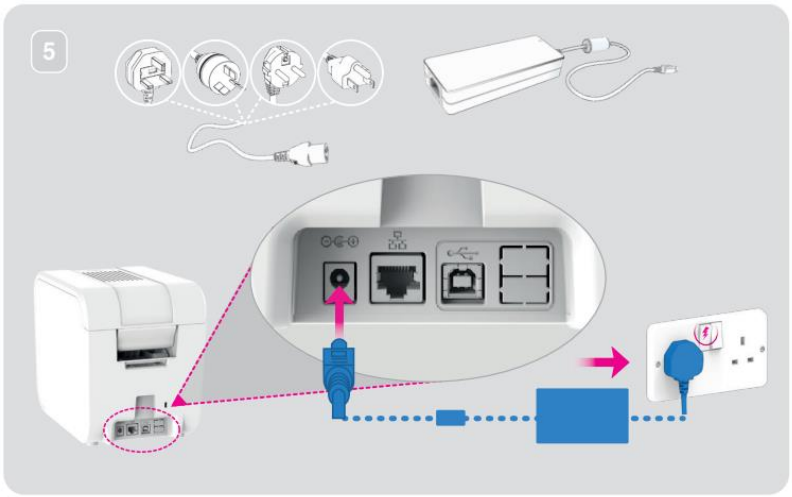


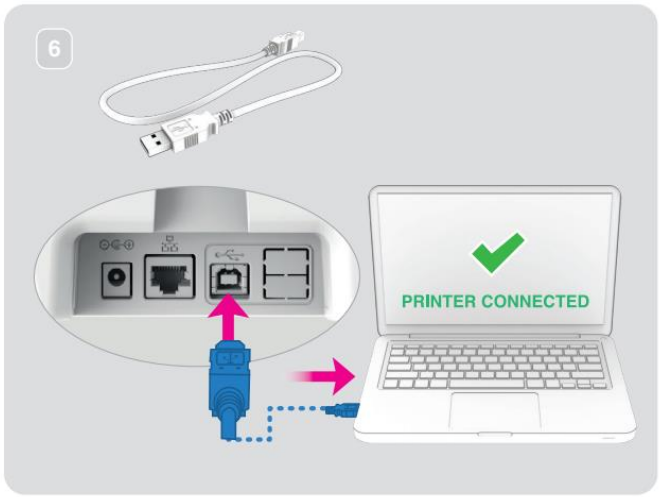
**Step 6**

After a few moments you should see this dialogue box.
Make sure your printer is on and has its consumables installed then connect the printers USB cable and click ‘OK’ to continue with the installation.




Now connect the EasyBadge 3.0 printer USB cable to your PC’s USB port.

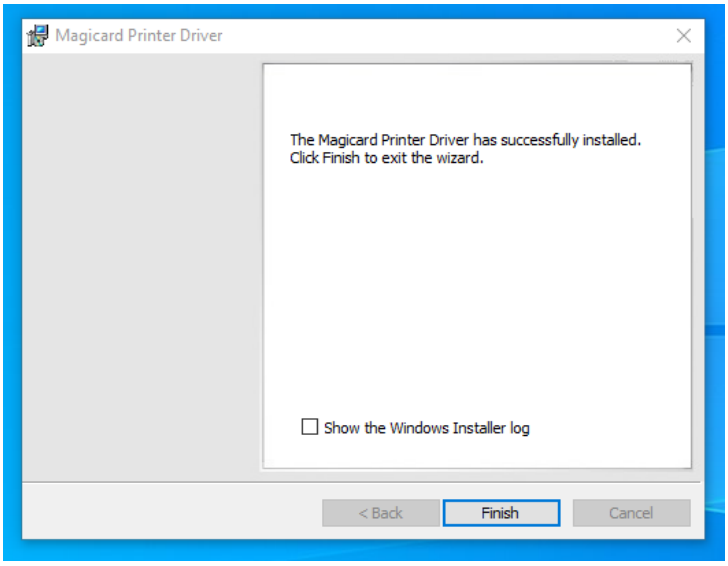



**Windows should automatically pick your printer up, open a new window and start installing the driver.**

**Step 7.**
At this stage your PC will do some system checks and may take several minutes depending on your computer speed. Windows will notify you when the Magicard printer Driver for the EasyBadge 3.0 bundle has been successfully installed.

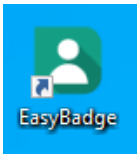
Click “Finish” to complete the installation of the printer driver.




**If you have bought the EasyBadge software only you will not be prompted to install any printer drivers. Instead, you will need to install your card printer using the installation instructions provided.**

# Using the EasyBadge 3.0 Bundle

**Your EasyBadge 3.0 Bundle should now be installed. Double click the EasyBadge desktop icon to open the software**

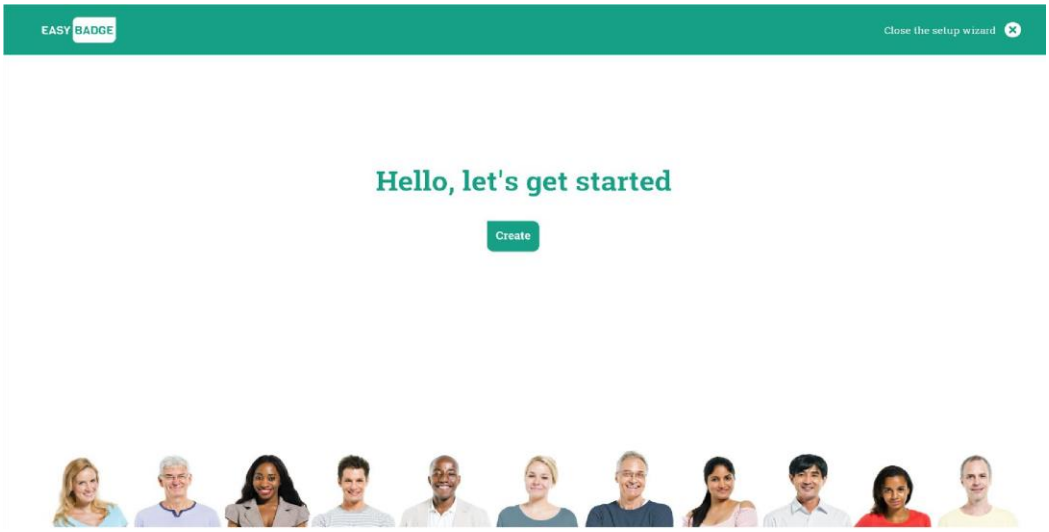



## Setting up your Database

To make things simple the EasyBadge software creates a database file which is stored on your computer. This file holds all your designs, logos, employee information and photos in one easy to manage file. The database must be created to use the software.

## Step 1. Starting the Wizard

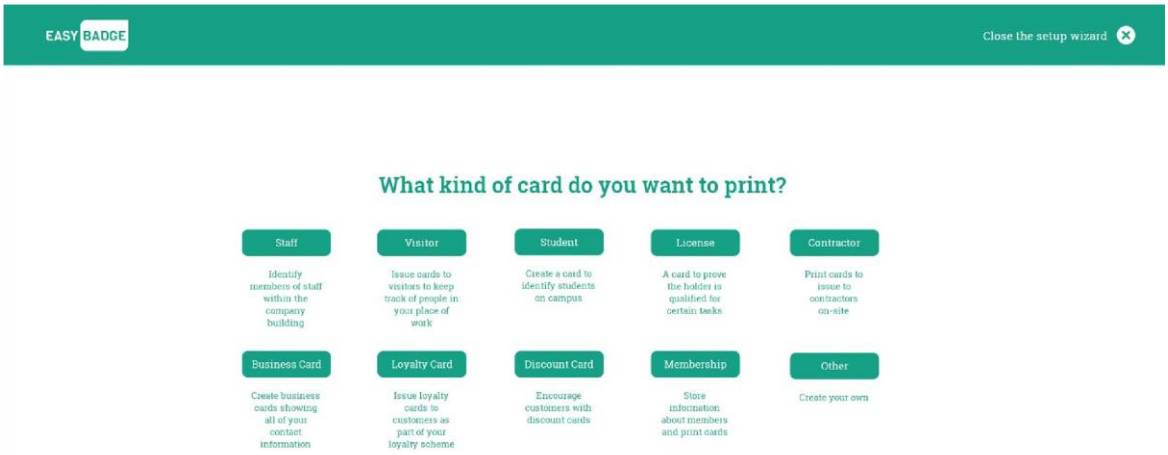
Click 'Create' to start the wizard.




## Step 2. Selecting the Database Template

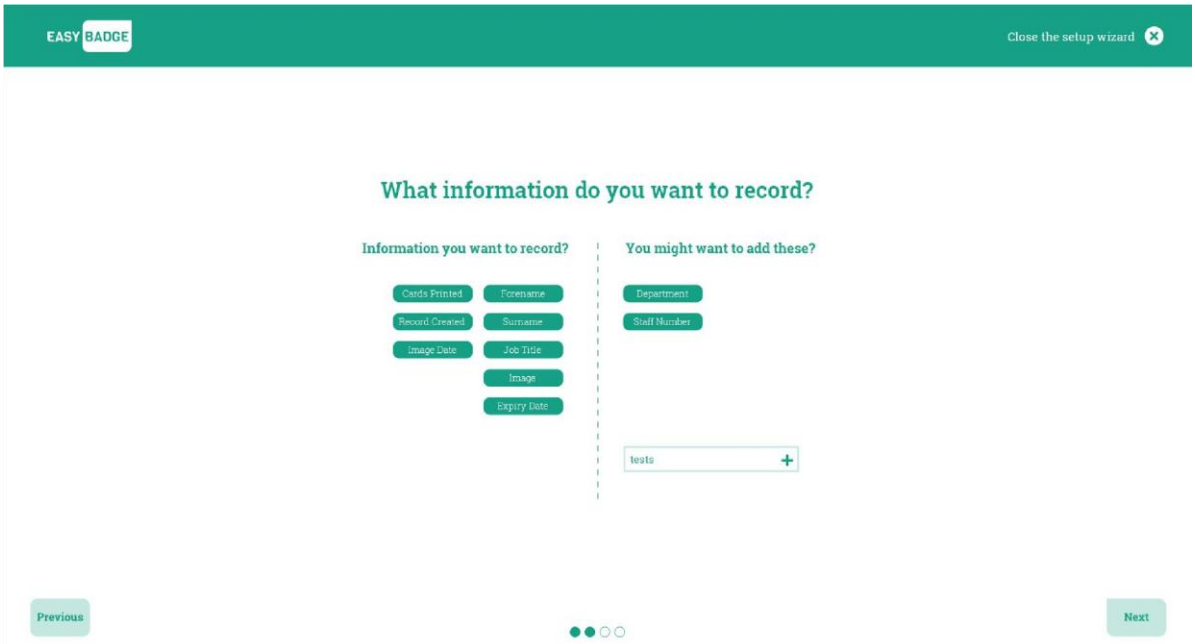
The next page of the wizard will help you to configure the rest of the database. For this guide we will select 'Staff'.

The different options will give you database fields relevant to your needs. Eg choosing Staff will provide fields relating to Staff ID cards whereas Student will include fields more suited to a college or university. Extra fields can be added via the wizard or later on from the main EasyBadge interface.



## Step 3. Selecting Fields to be Recorded

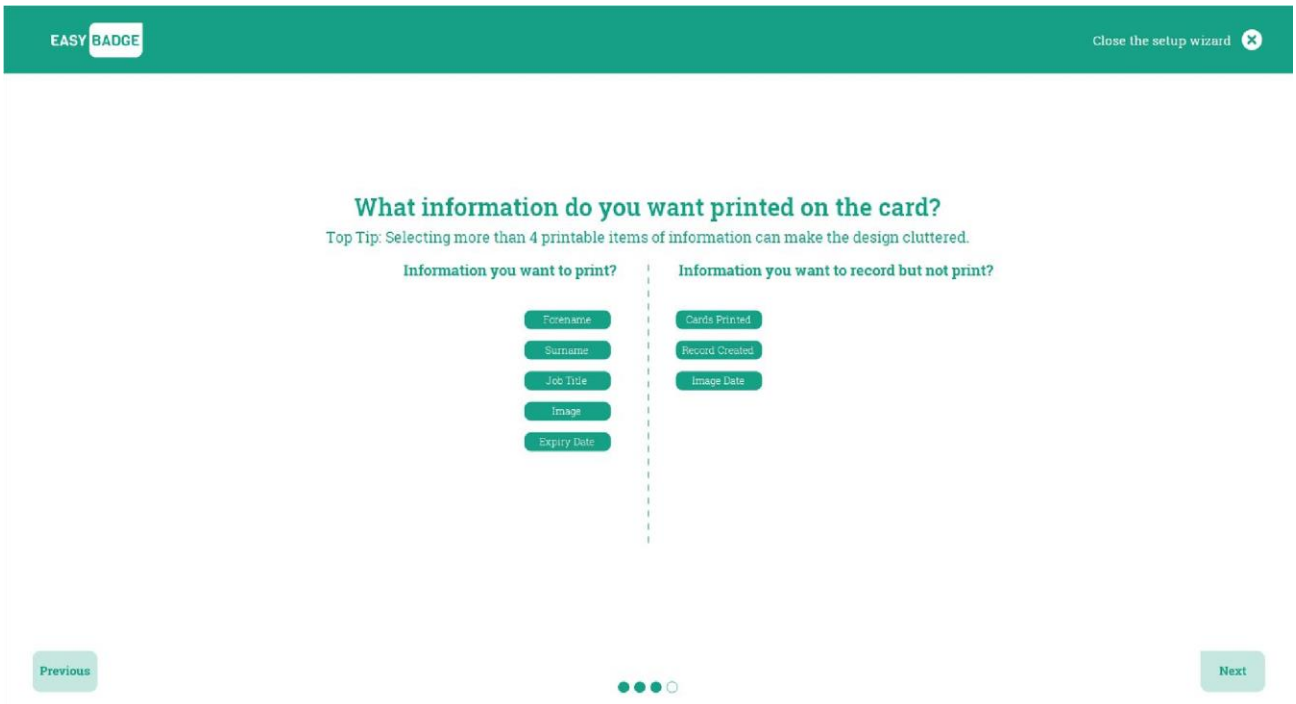
Next choose what information you want to record in your database. The field names on the left are currently selected to be added to your database, clicking on them and moving to the right of the dotted line will remove them. You can also add your own custom fields, when it asks how big the field should be that's referring to how many letters are allowed in said field, 128 is the default and recommended size.




## Step 4. Selecting fields to be printed on your card

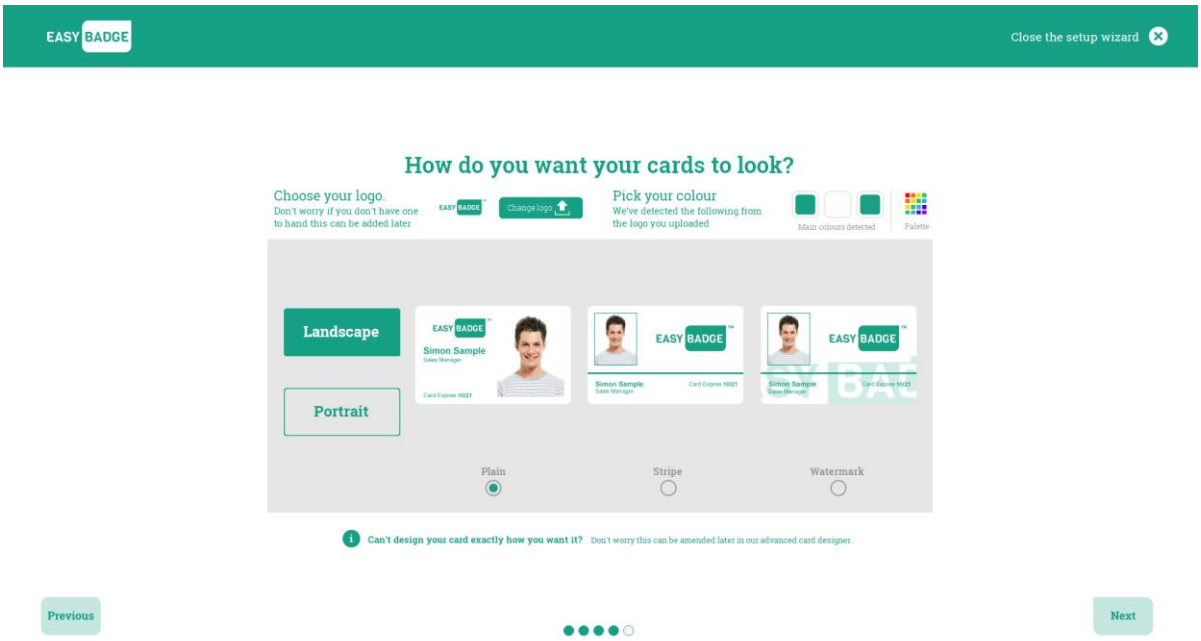
Here you can choose what information you record is actually printed on the card. This is only applied to the card design generated by the wizard. You can change this at a later date in EasyBadge' s built in card designer. Once again move anything to the right of the dotted line that you do not want to print on your card design.

.



## Step 5. Your Wizard Card Design

The wizard will create a card design based on the information you have provided so far. If you have a logo you would like on your card you can import it here by clicking *the* 'Upload Logo' button and the wizard will automatically sample the primary colours from your logo and merge these with the design the wizard creates for you. You will be presented with 3 options for landscape and 3 for portrait. Should you want to make a more personalised card you can do this in the built in EasyBadge Card Designer at a later stage. When you have made your selection click 'Next' to continue.

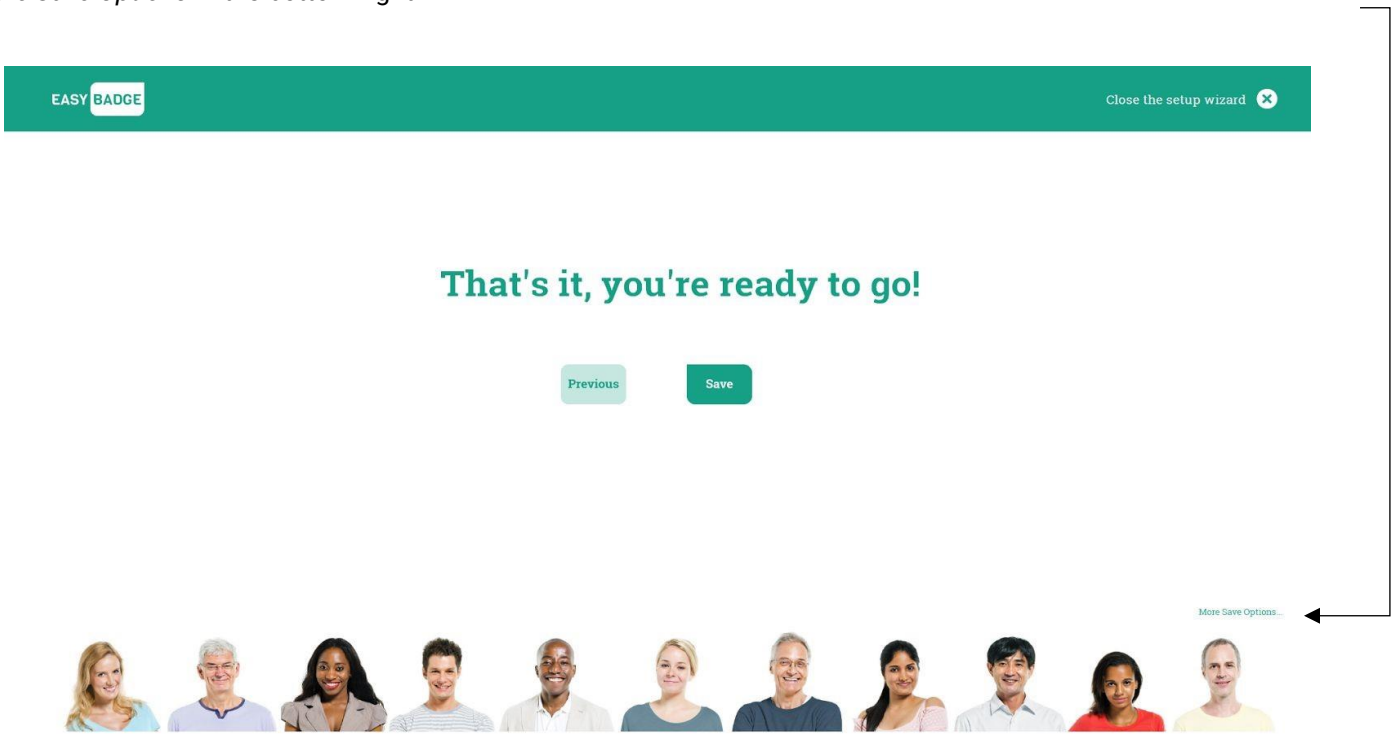



## Step 8. Saving Your Database

The final stage of the wizard prompts you to save the database file that is being created. It is advised you save your EasyBadge database in a folder you can easily access and that this location is regularly backed up. Should you need to move EasyBadge onto another computer you will need the .mdb file that is saved at this stage.

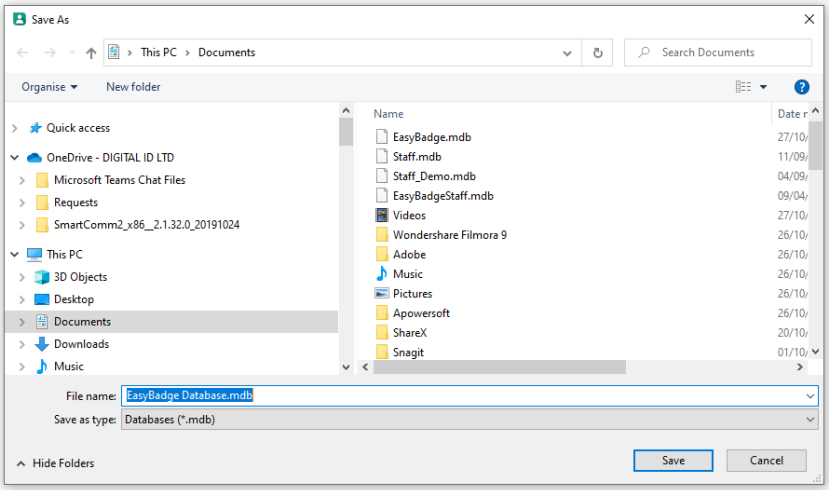
**EasyBadge Lite which is included in the bundle will automatically save the database to the logged in User's Documents folder and the database file will be named EasyBadge.mdb**

If you have EasyBadge Professional or above you can also save your database as SQL, MySQL or Oracle types by clicking *More Save Options* in the bottom right



**IMPORTANT PLEASE NOTE!**

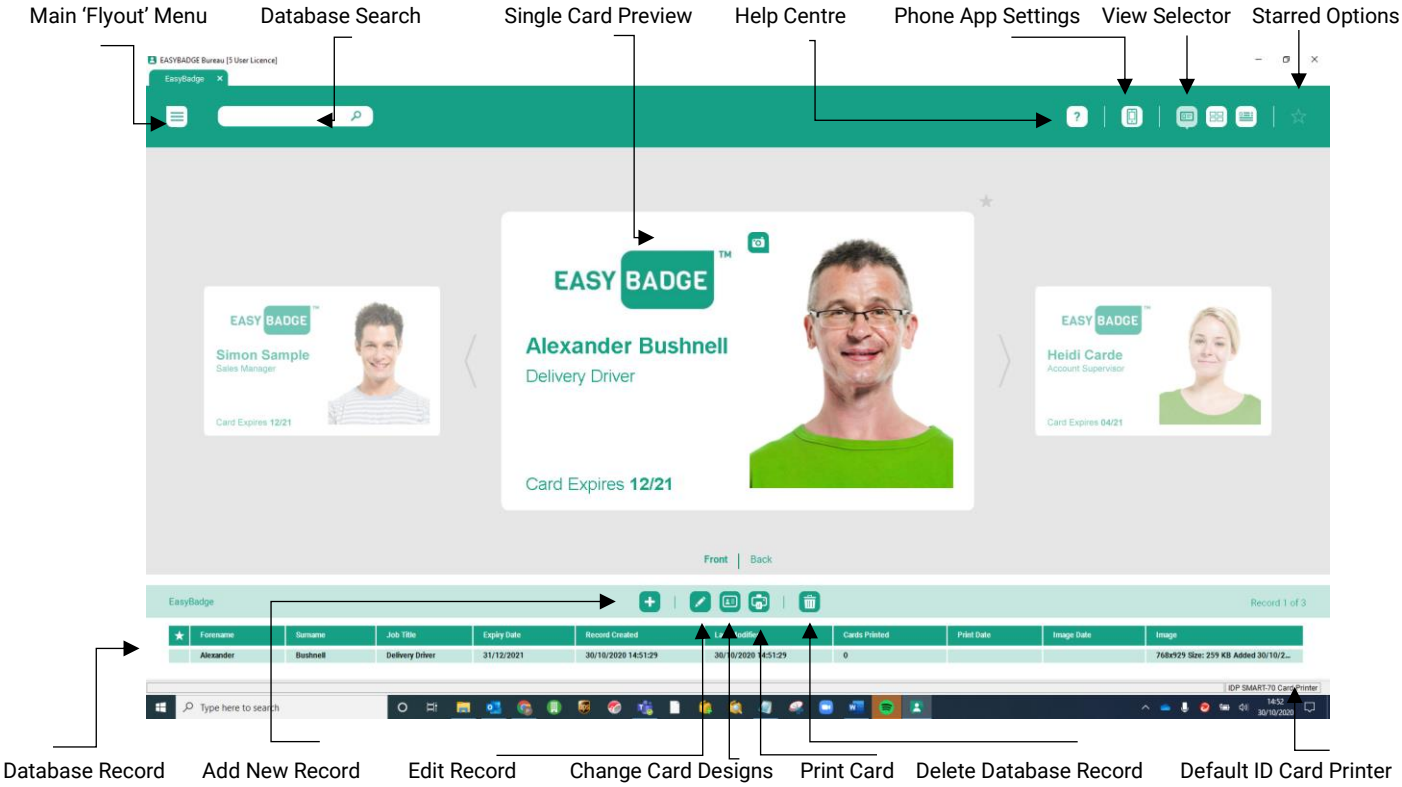
Browse to a folder where the database file will be safe and will get backed up and click ‘Save’. Please note cloud storage such as Google Drive and OneDrive are not recommended to store the EasyBadge database file.




Once your database has been created it is the user’s responsibility for keeping the database backed up.

## EasyBadge - Single Card view

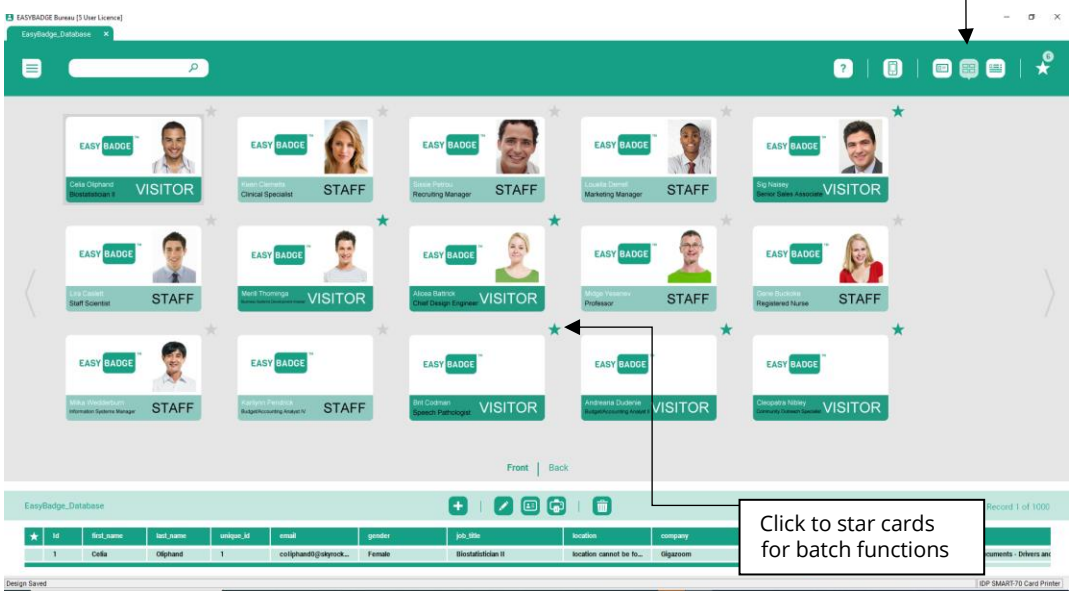
When the wizard is complete you will be presented with the ‘Single Card View’ which gives you a preview of the current database record you have selected. Some dummy data is added to the database to help familiarise the user with the interface. To change view’s, click one of the 3 icons grouped together on the right of the top tool bar.




The icons on the top menu such as Main Menu, Search, Help Centre, Phone App and the view selector are present on all 3 views for ease of use as are the Add New Record, Edit Record, Change the Design Print card and Delete record icons.

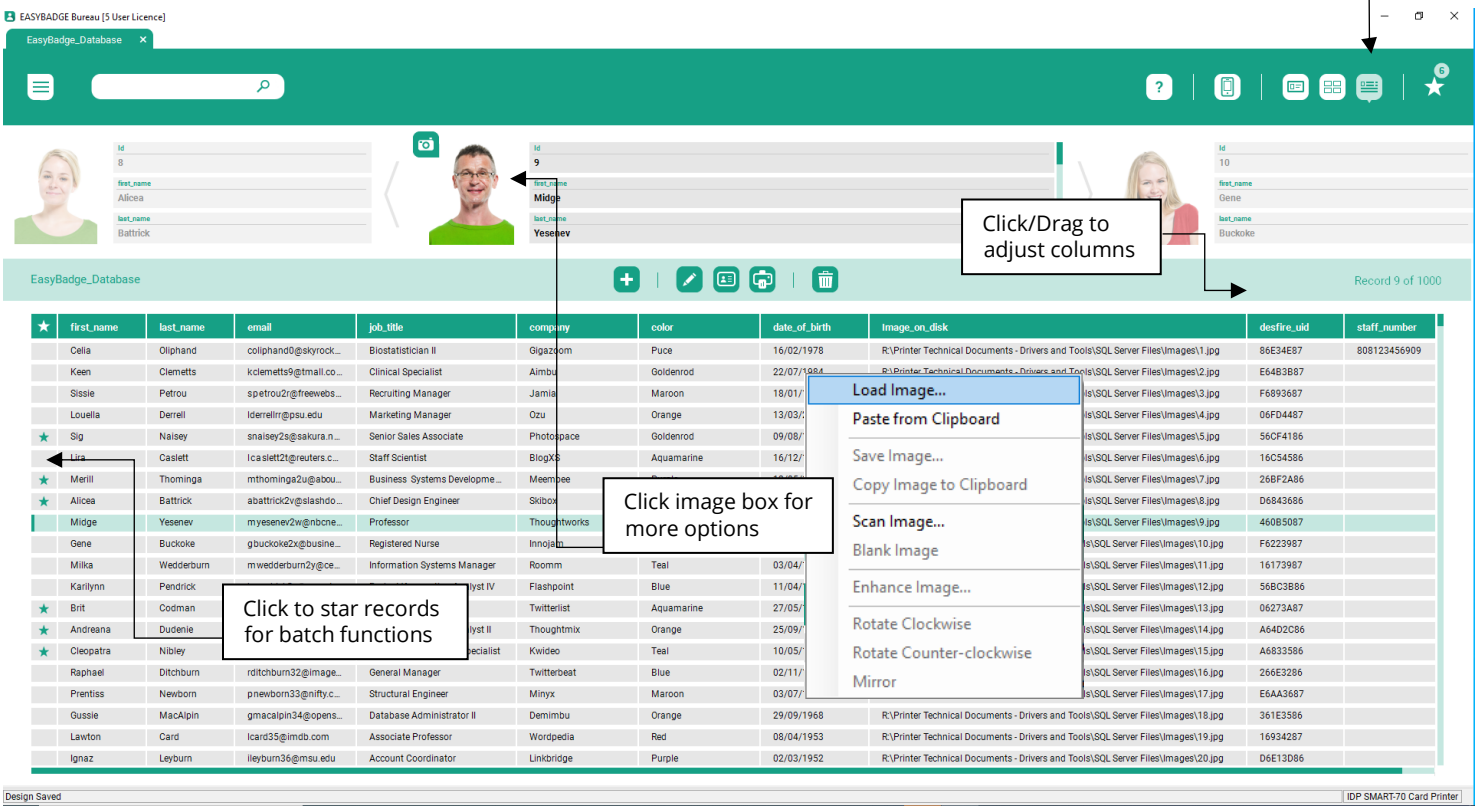
## EasyBadge – Multi Card view

Clicking the 'Multi Card View' gives you a preview of the multiple card records allowing you to see at a glance the different designs people may have assigned.




## EasyBadge – Split view

The 'Split View' provides a view of a list of database records to assist with searching, batch printing and management of the database records.





**Main Menu**
Access features for changing your database such as add new fields, create user accounts, data import and more.



**Search Bar**
Find records in your database by typing a name and hitting enter on your keyboard



**Help Centre**
Search help topics on functions within the software and also submit support queries via our simple submit form.



**Show/Hide Starred Records drawer**
This brings up a side menu allowing you to batch print or delete multiple records at once.



**Add a new record**
This adds new records to your database. If you have the Lite version of EasyBadge your database will hold up to 100 records. That limit can be removed by purchasing the Pro, Smart or Bureau version of EasyBadge.



**Edit this record**
This allows you to edit data in any of the variable fields for the existing records already in your database. Certain fields like 'Records created' will not be available to edit.



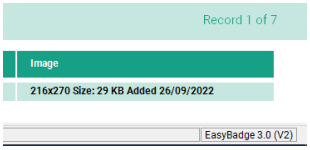
**Print a card**
This is the print button, it will print the currently selected record. It will give the option to see a print preview before sending to the printer. To batch print use the Starred Shortlist function to create a starred list you can print.



**Delete this record**
This will delete only the current record. Once deleted the record cannot be recovered. If you wish to delete more than one record at a time you can use the Starred Shortlist feature to do this.



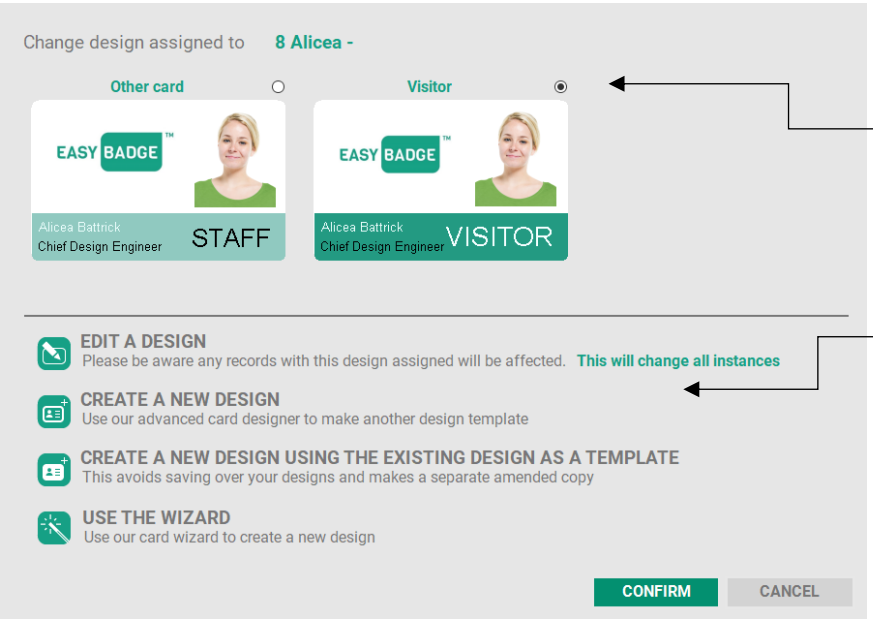
**Webcam**
Click the webcam icon to open your webcam and capture an image into a database record.




**Default Printer**
Click the printer name in the bottom right corner of the program window to select your default card printer.

## Change the design

This brings up a window allowing you to assign different designs to records or access and edit the designs associated with the database.




Select a design and click ...

**Edit a design** button to open the card design layout for editing

**Create new design** to start with a blank template

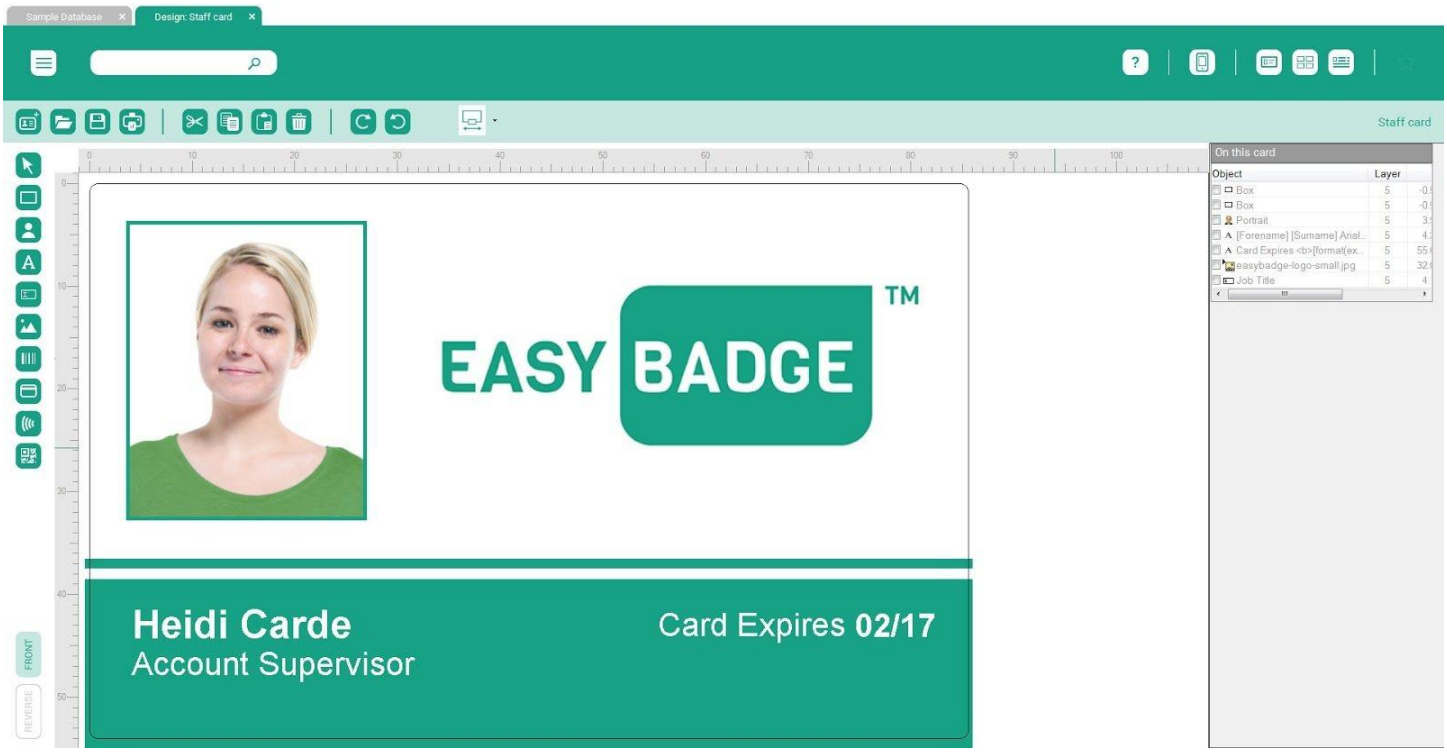
**Create new design using existing template** as a starting point

**Use the Wizard** to access the Easy Badge design wizard

**Confirm** to assign the current or starred records to the selected design.

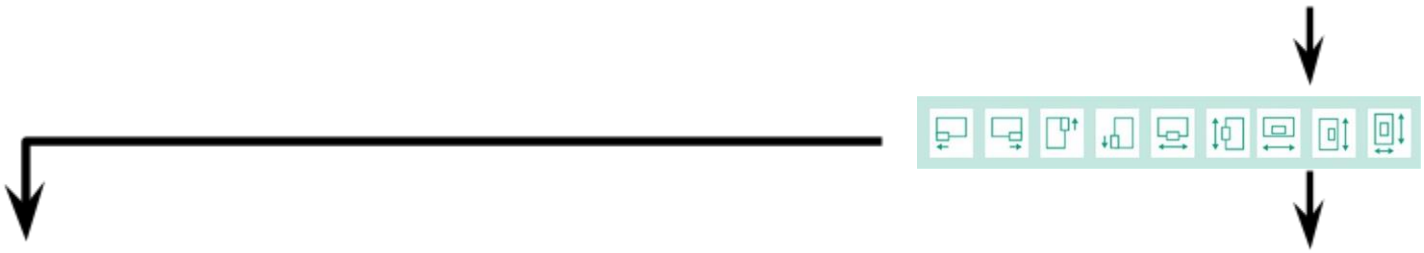
## Card Designer view

If you have a specific design you need to create the EasyBadge built in card designer will allow you to do this. Below is the window you will see when you open the card designer.



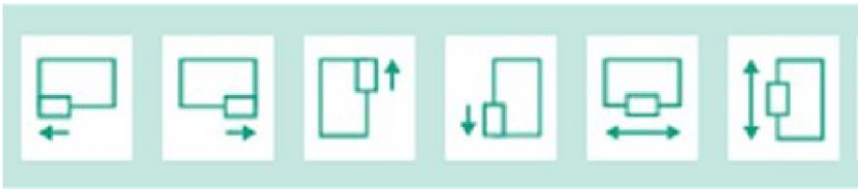

## The buttons along the top of the card designer are detailed below:



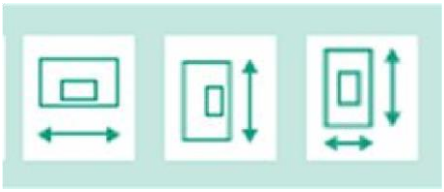


These are controls for selected elements and aligning them together

These control single elements



Align left bottom | Align right horizontally | Align top vertically | Align bottom | Align centre horizontally | Align centre vertically



Centre | Centre on card | Centre

**The buttons along the left of the card design window are detailed below:**



**Select tool**
Used for selecting items, either one at a time or drag a marquee to select a group of objects.



**New box**
Used to create a colour box on your card. On the right there are settings for the border and the fill colour.



**New Photo**
Drop this onto the design to create a variable photo object that links directly to the image field in your database.



**Static Text**
Drop a static text object on your card or use [Square Brackets] to link to a data field eg [Forename] [Surname]



**Draw Field on card**
Pick this object to drop a variable data field on your card. The list will display fields available in the database.



**New Bitmap**
Load an image file (jpg, bmp, png, gif)  onto your card design, e.g. a company logo, crest or background image.



**New Barcode**
Click to create barcode and drop onto the design. Use [Square Brackets] to link to a data field e.g. [Membership Number] in the right-hand properties panel.



**Magstripe Settings**
Change magnetic encoding settings and use [Square Brackets] to link to a field containing data e.g. [Mag Data]

### Edit Contactless Settings

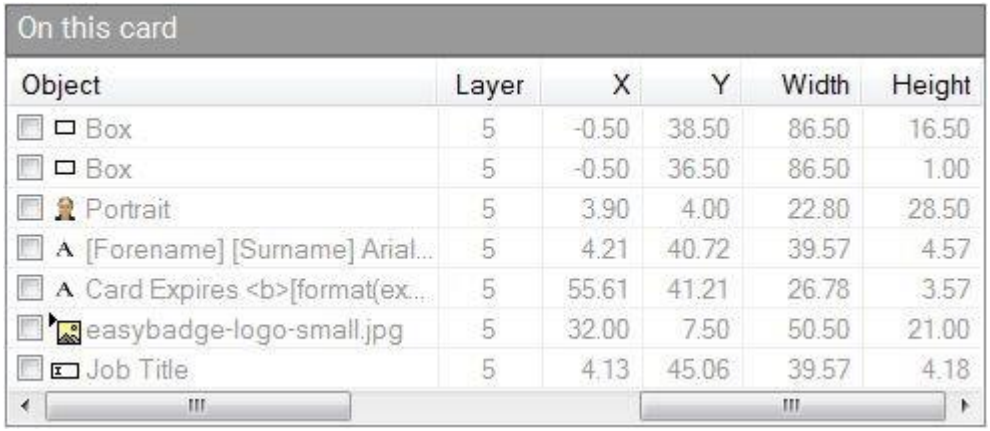
Edit your Mifare, DESFire and NDEF encoding settings

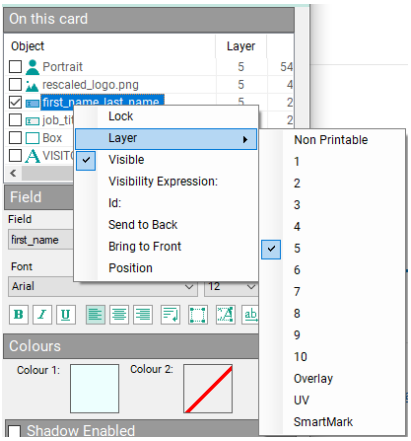
### New QR

If you want to link this QR code to a field put the field name in [Square Brackets] in the 'Contents' box on the right hand properties panel.

### On this card

On the right-hand side of the card designer view there is a column that allows you to see properties of objects on your design. You can use the tick box to select objects and move them around if there are a lot of elements on your design.




You can right click on each object and change what layer it is on. By selecting a different layer you can order your objects should you want one to appear above another for example a background image may go layer 1 with anything in foreground going on a layer above.

You can choose to put text and logos on the UV layer, anything on this layer must be black as the UV panel is only a mono print. You need to have a printer that supports UV printing from EasyBadge to use this feature.

## Linking your design to the information in your database

When creating your card design you will want to link it to variable data in your database, to do this you need to use the “Draw Field on Card” icon.

Clicking the *Draw Field on Card* button will present you with the list of headings from the database.

Select the heading of the data field you wish to add to your design. Once you click ‘OK’ you will be able to choose where to place the field on your card design.

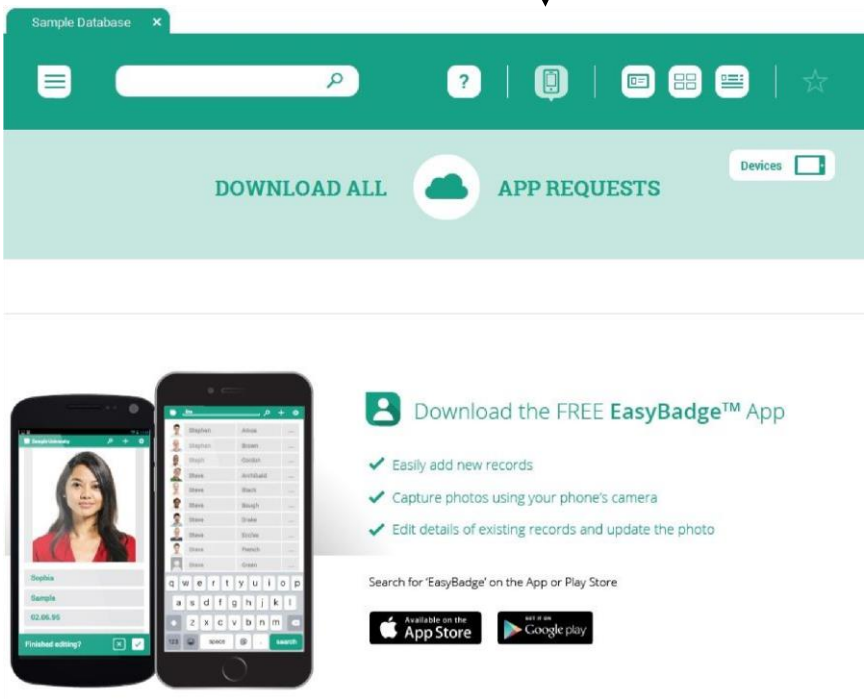
You can then format the object the same way you would a text box with the options on the right of the window using Bold, Italic, Font and Size etc.




You can also use a regular text object and use [Square Brackets] to link to fields in your database. e.g [Forename] [Surname] . You can also mix static and variable text in one object if you need to include a field heading such as name or Job title.

## Pairing EasyBadge with the EasyBadge App

Click the phone icon on the main program tool bar to access the EasyBadge ‘Cloud Sync Status’ View, here you can set up new devices and also see any pending downloads.




In order to use this part o
you need to download th
app for your

You can either search
your App or Play Store or
correct QR code for your

GET IT ON Google play

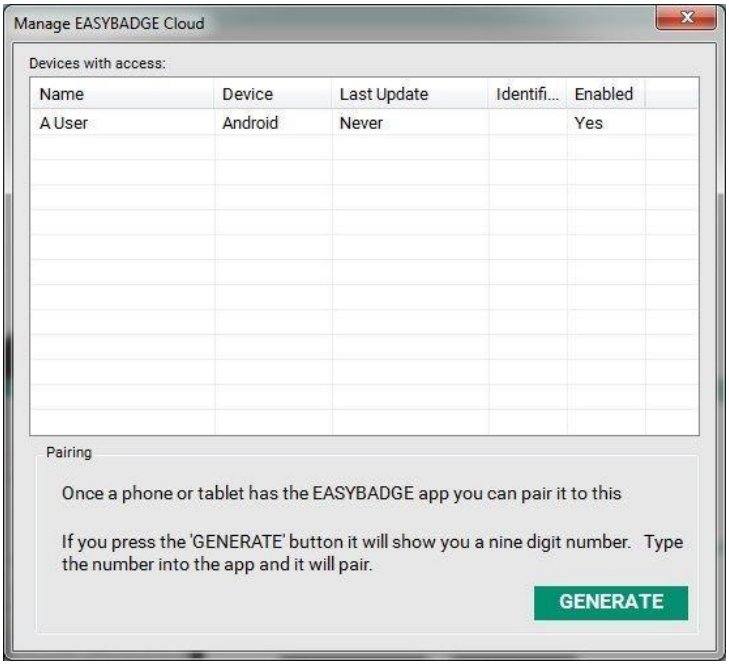
Available on the App Store

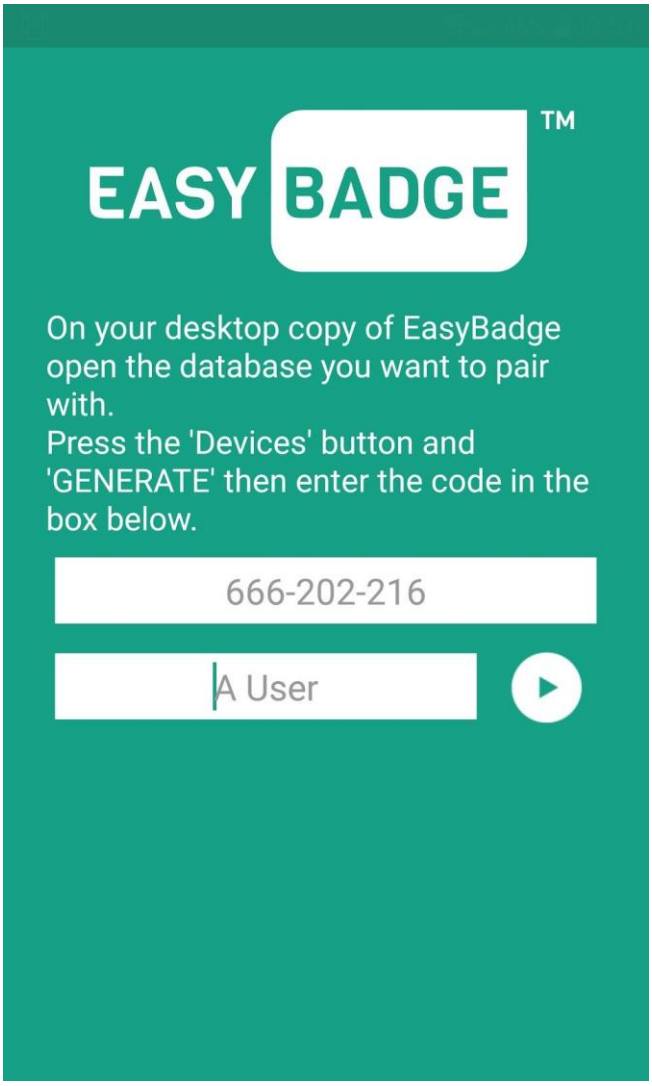
Once the app is installed on your phone you will need to generate a pairing code on your computer in EasyBadge.

To do this you will need to click on the 'Devices' button on the top right of the EasyBadge 'Cloud Sync Status' View.




The 'Devices' button will bring up the window on the right. Click 'GENERATE' to receive a code valid for 2 hours. Once paired the link is permanent until disabled.




With the pairing code now generated, open the app on your phone and enter it along with a name so you can identify this device from the computer. You can use the same code to pair multiple devices within the 2 hours that it is valid for.

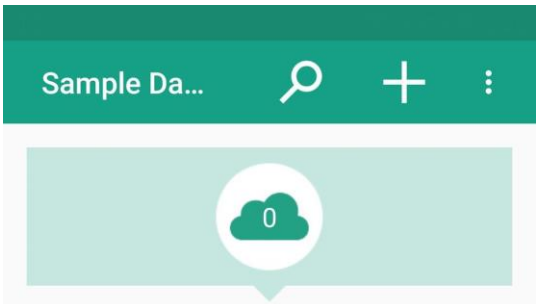
Once paired, the devices should show up in the 'Devices with Access' window (above) on your computer.

If needed you can right click the 'Generate' button and select different time lengths for how long the pairing code will stay valid for until paired.

If you need to disable a device or wipe the data on it remotely double click the entry in the *Devices with Access* list and you will be given a dialogue box where you can do this.

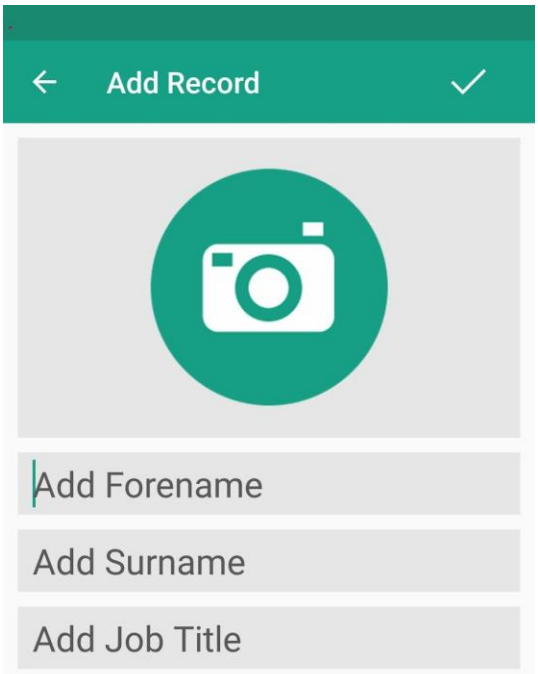
## Using the EasyBadge App

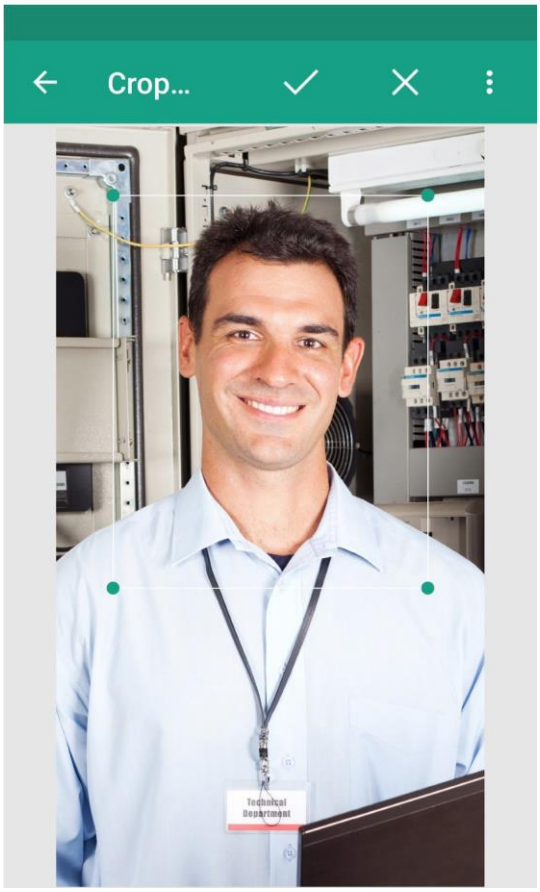
To upload a new person to the app click on the + button in the top right of the app window and enter the required information. Once you click the ✓ button your record will be available to upload.




If you click on the camera icon it should open the camera on your phone.

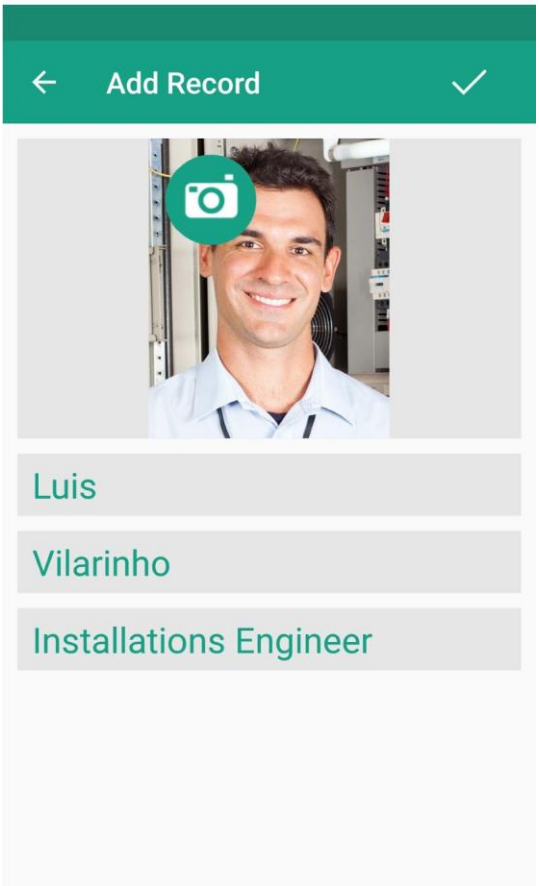
You may need to allow permission for this on your phones system settings if they are not automatically given.

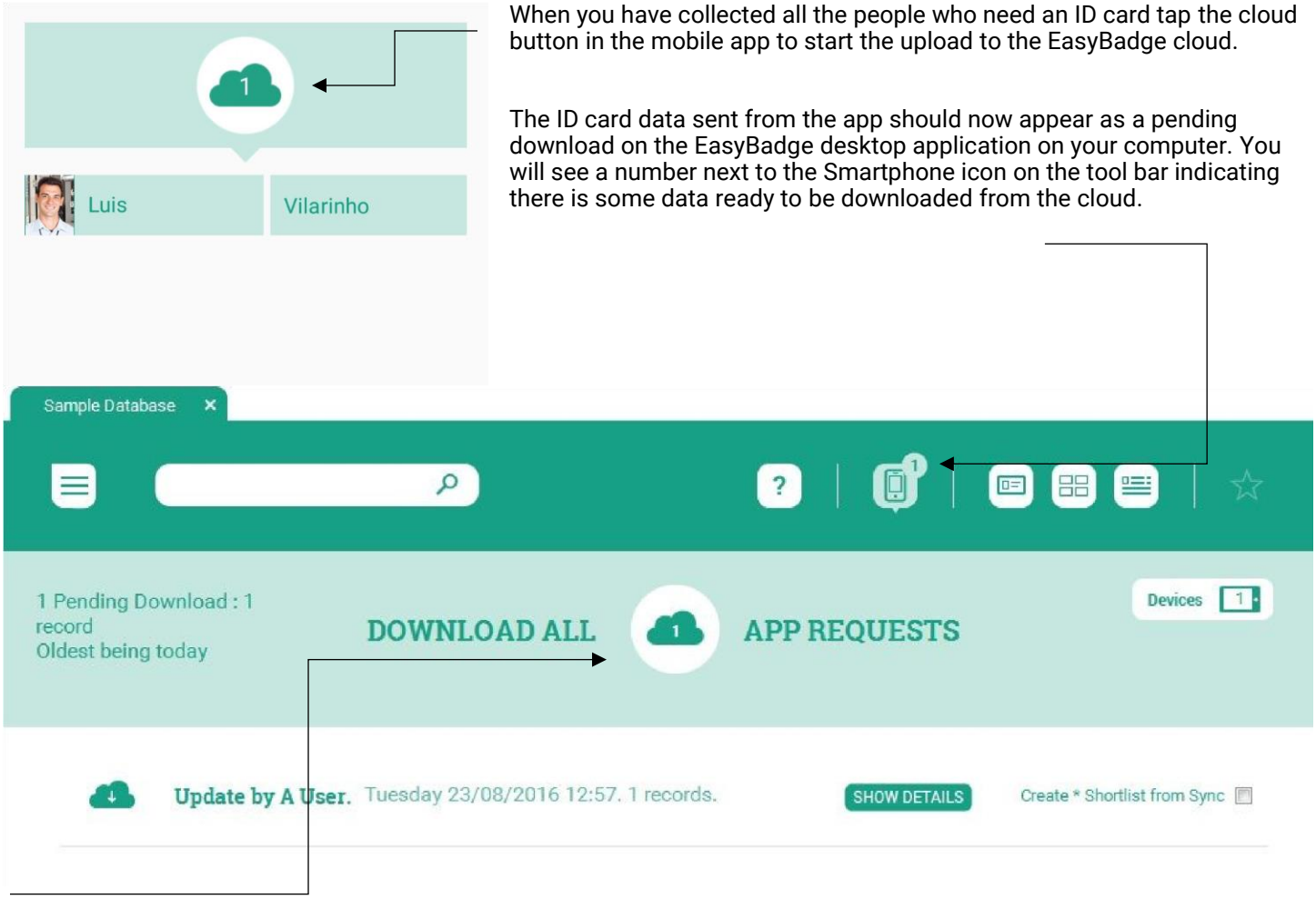



Once you've taken the picture of the person you would like to add to your database you will be given the option to crop the photo using your fingers to pinch and resize the cropping window. Tap the tick icon when you are done editing.

You can capture new records one at a time or prepare multiple records to upload in a batch of people to save time.






When you have collected all the people who need an ID card tap the cloud button in the mobile app to start the upload to the EasyBadge cloud.

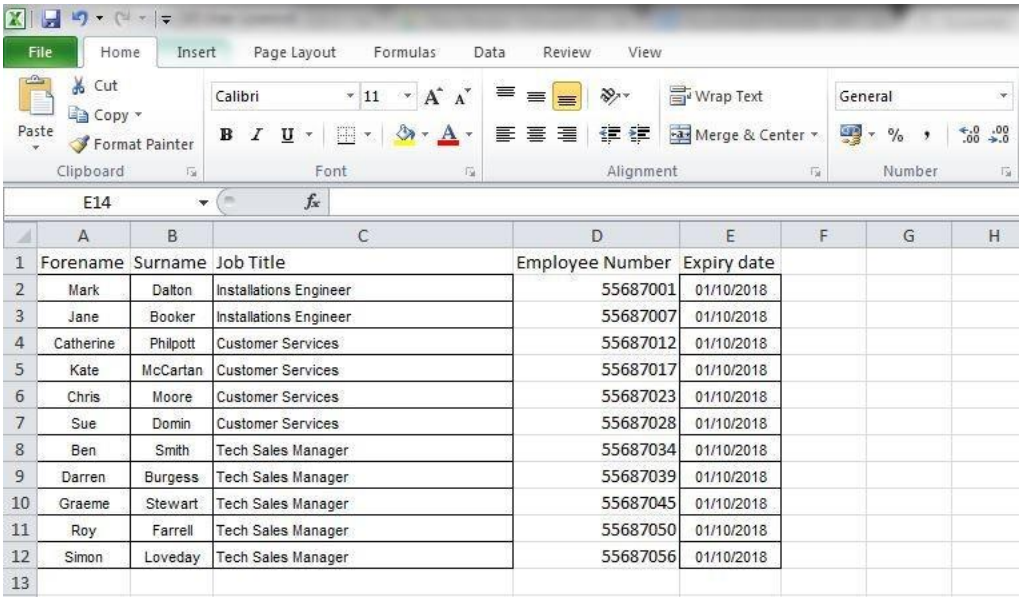
The ID card data sent from the app should now appear as a pending download on the EasyBadge desktop application on your computer. You will see a number next to the Smartphone icon on the tool bar indicating there is some data ready to be downloaded from the cloud.

Click the Smartphone icon on the tool bar in EasyBadge to open up the 'Cloud Sync Status' view and click the cloud icon to download all the data. Once downloaded, the data is removed from the cloud permanently.

Once the data from the app is downloaded to the desktop EasyBadge application you will be able to view the records easily in the Split/Record view. EasyBadge should automatically create a *starred* list of all the new records.

## Importing Data from a Spreadsheet

To import from an Excel (xls or xlsx) spreadsheet into EasyBadge first ensure you have saved your spreadsheet as an XLS or XLSX file and that there are no formulas, links or other objects within the spreadsheet. The import will only work with basic text data. It is good practice to name column headers identical to the columns/field in EasyBadge.



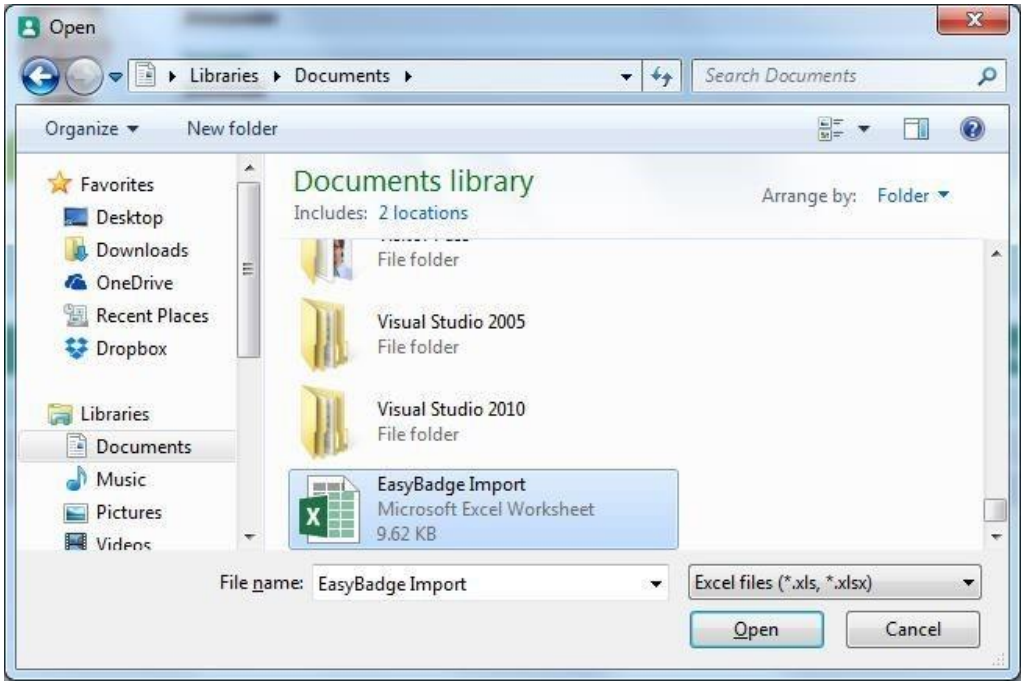

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | Forename | Surname | Job Title | Employee Number | Expiry date | | | |
| 2 | Mark | Dalton | Installations Engineer | 55687001 | 01/10/2018 | | | |
| 3 | Jane | Booker | Installations Engineer | 55687007 | 01/10/2018 | | | |
| 4 | Catherine | Philpott | Customer Services | 55687012 | 01/10/2018 | | | |
| 5 | Kate | McCartan | Customer Services | 55687017 | 01/10/2018 | | | |
| 6 | Chris | Moore | Customer Services | 55687023 | 01/10/2018 | | | |
| 7 | Sue | Domin | Customer Services | 55687028 | 01/10/2018 | | | |
| 8 | Ben | Smith | Tech Sales Manager | 55687034 | 01/10/2018 | | | |
| 9 | Darren | Burgess | Tech Sales Manager | 55687039 | 01/10/2018 | | | |
| 10 | Graeme | Stewart | Tech Sales Manager | 55687045 | 01/10/2018 | | | |
| 11 | Roy | Farrell | Tech Sales Manager | 55687050 | 01/10/2018 | | | |
| 12 | Simon | Loveday | Tech Sales Manager | 55687056 | 01/10/2018 | | | |
| 13 | | | | | | | | |

**Step 1**
Click the Main Menu icon  Import & Export > Import from Excel (xls, xlsx).

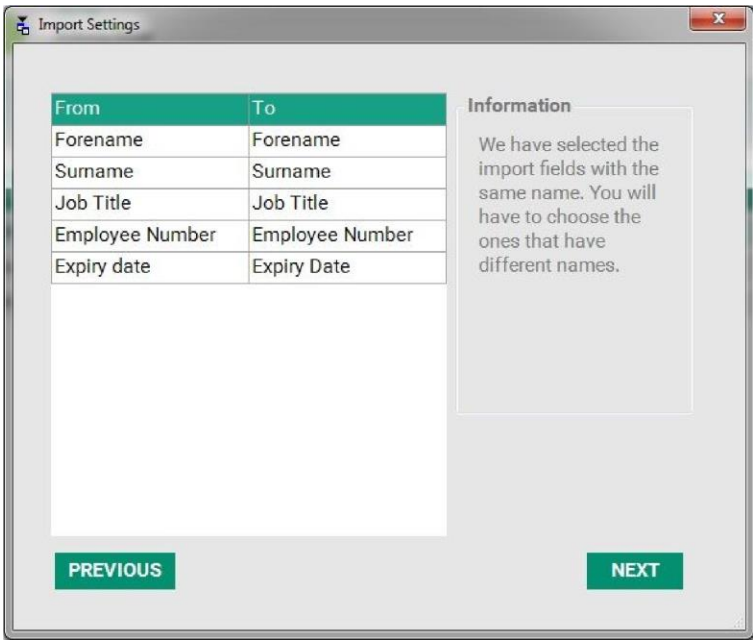
**Step 2**
Locate your Excel file (in this example it is called EasyBadge Import) select it and click 'Open'.

If you plan to do regular imports you can save time if you use the same file for importing, this allows you to use the same import settings and just copy new data into the same spreadsheet without having to set up an import every time.

If your excel file has more than 1 sheet the import will ask you to specify which one you wish to use.
Sheet 1 is used by default




**Step 3**
Next you have to match the column headings from your spreadsheet to the field names in your database. The 'from' list are the spreadsheet columns and the 'to' list are the field in the EasyBadge database.

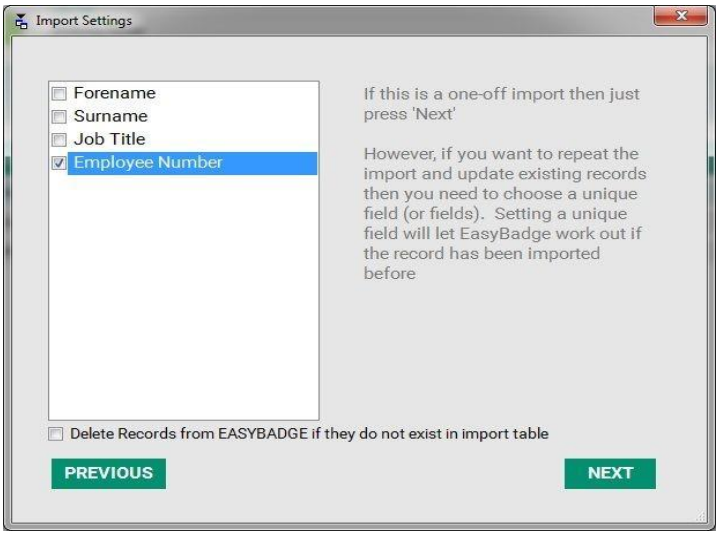



If the column headers from the spreadsheet match the fields in the database they will be paired up automatically, any empty boxes you can click on to bring a dropdown list of the available fields and make the link manually. It is important to make sure that data types (eg text or date) match the type of field you are importing into.

## Step 4

If you are importing information with the intention of updating records already in the database you will need to select a unique field. This is usually something like an employee or staff number. This must be a unique number.

If you are doing a one off import you can click ‘Next’ and skip this step.

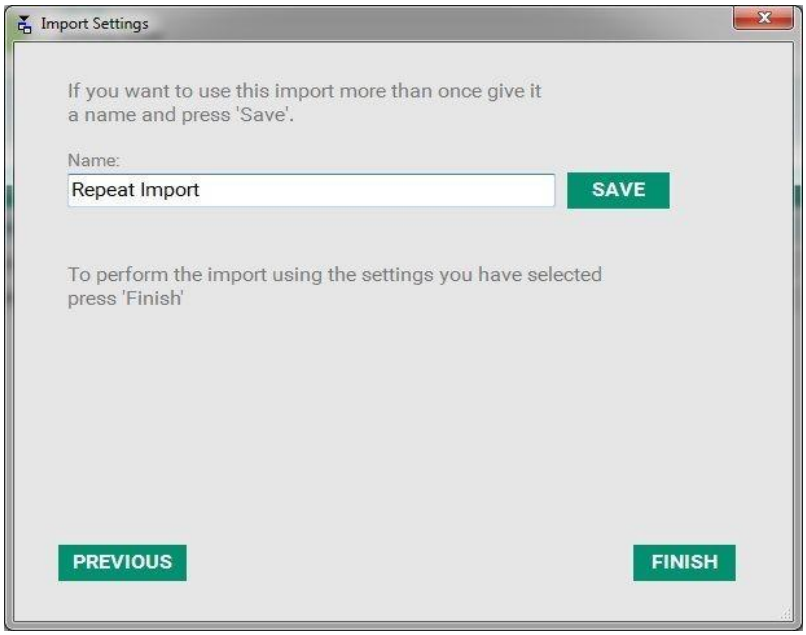



## Step 5

Saving your import settings is optional. If you are going to reuse a spreadsheet so you can run a regular import you can save the import so it can be used later.

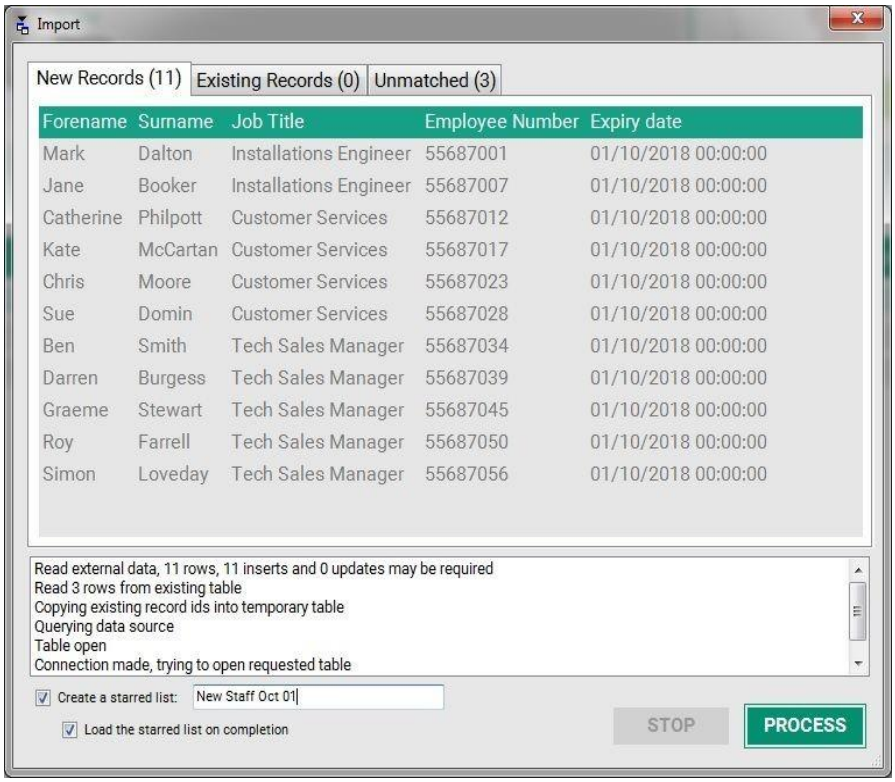
In this example we have named the import “Repeat Import”. Doing so allows you to skip the import setup process and run a new import with only a few clicks.

When saving the import as “Repeat Import” (or whatever suits your requirement) you will see it listed in the import menu. After giving the import a name click ‘Finish’.



## Step 6

On the final page of the import you will be given the option of creating a starred list. This allows you to come back and print this list of people at a later date. Once you click 'Process' the data will be imported into your database.







## Step 7 (If you're re-using the same spreadsheet)

For future imports you can just open your import spreadsheet and copy new data into it overwriting the old data.

As long the file name, location and column headings remain the same the data will be imported correctly.

Now browse to the import menu and you will see the name of the import you named (*Repeat import* in above example), Clicking this will take you the end of the import, skipping the setting up of the import again.

### Importing images from a folder

### Step 1

First ensure that the images you have in the folder match one of the unique fields in your database. In this example all of our images are named using the employee number which is unique.



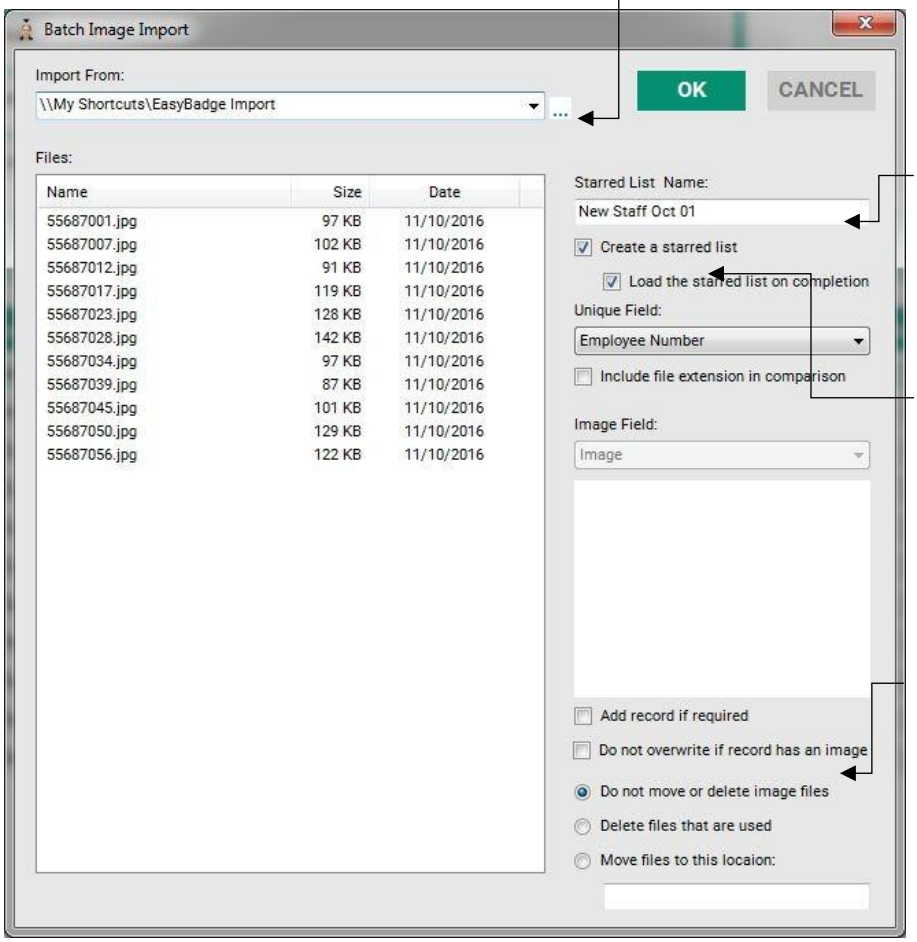

| ★ | Forename | Surname | Job Title | Expiry Date | Image | Image Date | Employee Number |
|---|---|---|---|---|---|---|---|
| ★ | Mark | Dalton | Installations Engineer | 01/10/2018 | No Image | | 55687001 |
| ★ | Jane | Booker | Installations Engineer | 01/10/2018 | No Image | | 55687007 |
| ★ | Catherine | Philpott | Customer Services | 01/10/2018 | No Image | | 55687012 |
| ★ | Kate | McCartan | Customer Services | 01/10/2018 | No Image | | 55687017 |
| ★ | Chris | Moore | Customer Services | 01/10/2018 | No Image | | 55687023 |
| ★ | Sue | Domin | Customer Services | 01/10/2018 | No Image | | 55687028 |
| ★ | Ben | Smith | Tech Sales Manager | 01/10/2018 | No Image | | 55687034 |
| ★ | Darren | Burgess | Tech Sales Manager | 01/10/2018 | No Image | | 55687039 |
| ★ | Graeme | Stewart | Tech Sales Manager | 01/10/2018 | No Image | | 55687045 |
| ★ | Roy | Farrell | Tech Sales Manager | 01/10/2018 | No Image | | 55687050 |
| ★ | Simon | Loveday | Tech Sales Manager | 01/10/2018 | No Image | | 55687056 |

## Step 2

Click the 'Main Menu' button > Import & Export > Batch Image Import

## Step 3

Locate the folder where your images are saved. You can do this by clicking on the three dots next to the 'Import From' properties box.




## Step 4

If you wish you can name a starred list from your imported images. This allows you to come back and print this same list of people at a later date.

## Step 5

Tell the import which field is unique. This is the field the import will look at when comparing the names of the images and the data in your database. We are using the Employee Number in this example.

## Step 6

Decide what happens to your images after you have imported them. You can move them to a different location, delete them or do nothing. Moving them to a different location allows you to see what images are left behind should an import not match all images to their respective people.

## Step 7

Once you've checked all the settings press the *OK* button at the top of the dialogue box.

The import will run and you will be presented with a window stating how the import went.

If you find that your images aren't matching, double check that they are exactly as they appear in the file name and in your database.



## Starred Shortlists

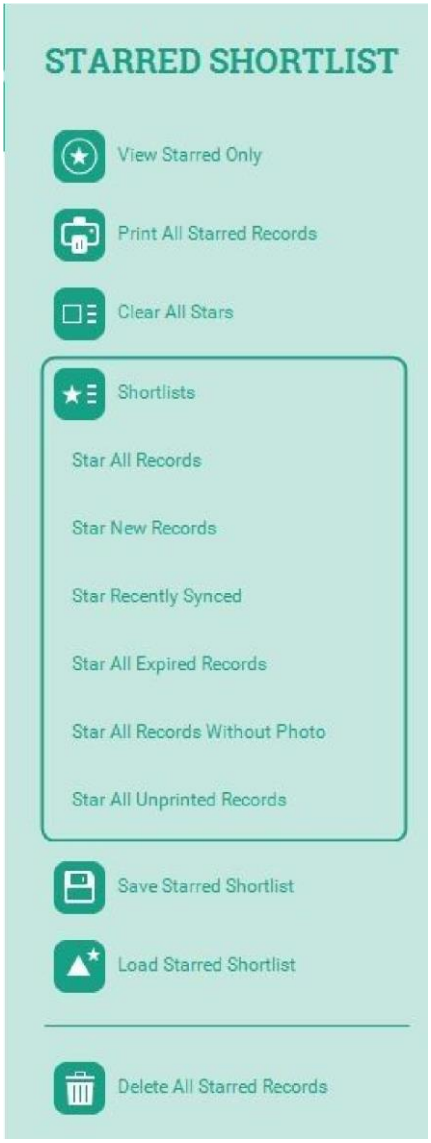
When viewing the database in the 'Split View' there is a column on the far left with a star. Clicking the column next to a record allows you to 'star' the record so you can pick multiple records and batch print or change design in one go.




The star in the top right of the program window lets you know how many records are selected for batch processing.




Click the star to reveal the Starred Shortlist menu.




From here you can do several things. View only the starred records, print the starred records and finally at the bottom you can delete the starred records.

To make batch operations quicker, EasyBadge has a few shortlists built in.

These will override any currently starred records.

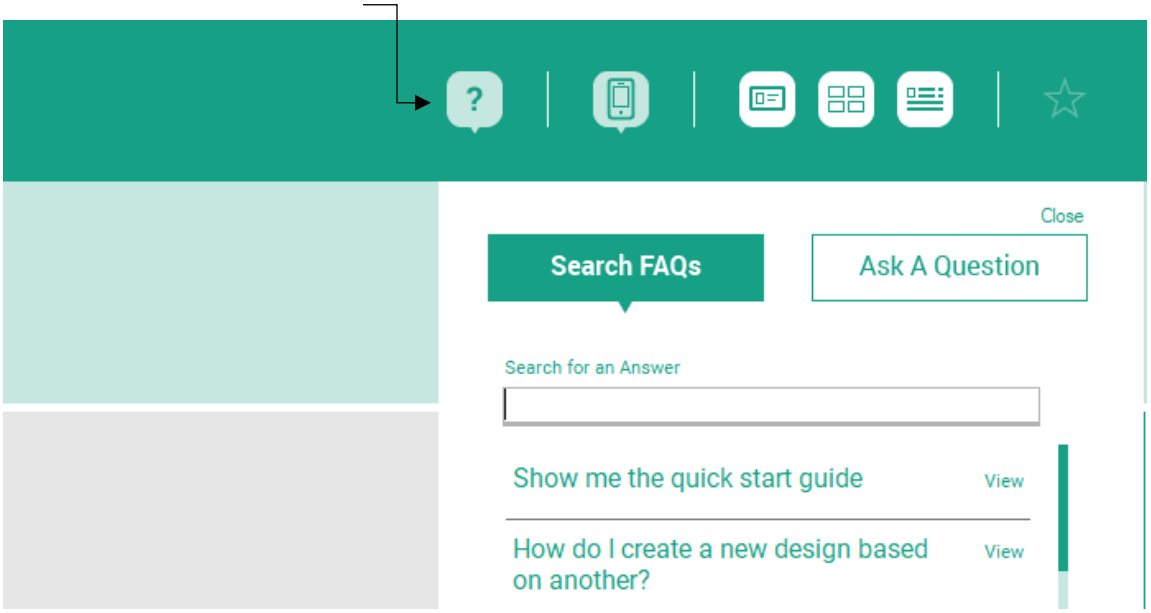
You can also save or load your starred list to easily access them at a later date.

Along with starred lists you have saved manually, you will also find any starred lists you have created when importing from a spreadsheet or when batch image importing.

**Deleting starred records will permanently delete records from your database in a batch.**

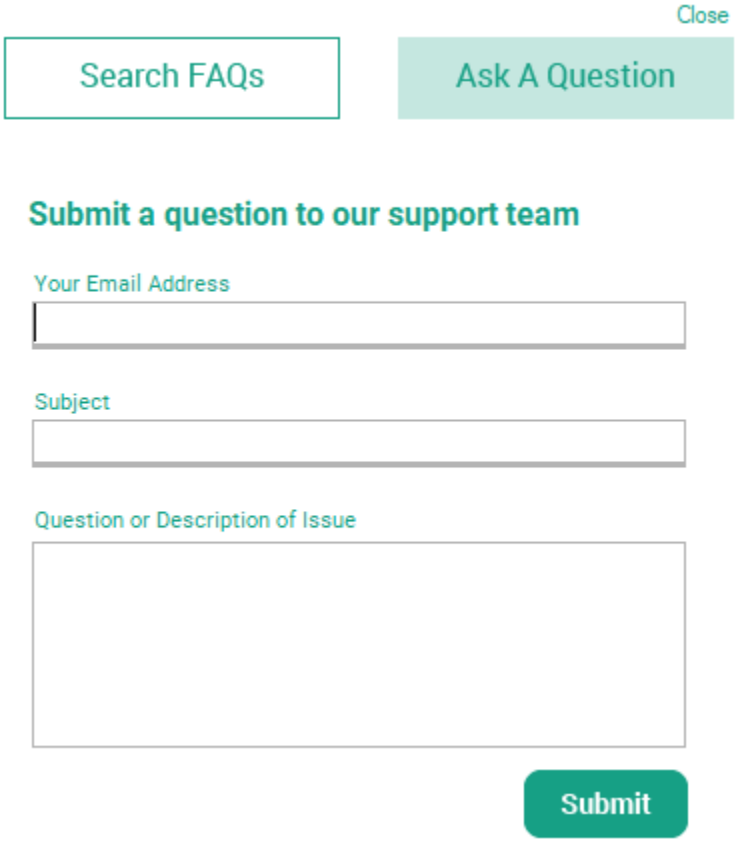
### Using the Help section

Clicking the question mark icon on the tool bar will open up the built-in help centre. Here you can search for solutions relating to using the EasyBadge software.




### Ask A Question

You can also submit a question if you have a moer specific requerment on your Easy Badge set up which you need help with.




For more information or support about EasyBadge you can email help@easybadge.com to raise a support ticket.