



How to Use Safe Send

For Professional Users

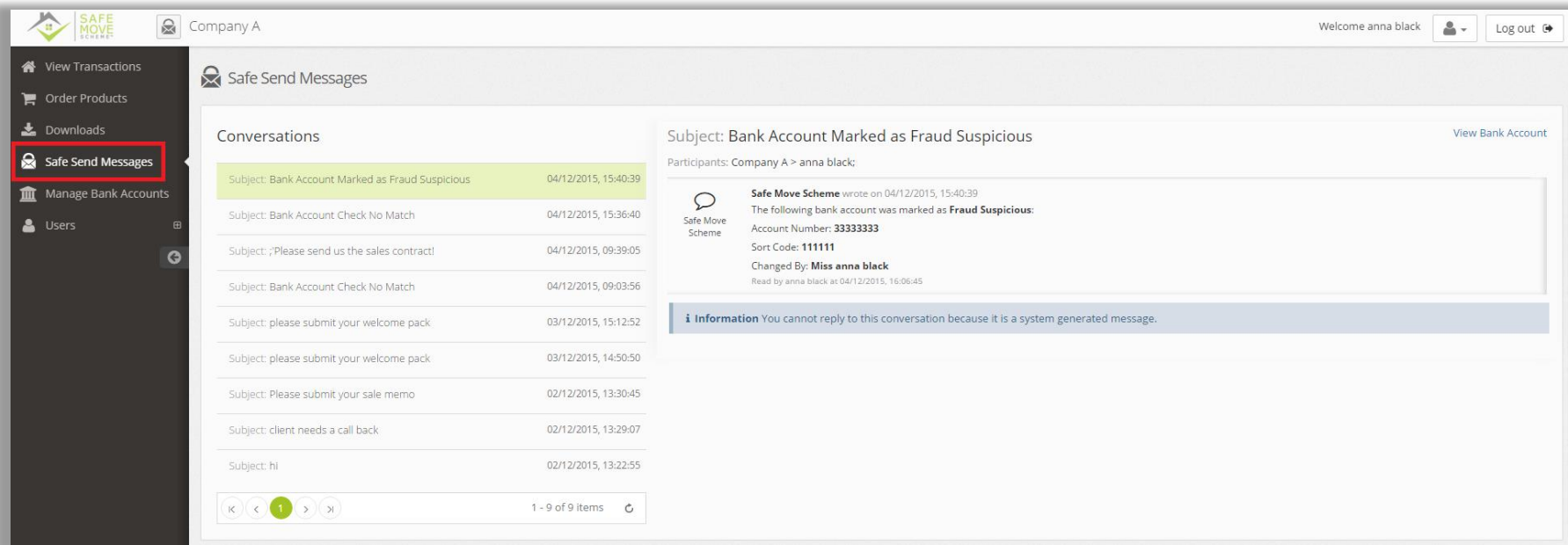
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Safe Send is a secure messaging system built into the Safe Move Scheme, it allows you to communicate with your clients and your colleagues through secure conversations.

It also allows the Safe Move Scheme to deliver system messages to you.



System Messages

Bank Account status:

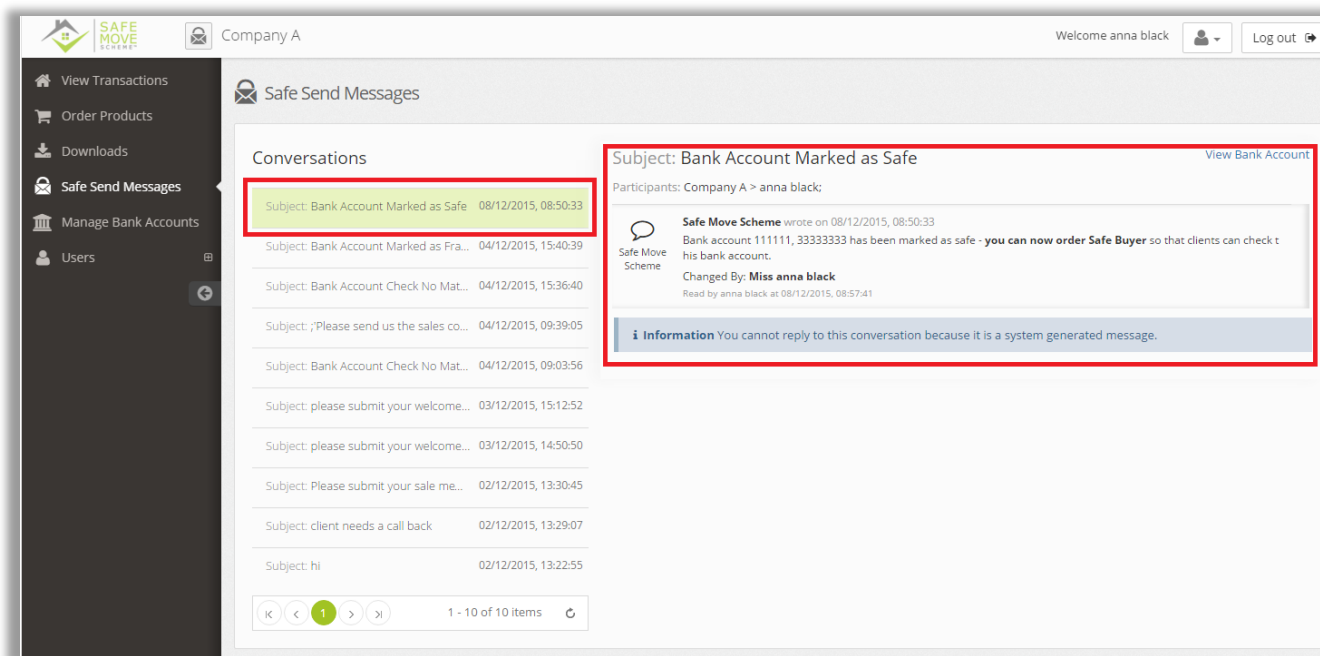
Messages are sent out via Safe Send when there has been a change in your Firm's bank account status.

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

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. The top navigation bar includes the logo, 'Company A', a user profile for 'anna black', and a 'Log out' button. The left sidebar contains a menu with 'View Transactions' (selected), 'Order Products', 'Downloads', 'Safe Send Messages', 'Manage Bank Accounts', and 'Users'. The main content area shows a table of transactions. The second row is highlighted in green, indicating the selected transaction. Below the table, the 'Safe Send' tab is active, showing a '+ New' button and a message 'You have not got any conversations.'.

Primary Buyer's ...	Your Reference	Address Line 1	Postcode	Created On	Created By	Last Logged in
jessies@test.com	rp-0001	Marlesfield House	DA14 6NG	12:08:39	annab@test.com	14:55:06
johns@test.com	rp-00001	Marlesfield House	DA14 6NG	17/11/2015, 12:07:28	annab@test.com	17/11/2015, 12:28:27
bsmithtest@test...		Marlesfield House	DA14 6NG	16/11/2015, 14:26:14	annab@test.com	16/11/2015, 17:30:42
MP@test.com		Marlesfield House	DA14 6NG	16/11/2015, 11:04:10	annab@test.com	17/11/2015, 08:45:09
pj@test.com		Marlesfield House	DA14 6NG	16/11/2015, 10:44:44	annab@test.com	17/11/2015, 08:52:43

1 - 10 of 18 items

Transaction **Safe Send**

Conversations **+ New** Select the conversation to see messages

You have not got any conversations.

No items to display

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 section with a hatched background and 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.

