

Mercury Network

# PREFLIGHT REVIEW

Automate your workflow with client groups



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**PREFLIGHT LEADER**

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Account Management Engin

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## Thank you

We hope you enjoyed the session and took away some ideas about how to set up your own custom automation using client groups.

We'd like to know what you thought of the session, and to hear what you think we can do to make future Preflights better. So, please fill out our survey (it's short, we promise.)

## 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:

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User guide for client groups:

## Preflight Registration

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

**Make Vendor Selection Settings work for you**

Thursday, May 25, 2017  
1:30 PM - 2:30 PM CDT