SAFE MOVE SCHEME™

Quick Start Guide

For Professional Users

Created February 2016. Version 1.2

Contents

Introduction

Welcome to the Safe Move Scheme!

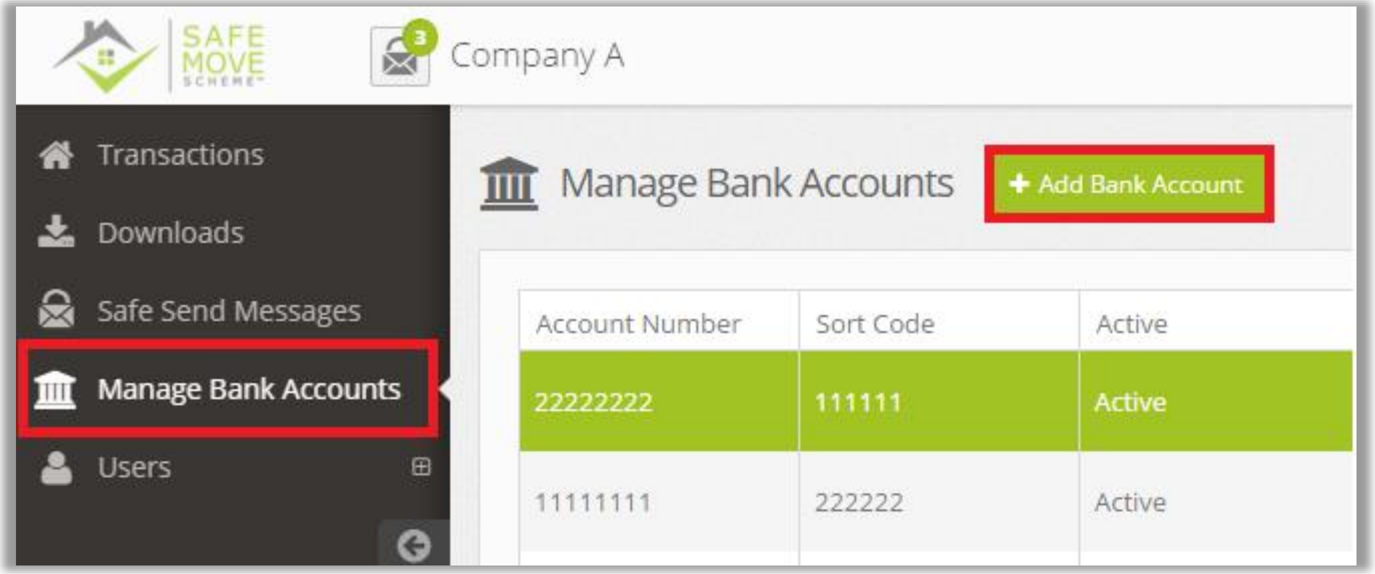
This document contains a few steps to help you get started as a new professional user of the Safe Move Scheme.

Submitting your Firms Bank Account Details

Now that you have a Safe Move Scheme account your Firm must have a Safe Move Scheme validated bank account before the system will allow you to order any products for your clients.

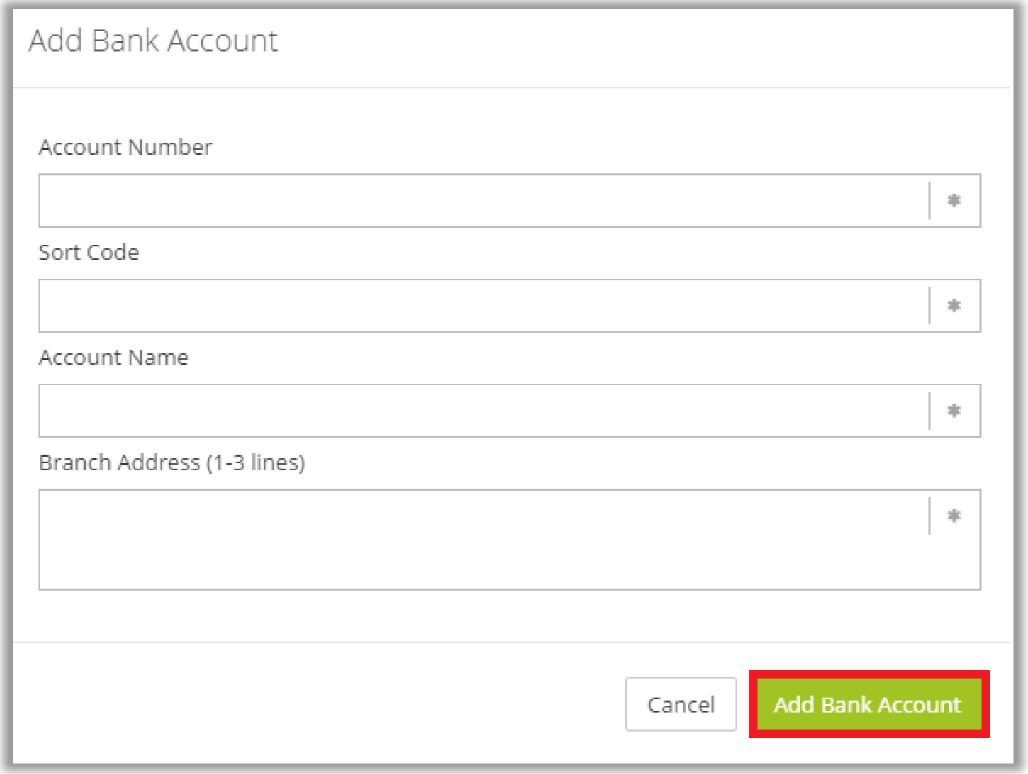
The management of these details are only available to the Firms SRO and Organisation Administrators.

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



Submitting your Firms Bank Account (cont.)

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.

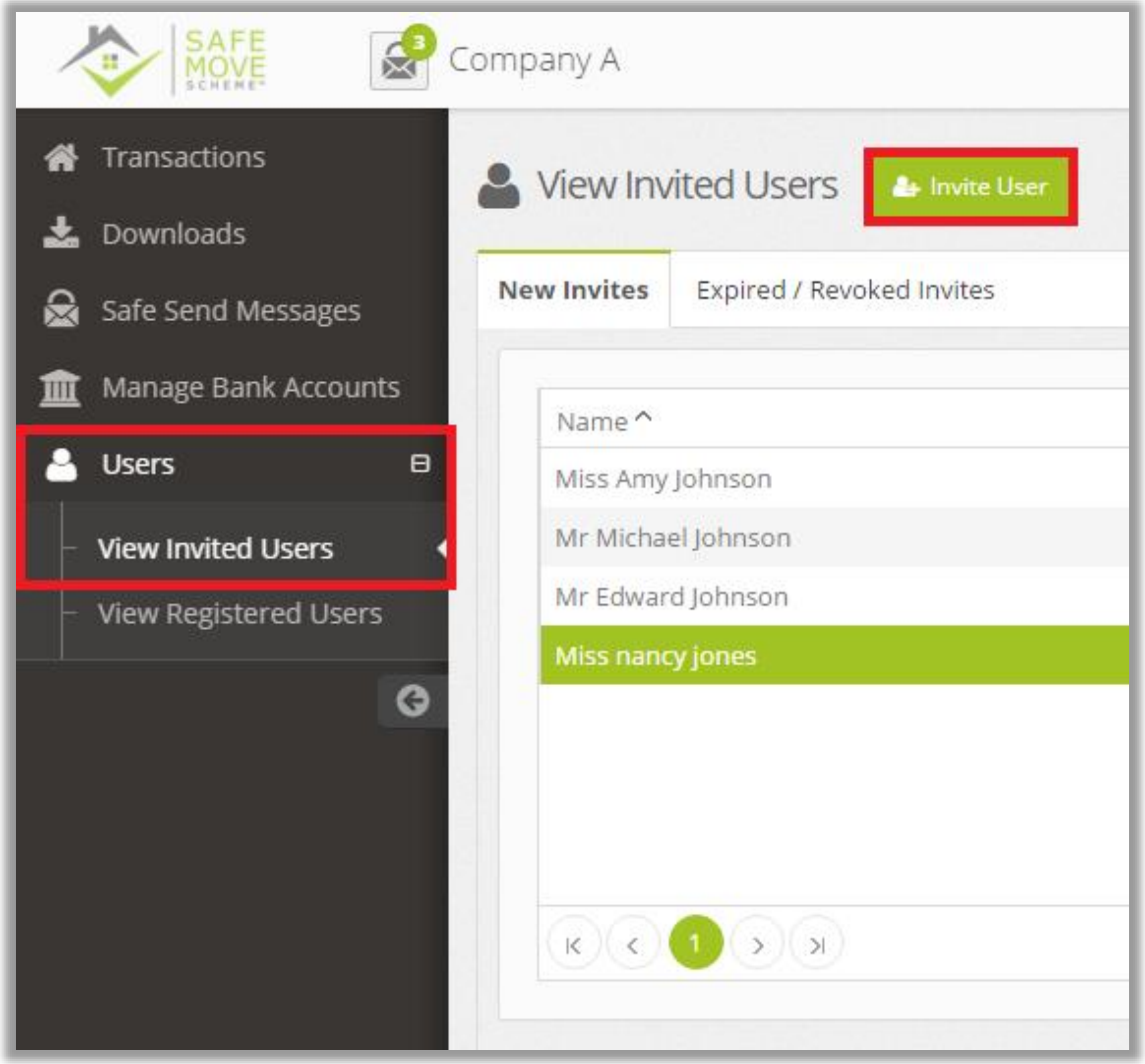
5. You will receive a notification from the Safe Move Scheme once the bank account details have been validated.

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'*



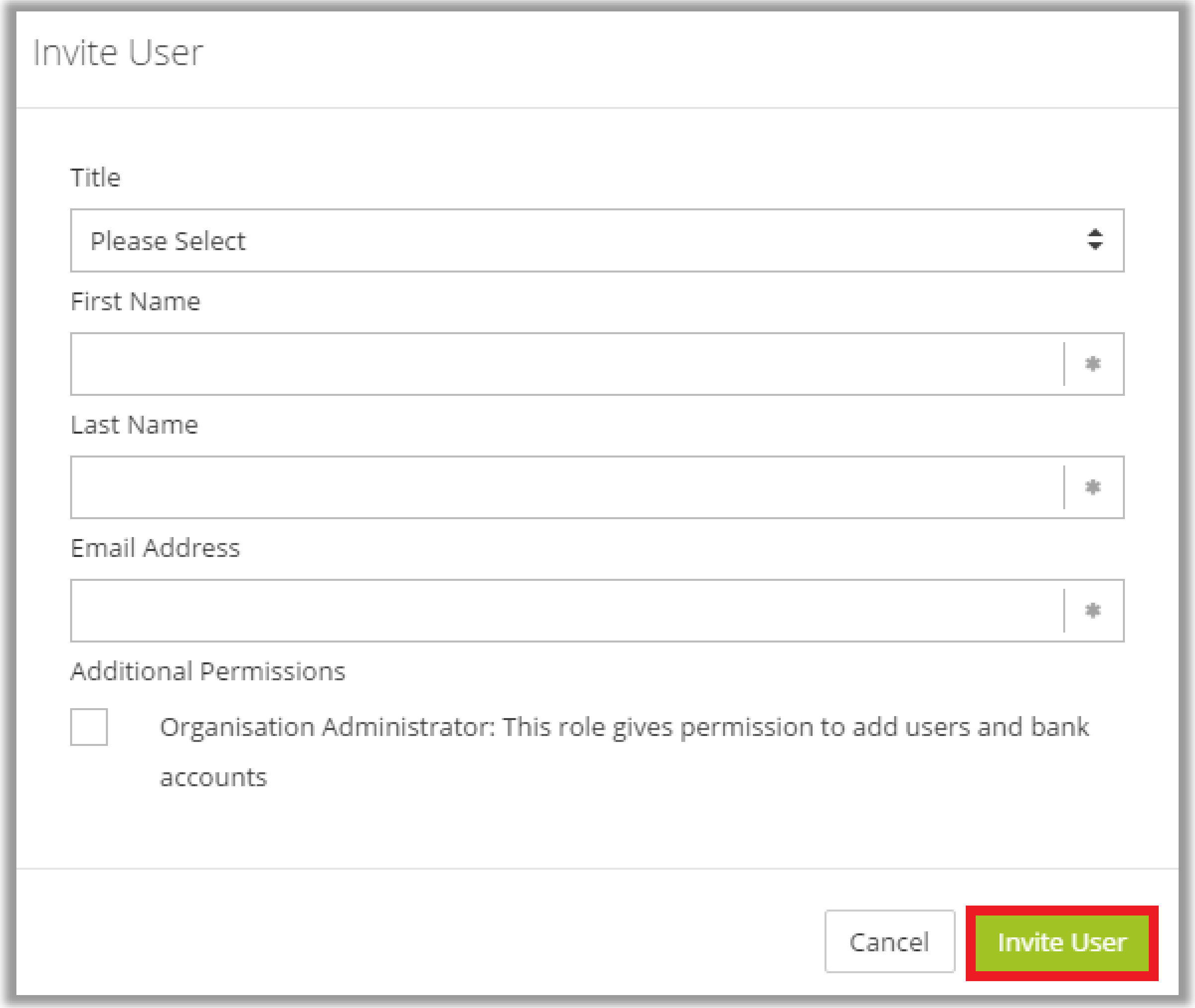
Inviting Users (cont.)

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'*

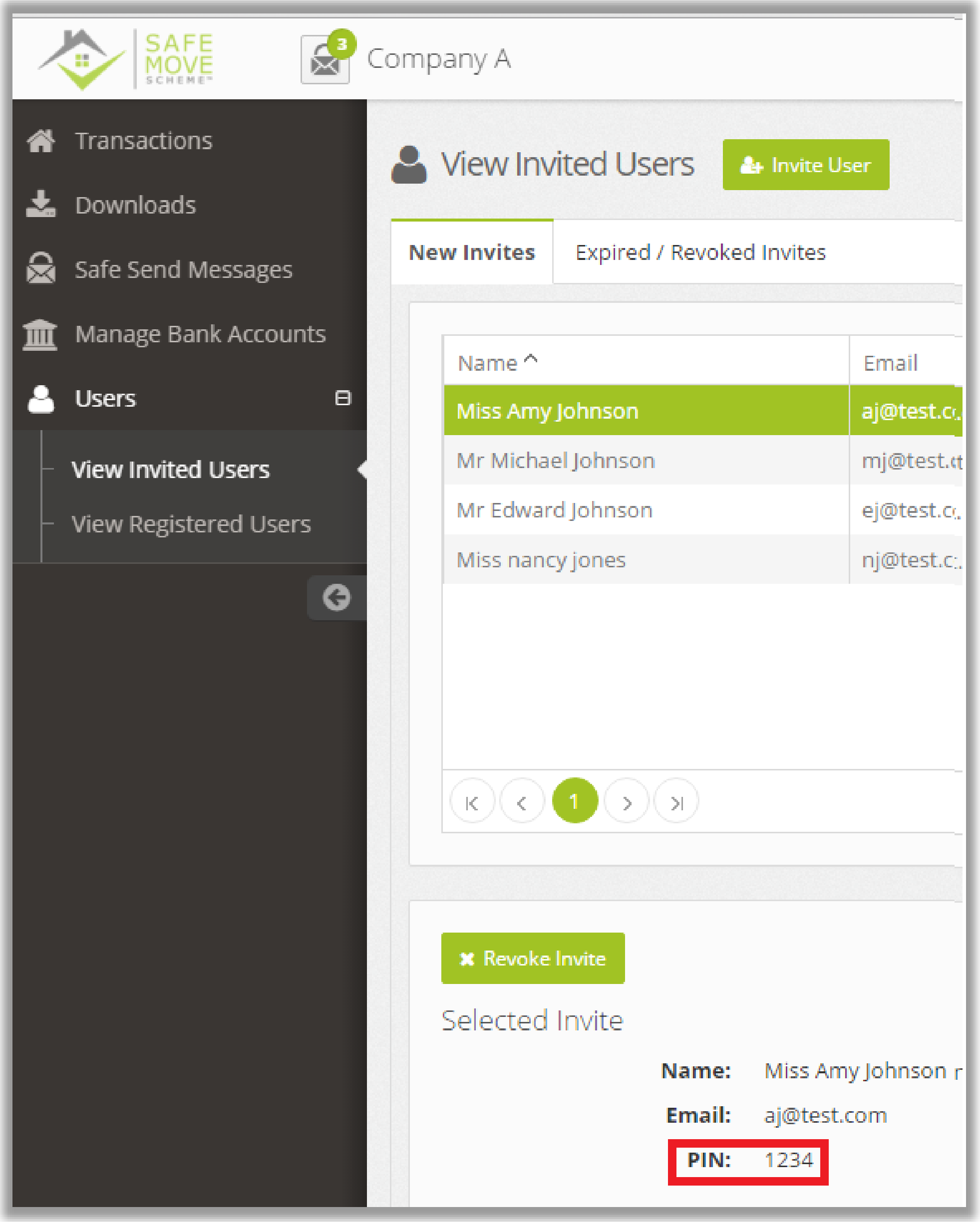


Inviting Users (cont.)

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 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.



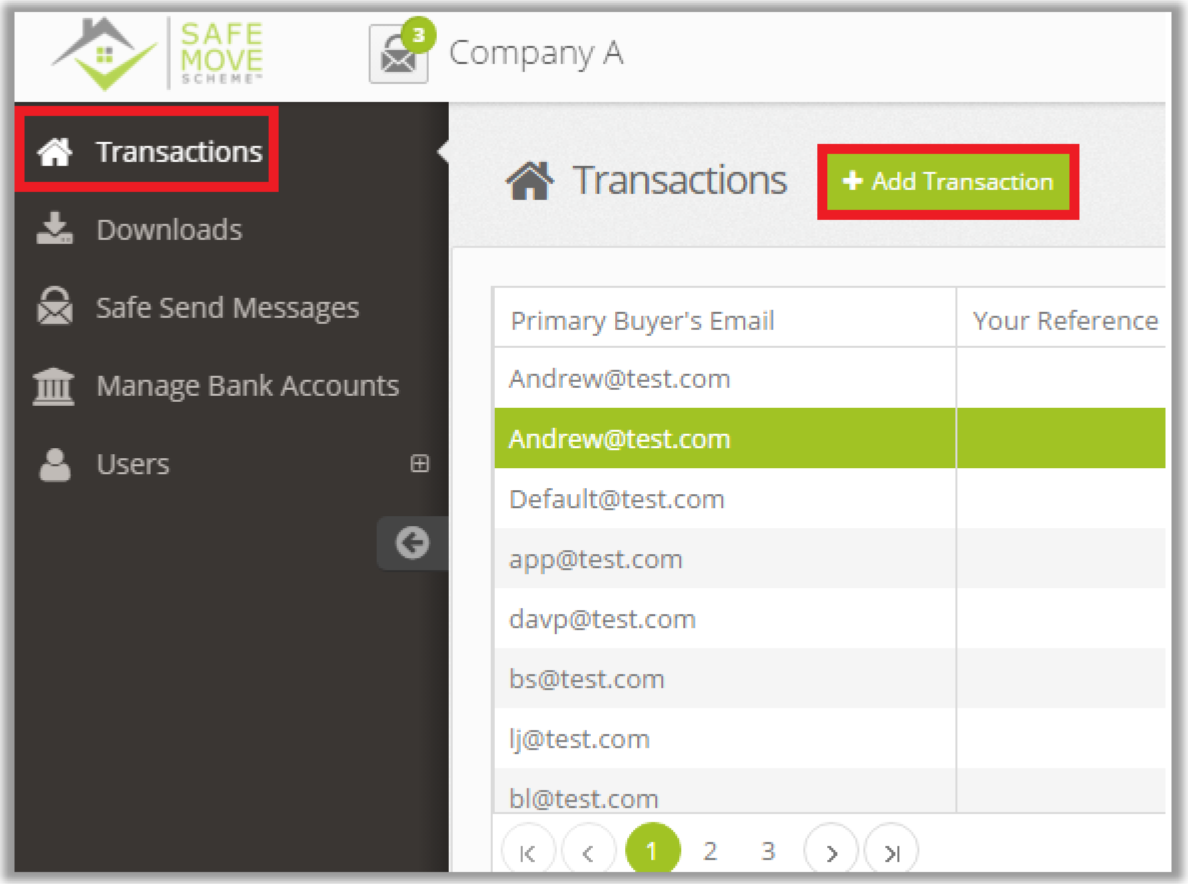
[1]Details of this process can be found in the 'How to Use the Safe Move Scheme', located in the Downloads page of the Safe Move Scheme.

Adding Transactions

Follow the below process in order to add your Buyer's transaction into the Safe Move Scheme, in doing so you will also be offering the 'Safe Buyer' product to the client (you must have a valid bank account to continue see [Submitting your Firms Bank Account Details]).

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

2. Select *'Add Transaction'*

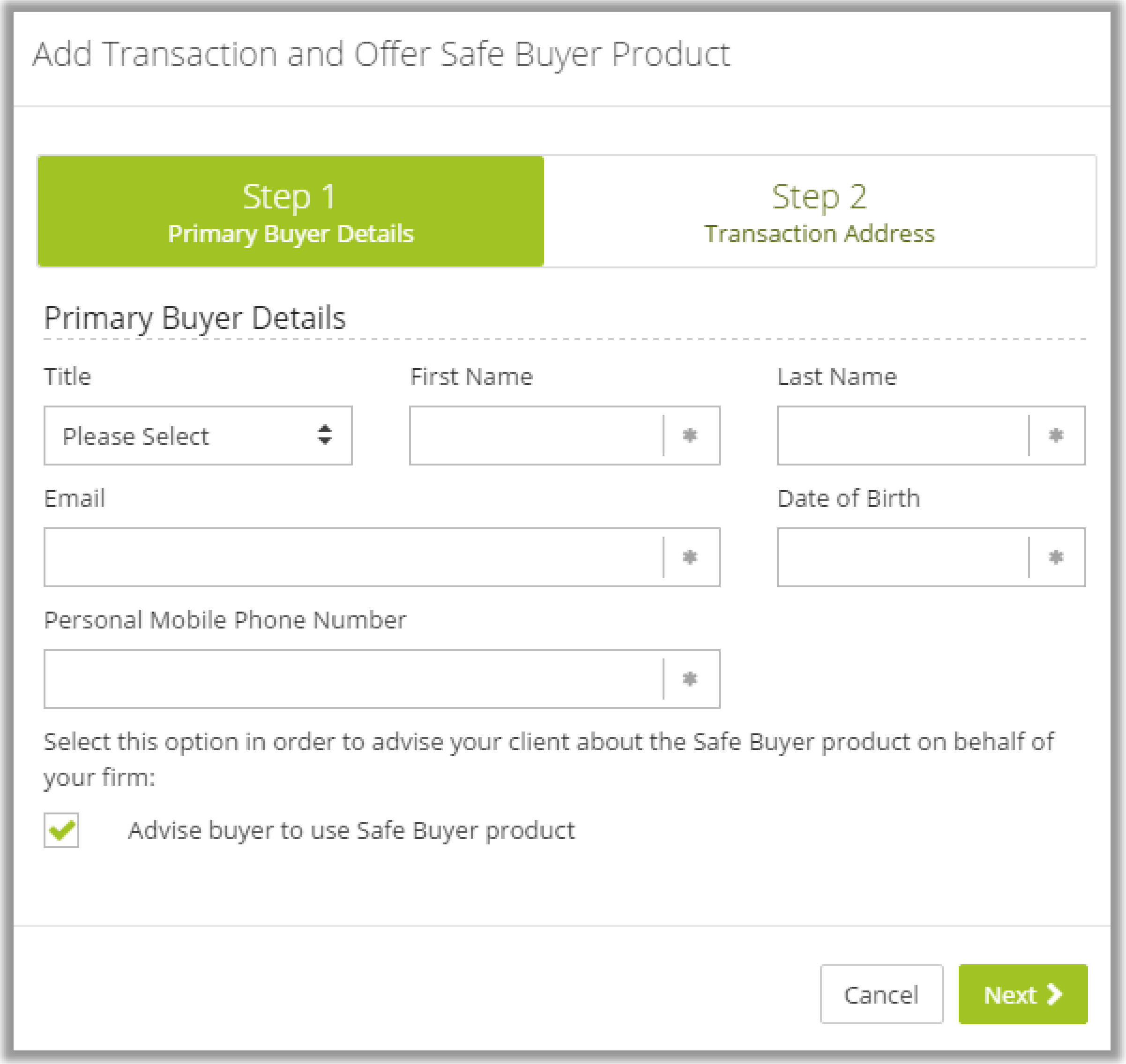


3. This screen (right) will appear for you to fill in

4. Fields which have an * are mandatory and must be filled in

5. By default the option 'Advising Buyer to Use Safe Buyer Product' is selected. When this option is selected, the Buyer will be informed that your Firm advised the buyer to use the 'Safe Buyer' product.

6. When you have completed these fields select *'Next'*

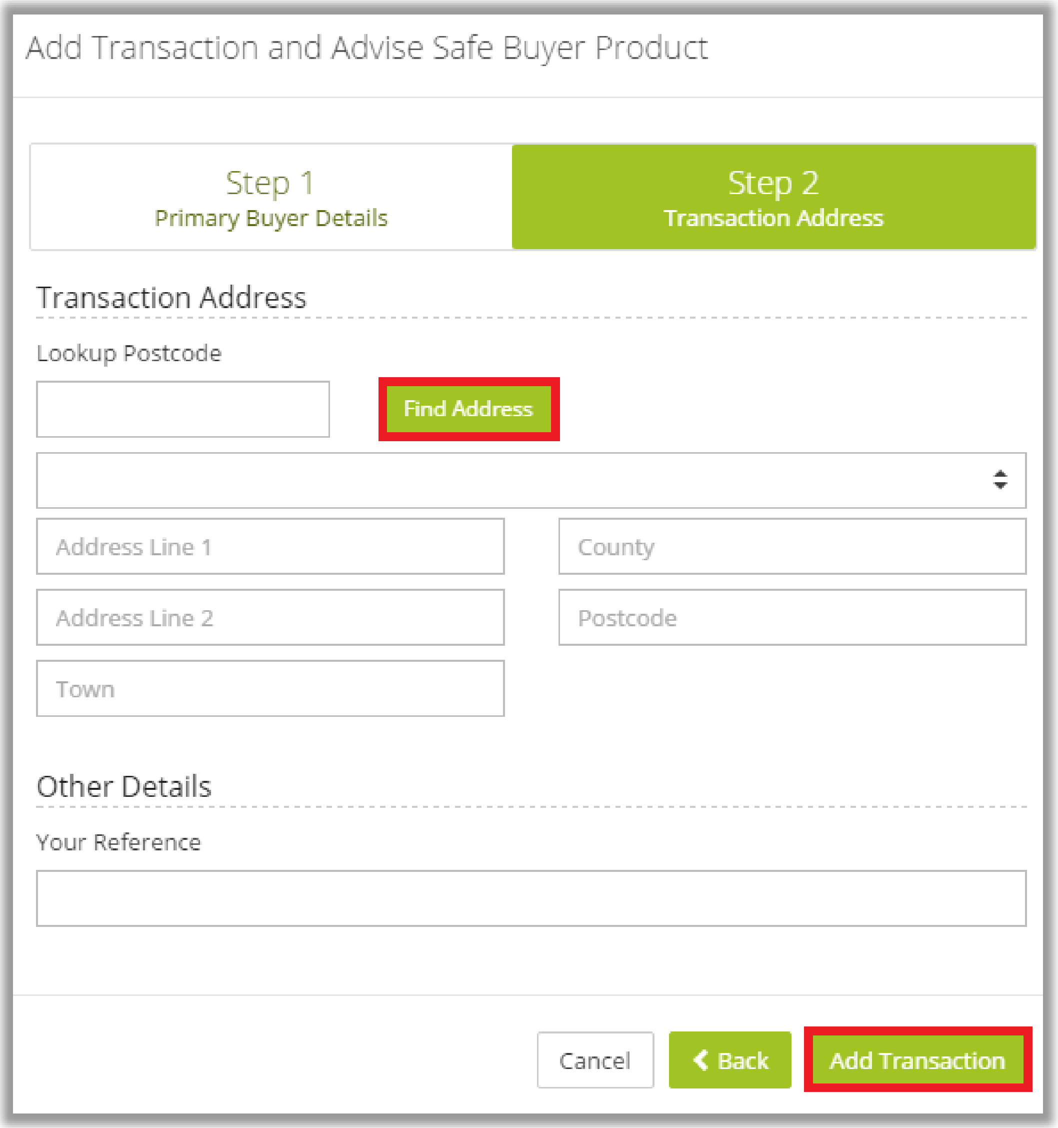


Adding Transactions (cont.)

7. The *'Transaction Address'* and *'Your Reference'* are not mandatory and you may leave blank if this information is not available

8. It is vital that the transaction address is correct, therefore, enter the postcode and select '*Find Address*', then select the correct address from the drop down. If the address is incorrect select '*Edit Address Details*' to allow you to edit the address. You can select an address and then edit the details if required

9. When you select *'Add Transaction'*, the system will add the product to the ***Transactions*** screen and the system will generate a PIN number for new clients and this will be sent to them via text message. They will require this PIN in order to create their account for the SMS[2].



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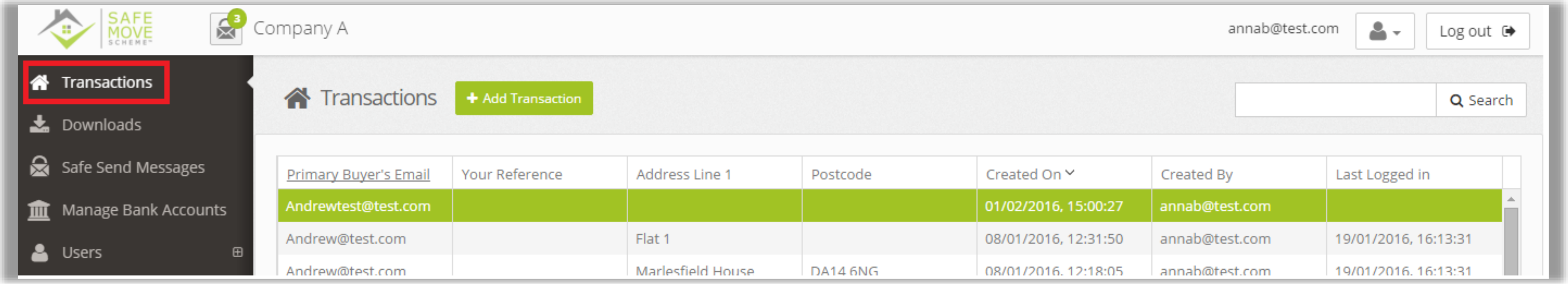
[2] Refer to the Buyer and SMS guide for further details on this process.

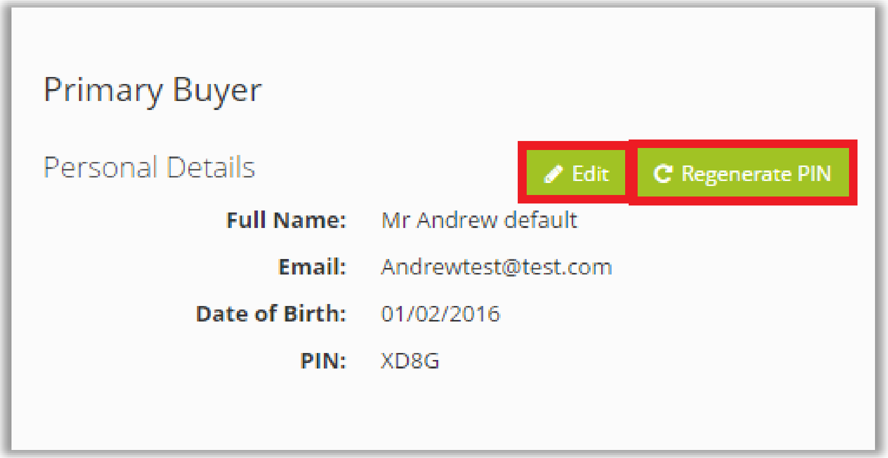
Transaction Management:

1. Select *'Transactions'* from the left menu and select a transaction. The 'Last Logged in' date column on the right of the screen you can see if the Buyer has completed their login process. This column records the date of the last time they logged into the system.



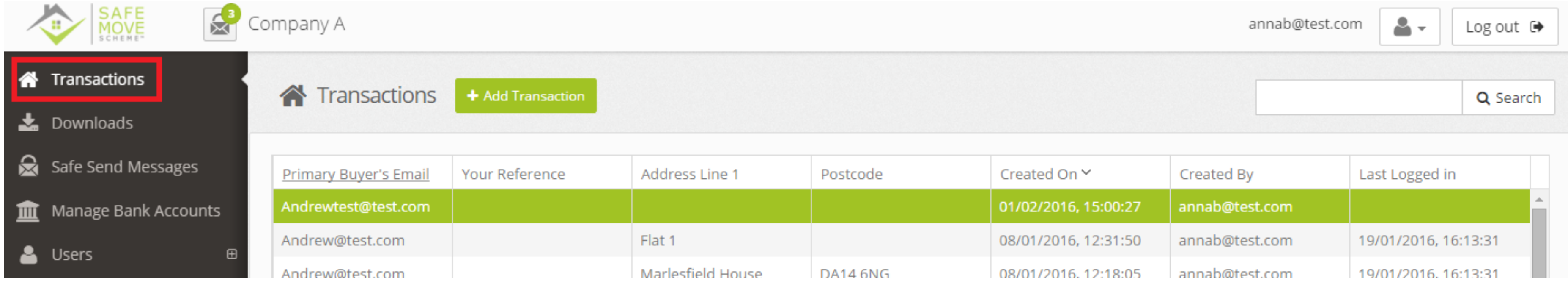
2. In the bottom half of the screen select *'Regenerate PIN'* to generate a new PIN for the client

3. To change the email address select *'Edit'*[3] in the lower part of the screen and update the details



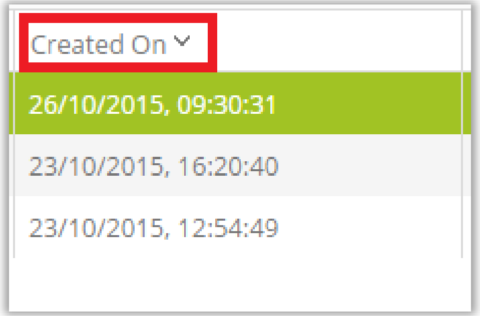
[3] **NOTE:** you cannot edit the client details if the client has already logged in. If they cannot login advise them to use the 'Forgotten Password' functionality

You can view a list of your Firm's transactions by selecting 'View Transactions'. Transactions will be displayed in a grid as shown below.



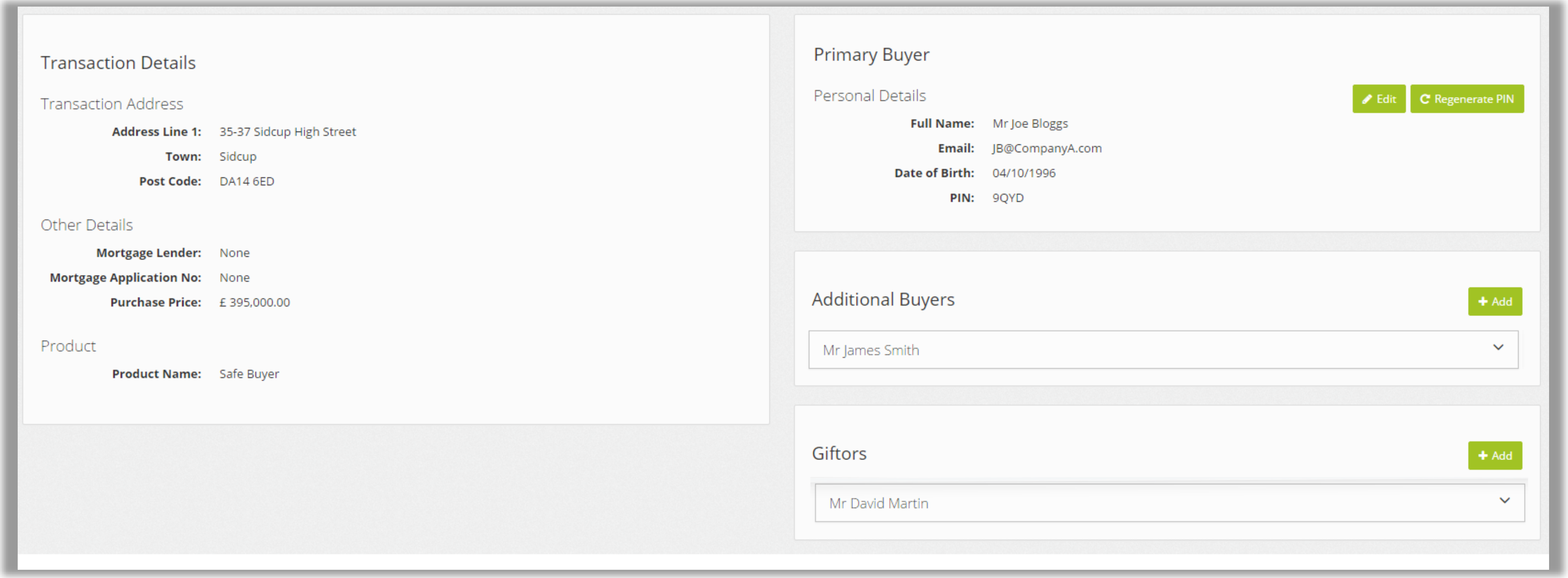
The grid shows a limited number of rows, use the grid navigation (bottom left of the screen) to view and navigate through the records.

You can order the data in the grid by clicking the column heading. An arrow will indicate the column which the grid is sorted by (right).



Managing Transactions (cont.)

Selecting a row in the View Transaction grid will display further details for that Transaction in the bottom half of the screen (shown below).



For further details on any of the steps above please refer to the 'How to Use the SMS' & Buyers and the SMS guide within the *Downloads* page of the SMS.