RUBIX SOFTWARE

DESIGN, DEVELOP, SUPPORT

INSIDE THIS ISSUE

- **We look at our new WhatsApp integration**

- **CREDAS the best ID verification system we have come across**

- **Getting the most from your Robots with FREE software**

A warm welcome

We are told that whilst we are great at providing software solutions we aren't so great at telling people about them. Often people discover our products and their response is why didn't we know about this before!

To make amends, this newsletter is (we hope) the first of many and is intended to let you know about some of our products and solutions and at the same time give you hints and help with your systems.

In this issue there is some **free** software!

Please remember we **never** do the hard sell, if you are interested in anything you see then contact us, we can set up a demonstration.

Don't worry we won't continue to hassle you simply because we hate that approach ourselves.

We hope you enjoy

The team@Rubix Software

**Rubix Messenger
WhatsApp in
Visualfiles**

<u>Rubix Messenger</u>

After many months of hard work, we are pleased to announce the launch of Rubix Messenger.

What is **Rubix Messenger?**

Billions of people use WhatsApp to communicate with friends and family but did you know businesses can also use WhatsApp to securely communicate to their cistomers.
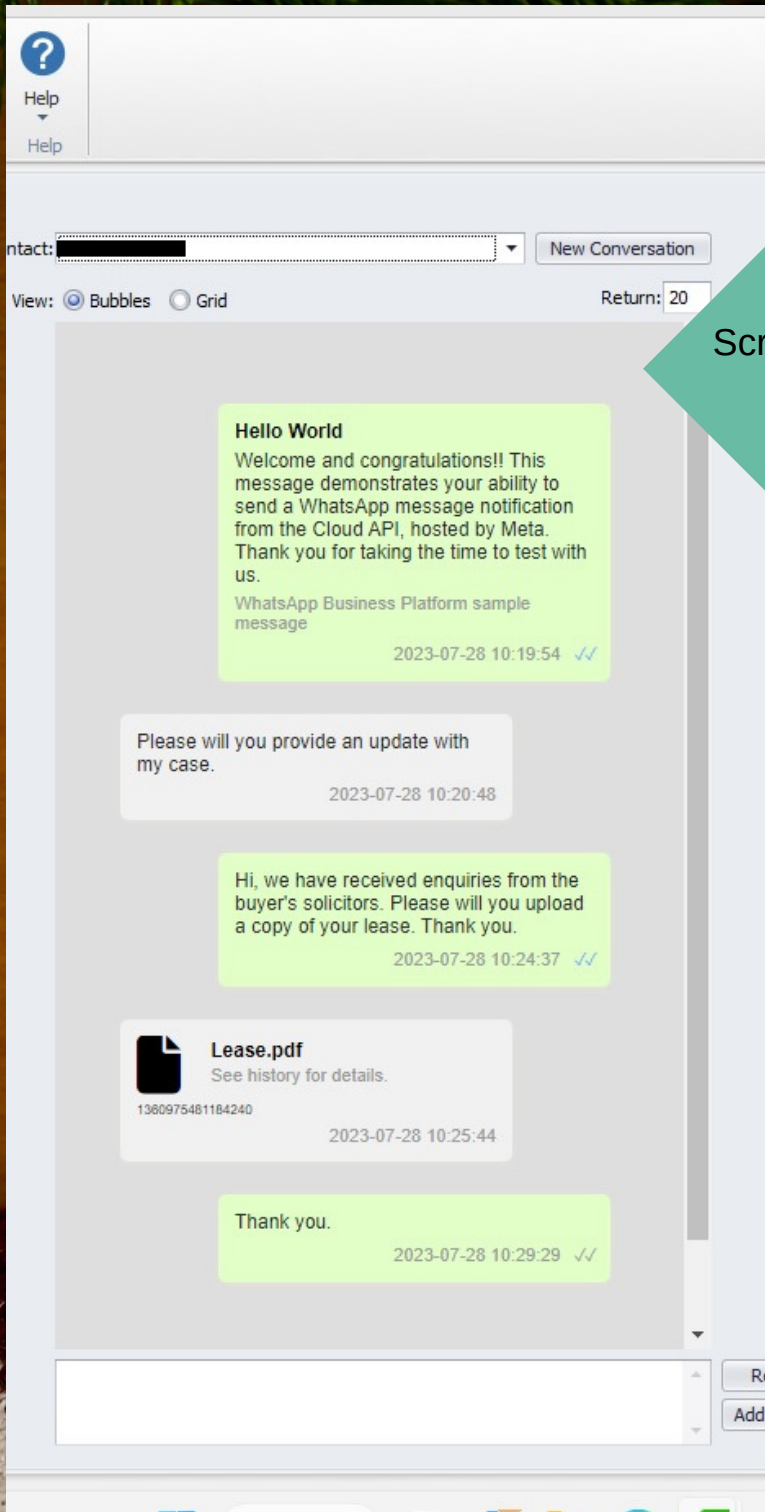
We therefore built a full-fledged WhatsApp integration with Visualfiles meaning that you can easily send and receive messages from your customers in real time.
Our integration makes sending and receiving WhatsApp messages effortless within Visualfiles. Our software will show you whether a message has been delivered and read and our user interface is built to mirror the familiarity of the WhatsApp mobile app.
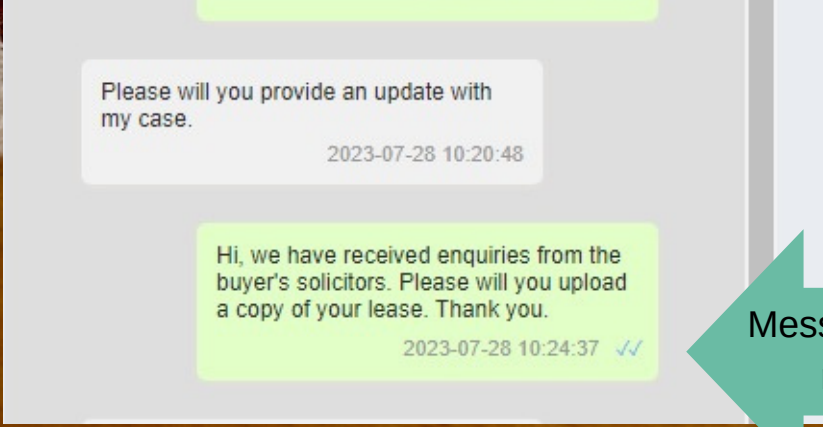
However, it does more than this, you can send update templated messages at key points in the case simply by scripting a templated message, for example that property completion has taken place.

Need a quick response, simply send them an interactive message with quick reply buttons which allows your client to response with their option. For example "Are you able to attend your medical appointment". The customer is provided with a simple Yes and No buttons**.** Your Visualfiles system can read this response and you can drive workflow from the response accordingly.

See the next page for a screenshot of the integration...........

Help
Help

ntact: ▮▮▮▮▮▮▮▮ ▼ New Conversation

View: ⚫ Bubbles ⚪ Grid   Return: 20

Hello World
Welcome and congratulations!! This
message demonstrates your ability to
send a WhatsApp message notification
from the Cloud API, hosted by Meta.
Thank you for taking the time to test with
us.
WhatsApp Business Platform sample
message
                        2023-07-28 10:19:54 ✓✓

Please will you provide an update with
my case.
                        2023-07-28 10:20:48

Hi, we have received enquiries from the
buyer's solicitors. Please will you upload
a copy of your lease. Thank you.
                        2023-07-28 10:24:37 ✓✓

📄 **Lease.pdf**
   See history for details.
1360975481184240
                        2023-07-28 10:25:44

Thank you.
                        2023-07-28 10:29:29 ✓✓

Re
Add

Screenshot from
Visualfiles

WhatsApp

Please will you provide an update with
my case.
                        2023-07-28 10:20:48

Hi, we have received enquiries from the
buyer's solicitors. Please will you upload
a copy of your lease. Thank you.
                        2023-07-28 10:24:37 ✓✓

Message delivery and
read receipts

ID Checks - simple and seamless

Robust identify verification is vital.

We have come across many solutions which promise the earth but either don't quite deliver or claim to offer untold levels of integration which never seems to be as good as advertised.

This changed when we saw **Credas** in operation as they genuinely deliver on both fronts. **Credas**, are a leading identity verification solution and provide us with the tools to provide a complete integration with Visualfiles.

You can now perform thorough and reliable checks on individuals. **Credas** leverages a wide range of identity documents, including passports, driving licences, and biometric data, to verify the authenticity of identities swiftly and accurately.

A typical process would be

- Initiate an ID check within Visualfiles within one click or an automated process.
- The prospective client would receive a branded invitation to perform an identify check.
- They would take a selfie and scan their passport to check the biometric information to confirm their identity. Other checks can be performed such as credit checks, HALO, and PEPs all within the same process.
- Results are automatically brought back into your system meaning you can get on with dealing with your clients' needs knowing a big regulatory hurdle has been easily dealt with.

Get in touch to see the integration working and join our friends at **Credas** who will demonstrate the client journey. (This has to be seen to be believed)

Robot Monitoring Software

If you use Visualfiles, chances are you will use robots to automate tasks such as to automate tasks such as document generation, email communication, the possibilities are endless.

Whilst robots are fantastic, they sometimes need a little TLC.

Rubix has produced a simple tool which can be configured to monitor your robots.

Our Software will

· Monitor 1 or more Robots.
· Set the frequency of automatic monitoring i.e., every 15 minutes.
· Set the times you want to monitor, i.e., every weekday from 9am to 5pm
· Set email address(s) where the software will advise you of alerts and status updates.

Once configured, simply leave the software to run, put your feet up (if time allows) and Rubix Robot Monitor will keep your robots purring along nicely and notify you in case they need a little attention.

As we are nice people if any Visualfiles customers would like the software, we will provide it for Free/Gratis/Zlilch, no small print or trial periods just get in touch.

Simply drop us an email at info@rubixsoftware.co.uk, let us know who you are and the best way to contact you and we can organise the install of the software. As our meerkat friends would say…………. simples

FREE

Next Month

- **Rubix Online - our complete dynamic web portal**
- **SQL Reports -Advice for VF Users with practical help and tips for getting most from your system including Accounts Date**
- **Rubix E-Filer - Automatic E-Mail filing with intelligence built in**

RUBIX SOFTWARE

www.rubixsoftware.co.uk

For all enquires contact us at info@rubixsoftware.co.uk

Increase productivity

Reduce expenses

Improve Service

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