



How to Use Safe Send

For Professional Users

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Contents

Introduction	3
Using Safe Send.....	4
System Messages	4
Conversations	5
Unread Messages	8

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.

The screenshot displays the 'Safe Send Messages' interface. On the left is a dark sidebar with navigation options: Transactions, Downloads, Safe Send Messages (highlighted with a red box), Manage Bank Accounts, and Users. The main area is titled 'Safe Send Messages' and shows a list of conversations. The selected conversation is titled 'Subject: Bank Account Marked as Fraud Suspicious' and includes a 'View Bank Account' link. The message content states that a bank account was marked as 'Fraud Suspicious' and provides the account number 33333333, sort code 111111, and the name Miss Anna Black. A blue information box at the bottom of the message area states: 'Information You cannot reply to this conversation because it is a system generated message.'

Company A

annab@test.com

Log out

Transactions

Downloads

Safe Send Messages

Manage Bank Accounts

Users

Safe Send Messages

Conversations

Subject: Bank Account Marked as F... 04/12/2015, 15:40:39

Subject: Bank Account Check No M... 04/12/2015, 15:36:40

Subject: ;Please send us the sales c... 04/12/2015, 09:39:05

Subject: Bank Account Check No M... 04/12/2015, 09:03:56

Subject: please submit your welco... 03/12/2015, 15:12:52

Subject: please submit your welco... 03/12/2015, 14:50:50

Subject: Please submit your sale m... 02/12/2015, 13:30:45

Subject: client needs a call back 02/12/2015, 13:29:07

Subject: hi 02/12/2015, 13:22:55

Subject: Bank Account Marked as Fraud Suspicious

View Bank Account

Participants: Company A > anna black;

Safe Move Scheme wrote on 04/12/2015, 15:40:39

The following bank account was marked as **Fraud Suspicious**:

Account Number: **33333333**

Sort Code: **111111**

Changed By: **Miss anna black**

Read by anna black at 04/12/2015, 16:06:45

i Information You cannot reply to this conversation because it is a system generated message.

11 - 19 of 19 items

System Messages

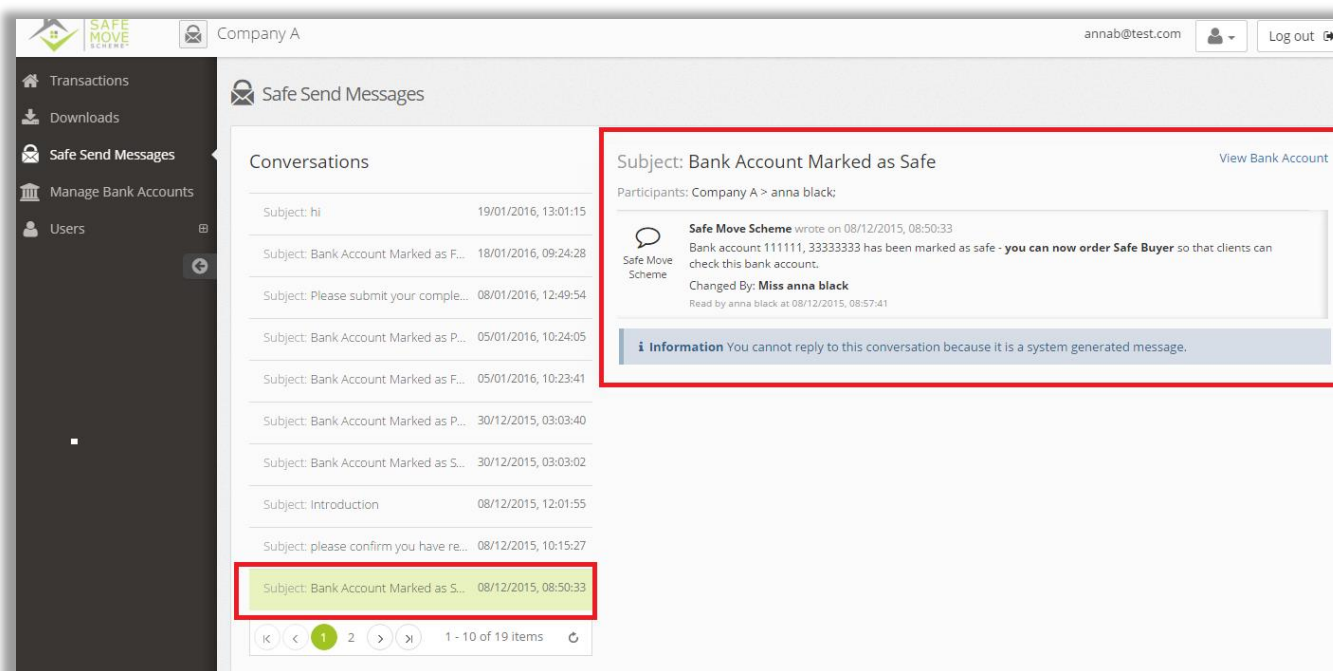
Bank Account status:

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 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 'SAFE MOVE SCHEME' 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'. The 'Safe Send' tab is selected and highlighted with a red box. Below the tab, there is a 'Conversations' section with a '+ New' button. A conversation thread is displayed with the subject 'Introduction' and participants 'Andrew default; Company A > anna black;'. The thread shows a message from 'Company A > anna black' dated '02/02/2016, 10:56:46' with the subject 'Introduction'. Below the message is a 'Write a reply...' text box and a 'Send' button. At the bottom, there is a 'Drop files here to upload' area.

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, 10:56:54

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' section shows 'You have not got any conversations.' with a '+ New' button. The main area is titled 'New Conversation'. It contains the following fields:

- To:** A text field containing 'Annie pepper' with a green plus icon and a '*' icon.
- Subject:** A text field containing 'hello' with a '*' icon.
- Message:** A large text area for writing the message, highlighted by a red box.
- Attachments:** A shaded area with the text 'Drop files here to upload', also highlighted by the red box.
- Send:** A green button 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.

