



Guide for Organisation Administrators

Information for Organisation Administrators

Created February 2016. Version 1.0

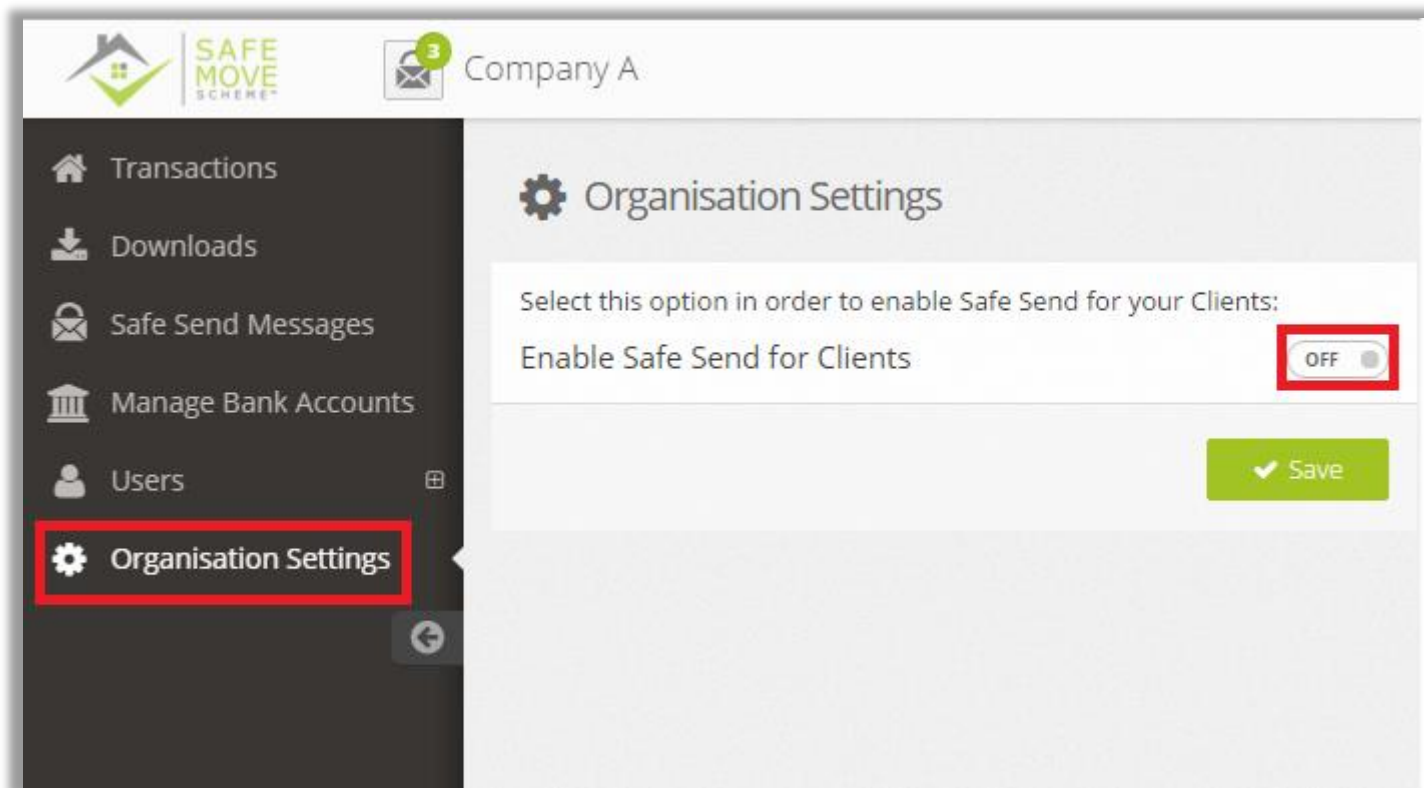
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As your Firm's Organisation Administrator you will be carry out elevated functions in comparison to a standard user of the system. Any additional features and responsibilities which are unique to Organisation Administrators have been highlighted in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

Enable Safe Send for Clients

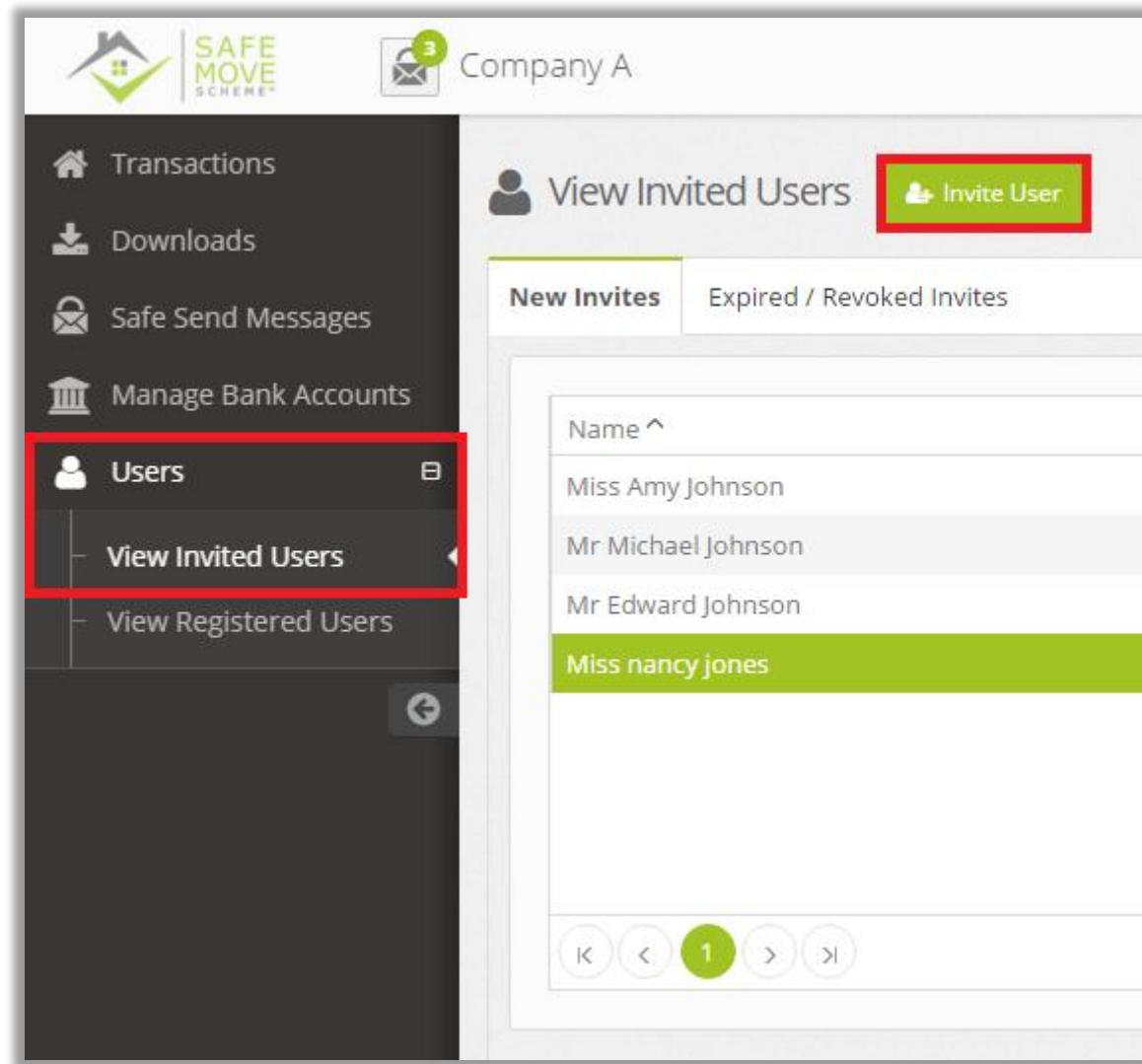
By default the option for your clients to create a new conversation with your Firm via Safe Send is disabled. If your Firm would like to use Safe Send to communicate with your clients, this feature will need to be turned on.



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'



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'

Invite User

Title

Please Select

First Name

Last Name

Email Address

Additional Permissions

☐ Organisation Administrator: This role gives permission to add users and bank accounts

Cancel

Invite User

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 process¹
7. Once they have created their account and logged in they will appear in the **Registered Users** screen.

The screenshot shows the 'SAFE MOVE SCHEME' web application. The top navigation bar includes the logo, a notification badge with the number '3', and the text 'Company A'. A dark sidebar on the left contains a menu with options: Transactions, Downloads, Safe Send Messages, Manage Bank Accounts, Users (with a sub-menu), and a back arrow. The 'Users' sub-menu is open, showing 'View Invited Users' and 'View Registered Users'. The main content area is titled 'View Invited Users' and features an 'Invite User' button. Below this, there are two tabs: 'New Invites' (active) and 'Expired / Revoked Invites'. A table lists invited users with columns for Name and Email. The first row, 'Miss Amy Johnson' with email 'aj@test.co.uk', is highlighted. Below the table is a pagination control showing '1' of 1 items. At the bottom, a 'Revoke Invite' button is visible. The 'Selected Invite' section displays details for Miss Amy Johnson, including her email 'aj@test.com' and a generated PIN '1234', which is highlighted with a red box.

Name ^	Email
Miss Amy Johnson	aj@test.co.uk
Mr Michael Johnson	mj@test.co.uk
Mr Edward Johnson	ej@test.co.uk
Miss nancy jones	nj@test.co.uk

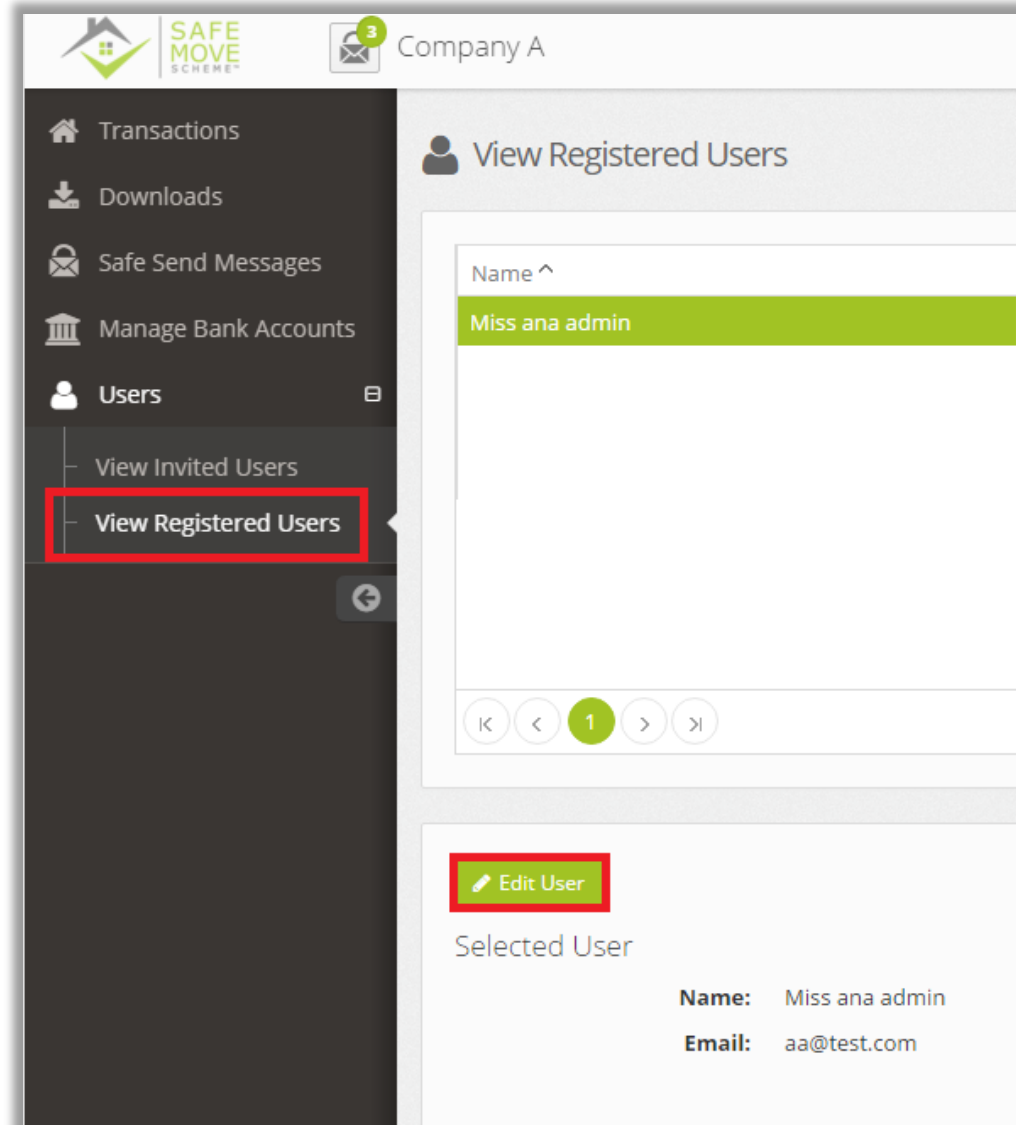
Selected Invite

Name: Miss Amy Johnson r
Email: aj@test.com
PIN: 1234

¹Details 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



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**'.

Edit User

Title

Miss

First Name

ana

Last Name

admin

☒ Enable Login

Additional Permissions

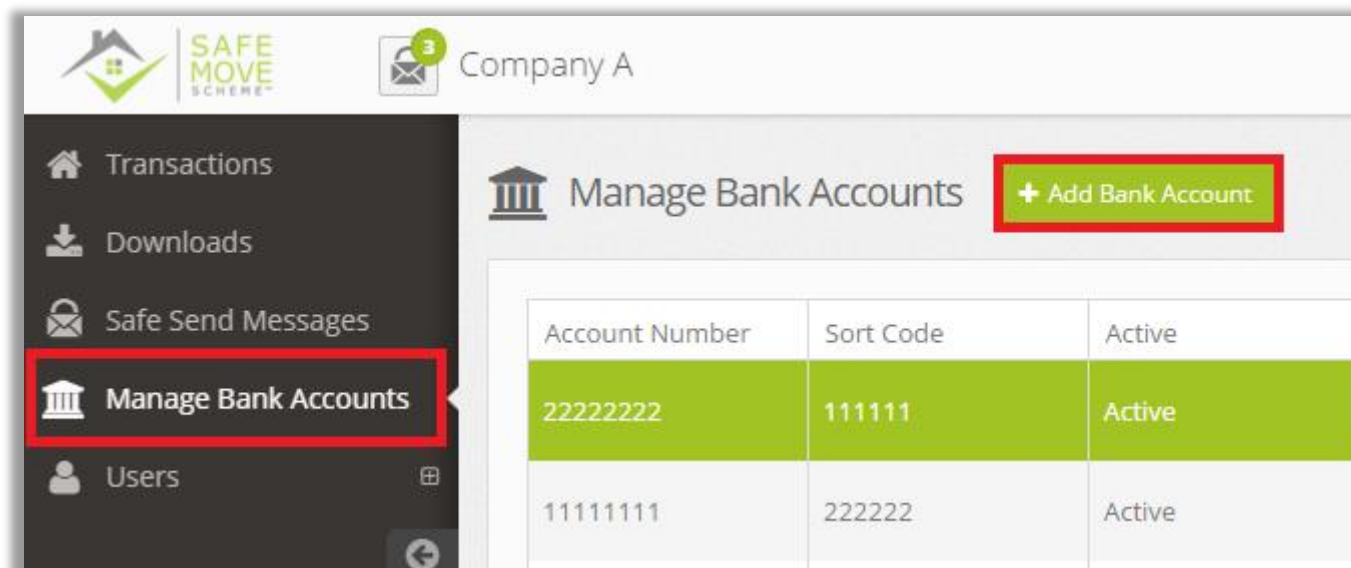
☒ Organisation Administrator: This role gives permission to add users and bank accounts

Cancel

Save

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.

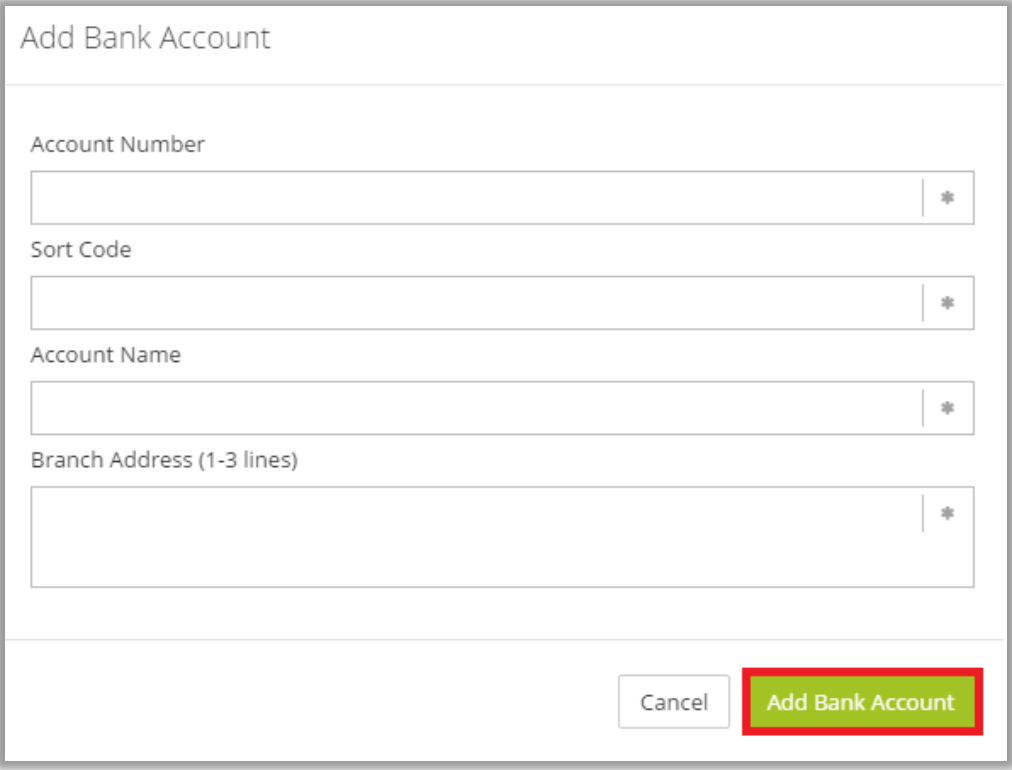
1. Select 'Manage Bank Accounts' from the left hand side menu, this will bring up the below screen:



The screenshot displays the 'Manage Bank Accounts' interface. The left sidebar menu includes 'Transactions', 'Downloads', 'Safe Send Messages', 'Manage Bank Accounts' (highlighted with a red box), and 'Users'. The main content area is titled 'Manage Bank Accounts' and features a '+ Add Bank Account' button (highlighted with a red box). Below the title is a table with two columns: 'Account Number' and 'Sort Code', and a third column for 'Active' status.

Account Number	Sort Code	Active
22222222	111111	Active
11111111	222222	Active

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



The screenshot shows a pop-up window titled "Add Bank Account". It contains four input fields, each with a required field indicator (an asterisk in a circle):

- Account Number
- Sort Code
- Account Name
- Branch Address (1-3 lines)

At the bottom right of the form are two buttons: a "Cancel" button and an "Add Bank Account" button. The "Add Bank Account" button is highlighted with a red rectangular border.

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 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 Safe²
- **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.