

ERC Access Permissions

Automatic Access by Contact Type

Automatically grant ERC access to designated contact types—like Billing and Marketing—eliminating the need for the primary contact to manually add them. This improves the onboarding process for exhibitors.

How to Set Automatic ERC Access by Contact Type

Understanding the Default Process

By default:

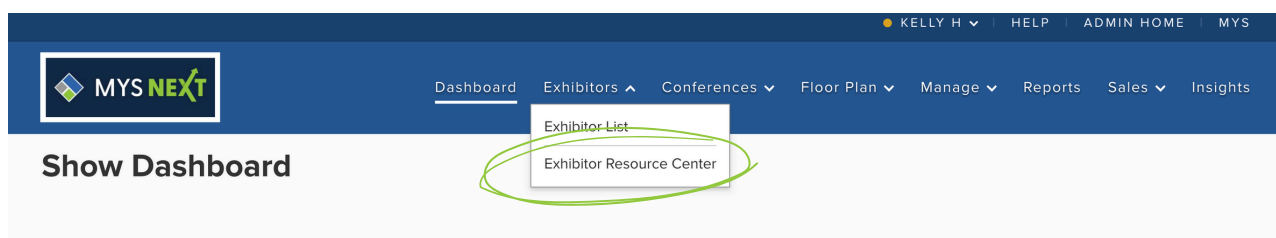
- Only the **Primary Contact** automatically receives ERC access
- The primary contact can manually add additional users in the ERC

This behavior still applies unless you choose to expand access.

1

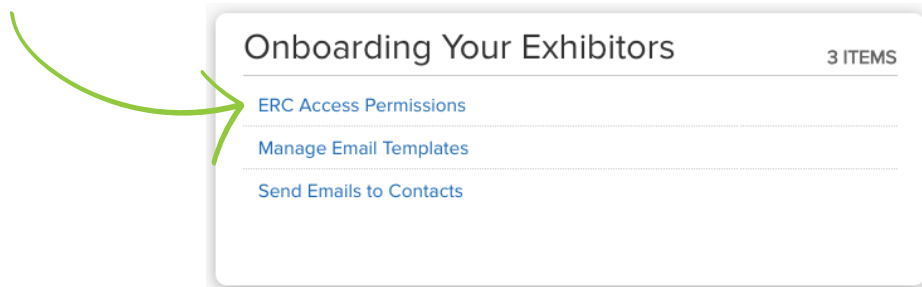
Access the Exhibitor Resource Center

- Access the Exhibitor Resource Center admin through the **Exhibitors** dropdown on the Show Dashboard.



2 Choose which contact types get automatic ERC access

- In the **ERC Admin**, go to the **Onboarding Your Exhibitors** tile.
- Under **ERC Access Permissions**:



- You'll see a list of the contact types used by your show. Select which contact types should automatically receive ERC access.

A screenshot of the "ERC ACCESS PERMISSIONS" form. It includes a heading "ERC ACCESS PERMISSIONS", a paragraph explaining that Primary Contacts are automatically granted access, and a question: "Would you like to enable automatic ERC access to any of the following contact types as well?". Below this are three checkboxes: "Billing Contact" (checked), "Marketing Contact" (unchecked), and "Onsite Contact" (unchecked). A "Save" button is at the bottom.

- **Save** your selections.

Note After saving, make sure to publish your ERC changes before sending any emails. [Click here to review how to publish ERC changes.](#)

3 Review ERC email templates

- Select **Manage Email Templates** from the **Onboarding Your Exhibitors** tile in the **ERC Admin**.
- Two email templates are available—one for notifying primary contacts yet to receive a login email and one for granting additional users access. Upon selecting your template, complete the required information.



Tip

When composing your email, use the placeholders to personalize it. MYS will replace these tags with actual recipient data when the email is sent.

4

Activate & publish your email

Activating will send the email when the specified scenario occurs. In this case, upon adding users. If inactive, an email will not be sent when adding users.

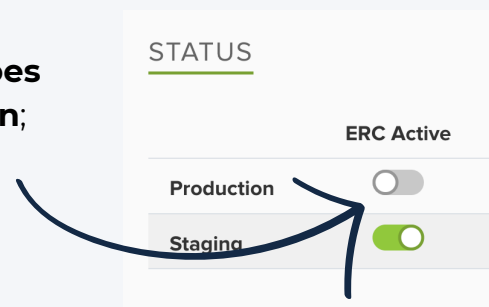
Publishing will move your email template from Staging to Production.

Note

If a template is inactive, an email will not automatically be sent when adding a primary contact or user.

Once you activate the ERC, we recommend that the templates be activated as well, so your primary contacts and users have the information needed to log in.

Deactivating the email templates does not prevent someone from logging in; that is handled by deactivating the Exhibitor Resource Center.



5 Send Emails to Contacts

After reviewing the email templates and activating the ERC on Production, notify exhibitors that the ERC is live.

- Select **Send Emails to Contacts** from the **Onboarding Your Exhibitors** tile in the **ERC Admin**.
- Choose which exhibitors to email: all exhibitors, exhibitors yet to log in, or exhibitors added after a specified date.

Note *This will send emails to all primary contacts and any additional contact types with automatic access enabled.*

SEND EMAILS TO CONTACTS



Which contacts would you like to email? *

- ☒ All contact types with automatic ERC access
- ☐ All contact types with ERC access who haven't logged in yet
- ☐ All contact types with automatic ERC access, added after (choose date)

Contact Types with automatic ERC access:

- Primary Contact
- Billing Contact

This email will be sent to the contacts based on the options you selected above. If you need to use additional parameters for the distribution list, please exit this window and use the 'Send Email' option under the 'Manage' menu.

Send Later

Send Email

Send Self Test

- Click **Send Email** to notify your exhibitors.

How this Affects Exhibitors

- More exhibitor contacts can automatically receive system access, reducing the administrative duties of the primary contact.
- Automatic access for additional contact types does **not** grant permission to manage users. User-management access must still be enabled individually for each contact in the **Users** tab.
- When automatic access is enabled, only contacts with permission to manage users can edit contact details for contact types that are set to receive automatic access.