



# Buyers and the SMS

## Information for Professional Users

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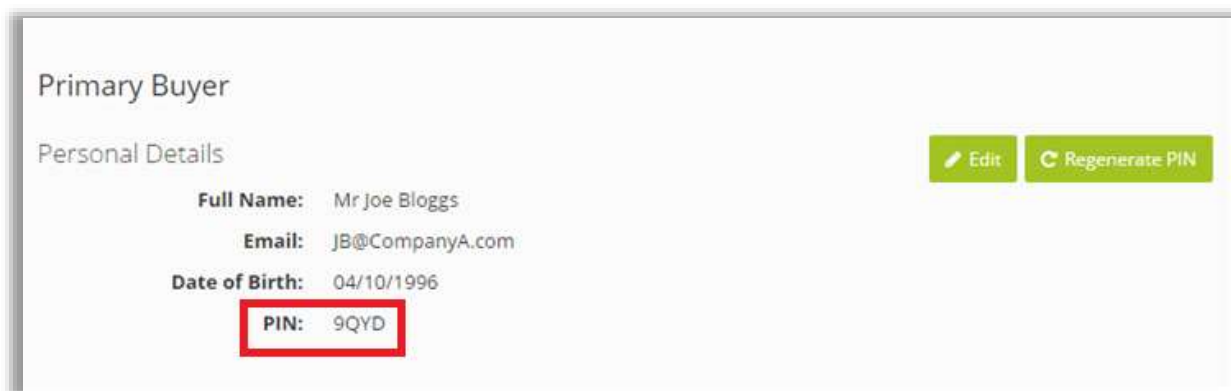
The document is designed to guide yourself as a professional user on the steps required from you and your client in order to set up their account on the Safe Move Scheme.

This document can be used to guide you on the set up of a primary buyer of a transaction as well as any Additional Buyers /Giftors of a transaction.

Buyers will have to follow the below steps to set up their account, if they don't already have one. (If they do already have an account they simply need to log in with the email and password they set up).

***New Primary Buyers can only set up their account once you have ordered an SMS product for the client<sup>1</sup>. Additional Buyers and Giftors can set up their account once they have been added to the corresponding transaction***

**Step 1: Let the Buyer know their PIN** - If the Buyer does not have an existing SMS user account, you will need to inform them of their PIN so that they can create their own account.



The screenshot shows a 'Primary Buyer' section with 'Personal Details'. The details listed are: Full Name: Mr Joe Bloggs, Email: JB@CompanyA.com, Date of Birth: 04/10/1996, and PIN: 9QYD. The PIN is highlighted with a red rectangular box. There are two green buttons in the top right: 'Edit' and 'Regenerate PIN'.

Primary Buyer	
Personal Details	
Full Name:	Mr Joe Bloggs
Email:	JB@CompanyA.com
Date of Birth:	04/10/1996
PIN:	9QYD

A PIN number is created for the buyer by the system as soon as the new transaction has been created, following the order of an SMS product. The PIN number will be displayed within the **Personal Details** section of the **Transaction** record.

Please ensure you communicate this PIN number to your client **securely**. This PIN number will expire within 28 days of generation

<sup>1</sup> For further details refer to the 'Quick Start Guide' and the 'How to use Safe Move Scheme for Firms' guide, these are located in the **Downloads** page of the SMS.

## Accounts Setup (cont.)

### Step 2: Buyers creating their account –

The Buyer will need to browse to the SMS and select **Create Account**.

They must then complete the **Create Account** Form. Once the password has been successfully set, the account set up will be complete. They will then be able to login to the SMS and access their authorised features.

The screenshot shows a web form for creating an account. At the top, there are two tabs: 'Sign In' and 'Create Account'. The 'Create Account' tab is active. Below the tabs, there is an 'E-mail' input field with a user icon on the right. Below that is a label 'Please enter your PIN as provided by Safe Move Scheme' followed by a PIN input field. Then, there is a 'Choose a Password' section with a text description: 'Your password must contain at least one upper case letter, at least one number and at least one special character (e.g. &, #, %). It must be at least 10 characters long.' Below this is a 'Password' input field with a lock icon on the right. Then, there is a 'Confirm password' input field with a lock icon on the right. Below the password fields is a reCAPTCHA section with a checkbox labeled 'I'm not a robot' and the reCAPTCHA logo. Below the reCAPTCHA section is a note: 'reCAPTCHA may not display correctly if you are running IE in compatibility view'. At the bottom left, it says 'Version 1.0.510'. At the bottom right, there is a green 'Create Account' button with a red border.

Sign In Create Account

E-mail

Please enter your PIN as provided by Safe Move Scheme

**Choose a Password**  
Your password must contain at least one upper case letter, at least one number and at least one special character (e.g. &, #, %). It must be at least 10 characters long.

Password

Confirm password


☐ I'm not a robot reCAPTCHA Privacy - Terms

reCAPTCHA may not display correctly if you are running IE in compatibility view

Version 1.0.510 Create Account

**Step 3: Accepting the Terms and Conditions** – Once the Buyer has accepted the SMS terms and conditions from the screen below, they will see their SMS page from which they can access their authorised products.

### Terms and Conditions



Please read the following Terms and Conditions. once you are happy please check the checkbox at the bottom of the Terms and Conditions to confirm you have read, understood and accept the Terms and Conditions before you click 'Continue'.

**2. IMPORTANT NOTICE TO ALL USERS**

**2.1 WE ADVISE YOU TO PRINT AND KEEP A COPY OF THESE TERMS AND CONDITIONS.**

**2.2** By clicking in the box below you agree to be bound by these Terms and Conditions, which will bind you. Please note the limitations of liability set out at clause 11.

**2.3** If you do not agree to these Terms and Conditions, we are not able to provide the Services to you and you must discontinue the process now. In this case, the process will end and you will not be able to access or make use of the Services. Please note that by doing so, you may delay the Transaction.

**2.4** These Terms and Conditions are a legal agreement between us and can only be modified with our written consent. We may change these Terms and Conditions at our discretion by changing them on our website. Clause 16.8 states when the last changes were made. The current version of these Terms and Conditions as displayed on our Portal, will apply.

**2.5** Misuse of the Services is prohibited. Please refer to clause 8 for your obligations in relation to the use of the Services.

**3. DEFINITIONS**

**3.1** In these Terms and Conditions, the following definitions shall apply:

Save as PDF

Continue

User must select checkbox, located at the bottom of the Terms and Conditions text, before continuing:

17.1



☐ I have read, understood and accept the Terms and Conditions