

Rubix Software

E: info@rubixsoftware.co.uk

W: www.rubixsoftware.co.uk

Online



**Fully dynamic
online portal**



Contents

About	2
Online isn't as easy as it could be	2
Introducing Online	2
Secure foundations	3
Accessibility	3
Is Online truly dynamic?	4
Under the hood	5
Screenshots	6
Login	6
Two Factor Authentication	6
Cases	7
Case details	8
Ledger and Case schedule	10
Case history	11
Document upload	11
Message case handler	12
Dashboard	13
To-Do list	14
Case forms	15
Payment gateway	17
Contact	19

About

Online isn't as easy as it could be

Your clients and work providers expect an online solution so they can interact with you whenever they want to.

Creating a secure online portal is not easy and can often be very time consuming. Each work provider may have different requirements and different work types require different information. All of this adds up to many months of work utilising different skills such as Web Developers, Visualfiles developers and security experts.

Is there a better way?

Introducing Online

When we created Online we set out to create a truly dynamic portal which can be installed in a matter of hours and every part of the portal can be configured by you to meet the exact needs of your business.

We provide you with the tools to change the portal within Visualfiles or its own configuration area. There are no skills required apart from basic Visualfiles scripting knowledge to change the portal to meet your exact requirements.

Secure foundations

Security is of course a major concern for any organisation, so Online is built with security at its heart. The solution uses the latest technology and has been tested against a series of penetration testing to ensure it is robust and secure when used.

Security Features include:

- ✓ Two factor authentication out of the box using SMS, Email, or both.
- ✓ Document uploads meta data check to block anything outside of specific file types
- ✓ Ability to set complex passwords
- ✓ Session time outs can be set by you to suit your business needs.
- ✓ Secure payment gateway*
- ✓ Uses HTTPS as standard for security between your clients and the portal.

Accessibility

Online is tested against [W3C](#) standards to ensure that it meets the need for access with people with disabilities.

Is Online truly dynamic?

The short answer is yes. However, what does this mean in practice?

You can: -

- ✓ Change branding and logos at any time (although we will set this up for you from the outset)
- ✓ Change colour schemes.
- ✓ Change font sizes and types
- ✓ Adding a disclaimer message couldn't be easier. Simply switch this on change the message to suit your needs and it instantly appears
- ✓ Turn on Two- Factor Authentication either by SMS or email or both
- ✓ All pages within the portal can be switched off and on as required for both clients and work introducers
- ✓ Pages can be renamed to suit your requirements

Under the hood

We have designed Online to interact seamlessly with Visualfiles.

This means that ALL data within the portal can be changed by you from within Visualfiles using our Visualfiles scripting.

- ✓ What pages you display and how these are labelled.
- ✓ You can add and remove any data you want to make available for the client or introducer from within Visualfiles.
- ✓ Want to display different data based on your work type; easy. Simply change the Visualfiles scripts and Visualfiles Online will change instantly
- ✓ Split data into organised sections including group screens and calculated fields.
- ✓ Display ledger information and add/change exactly what you want to present to your client or introducer.
- ✓ Display Debtor/Payments/Recoverable Costs information as needed
- ✓ Display Schedules and add/change exactly what you want to present to your client or introducer.
- ✓ Decide what columns of data you want to appear on the site from any field in your system.
- ✓ Add interactive dashboards to the Portal whether this is a bar chart, line chart or pie chart and what data you want to display; this can change dependent on the client or work introducer.

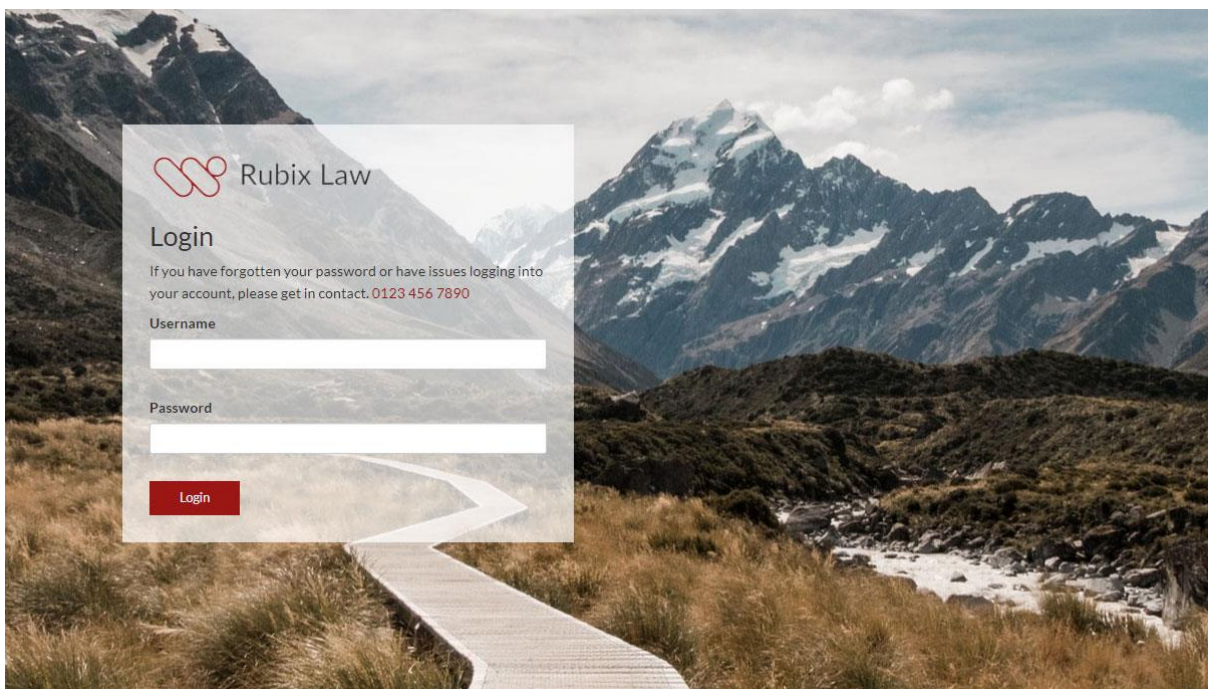
As Visualfiles Online is dynamic to the core then the possibilities are endless.

Screenshots

The following screens are examples of what can be utilised with Online. You have the option of switching on/off the screens dependent if a client or work introducer is logging in and information in the screens can be changed/removed/added to by you, instantly within Visualfiles.

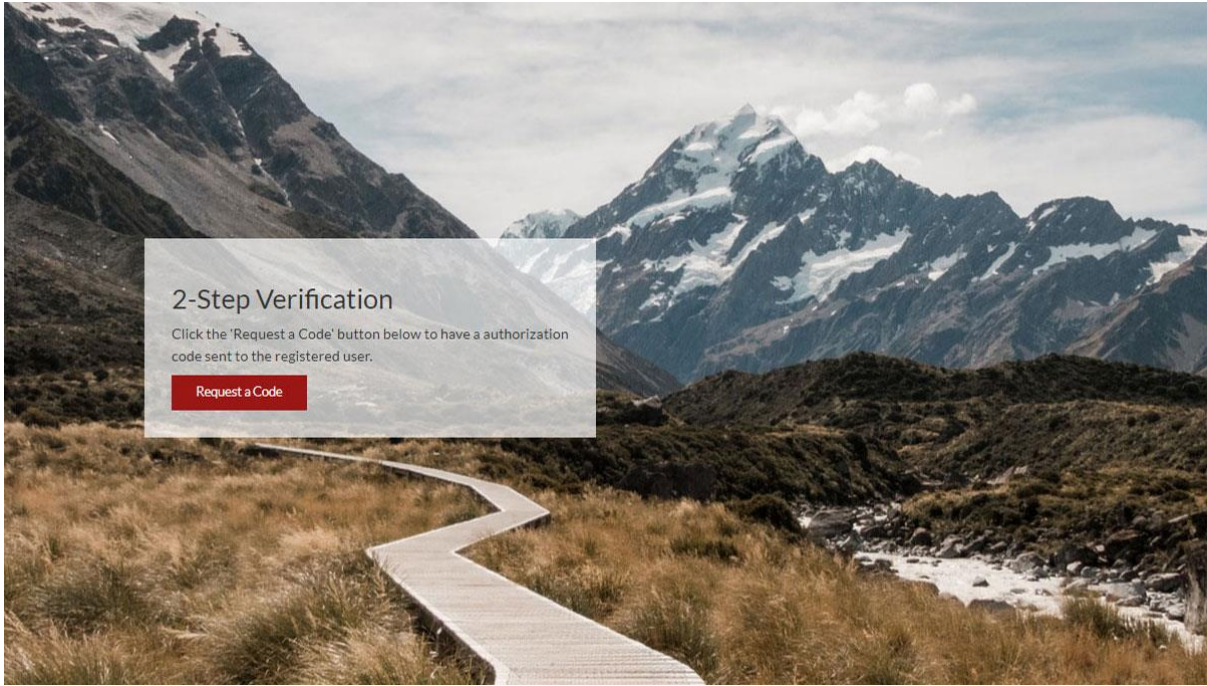
Login

A typical login screen: the logos/images/branding styles are all configurable.




Two Factor Authentication

This can be set up within seconds and provide for additional login security using SMS, email, or both.

















Cases

I am logged in as a work introducer here so I can see all my related cases. This screen features search facilities out of the box. Any data on this screen can be changed by you within Visualfiles instantly.

Cases 

Show entries Search:

Case Owner 	Description 	Case Type 	Current Status 	Opened 	Case Code 	Case Holder 	Closed 	
Paddon Martyn	(00000002/100) Mr Martyn Paddon	Rubix Practice Management	Instructions	03/07/2019	00000002/100	David Reeves		
Paddon Martyn	(00000002/101) Mr Rubix Tech	Rubix Practice Management	Instructions	03/07/2019	00000002/101	David Reeves		
Paddon Martyn	(00000002/102) Mr Rubix Tech	Rubix Practice Management	Instructions	03/07/2019	00000002/102	David Reeves		
Paddon Martyn	(00000002/103) Mr Rubix Tech	Rubix Practice Management	Instructions	03/07/2019	00000002/103	David Reeves		
Paddon Martyn	(00000002/104) Mr Martyn Paddon v Mr John Harvey	Rubix Practice Management	Instructions	03/07/2019	00000002/104	David Reeves		

Searching for cases could not be easier using the inbuilt search facility. The search criteria are dynamic and can be set by you to search for any given information.

×

Filter Cases

Field ⓘ

Code ▾

Operator ⓘ

Begins ▾

Status ⓘ

Open ▾

Return ⓘ

50

Return all

Search Text ⓘ

Search

Reset

Case details

A typical case details screen. The information including the sections/labels and data are controlled by you within Visualfiles. This means that irrespective of the work type or work introducer you can determine what is displayed here. Online will do the rest.

Key Details

Description 1	(00000002/100) Mr Martyn Paddon
Date of File opened	03/07/2019
Code	00000002/100
File Type Description	Rubix Practice Management
Status Description	Instructions
Number Of Months Since Opening File	39

Key Personnel

File Holder: Name	David Reeves
Direct Dial	
Email	david@rubixsoftware.co.uk

Client Details

Name	Mr Martyn Paddon
Address	1 East Street, Bromley, BR1 1LN
Telephone	07881458060

Ledger and Case schedule

The ledger screen interacts with the ledger within Visualfiles and shows the case transactions. All information can be changed by you.

Ledger

Show 50 entries Search:

Posting Date	Narrative	Ref	Payee(r)	Net Amount	VAT Amount	Total Amount
07/02/2022	Testing		D Pearce	250.00	0.00	250.00

Showing 1 to 1 of 1 entries

Previous 1 Next

This shows the traditional case to-do list within Visualfiles.

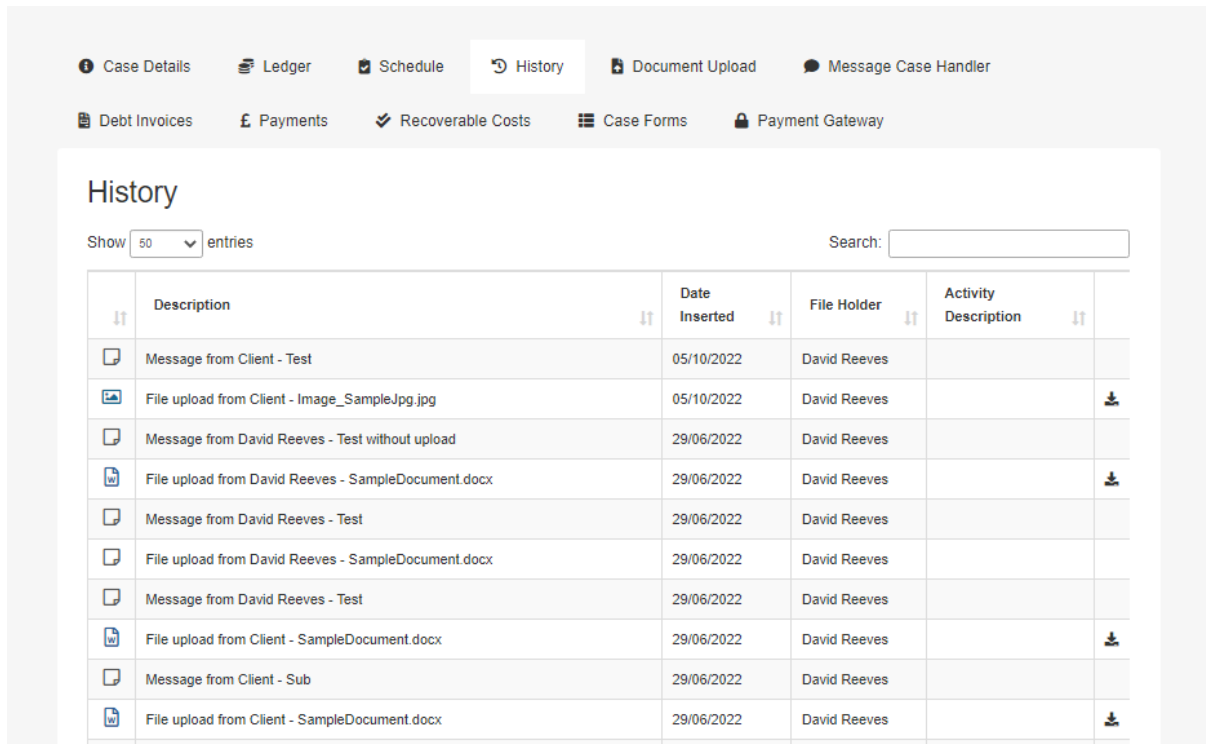
Schedule

Show 50 entries Search:

Date Due	Description	File Holder: Name	Category
03/06/2021	Letter: Request Consent - Adult Occupier Mr Two Occup	David Reeves	DEFAULT
03/06/2021	Process: Conflict Check - Purchaser	David Reeves	DEFAULT
03/06/2021	Letter: Initial Contact - Purchaser's Solicitor MTA Solicitors LLP	David Reeves	DEFAULT
10/02/2022	File Upload from Rubix Estate Agents - SampleDocument.docx	David Reeves	DEFAULT
22/02/2022	File Upload from Client - SampleDocument.docx	David Reeves	DEFAULT
22/02/2022	File Upload from Client - SampleDocument.docx	David Reeves	DEFAULT
04/03/2022	File Upload from Rubix Estate Agents - SampleDocument.docx	David Reeves	DEFAULT
04/03/2022	File Upload from Rubix Estate Agents - SampleDocument.docx	David Reeves	DEFAULT
07/03/2022	File Upload from Rubix Estate Agents - Mondago Agreement.pdf	David Reeves	DEFAULT
10/03/2022	File Upload from Rubix Estate Agents - SampleDocument.docx	David Reeves	DEFAULT

Case history

Here I can see the history of a case. Once again, all information to be displayed can be changed by you. We also feature automatic PDF conversion if downloading a document.



History

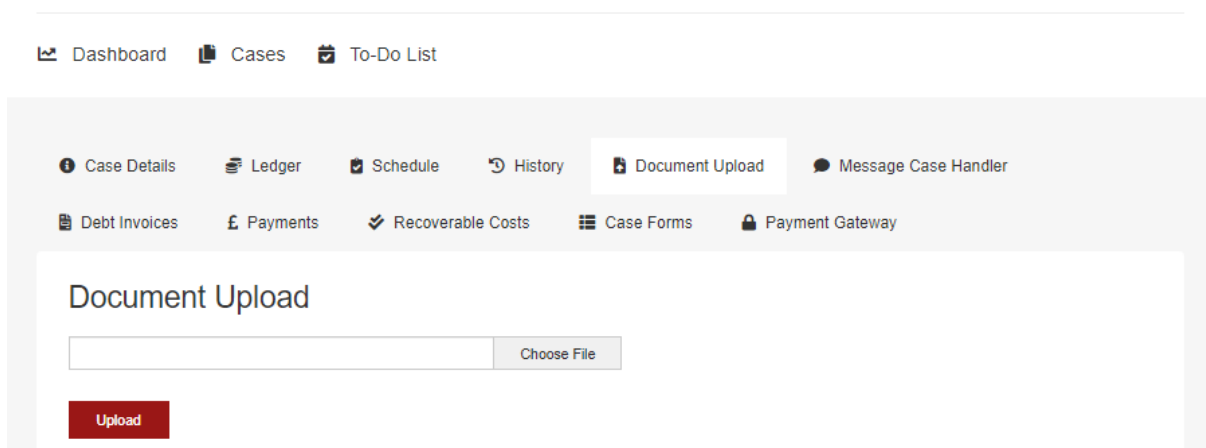
Show entries

Search:

Description	Date Inserted	File Holder	Activity Description
Message from Client - Test	05/10/2022	David Reeves	
File upload from Client - Image_SampleJpg.jpg	05/10/2022	David Reeves	
Message from David Reeves - Test without upload	29/06/2022	David Reeves	
File upload from David Reeves - SampleDocument.docx	29/06/2022	David Reeves	
Message from David Reeves - Test	29/06/2022	David Reeves	
File upload from David Reeves - SampleDocument.docx	29/06/2022	David Reeves	
Message from David Reeves - Test	29/06/2022	David Reeves	
File upload from Client - SampleDocument.docx	29/06/2022	David Reeves	
Message from Client - Sub	29/06/2022	David Reeves	
File upload from Client - SampleDocument.docx	29/06/2022	David Reeves	

Document upload

Documents can be uploaded here. This area can be switched on or off as required. The documents will be checked for the file type during upload for security purposes.



Dashboard Cases To-Do List

Case Details Ledger Schedule History Document Upload Message Case Handler

Debt Invoices Payments Recoverable Costs Case Forms Payment Gateway

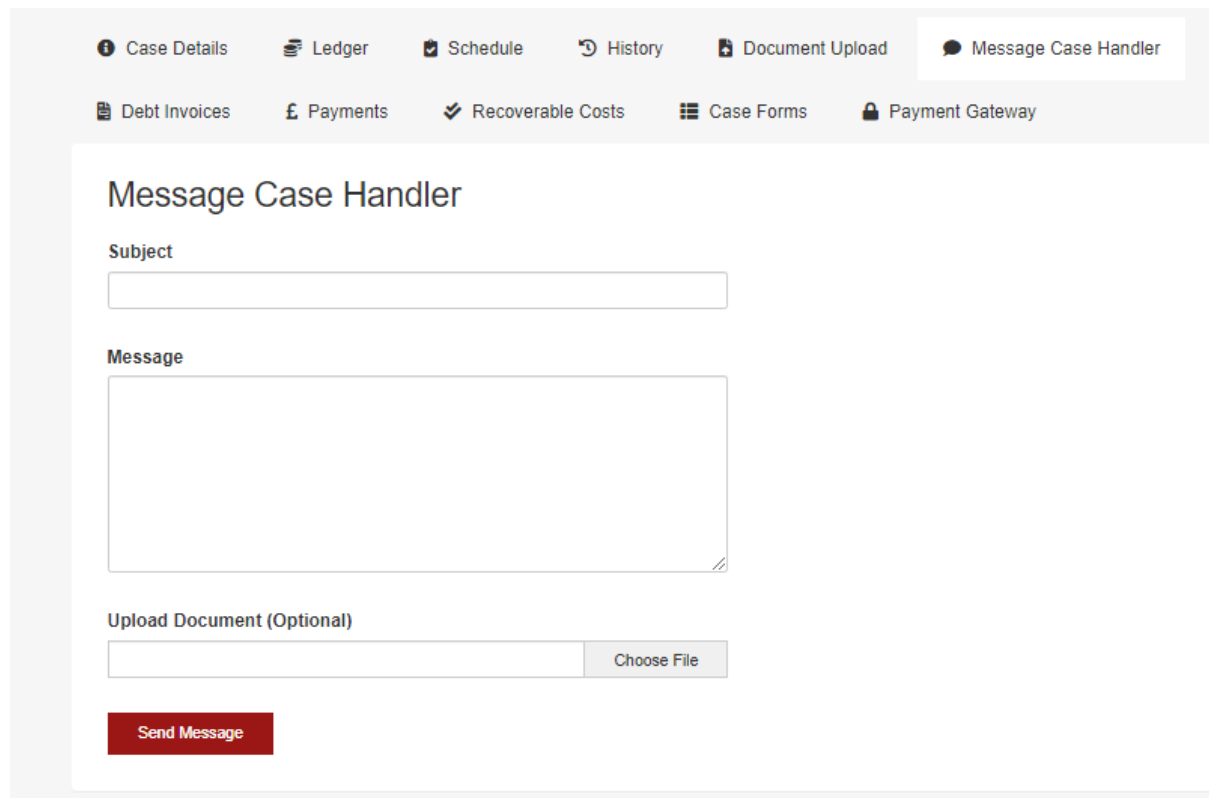
Document Upload

Choose File

Upload

Message case handler

Communication is easy through Online. If utilised your clients/work introduces can instantly message, you through the portal. The upload documents option is configurable by you.



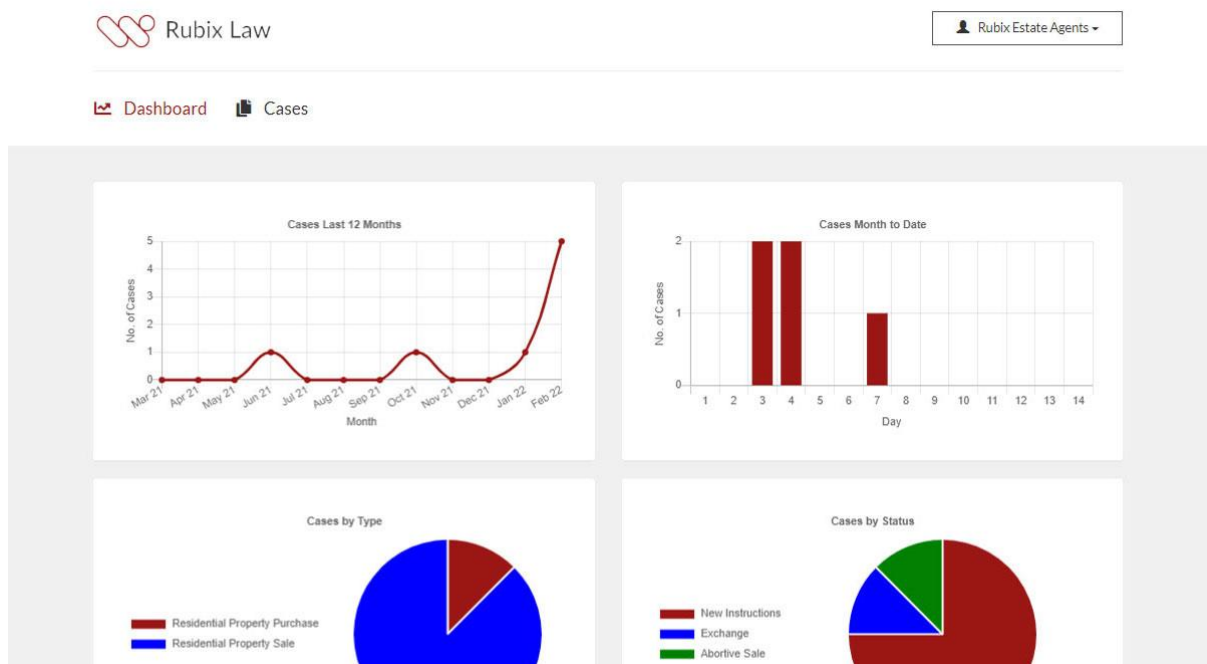
The screenshot shows a web interface for a 'Message Case Handler'. At the top, there is a navigation bar with several menu items: 'Case Details', 'Ledger', 'Schedule', 'History', 'Document Upload', and 'Message Case Handler' (which is highlighted). Below this, there is a secondary navigation bar with 'Debt Invoices', 'Payments', 'Recoverable Costs', 'Case Forms', and 'Payment Gateway'. The main content area is titled 'Message Case Handler' and contains three sections: a 'Subject' field with a text input box, a 'Message' field with a larger text area, and an 'Upload Document (Optional)' section with a file input box and a 'Choose File' button. At the bottom of the form is a red 'Send Message' button.

Debt invoices, Payments, and Recoverable costs

If you are using the Debt Recovery Screens within Visualfiles then Online gives you the option of displaying data collected. Again, these screens are completely configurable.

Dashboard

If you want to add reporting to your portal, then it is incredibly easy. The data, charts and types are all driven from Visualfiles and can be changed within an instant. Also, the data displayed can be changed per introducer as needed. No hard coding needed, Online will take care of the rest.



To-Do list

This shows the To-Do list; we feature easy search facilities and like always any information can be changed by you.

Rubix Law David Reeves

Dashboard Cases To-Do List

To-Do List

Show 50 entries Search:

	Overdue	Priority	Case Code	Schedule Description	Created	Due	Category Code	
<input type="checkbox"/>			0000002/38	Refer to DR by 25/11/2019	03/11/2022	21/11/2019	DEFAULT	
<input type="checkbox"/>			0000002/38	Referral Due Today	03/11/2022	25/11/2019	DEFAULT	
<input type="checkbox"/>			JON002/002	Process: Input details of Client	08/01/2020	10/01/2020	DEFAULT	
<input type="checkbox"/>			HOL001/019	Process: Input details of Financial Advisor	20/01/2020	20/01/2020	DEFAULT	
<input type="checkbox"/>			HOL001/020	Process: Input details of Financial Advisor	20/01/2020	20/01/2020	DEFAULT	
<input type="checkbox"/>			HOL001/021	Process: Input details of Financial Advisor	20/01/2020	20/01/2020	DEFAULT	
<input type="checkbox"/>			HOL001/022	Process: Input details of Financial Advisor	20/01/2020	20/01/2020	DEFAULT	
<input type="checkbox"/>			HOL001/023	Process: Input details of Financial Advisor	20/01/2020	20/01/2020	DEFAULT	
<input type="checkbox"/>			IMS001/007	Process: Input details of Financial Advisor	20/01/2020	20/01/2020	DEFAULT	

Rubix Law David Reeves

Dashboard Cases To-Do List

To-Do List

Show 50 entries Search:

Filter To-Do List

Date From

Date To

Priority Critical High Normal

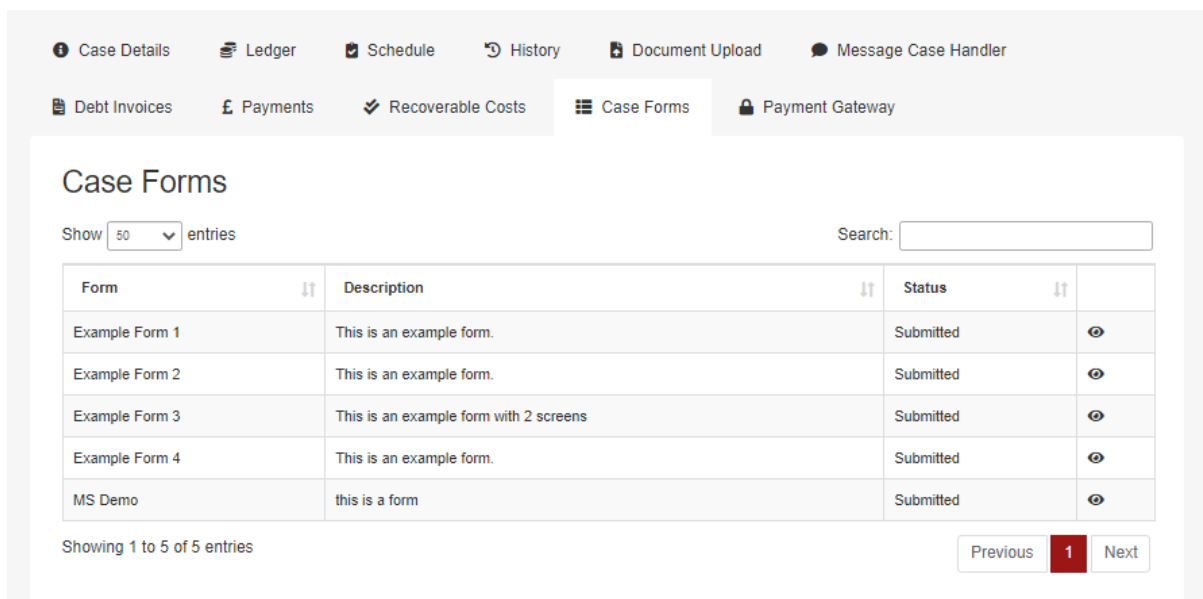
Search Text

Case forms

Often you will need your client to complete key information along the journey of their case. Trying to do this online could take weeks of development. Online features a forms designer within Visualfiles meaning you can easily create screens and publish these to the portal. Using the power of Visualfiles scripting means you can add these to the portal at the time for completion. Once the form is completed the information is added back into Visualfiles instantly.

Once the user has completed the form, they can always see these in a read only format.

Finally, the user can save and come back to a form when ready.



The screenshot displays the 'Case Forms' section of a software interface. At the top, there is a navigation bar with icons and labels for 'Case Details', 'Ledger', 'Schedule', 'History', 'Document Upload', 'Message Case Handler', 'Debt Invoices', 'Payments', 'Recoverable Costs', 'Case Forms', and 'Payment Gateway'. Below this, the 'Case Forms' section is titled, followed by a 'Show 50 entries' dropdown and a 'Search:' input field. A table lists five forms, all with a 'Submitted' status and an eye icon. The table columns are 'Form', 'Description', and 'Status'. Below the table, it says 'Showing 1 to 5 of 5 entries' and a pagination control with 'Previous', '1', and 'Next' buttons.

Form	Description	Status	
Example Form 1	This is an example form.	Submitted	👁
Example Form 2	This is an example form.	Submitted	👁
Example Form 3	This is an example form with 2 screens	Submitted	👁
Example Form 4	This is an example form.	Submitted	👁
MS Demo	this is a form	Submitted	👁

You can add as many fields as needed to the Form. These can be a variety of types such as Check Boxes; Dates; Notes; Text; Radio Sets; Selection and Time. You can make the fields compulsory if required.

Example Form 1

This is an example form.

Check Box Field

Check Box Field

Date Field *

11/05/2022 

Notes Field *

text area notes

Number Field

10.60

Radio-Set Field *

- one
- two
- three

Text Field *

textbox value 111

Text Field (Selection)

one 

Time of Day Field *

1:00 

Payment gateway

We provide the ability for you to take payment from your clients within inbuilt payment gateways. The payment part of the portal uses an inbuilt Visualfiles Add in which will either show payments due from the client or they can create their own payment. The Payment Portal is completely compliant with PCI Requirements as it uses the banks own systems to take the actual payment.

Create Payment

Complete as many details as possible. Fields marked as * are required.

Payment Details


Amount *	Your Name *
<input type="text"/>	<input type="text"/>
Description *	
<input type="text"/>	

Your Contact Details

Telephone Number	Email Address
<input type="text"/>	<input type="text"/>
Address	City
<input type="text"/>	<input type="text"/>
Town	Postcode
<input type="text"/>	<input type="text"/>

[Proceed to Payment](#)

Step 1 - Add payment information

PAY WITH:  **VISA**

CARDHOLDER'S NAME*

CARD NUMBER*

EXPIRY DATE (MM / YYYY)*
 /

CARD VERIFICATION CODE* :
 ?

[Yes, I confirm my payment](#)

[Cancel](#)



Step 2 – Client enters their payment information securely.

Payment Successful

Payment has been successfully made. Payment Reference: 0000000000020.

[Return to Payment Gateway](#)

Step 3 – Payment is made, and your client is returned to the portal.

Contact

For more information or to arrange a demonstration.

Get in touch

Email: info@rubixsoftware.co.uk

Telephone: 0203 973 0975

Website: www.rubixsoftware.co.uk

Rubix Software,
The Warren,
Croydon Road,
Bromley,
BR2 7AL

