

Exhibitor Primary Contact Onboarding

The Exhibitor Resource Center (ERC) now includes the option to set up onboarding for exhibitors' primary contacts. This feature helps ensure exhibitors complete critical setup tasks from their very first login, setting them up for success at your show.

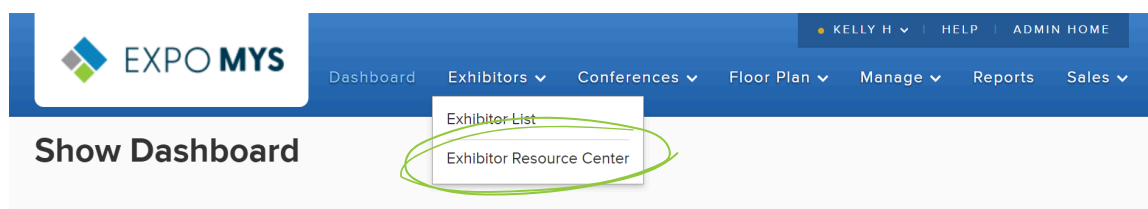
Use this section to configure the key tasks Primary Contacts should review or complete during their first login to the ERC.

Notes

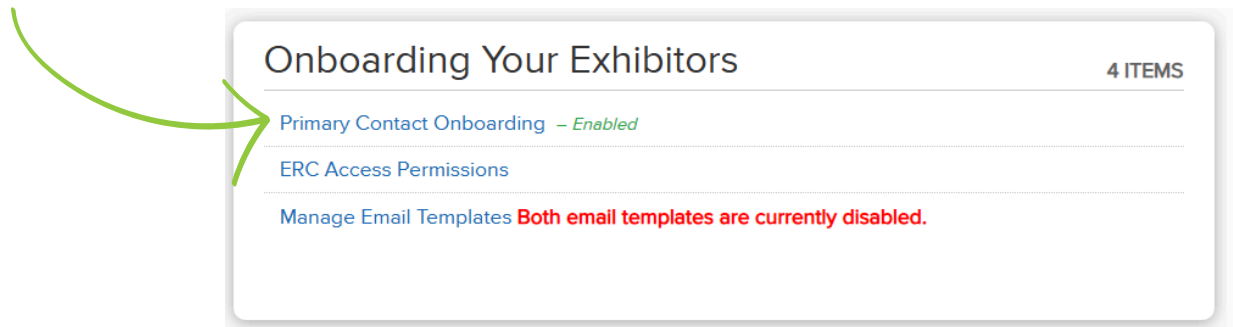
- The onboarding process is only available for primary contacts.
- The onboarding prompt will only appear the first time a primary contact logs into the ERC. After that, the items included in the onboarding are available in the full ERC, but primary contacts will not be alerted upon login to complete them.
 - If an exhibitor's primary contact changes, the new primary contact will see the onboarding prompt when they log in.
- For the best experience, we recommend highlighting 3–5 key action items for the best onboarding experience. You may include up to 6 if needed.

Setting Up Exhibitor Primary Contact Onboarding

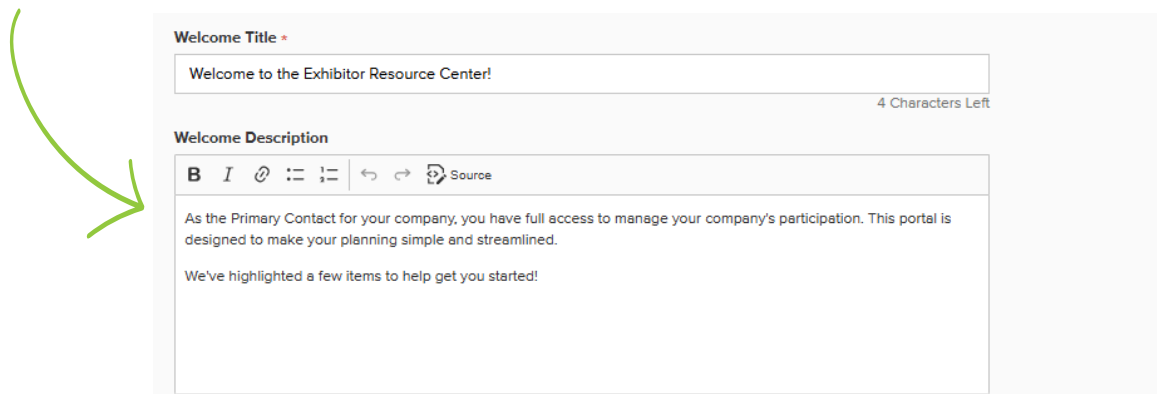
- 1 Access the Exhibitor Resource Center From your Show Dashboard, navigate to the Exhibitor Resource Center admin.



- 2 Go to the Onboarding Your Exhibitors section and click Primary Contact Onboarding.



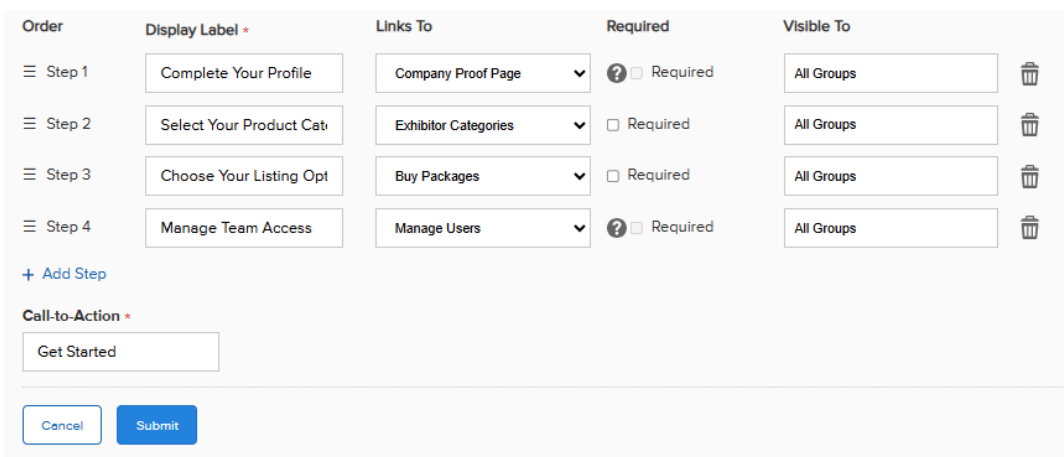
- 3 Enter a Welcome Title and Description for the onboarding prompt.



By default, four steps will appear:

- **Complete Your Profile** – Enter exhibitor info to display on the exhibitor profile
- **Select Your Product Category** – Choose the product categories appropriate for the exhibitor
- **Choose Your Listing Option** – Upgrade profile to include more info and access additional features
- **Manage Team Access** – Determine which exhibitor team members have access to ERC tools

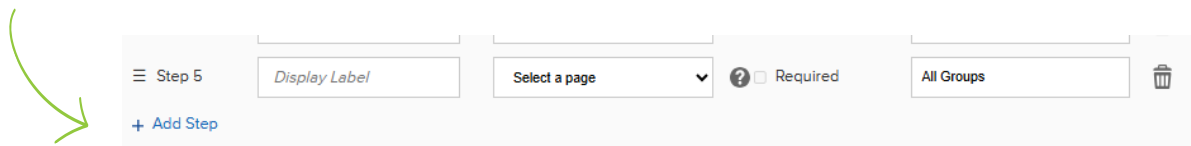
These defaults cover the most common setup actions, but you can edit, rearrange, delete, and add steps to fit your show's needs.



Each step includes the following fields:

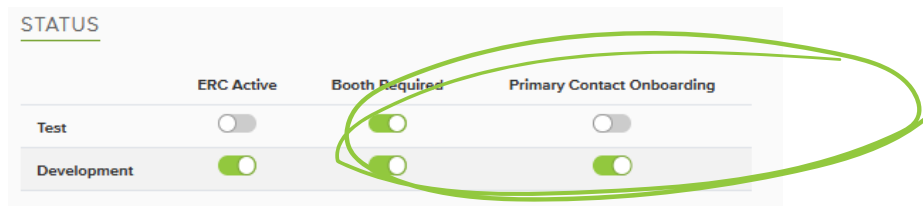
- **Order:** Click and drag to reorder the steps.
- **Display Label:** Enter the text that should display on-screen.
- **Links To:** Select one of the existing MYS pages to direct this step to.
- **Required:** Decide if this step should be required. Note: Some pages, such as "Complete Your Profile" and "Manage Team Access," cannot be required steps.
- **Visible To:** Select the exhibitor groups you'd like this step to display to, or select "All Groups" to display to all exhibitors' primary contacts.
- **Call to Action:** Enter a label for the call-to-action button.

To add a new step, click **Add Step** and complete the fields above. You may add a **maximum of six steps**.



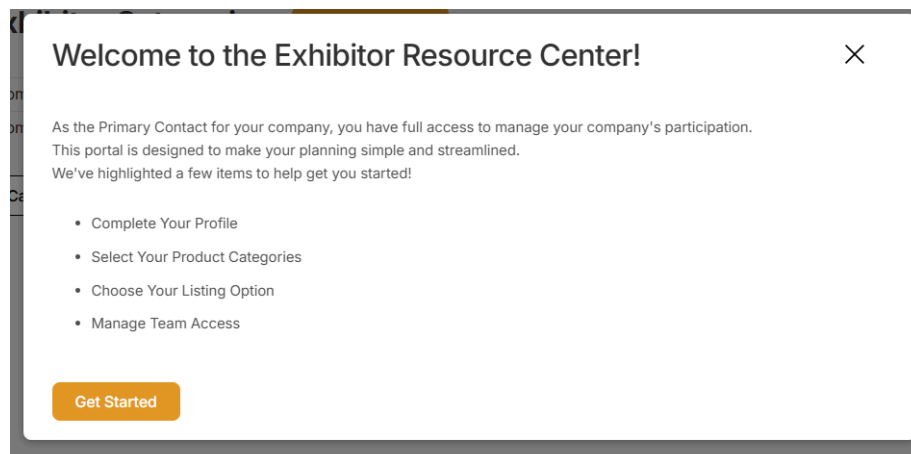
Enabling Exhibitor Primary Contact Onboarding

On the ERC admin home page, use the Primary Contact Onboarding Status toggle to turn the feature on or off.

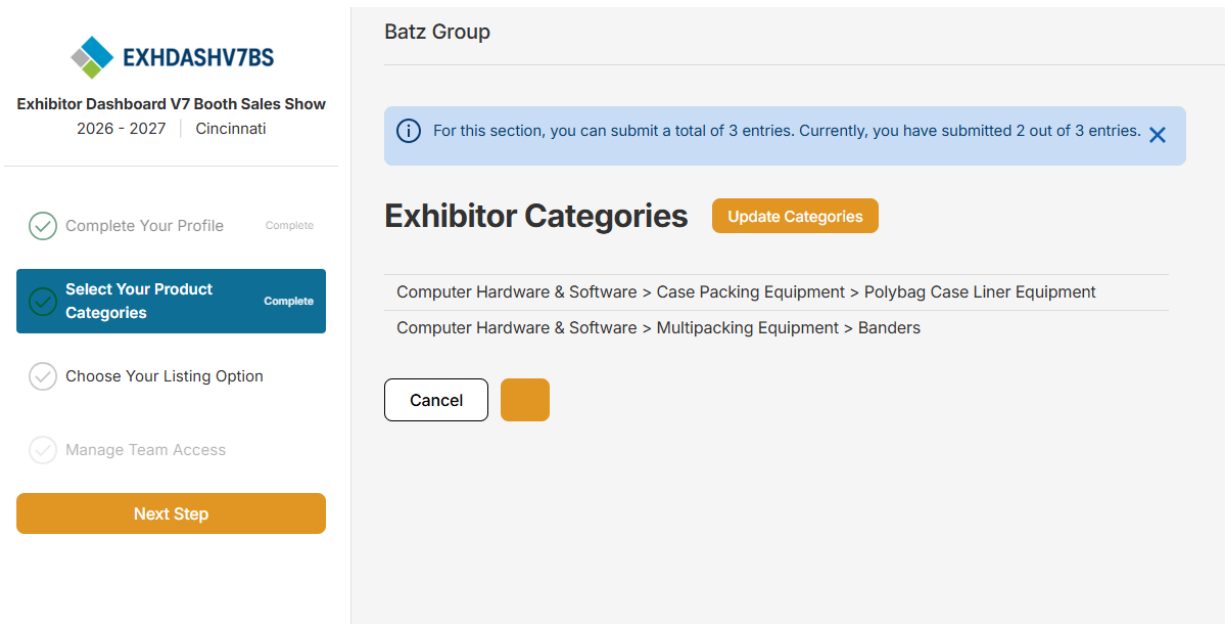


Primary Contact View

When **Primary Contact Onboarding is enabled**, primary contacts will see an onboarding prompt the first time they log into the ERC. The prompt displays the Welcome Title and Description you configured, followed by the list of onboarding steps you have set up.



Each step is presented with its display label and a call-to-action button that directs the primary contact to the associated page. Required steps are clearly indicated, prompting the primary contact to complete them before moving forward. Optional steps can be skipped and completed later.



After the initial login, the onboarding prompt will no longer appear automatically. However, primary contacts can still access and complete any of the items through the full ERC experience.