



# Quick Start Guide

For Professional Users

Created February 2016. Version 1.2

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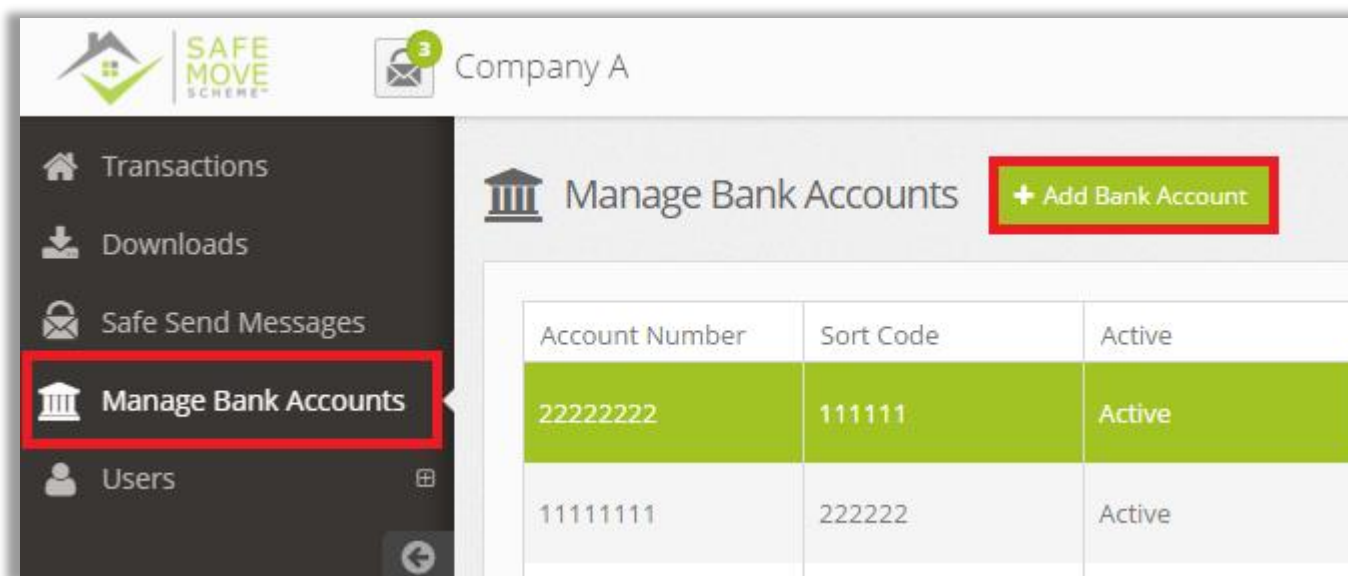
Welcome to the Safe Move Scheme!

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

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.***

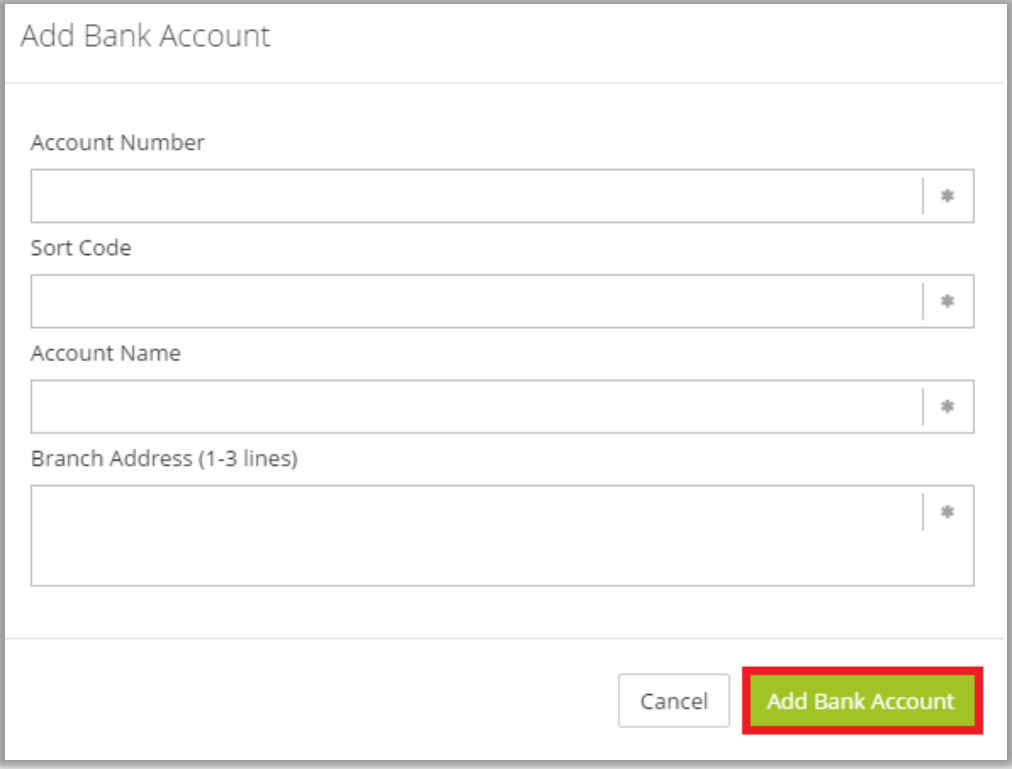
1. Select 'Manage Bank Accounts' from the left hand side menu, this will bring up the below screen:



The screenshot displays the 'Manage Bank Accounts' interface for 'Company A'. The left-hand sidebar menu is visible, with 'Manage Bank Accounts' highlighted by a red rectangular box. The main content area features a header with a bank icon, the title 'Manage Bank Accounts', and a '+ Add Bank Account' button, which is also highlighted with a red rectangular box. Below the header is a table listing bank accounts.

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



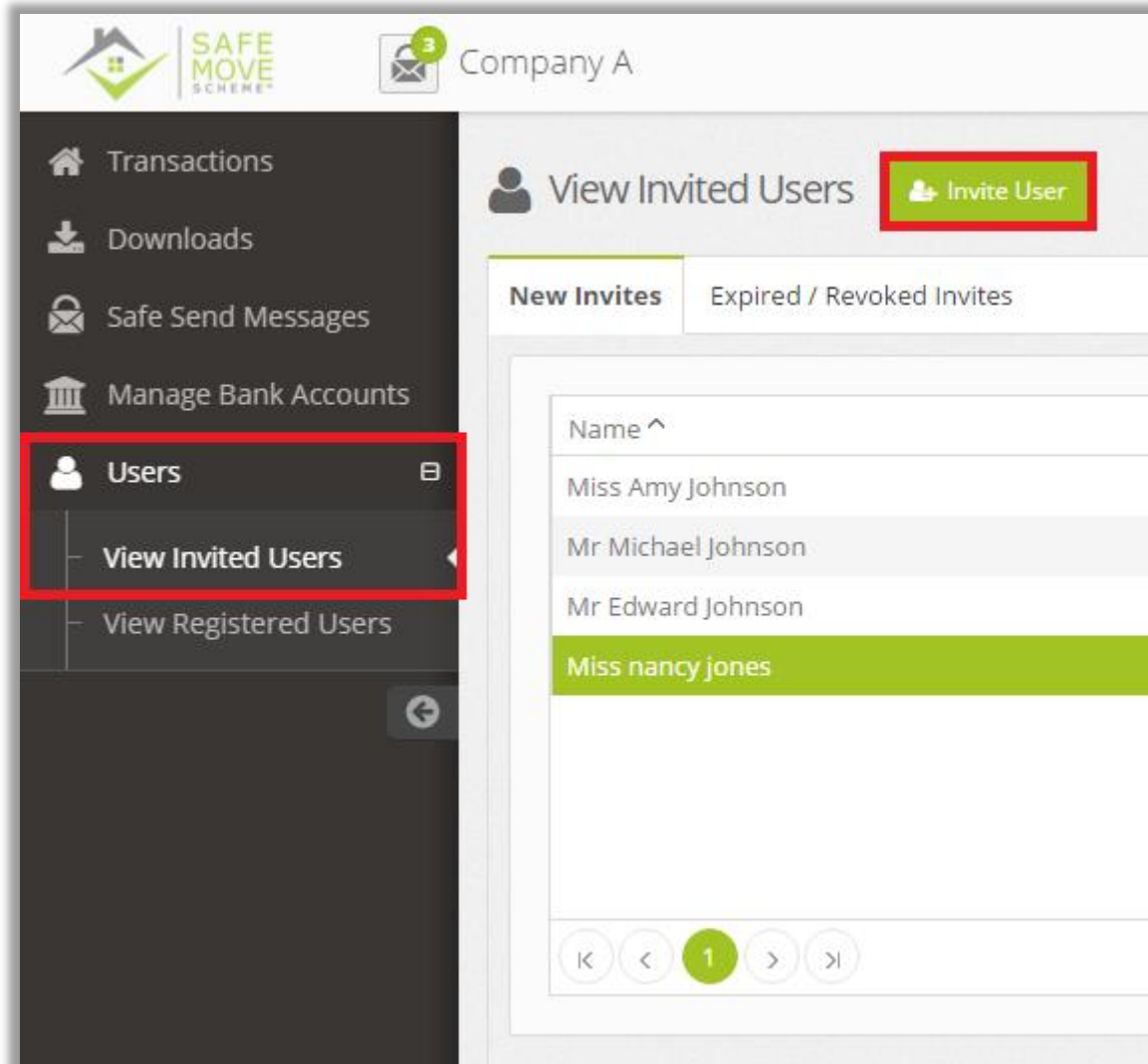
The screenshot shows a 'Add Bank Account' pop-up form. It has a title bar at the top that says 'Add Bank Account'. Below the title bar, there are four input fields, each with a label and a small asterisk icon on the right side of the input box. The fields are: 'Account Number', 'Sort Code', 'Account Name', and 'Branch Address (1-3 lines)'. At the bottom right of the form, there are two buttons: a 'Cancel' button and an 'Add Bank Account' button. The 'Add Bank Account' button is highlighted with a red 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.

In order for your staff members to log into the SMS, individual user accounts will need to be created for the users.

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

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 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<sup>1</sup>
7. Once they have created their account and logged in they will appear in the **Registered Users** screen.

SAFE MOVE SCHEME

Company A

Transactions

Downloads

Safe Send Messages

Manage Bank Accounts

Users

View Invited Users

View Registered Users

View Invited Users

Invite User

New Invites

Expired / Revoked Invites

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

Revoke Invite

Selected Invite

Name: Miss Amy Johnson

Email: aj@test.com

PIN: 1234

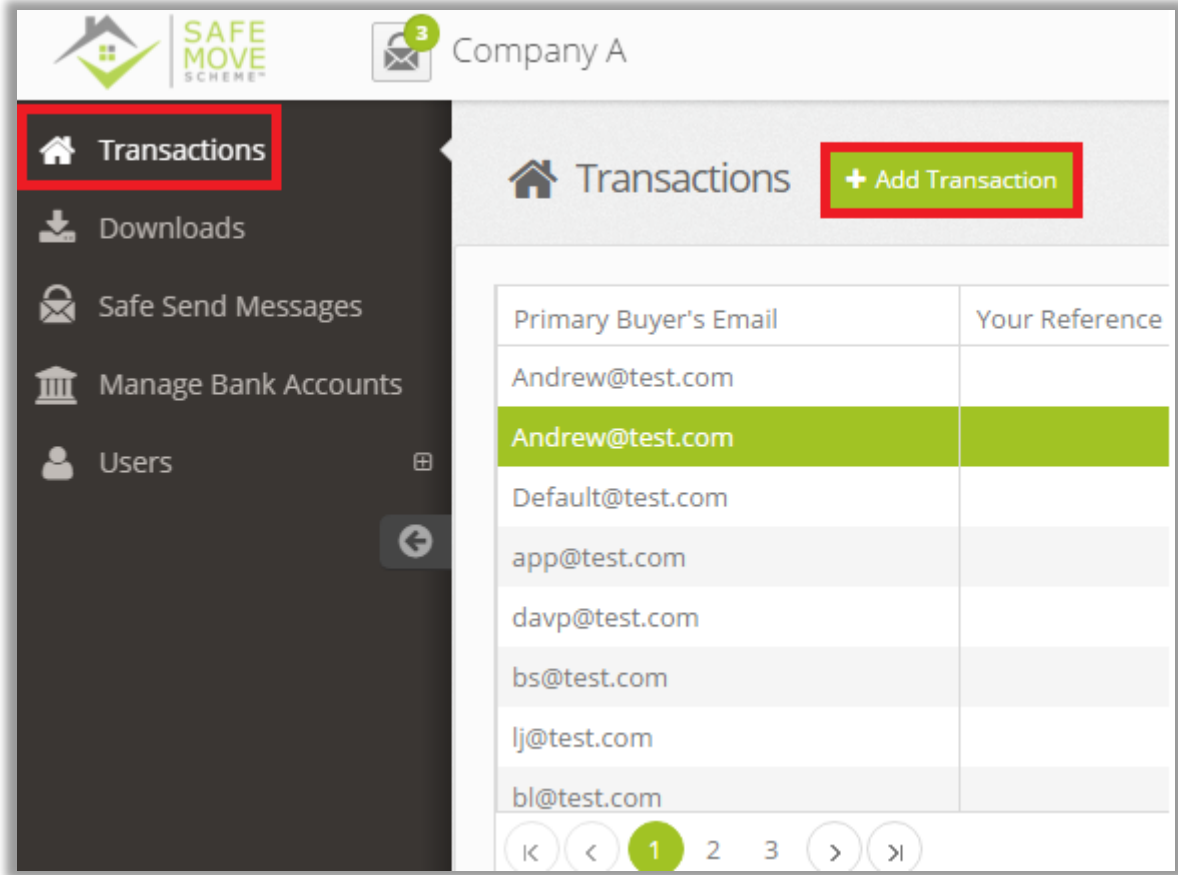
<sup>1</sup>Details of this process can be found in the 'How to Use the Safe Move Scheme', located in the Downloads page of the Safe Move Scheme.



# 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'

### Add Transaction and Offer Safe Buyer Product

Step 1  
Primary Buyer Details

Step 2  
Transaction Address

#### Primary Buyer Details

Title  

Please Select ▾

First Name

Last Name

Email

Date of Birth

Personal Mobile Phone Number

Select this option in order to advise your client about the Safe Buyer product on behalf of your firm:

☒ Advise buyer to use Safe Buyer product

Cancel

Next >

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. Select whether the Buyer is purchasing with a Mortgage. If yes, you will need to select the Mortgage Lender and enter the Mortgage Application number.
10. 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<sup>2</sup>.

Add Transaction and Offer Safe Buyer Product

Step 1  
Primary Buyer Details

Step 2  
Transaction Address

Transaction Address

Lookup Postcode

Address Line 1

County

Address Line 2

Postcode

Town

Other Details

Buying with Mortgage

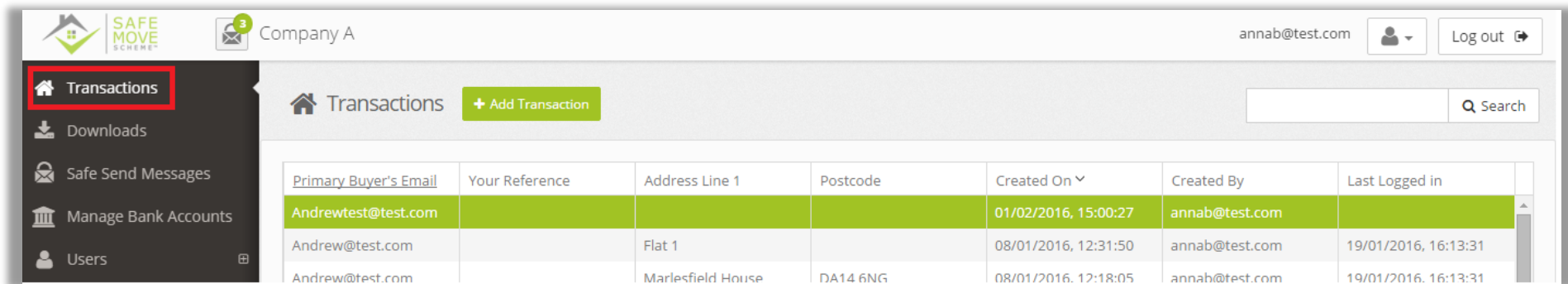
Please Select

Your Reference

<sup>2</sup> 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.



The screenshot displays the 'Transactions' page in a web application. The top navigation bar includes the 'SAFE MOVE SCHEME' logo, 'Company A', the user email 'annab@test.com', a user profile icon, and a 'Log out' button. The left sidebar menu has 'Transactions' highlighted with a red box, along with '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 with the following data:

Primary Buyer's Email	Your Reference	Address Line 1	Postcode	Created On	Created By	Last Logged in
Andrewtest@test.com				01/02/2016, 15:00:27	annab@test.com	
Andrew@test.com		Flat 1		08/01/2016, 12:31:50	annab@test.com	19/01/2016, 16:13:31
Andrew@test.com		Marlesfield House	DA14 6NG	08/01/2016, 12:18:05	annab@test.com	19/01/2016, 16:13:31

- The 'Decision' column will show whether the Buyer has purchased or declined to use the Safe Buyer product.
- The 'Safe Buyer No matches' column will show whether the Buyer has received a no match through Safe Buyer and the number of times this has occurred on this transaction.

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*'<sup>3</sup> in the lower part of the screen and update the details



**Primary Buyer**

Personal Details

**Full Name:** Mr Andrew default

**Email:** Andrewtest@test.com

**Date of Birth:** 01/02/2016

**PIN:** XD8G

[Edit](#) [Regenerate PIN](#)

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<sup>3</sup> **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

## Managing Transactions

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

Primary Buyer's Email	Your Reference	Address Line 1	Postcode	Created On	Created By	Last Logged in	Decision	Safe Buyer No Matches
hc@test.com		Marlesfield House	DA14 6NG	15/02/2016, 08:34:22	annab@test.com	15/02/2016, 08:36:13		
gl@test.com				10/02/2016, 11:20:20	annab@test.com	15/02/2016, 08:31:31		

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).

Created On
26/10/2015, 09:30:31
23/10/2015, 16:20:40
23/10/2015, 12:54:49

Selecting a row in the View

Transaction grid will display further details for that Transaction in the bottom half of the screen (shown below)<sup>4</sup>.

### Transaction Details

Transaction Address

**Address Line 1:** 35-37 Sidcup High Street

**Town:** Sidcup

**Post Code:** DA14 6ED

Other Details

**Mortgage Lender:** None

**Mortgage Application No:** None

**Purchase Price:** £ 395,000.00

Product

**Product Name:** Safe Buyer

### Primary Buyer

Personal Details

**Full Name:** Mr Joe Bloggs

**Email:** JB@CompanyA.com

**Date of Birth:** 04/10/1996

**PIN:** 9QYD

[Edit](#) [Regenerate PIN](#)

### Additional Buyers

[+ Add](#)

Mr James Smith

### Giftors

[+ Add](#)

Mr David Martin

## Safe Buyer Results

The Safe Buyer Results tab with the transaction details will list the details of any bank account checks which have been performed by any party of the transaction. The results will inform you of whether the check was a *Match* or *No Match*.

**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.**

[Transaction](#)
[Safe Send](#)
[Safe Buyer Results](#)

### Mr Andrew default (Primary Buyer)

#### Bank Account Check Results

Account Number	Sort Code	Checked On	Result
22222222	111111	02/02/2016, 10:47:56	Match

#### Source of Funds

Account Number	Sort Code
11111111	222222

<sup>4</sup> See our 'How to Use the Safe Move Scheme guide for details on how to add the additional buyers and Giftors as parties to this transaction