Profile Management

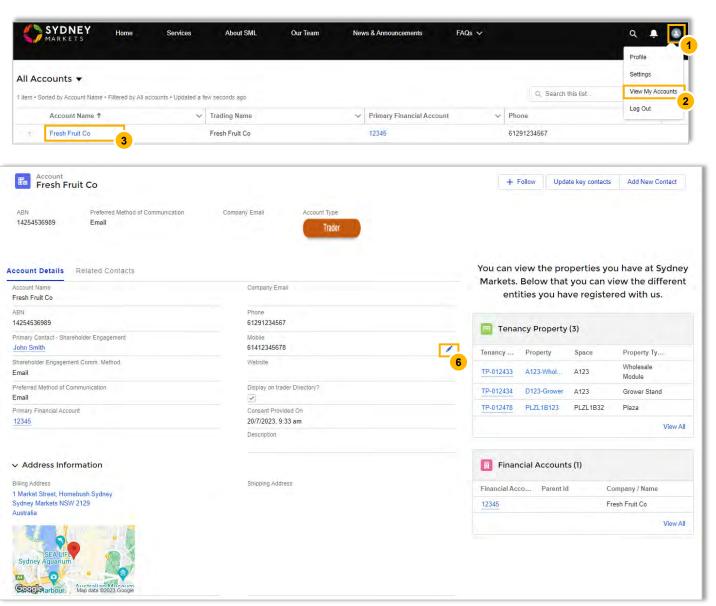# View and Update your Account Details

View and Update your Account Details

1. Go to the **Profile** icon

2. Select **View My Accounts**

> **TIP**
> An Account represents your individual unique customer account with us and may include more than one MAJIK/ Financial account number. The MAJIK/Financial account is your unique account ID in our finance system that is used to invoice you based on your tenancies across Sydney Markets.

3. Select the Account you want to view.

4. In the **Account Details** tab (Default view), you will see your account details. You will see a quick view of your properties and MAJIK/financial accounts.

5. You can edit the following fields on this account:

   • Company Email

   • Phone

   • Mobile

   • Website

   • Billing Address

   • Shipping Address

6. Click on the pencil icon next to the field, edit the field and click **Save.**

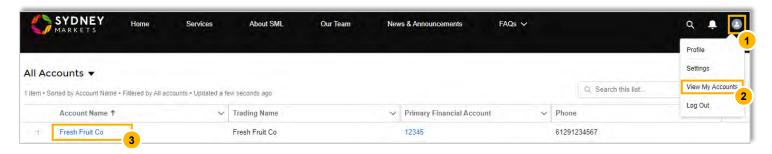# Add Contacts and Manage Communication Preferences

View and Add New Contacts

1. Go to the **Profile** icon

2. Select **View My Accounts**

3. Select the Account you want to view

4. View contacts in the **Related Contacts** tab

5. If you want to add a new contact, click **Add New Contacts**

6. Fill out contact details
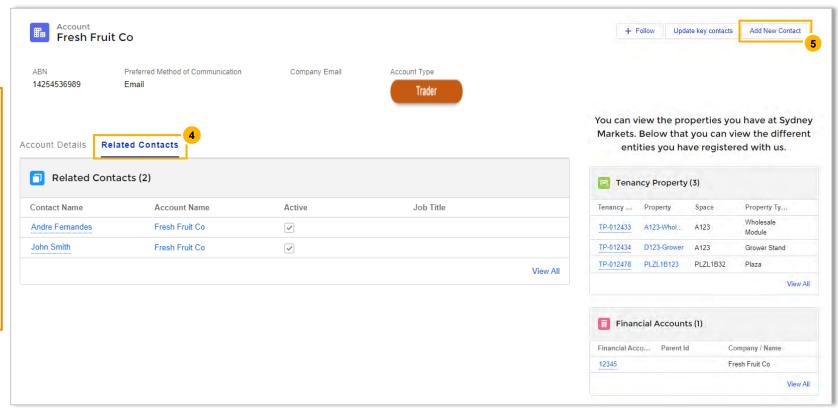
7. Click **Save**

8. Repeat for each new contact

> **TIP**
>
> Please identify appropriate roles for each contact you add as SML will use the role to determine how different communications from head office are sent to you as business and who receives it.
>
> Also please review your contact list on a monthly basis to request deletion for contacts who may not be your employees anymore or to add new contacts you would like to include in our database.
>
> At a bare minimum you must have the CEO/Principal of the business and Finance/Accounts identified in our database.

Add Contacts and Manage Communication Preferences

Select Preferred Contact for Communications

1. Go to the **Profile** icon

2. Select **View My Accounts**

3. Select the Account you want to edit

4. Click **Update key contacts**

5. Select a contact for each category of communications

   • Shareholder Engagement (Proxy forms, Ballots, notices)

   • Tenancy Related Communications (Rent review, Invoices)

   • All Other Communications (Marketing, general CEO comms)

6. Provide acknowledgement by selecting Yes checkbox

7. Click **Next** – This will be saved.