Guide for Organisation Administrators

Information for Organisation Administrators

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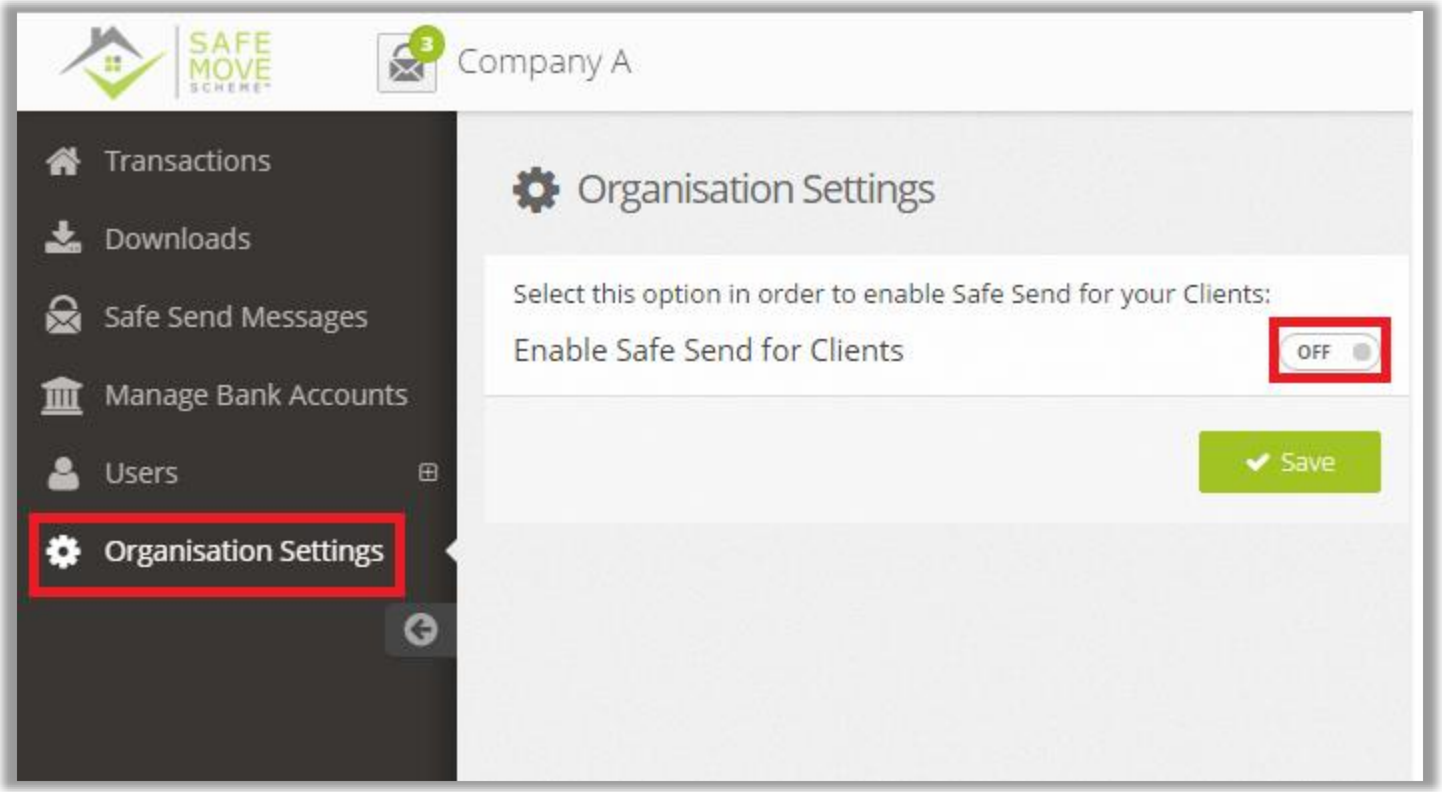
Introduction

As your Firm’s Organisation Administrator you will be carry out elevated functions in comparison to a standard user of the system. Any additional features and responsibilities which are unique to Organisation Administrators have been highlighted in the following document.

Enable Safe Send for Clients

By default the option for your clients to create a new conversation via Safe Send is disabled. If your firm would like to use Safe Send as your communication tool, this feature will need to be turned on.

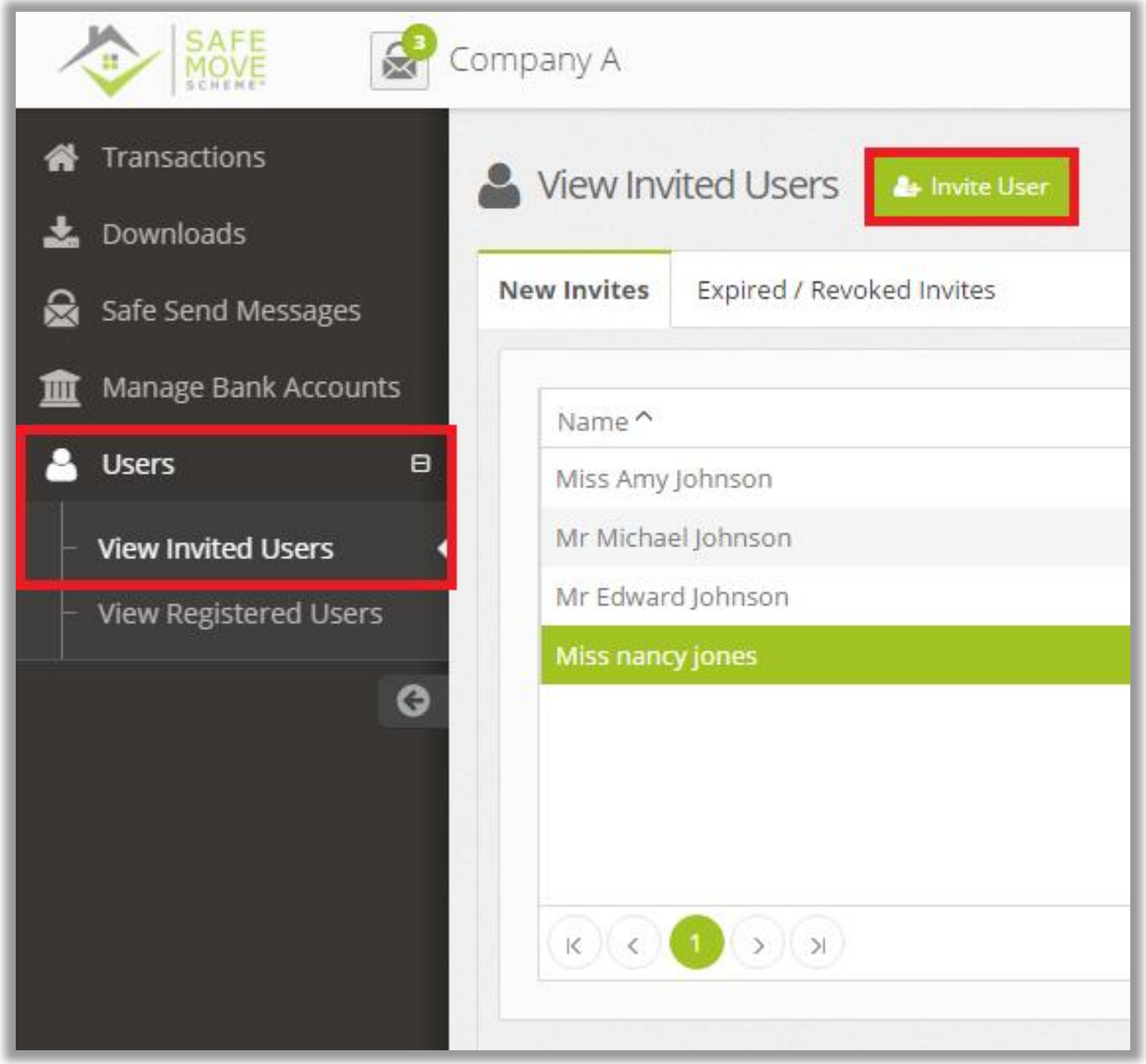


Inviting Users

In order for your staff members to log into the SMS, individual user accounts will need to be created for the users.

1. Select *'Users'* > *' View Invited Users'* from the left hand side menu, this will bring up the ***View Invited Users*** screen:

2. Select *'Invite User'*



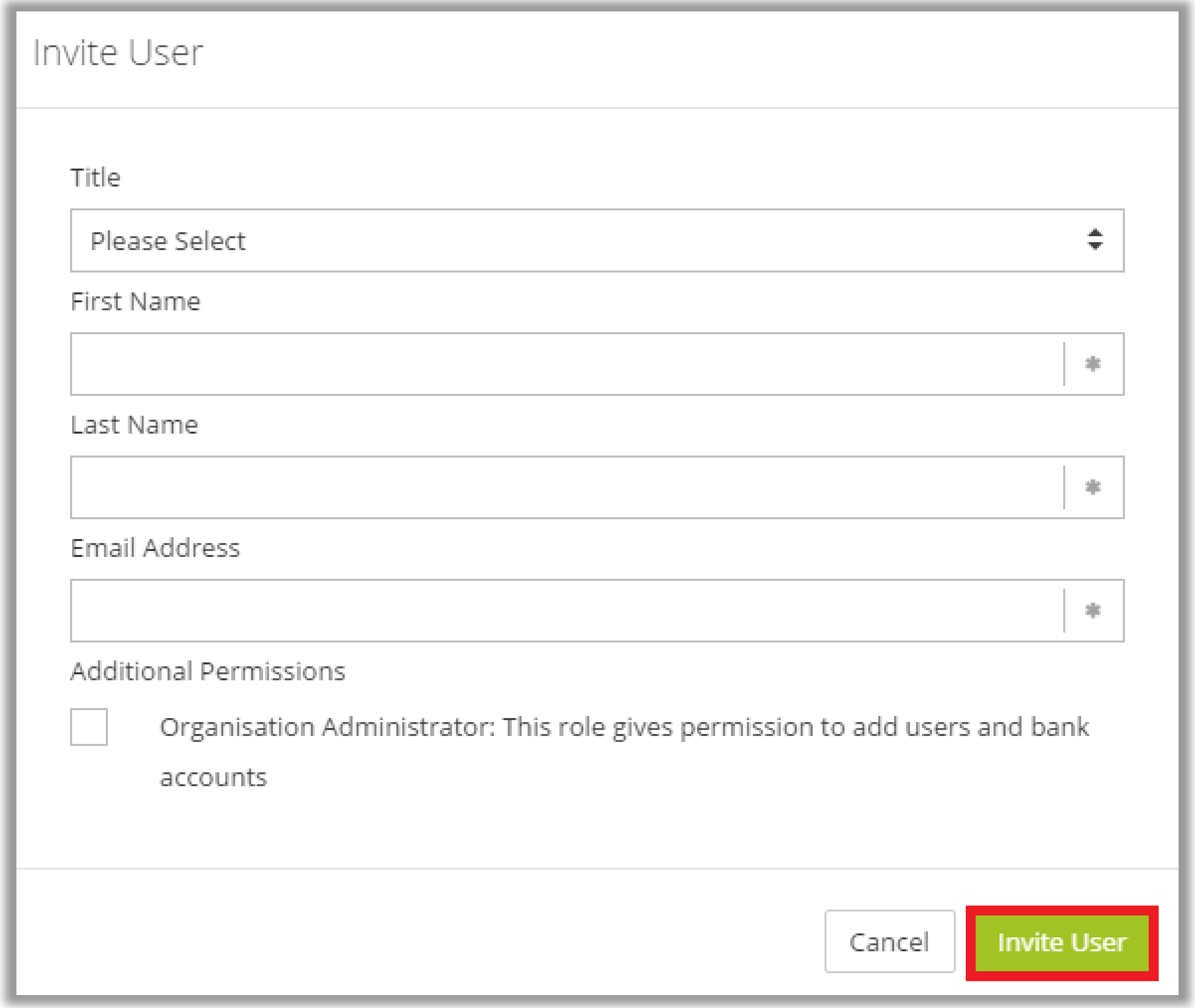
User Management (cont.)

1. This pop up (right) will appear for you to complete

2. Ensure your employee is able to access the email address entered

3. All new users will have the permissions of an Organisation Employee by default. Selecting the Organisation Administrator permission, will grant this user elevated privileges.

4. Select *'Invite User'*

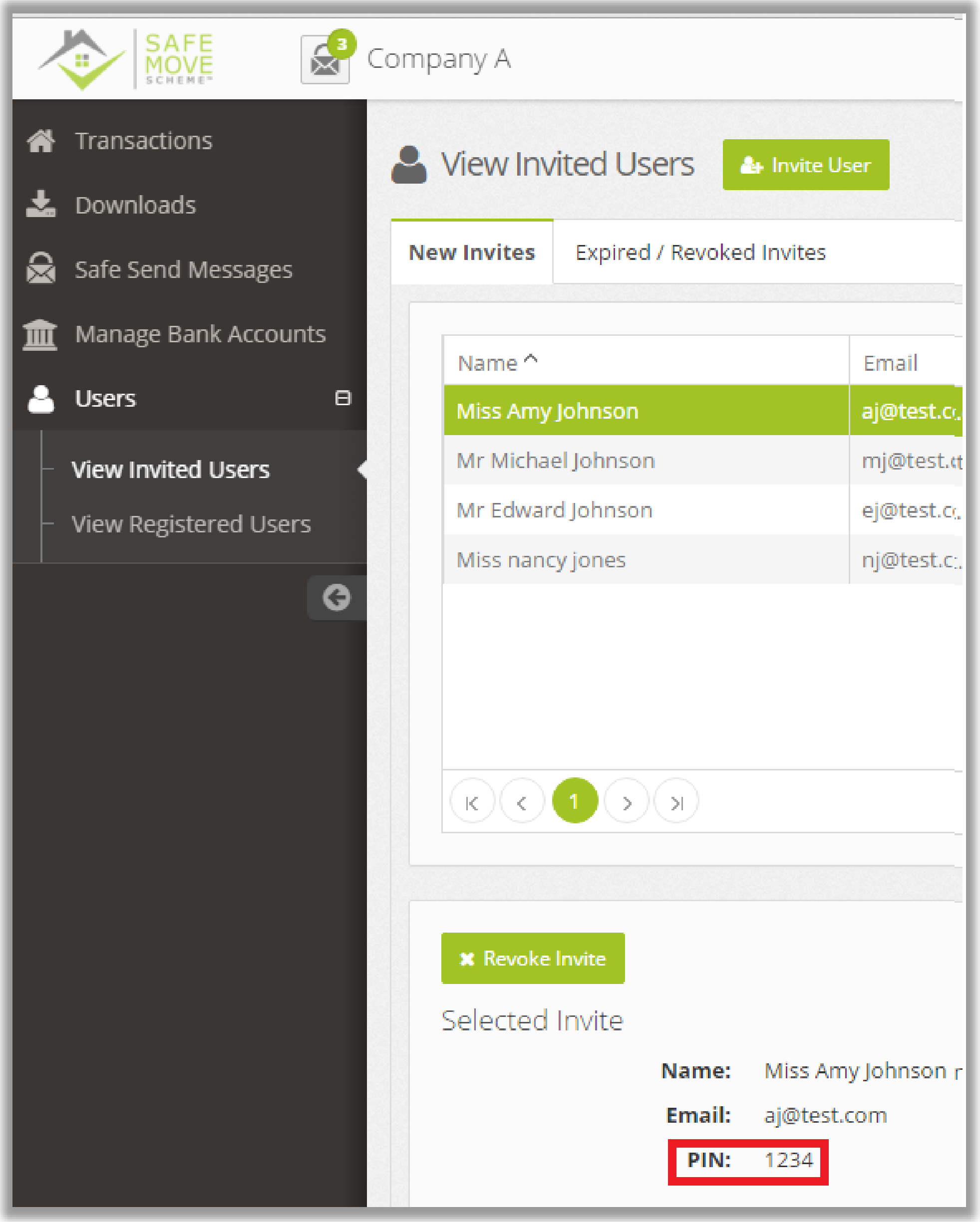


User Management (cont.)

5. Doing so will create a new entry in the ***New Invites*** tab, a PIN will be generated within details of the ***Selected Invite*** section

6. Now inform the invited user of their PIN number and ask them to browse to the Safe Move Scheme website and create their account, they will be prompted for their PIN before being able to complete this process[1]

7. Once they have created their account and logged in they will appear in the ***Registered Users*** screen.

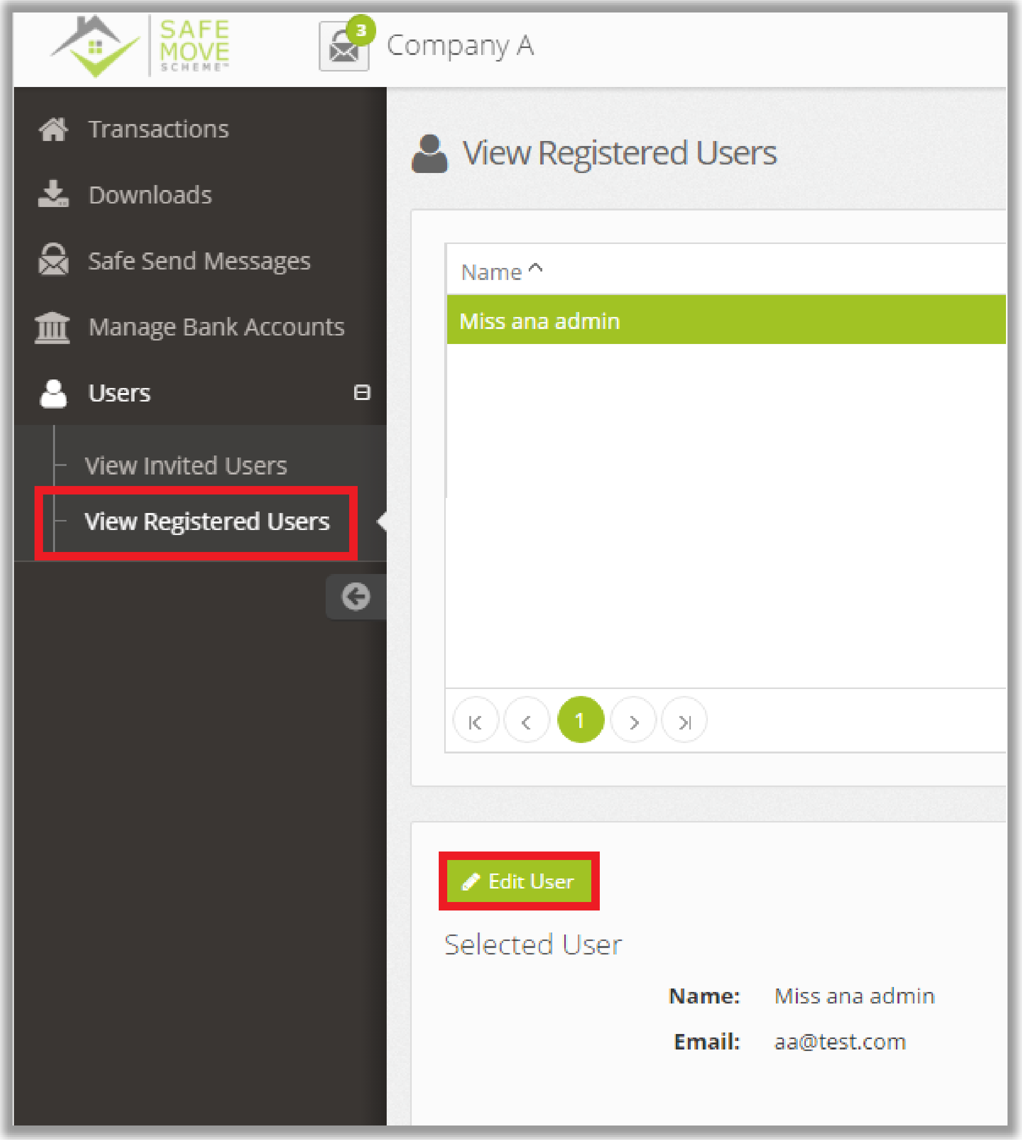


[1]Details of this process can be found in the 'How to Use the Safe Move Scheme', located in the Downloads page of the Safe Move Scheme.

Modifying Users

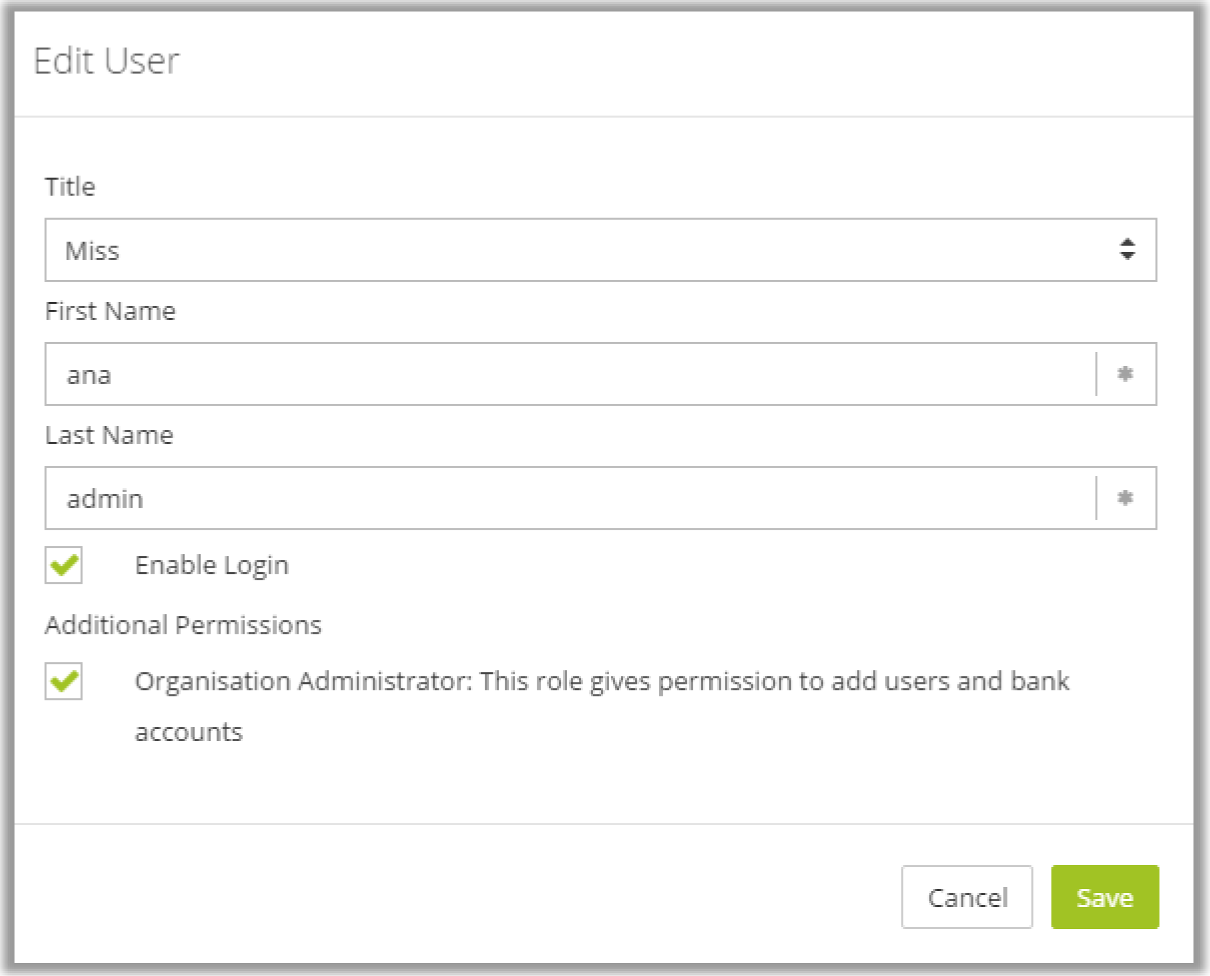
1. Select *'View Registered Users'*, this will bring up the ***View Registered Users*** screen (right). Highlight the relevant record from the grid to bring up their details

2. Select *'Edit User'* to view the ***Edit User*** screen



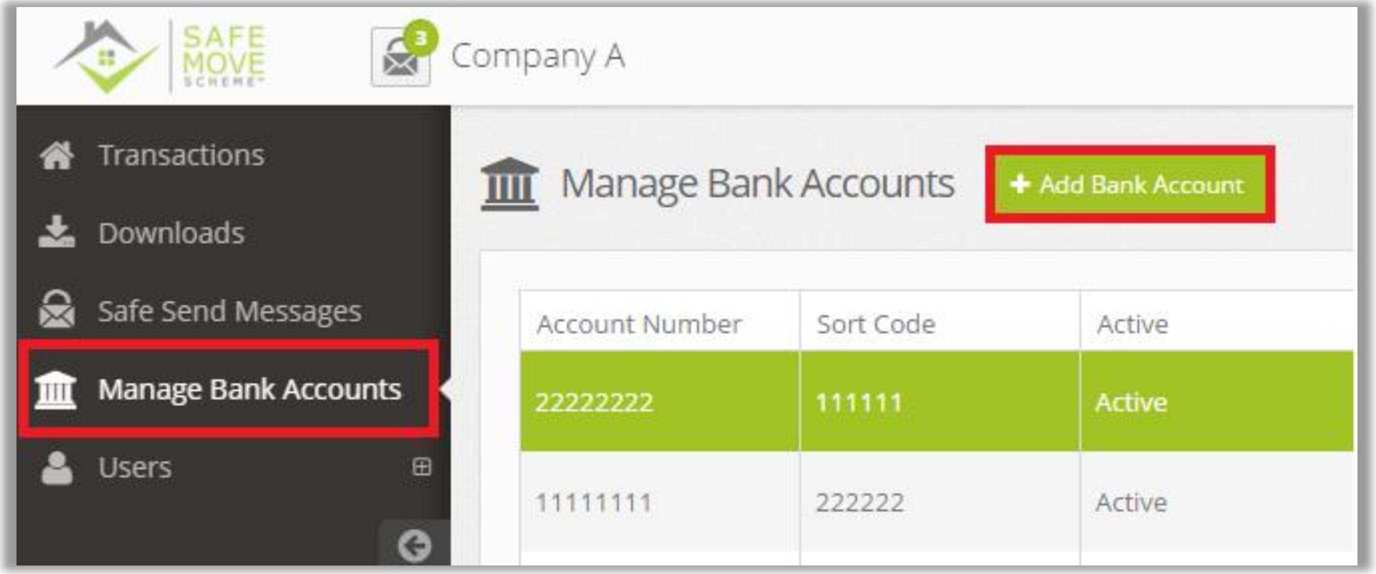
User Management (cont.)

3. On the **Edit User** screen you can amend the User detail fields as necessary
4. If this user is not required to log into the Safe Move Scheme, make sure you deselected **'Enable Login'.**

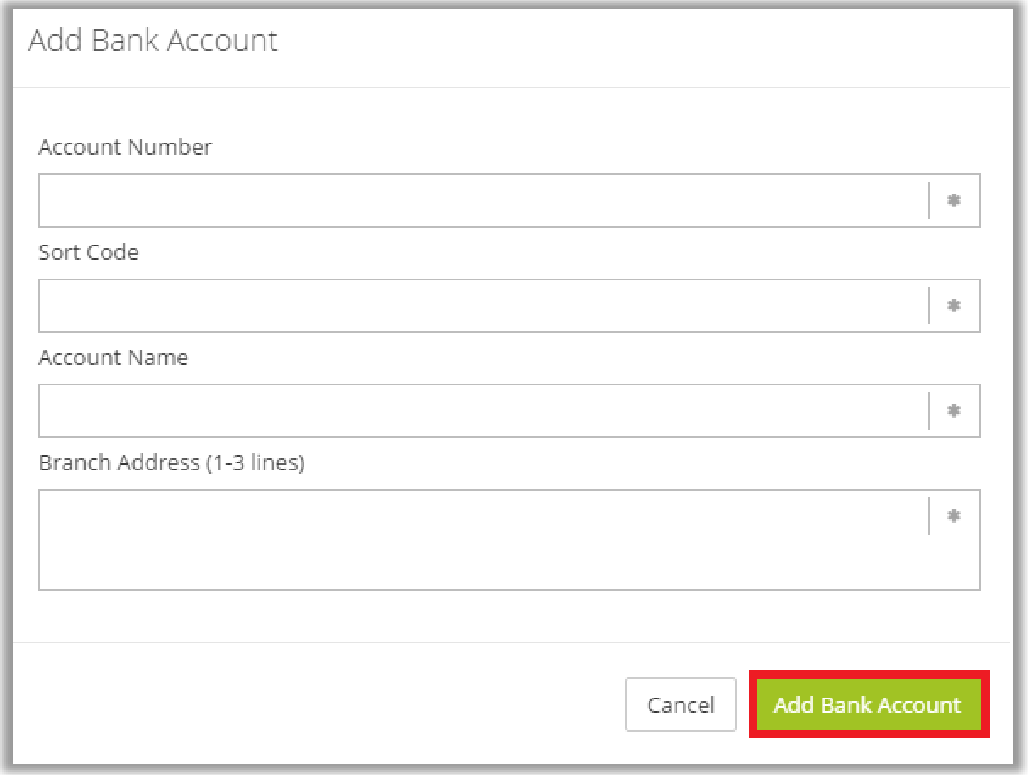


Your Firm must have a Safe Move Scheme validated bank account before the system will allow your Firm to order any products for your client.

1. Select '*Manage Bank Accounts'* from the left hand side menu, this will bring up the below screen:



2. Select '*Add Bank Account*'. The following pop up will appear for you to complete



3. Enter in the **Account Number**, **Sort Code, Account Name & Branch Address** for your Firm's client account.

4. Select '*Add Bank Account*' to submit these details for validation.

5. You will receive a notification from the Safe Move Scheme once the bank account details have been validated.

Bank Account Management (cont.)

Bank Account Statuses

- **Pending Validation** – all newly submitted bank account details to the Safe Move Scheme will be marked with this status
- **Safe** – this status indicates the bank account is available for use
- **Mark as Fraud Suspicious** – if a user within your Firm suspects fraudulent activity is occurring on a particular bank account, they can mark it as fraud suspicious. The firm's SRO will be notified of this change, they can either 'Confirm Potential Fraud' or mark the account as Safe[2]
- **Confirm Potential Fraud** – the Firms SRO is able to confirm a bank account is fraudulent, these account details cannot be re-used

If your Firm no longer requires a particular bank account, your Firm's SRO or Organisation Administrator can 'Deactivate' the account. Should the bank account be required in the future, your firm's SRO or Organisation Administrator can 'Activate' the account once again.

[2] If a client was to enter these bank account details into Safe Buyer, the system will return a 'No Match' for further details refer to the Safe Buyer Product factsheet.