

Mercury Network

PREFLIGHT REVIEW

Automate your workflow with client groups



PREFLIGHT LEADER

Angela Jenkins
Account Management Engin



Thank you

We hope you enjoyed the session and took away some ideas about how to organize your clients into groups, and what the benefits are.

We want to offer some resources you might find useful as you're applying what you've learned.

If you have questions or need any help, click Contact support inside Mercury for fast, personal assistance.

Tutorials & Guides

How to create a new client:

How to create a client group

How to add a client to a group:

Assign a client group to an AMC/firm:

User guide for client groups:

Preflight Registration

Register now for our next Preflight from Mercury Support to guarantee your seat.

Continued: Automate your workflow using Client Groups

Thursday, April 27, 2017
1:30 PM - 2:30 PM CDT