



# How to Use Safe Send

For Professional Users

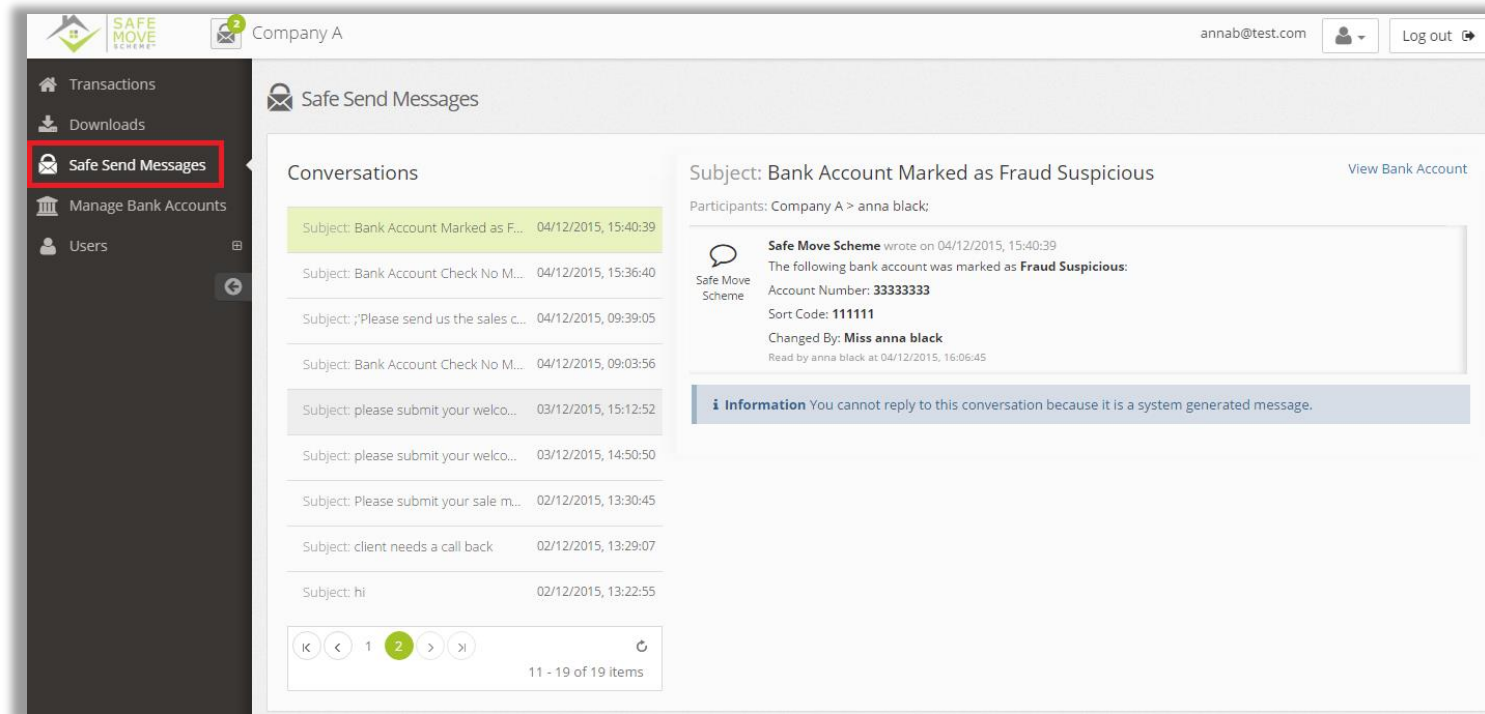
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Safe Send is a secure messaging system built into the Safe Move Scheme, it allows you to communicate with your clients and your colleagues through secure conversations. It also allows the Safe Move Scheme to deliver system messages to you.



## Enabling Safe Send for Clients

Your clients will not be able to start a new conversation with your firm, until the option '**Enable Safe Send for Clients**' has been turned on by your Organisation Administrator.

The enabling of this feature can be found by your Organisation Administrator within Organisation Settings.

## System Messages

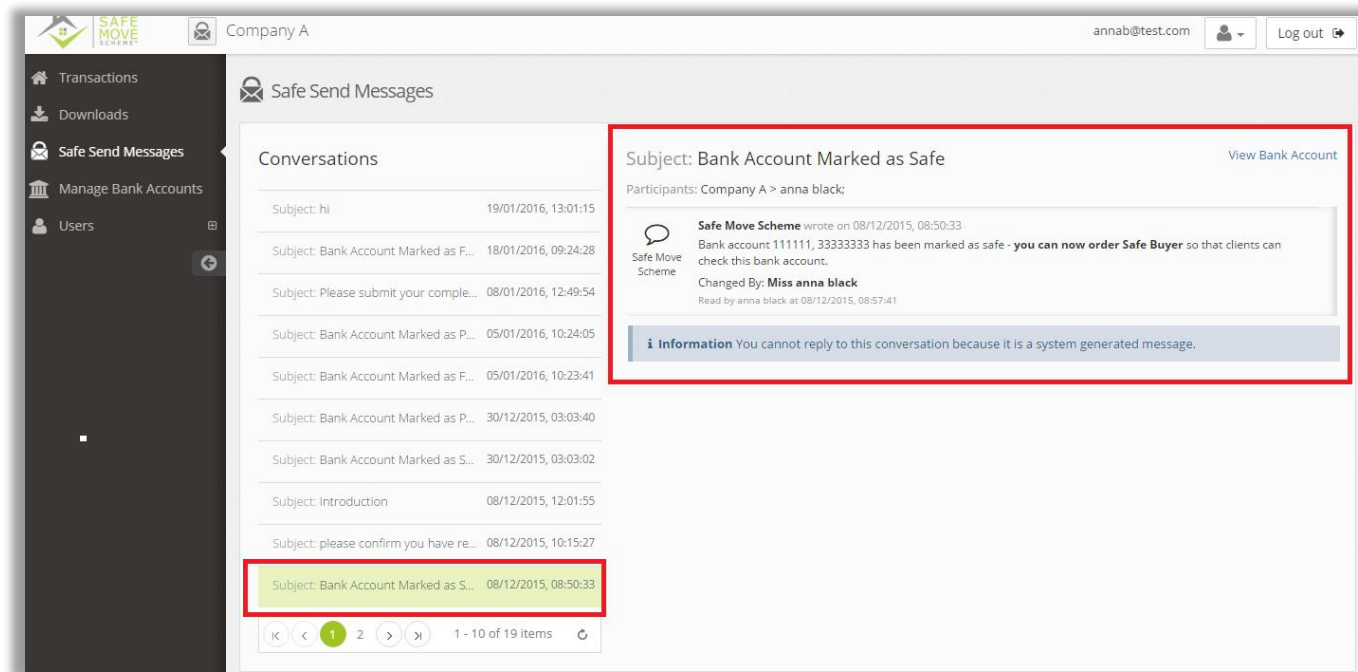
### Bank Account status:

Messages are sent out via Safe Send when there has been a change in your Firm's bank account status. There are certain rules regarding which types of users receive particular messages:

- If a bank account is marked as **safe**, all professional users of your Firm will be messaged.
- If a bank account has been marked as **fraud suspicious** the SRO and Organisation Administrators will be messaged.

### Other:

- If your client uses the **Safe Buyer** product and receives a '**No Match**' result, all professional users of your Firm will receive a message.



## Conversations

**Note: Safe Send Conversations can only be started against a transaction, once the Buyer has accepted to use Safe Buyer.**

### Starting a Conversation:

1. To start a conversation, select 'View Transactions' and click on the transaction you are looking to start a conversation based on.
2. Select the **Safe Send** tab and click on 'New'
3. Enter the full name of the individuals you would like to **participate** in this conversation. This message can be to the Primary Buyer, Additional Buyer(s), Giftors<sup>1</sup> of the transaction, or your colleague(s).
4. Complete the required fields and select 'Send' once it is ready.

The screenshot displays the 'SAFE MOVE SCHEME' web application interface. The top navigation bar includes the logo, 'Company A', the user 'annab@test.com', and a 'Log out' button. The left sidebar contains navigation links: Transactions, Downloads, Safe Send Messages, Manage Bank Accounts, and Users. The main content area is titled 'Transactions' and features a '+ Add Transaction' button and a search bar. Below this is a table of transactions with columns: Primary Buyer's..., Your Reference, Address Line 1, Postcode, Created On, Created By, and Last Logged in. The table lists several transactions, with the first one highlighted in green. Below the table is a pagination control showing '1 - 10 of 26 items'. Below the table, the 'Safe Send' tab is selected and highlighted with a red box. The 'Safe Send' interface shows a 'Conversations' section with a '+ New' button. A conversation titled 'Subject: Introduction' is displayed, showing participants 'Andrew default: Company A > anna black:' and a message from 'Company A > anna black' dated 02/02/2016, 10:56:46. The message content is 'Introduction' and 'Convey...'. Below the message is a 'Write a reply...' text box and a 'Send' button. At the bottom of the 'Safe Send' interface is a file upload area with the text 'Drop files here to upload'.

Primary Buyer's ...	Your Reference	Address Line 1	Postcode	Created On	Created By	Last Logged in
Andrewtest@tes...		Marlesfield House	DA14 6NG	01/02/2016, 15:00:27	annab@test.com	02/02/2016, 10:54:34
Andrew@test.com		Flat 1		08/01/2016, 12:31:50	annab@test.com	02/02/2016, 09:38:08
Andrew@test.com		Marlesfield House	DA14 6NG	08/01/2016, 12:18:05	annab@test.com	02/02/2016, 09:38:08
Default@test.com		Marlesfield House	DA14 6NG	15/12/2015, 14:50:46	annab@test.com	01/02/2016, 16:12:09
app@test.com		Marlesfield House	DA14 6NG	15/12/2015, 14:50:46	annab@test.com	18/01/2016, 10:54:34

<sup>1</sup> The parties of a transaction will not be displayed as available recipients of the Safe Send message if your Organisation Administrator has not enabled Safe Send for your clients, see '[Enabling Safe Send for Clients](#)' for more information

### Replying to a conversation:

You are able to reply to a conversation by locating the transaction (**View Transactions**) and selecting the message you would like to reply to, write your reply and select 'Send'. This message will be delivered to all participants of this conversation.

If you would like to attach a file to your message, select the drop zone to browse and select a file or alternatively drag and drop the required file.

The screenshot displays the 'Safe Send' interface. On the left, the 'Conversations' panel shows 'You have not got any conversations.' with a '+ New' button. The main area is titled 'New Conversation'. It features a 'To' field with 'Annie pepper' and a green plus icon, a 'Subject' field with 'hello', and a 'Message' field. A red rectangular box highlights the 'Message' field and the 'Attachments' section below it. The 'Attachments' section has a light blue hatched area with the text 'Drop files here to upload'. A green 'Send' button is located at the bottom right of the form.

### **Viewing other conversations:**

You are able to view a list of all the conversations which your firm is currently participating in. This list can be viewed by selecting '*Safe Send Messages*' from the left hand side navigation bar. This screen will also display any system generated messages which you need to be aware of.

Once a message has been read by any participants of the conversation, the participants name, date and time will be notated as "Read by xxx at xx/xx/xx, xx:xx:xx"

### Unread Messages

When you receive a new message via Safe Send, the number of unread messages will increase. This is shown in a green bubble on top of the message icon (top left hand corner). You will also receive an external email alert.

Selecting 'Read More' will redirect you to the details of the message.

