

Buyers and the SMS

Information for Professional Users

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The document is designed to guide yourself as a professional user on the steps required from you and your client in order to set up their account on the Safe Move Scheme.

This document can be used to guide you on the set up of a primary buyer of a transaction as well as any Additional Buyers /Giftors of a transaction.

Buyers will have to follow the below steps to set up their account, if they don't already have one. (If they do already have an account they simply need to log in with the email and password they set up).

New Primary Buyers can only set up their account once you have ordered an SMS product for the client¹. Additional Buyers and Giftors can set up their account once they have been added to the corresponding transaction

Step 1: Let the Buyer know their

PIN - If the Buyer does not have an existing SMS user account, they will need a PIN number so that they can create their own account.



A PIN number is created by the system

for the buyer when a product is ordered. The PIN number will be displayed within the Personal Details section of the Transaction record. If you have entered the client's **mobile number**, the system will automatically send the user with their PIN number via **text message**. If the client's mobile was not entered when the product was ordered, a text message will not be sent, and you will need to inform your client.

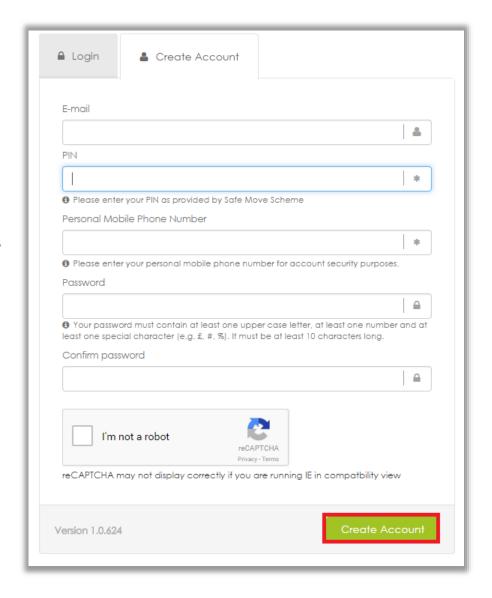
Please ensure you communicate this PIN number to your client **securely**. This PIN number will expire within 28 days of generation.

¹ For further details refer to the 'Quick Start Guide' and the 'How to use Safe Move Scheme for Firms' guide, these are located in the **Downloads** page of the SMS.

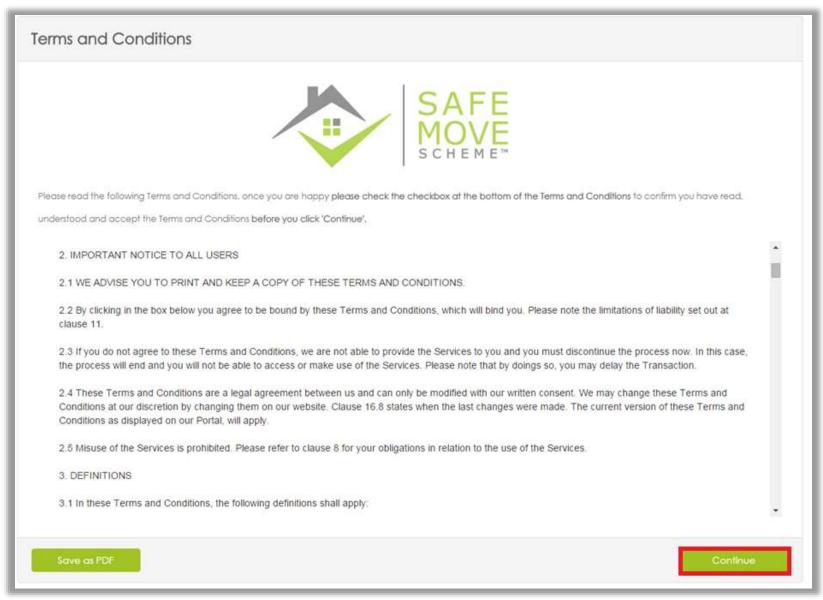
Step 2: Buyers creating their account – The Buyer will need to browse to the SMS and select *Create*Account.

They must then complete the *Create Account* Form.

Once the password has been successfully set, the account set up will be complete. They will then be able to login to the SMS and access their authorised features.



Step 3: Accepting the Terms and Conditions – Once the Buyer has accepted the SMS terms and conditions from the screen below, they will see their SMS page from which they can access their authorised products.



User must select checkbox, located at the bottom of the Terms and Conditions text, before continuing.

