Caruso How To Guide Switching investing entities

If you have more than one investing entity with Mackersy Property, the below steps will explain how you can switch between investing entities to enable you to view each portfolio, documents, transactions & apply for new offers.

1. When you are logged into the portal, you will see in the top right the current investing entity you are logged in to view



Click on the down arrow. This will give you three options, investment settings, switch investing entity or add investing entity
Select 'Switch investing entity'



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3. This will then bring you to a screen displaying all the investing entities that are set up with Mackersy, from here you can select which one you wish to open.

Tip: when you are in this screen, the Investing entity with the darker ring is showing you what investing entity you are currently viewing.

//// Mackersy Property

Your investing entities

Investing Entity Name	Туре	Notifications	
M Mackersy Test	INDIVIDUAL	2	Select
M2 Mackersy Test 2	TRUST	2	Select