



Frequently Asked Questions

For Professional Users

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The following document is designed to assist you, as a professional user to resolving any queries you may receive from:

- Other Professional Users from your Firm
- Your clients who have been instructed to use the Safe Move Scheme by your Firm

For further guidance see the documentation (Quick Start Guide & How to Use the SMS) from within the **Downloads** page of the Safe Move Scheme.

Professional Users

Login Process

1. A new employee has started, I want to add them to the Safe Move Scheme. How do I do this?

- The **Organisation Administrator** must add the details of this new employee into the Safe Move Scheme.
- The SMS will generate a **PIN number**, inform the new employee of this number
- The new employee needs to complete the **Create Account** form on the **Safe Move Scheme website** login page

2. I know I have been invited to the Safe Move Scheme, but I cannot create my account

Make sure you have the **correct PIN number**, if so the PIN number may have expired, the PIN is valid for 28 days.

If it has expired, please ask another Safe Move Scheme Organisation Administrator user to **reinstate** your invite for this user from within the SMS:

- Select '*Users*' > '*Invited Users*' > '*Expired/Revoked Invites*' > select the record for the user > select '*Reinstate Invite*'

3. As my Firm's SRO, I am trying to create my account but I am getting the message "This email cannot be registered at the moment", when I enter my email address. What shall I do?

If this message appears it indicates the Safe Move Scheme are in the process of checking your firm's registration details, at the moment you are unable to continue with creating your account. You will be contacted as soon as the Safe Move Scheme are ready for you to proceed.

4. I am entering my PIN number but the system is displaying the error 'Invalid PIN'

Make sure you are entering your PIN number in **uppercases only**, if the error still occurs please check that the PIN has not expired. If the PIN number has expired your Firm's **SRO** can **regenerate** a PIN number for you.

5. I have forgotten my password, what shall I do?

Go to the **Login** screen of the SMS and select '*Forgotten Password*'. You can then initiate for the system to send you a PIN number which allow you to change your password, this code will be sent to the mobile phone number which was entered upon account creation.

Managing Users and Transactions

6. I have logged in to the Safe Move Scheme but, I cannot see the 'Users' option?

Another Organisation Administrator or SRO of your Firm will need to check the **Permissions** which have been assigned to you, you will need the permissions of **Organisation Administrator** in order to carry out these elevated functions.

7. I am trying to edit the details of my Primary Buyer but the 'Edit' button is greyed out/unavailable.

To avoid incorrect data changes, Professional users are **not able to edit** the personal details of their Primary Buyer once the **Primary Buyer** has logged in and **confirmed** their details.

8. I am trying to regenerate the PIN number for a client but the 'Regenerate PIN' button is greyed out/unavailable.

As soon as the **client** has **completed** the **Create Account** process on the Safe Move Scheme website, professional users are **unable to regenerate** another PIN number for this client. Ask your client to try and log in again, as the account should have been created successfully.

Managing Bank Accounts

9. My Organisation Administrator has submitted my Firm's bank account details via the Safe Move Scheme but I still can't add transactions, What do I need to do?

Once the bank account details have been submitted they will need to be **validated** by the Safe Move Scheme. As soon as your Firm has one validated bank account you will be able to add transactions, your Firm will receive a **System Message** to let you know once the results of the validation are available. Please note the validation process can take a few weeks.

10. I am looking for the Bank Account Transfer instructions, where is it located?

For each Safe registered bank account the SMS will provide Bank Account Transfer Instructions, these details are located in the **Downloads** page of the SMS.

Products

11. I have advised my client to use the Safe buyer product, how do I know if they have used it?

Once the client has logged in and carried out a bank account check, the date of this check will be recorded within their personal details under their transaction record. The **Decision** column will also display whether the client has '**Purchased**' the offered/advised product or whether this has been '**Declined**'.

12. What is the difference between Offering the Safe Buyer to my client and advising them to use the product?

To help protect the conveyancer from a potential negligence claim, conveyancers have an option, when setting up a transaction, to select the box 'Advise buyer to use Safe Buyer product'. By selecting this option the buyer is warned of the threat of fraud and is advised to use Safe Buyer to protect them – the Safe Move Scheme delivers this advice to the buyer from the conveyancer. This 'advice' feature helps conveyancers demonstrate that they have acted reasonably to protect their client. If the buyer decides to proceed without purchasing Safe Buyer they are doing so in the knowledge that it is at their own risk. The buyer's decision is recorded on the Safe Move Scheme for audit purposes. When the client logs in to the Safe Move Scheme they will have the option to use the Safe Buyer product to protect them from fraud whether the conveyancer has 'advised' the product or not, it is just the wording in the message to the client that differs.

13. I can start a new conversation with my Primary Buyer but my client has reported they cannot start a New Conversation with me via Safe Send, why would this be?

By default the feature for clients to communicate with professional users via Safe Send is **disabled**. Your **Organisation Administrator** will need to enable this feature, this is located within **Organisation Settings**. Once enabled, all your clients will be shown the **Safe Send** tab within their transactions once they have accepted to use the Safe Buyer product, they will then be able to start a conversation with any user from your Firm.

Public Users

As a Professional user you will be the first point of contact for your client should they require further assistance or support. To ensure you are equipped in resolving their queries, we have devised a list of typical questions and answers.

Login Process

1. I am a new user, how do I log into the Safe Move Scheme?

All new users will have a Safe Move Scheme **PIN number**, generated by the system. This PIN number is sent to the client's mobile number via text message.

Advise your client to take this PIN number and browse to the **Safe Move Scheme website**. From there select the **Login** option and select the tab **Create Account** to complete the required form.

2. I received a PIN number via text but I cannot locate it, what shall I do?

As an Organisation Employee, you are able to view the PIN number generated for the client. This information is located within the personal details of the client's transaction record, communicate this information to your client securely. If the client requires another PIN to be sent to them via text message, select **Regenerate PIN**.

3. I know I have been added to the Safe Move Scheme, but I cannot create my account

First of all, make sure the client has the correct PIN number, if so the PIN number may have expired. The PIN is valid for 28 days. If it has expired, you are able to regenerate the PIN for this user from within the SMS. See the 'Buyers and SMS' guide from within the SMS **Downloads** page for more information.

4. I am entering my PIN number but the system is displaying the error 'Invalid PIN'

Make sure the client is entering PIN number in uppercases only, if the error still occurs please check that the PIN has not expired. If the PIN number has expired, you are able to regenerate a PIN for the client (see question 7 for Professional Users).

5. What internet browser should I be using?

The Safe Move Scheme currently supports IE10/11 and Google Chrome.

6. I have forgotten my password, what shall I do?

Go to the **Login** screen of the SMS and select '*Forgotten Password*'. You can then initiate for the system to send you a **PIN number** to allow you to change your password, this code will be sent to the mobile phone number which was entered upon account creation.

7. I have received my PIN in order to carry out the forgotten password option but the system is indicating that the PIN is 'Invalid'?

This message will be displayed to users if:

- A. The user has waited longer than 10 minutes after receiving the text message. A new PIN number must be requested.
- B. The user has typed the PIN number into this field incorrectly.

Products

8. What is Safe Buyer?

This is a fraud prevention product from the Safe Move Scheme system. This product helps prevent buyers being successfully targeted by cyber criminals.

This product allows the buyer to confirm the bank account details provided by their conveyancer are correct.

9. I have received a 'No Match' result from using the Safe Buyer product, what does this mean?

Your client has received and entered details which do not match the bank account details we have registered for your Firm, your client should not send their funds to this account.

Managing Transactions

10. My Partner is buying the property with me, can they use Safe Buyer/the Safe Move Scheme?

Yes, **Additional Buyers** can be **added** onto the same transaction by the conveyancing Firm, doing so will create a **PIN number** for this user. The conveyancing Firm will need to inform the additional buyer of this PIN number, they can then browse to the **Safe Move Scheme website** and complete the **Create Account** form.

11. My Gifto is looking to transfer some funds to you, can they use Safe Buyer/ the Safe Move Scheme?

Yes, **Giftors** can be **added** onto the same transaction by the conveyancing firm, doing so will create a PIN number for this user. The conveyancing Firm will need to inform the Gifto of this PIN number, they can then browse to the **Safe Move Scheme website** and complete the **Create Account** form.

12. I am trying to enter my Transaction Address but the postcode I have entered is not bringing up the right address details, what shall I do?

After the postcode has been entered and 'Find Address' has been selected, if the correct address is not listed please select the option '*Address not listed, please enter manually*'. This will allow the client to enter their own address details.