SAFE MOVE SCHEME™

How to Use Safe Send

For Professional Users

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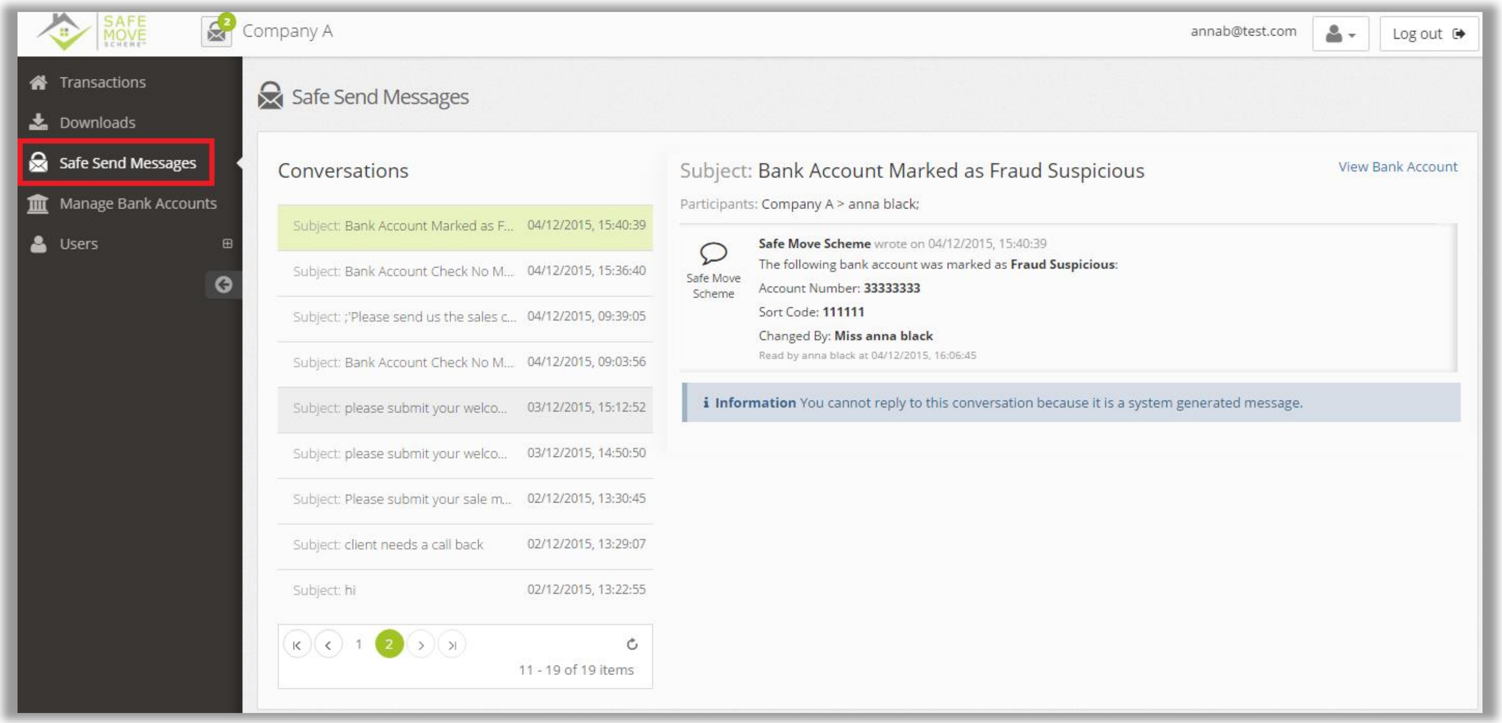
Introduction



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.

Enabling Safe Send for Clients

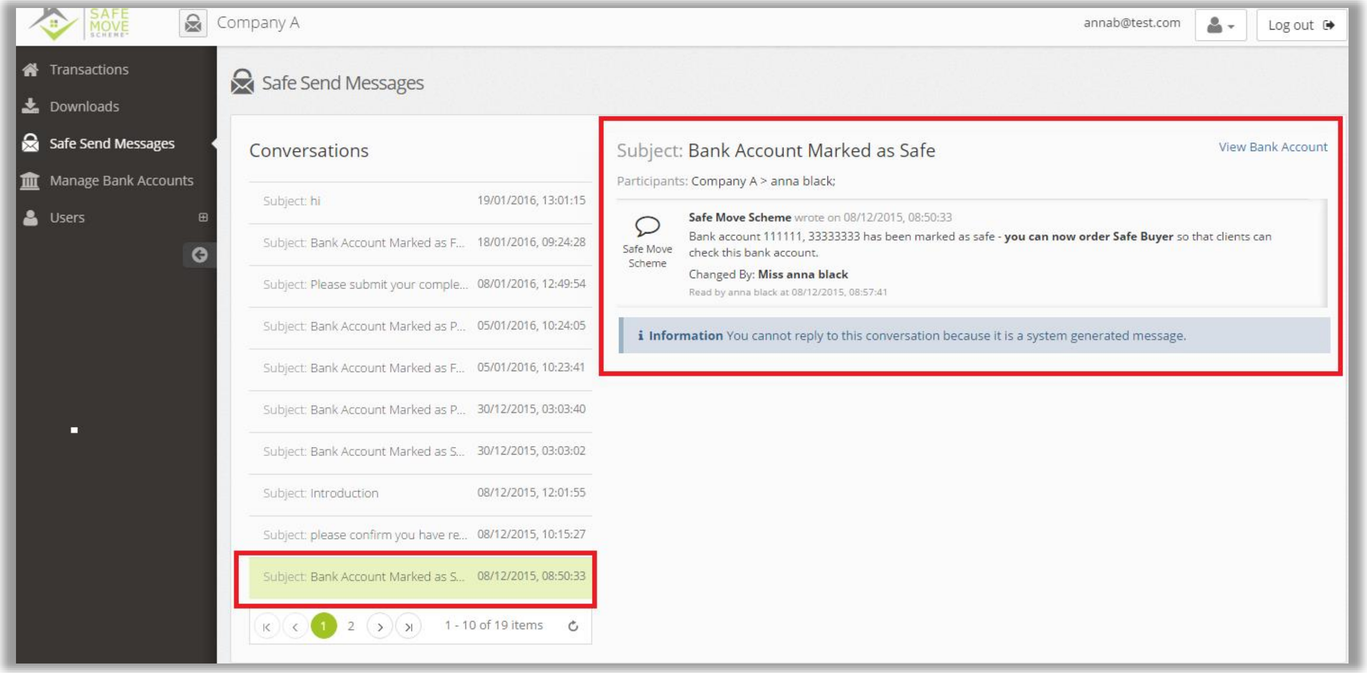
You will not be able to select any parties of a transaction as a recipient of a new conversation and your clients will not be able to start a new conversation with your firm, until the option ‘Enable Safe Send for Clients’ has been turned on by your Organisation Administrator.

The enabling of this feature can be found by your Organisation Administrator within Organisation Settings.

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:

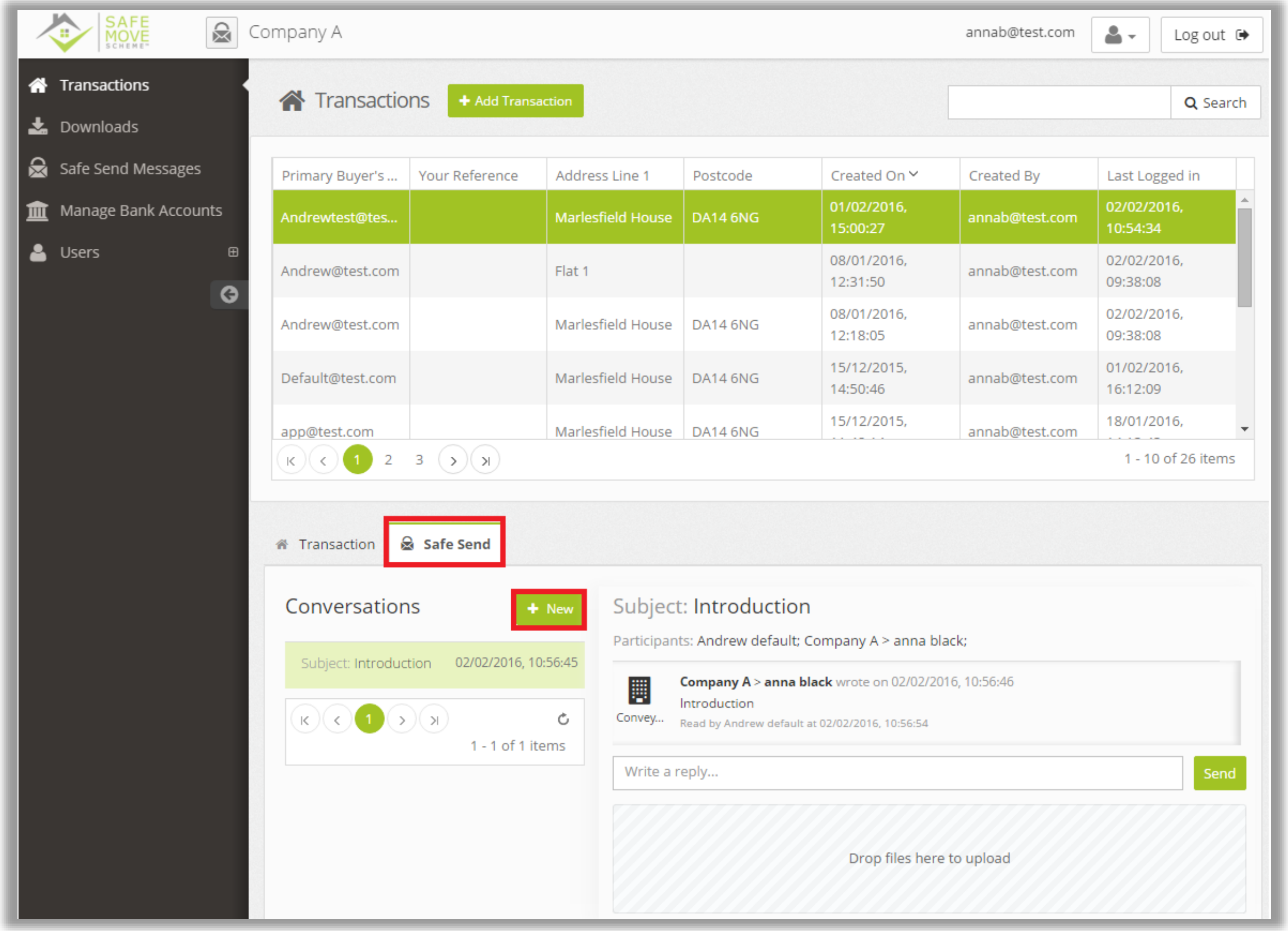


- If a bank account is marked as **safe**, all professional users of your Firm will be messaged.
- If a bank account has been marked as **fraud suspicious** the SRO and Organisation Administrators will be messaged.

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.

Using Safe Send (cont.)



Conversations

Note: Safe Send Conversations can only be started against a transaction, once the Buyer has accepted to use Safe Buyer.

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[1] of the transaction, or your colleague(s).
4. Complete the required fields and select '*Send*' once it is ready.

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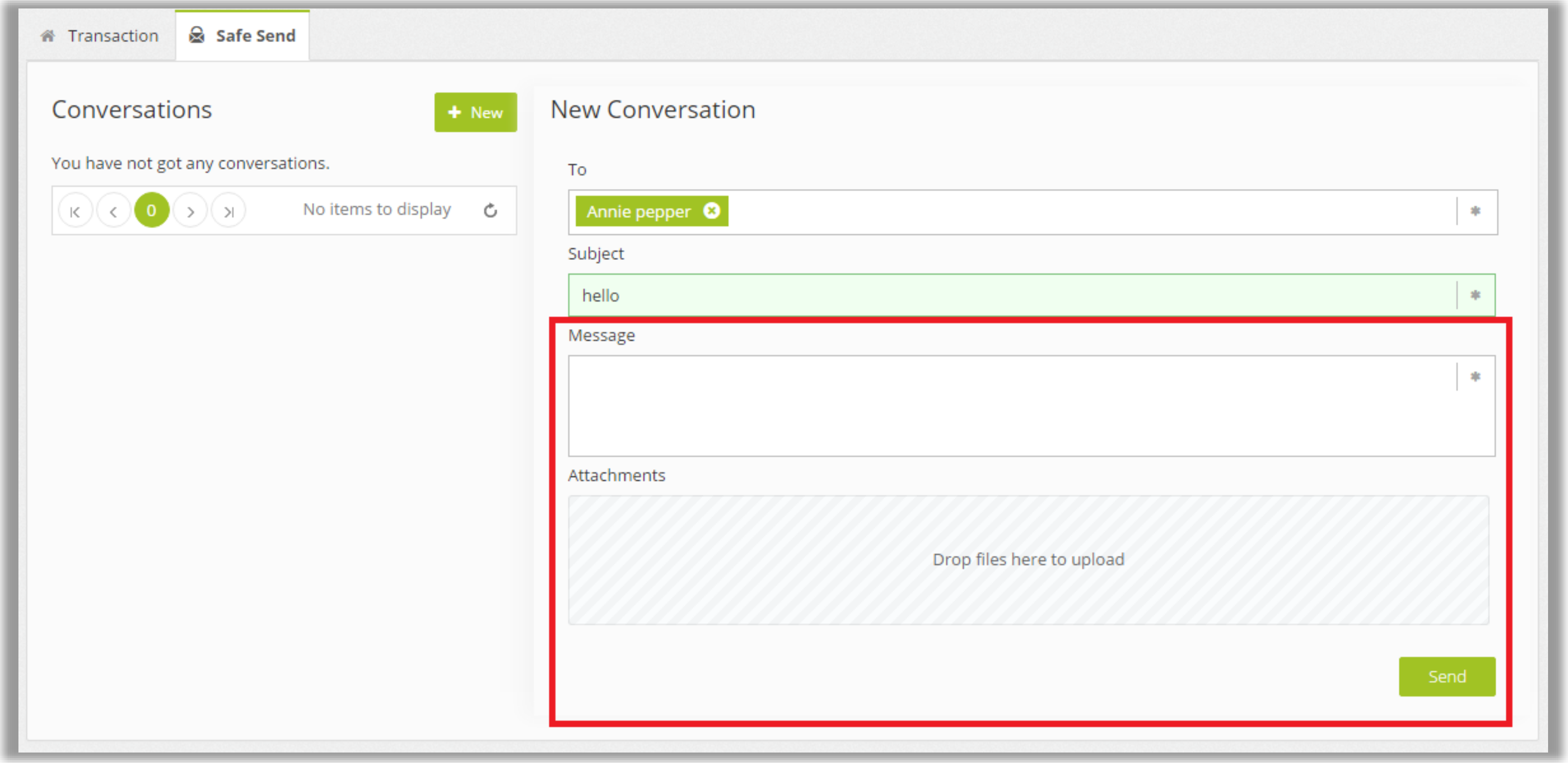
[1] The parties of a transaction will not be displayed as available recipients of the Safe Send message if your Organisation Administrator has not enabled Safe Send for your clients, see 'Enabling Safe Send for Clients' for more information

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.



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.