



# Quick Start Guide

For Professional Users

Created October 2015. Version 1.0

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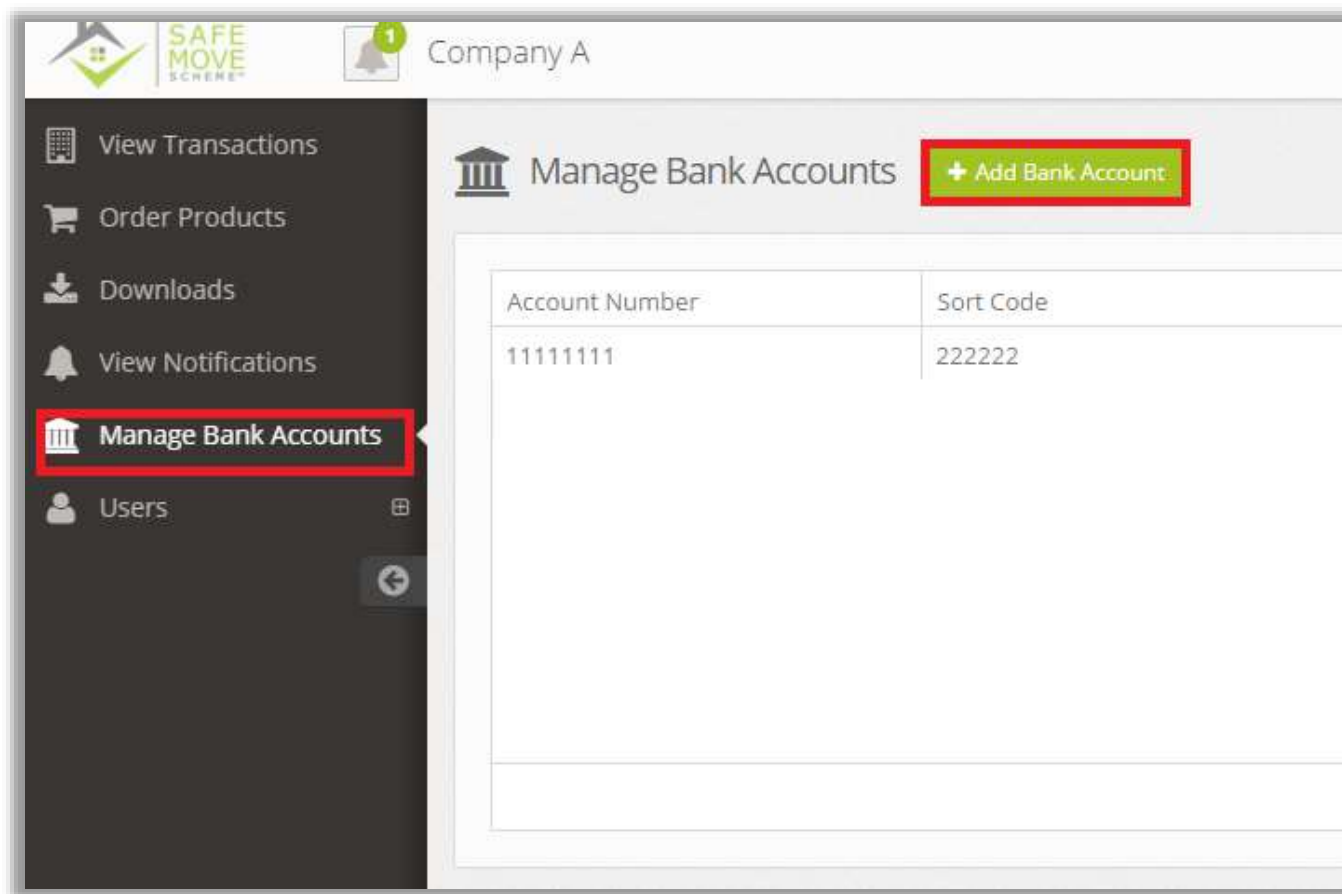
Welcome to the Safe Move Scheme!

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

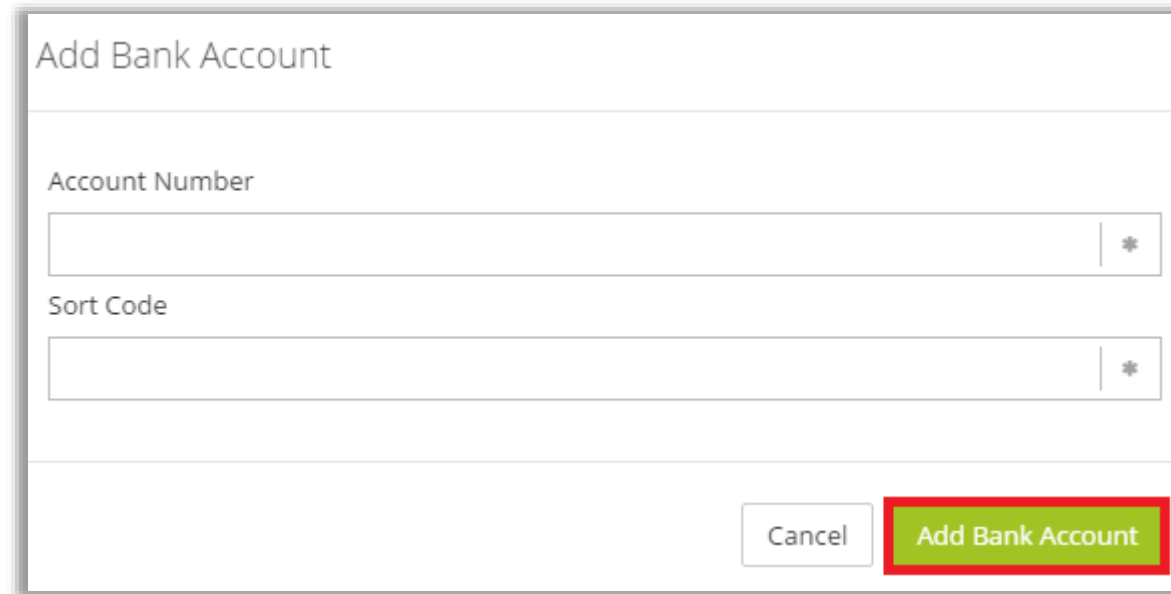
Now that you have a Safe Move Scheme account your Firm must have a Safe Move Scheme validated bank account before the system will allow you to order any products for your clients.

***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:



2. Select 'Add Bank Account'. The following pop up will appear for you to complete

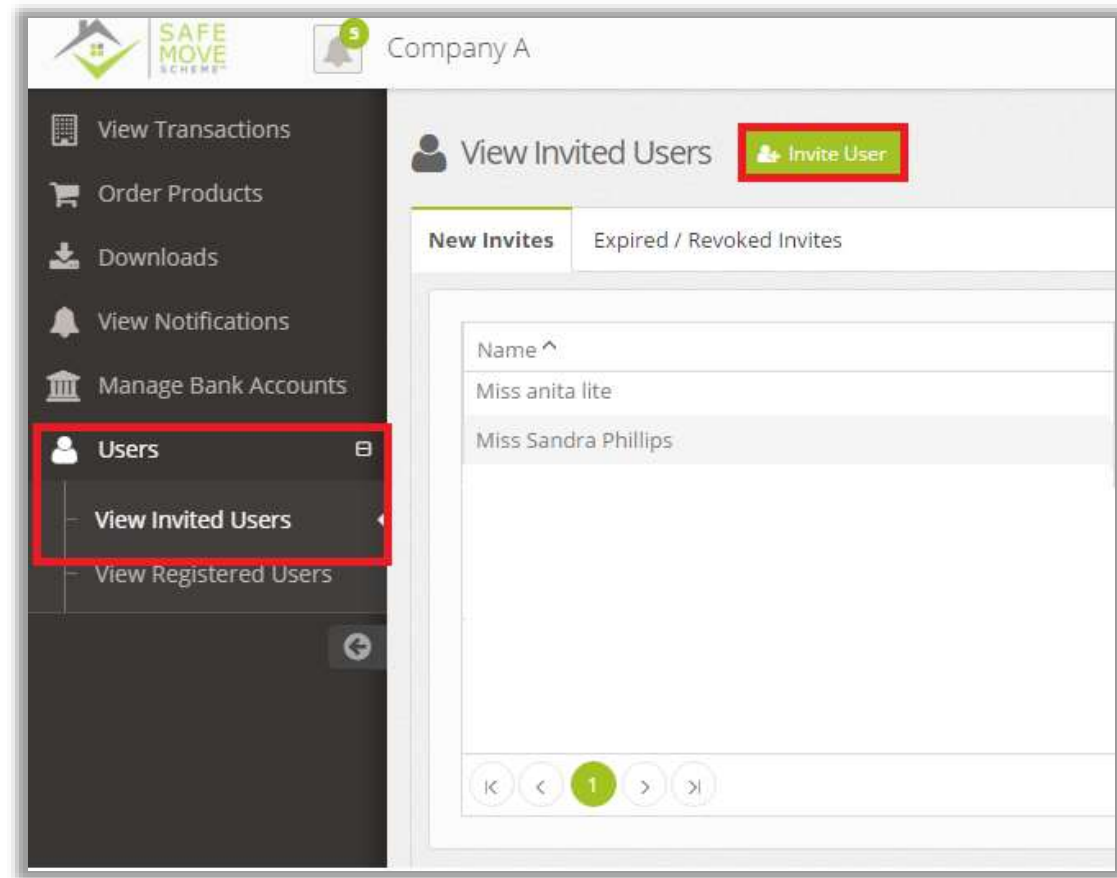


The screenshot shows a modal window titled "Add Bank Account". It contains two input fields: "Account Number" and "Sort Code". Each field has a small asterisk icon on the right side, indicating a required field. At the bottom right of the modal, there are two buttons: a "Cancel" button and an "Add Bank Account" button. The "Add Bank Account" button is highlighted with a red border.

3. Enter in the **Account Number** and **Sort Code** details for your Firms 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.

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'



3. This pop up (right) will appear for you to complete
4. Ensure your employee is able to access the email address entered
5. Use the tick box to select the permissions that you wish to allocate for the User

For an explanation of the permissions see the document 'How to Use the Safe Move Scheme', located in the **Downloads** page of the Safe Move Scheme.

6. Select 'Invite User'

### Invite User

Title

Please Select

First Name

Last Name

Email Address

Permissions

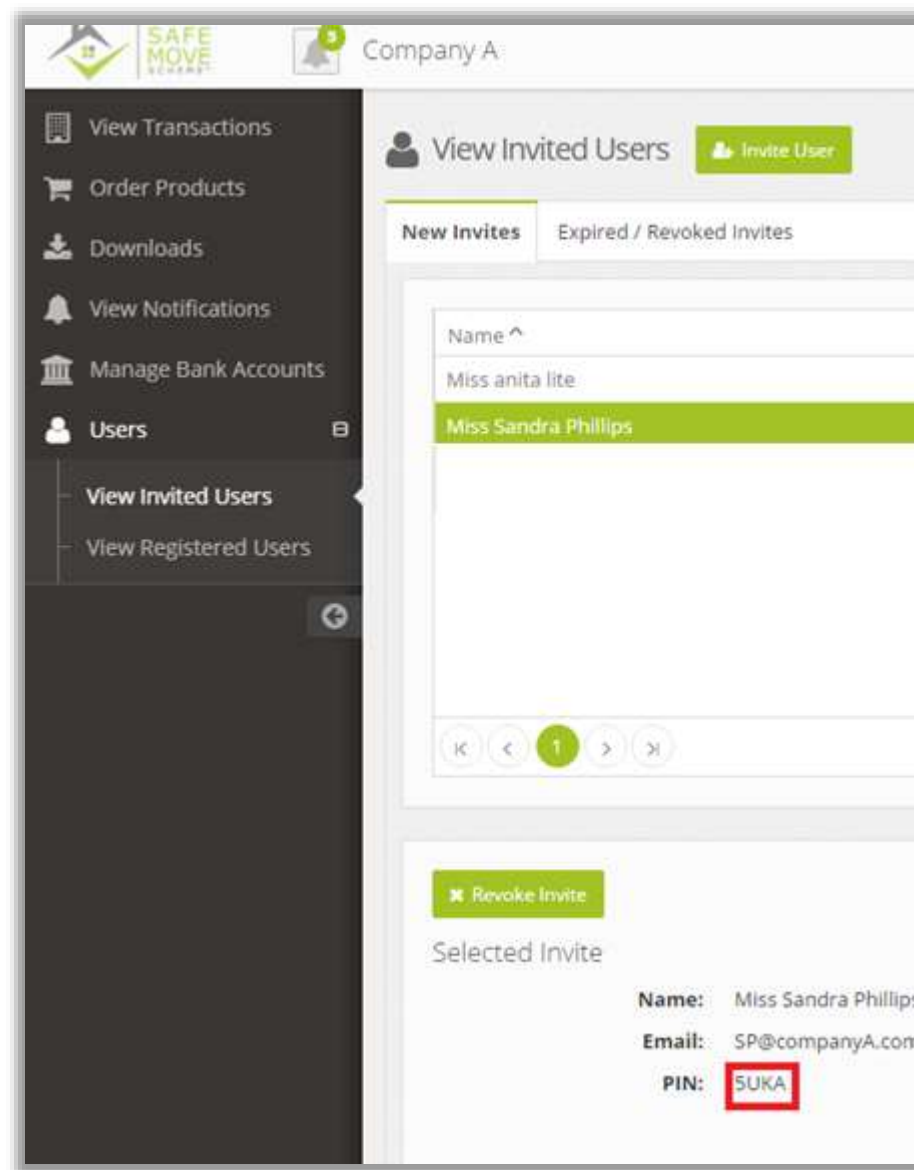
☐ Organisation Administrator

☐ Organisation Employee

Cancel

Invite User

7. Doing so will create a new entry in the **New Invites** tab, a PIN will be generated within details of the **Selected Invite** section
8. 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>
9. Once they have created their account and logged in they will appear in the **Registered Users** screen.

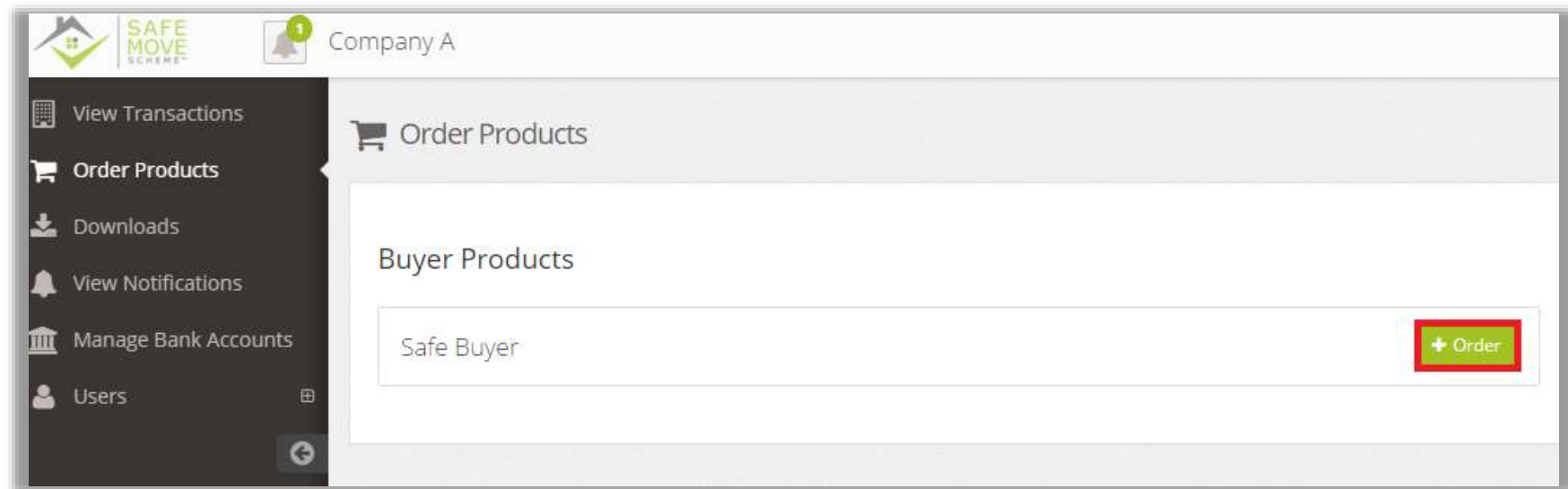


<sup>1</sup>Details of this process can be found in the 'How to Use the Safe Move Scheme', located in the Downloads page of the Safe Move Scheme.



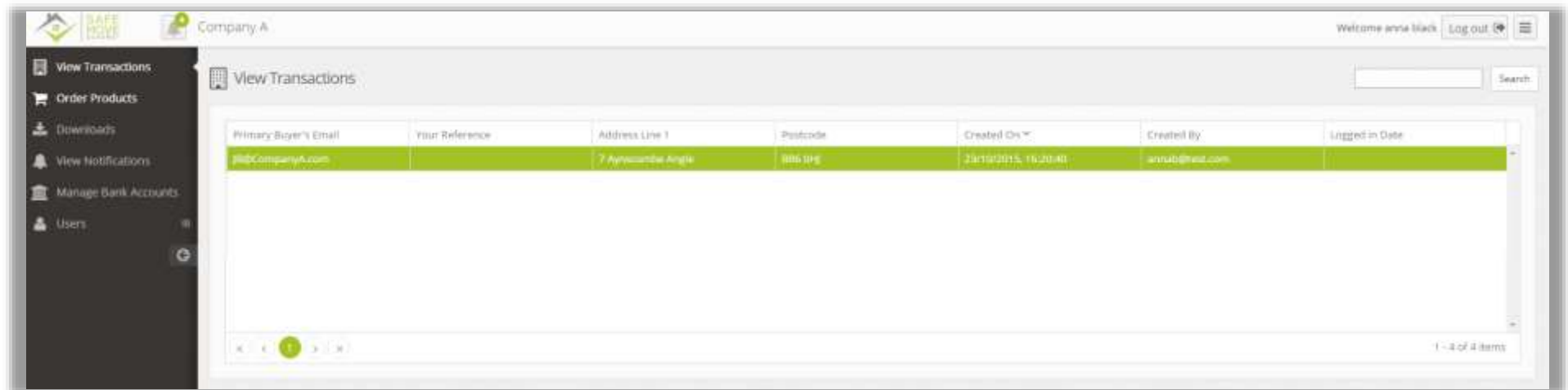
Follow the below process to order a product from the Safe Move Scheme (you must have a valid bank account to continue see [Submitting your Firms Bank Account Details](#)).

1. Select 'Order Products' from the left hand side menu, this will bring up the screen below. This screen will display a list of the available products for your client.



2. Select 'Order' and follow the on screen guidance.
3. Once the product has been successfully ordered, a new transaction with the submitted details will be created within the Safe Move Scheme.

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

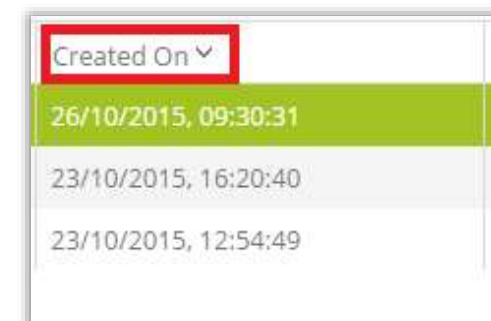


The screenshot shows a web application interface for 'Company A'. On the left is a dark sidebar with navigation links: 'View Transactions' (selected), 'Order Products', 'Downloads', 'View Notifications', 'Manage Bank Accounts', and 'Users'. The main area is titled 'View Transactions' and contains a table with the following columns: 'Primary Buyer's Email', 'Your Reference', 'Address Line 1', 'Postcode', 'Created On', 'Created By', and 'Logged in Date'. A single transaction is visible in the table. At the bottom left of the table is a green circular button with a right arrow. At the bottom right is a pagination link '1 - 4 of 4 items'. The top right of the interface shows a user profile 'Welcome anna black' and a 'Log out' button.

Primary Buyer's Email	Your Reference	Address Line 1	Postcode	Created On	Created By	Logged in Date
pl@CompanyA.com		7 Appencroft Angls	BB6 9PG	23/10/2015, 16:20:40	anna@meat.com	

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).



This image is a close-up of the 'Created On' column header from the table in the previous image. The header text 'Created On' is enclosed in a red rectangular box. Below the header, a dropdown menu is open, showing three date and time entries: '26/10/2015, 09:30:31' (highlighted in green), '23/10/2015, 16:20:40', and '23/10/2015, 12:54:49'.

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).

The screenshot displays a web interface for managing transactions, divided into two main columns. The left column contains 'Transaction Details' and 'Product' sections. The right column contains 'Primary Buyer', 'Additional Buyers', and 'Giftors' sections.

**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: 04/10/1995
- PIN: 9QYD

Buttons: Edit, Regenerate PIN

**Additional Buyers**

Buttons: + Add

Mr James Smith

**Giftors**

Buttons: + Add

Mr David Martin

For further details on any of the steps above please refer to the 'How to Use the SMS' guide within the **Downloads** page of the SMS.