How to Integrate Your Ruby & Lexicata Accounts

Lexicata's all-in-one CRM and client intake solution for lawyers combined with Ruby's 100% live answering ensures you never miss an opportunity due to a missed call.

HOW TO BEGIN SETUP

Linking your Ruby and Lexicata accounts is a two-step process. Step one is to generate an authorization token from Lexicata. To do this, log-in to your Lexicata account and click on "Settings" (the gear icon) in the top right side of the screen.

GENERATE AUTHORIZATION TOKEN

Under the "Manage Settings" menu, click on "Integrations." You will see a list of available integrations, including Ruby Receptionists. Click on the Ruby logo to be taken to the token screen. Click "Generate Token" and your authorization token will appear. This is the code you will need to enter into Ruby's Member Services site.
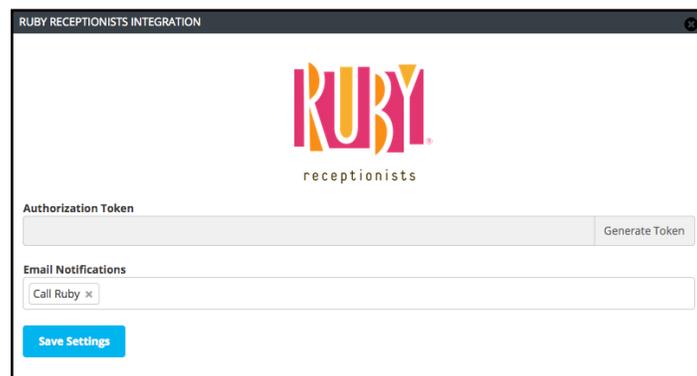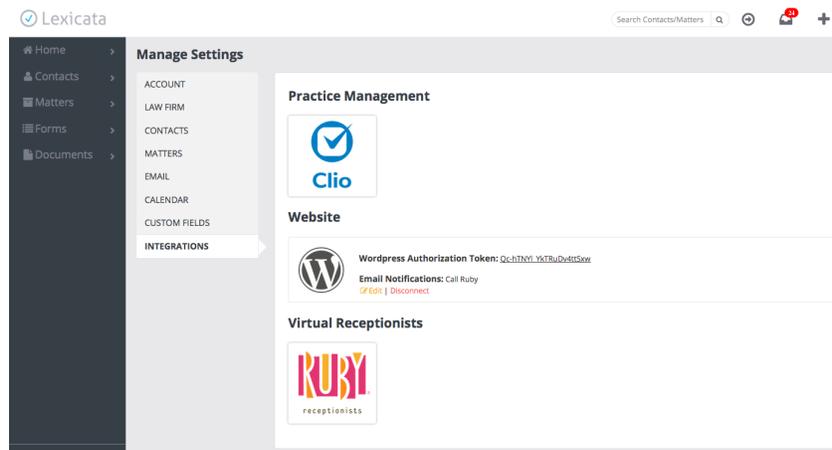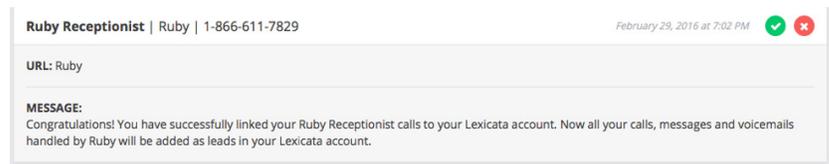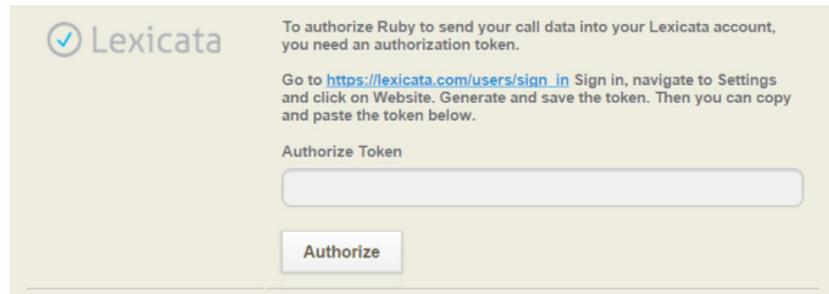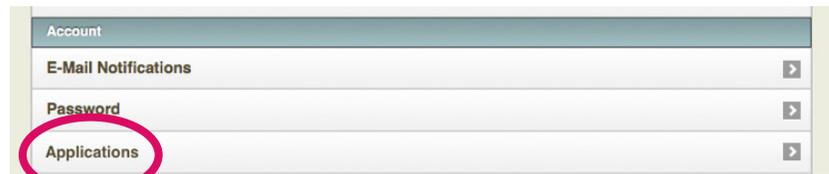
ADD TOKEN TO RUBY ACCOUNT

To add the token to your Ruby account, go to callruby.com and log into the Member Services area in the top right corner. From the Member Services menu, select "Applications", which is under the Account section.
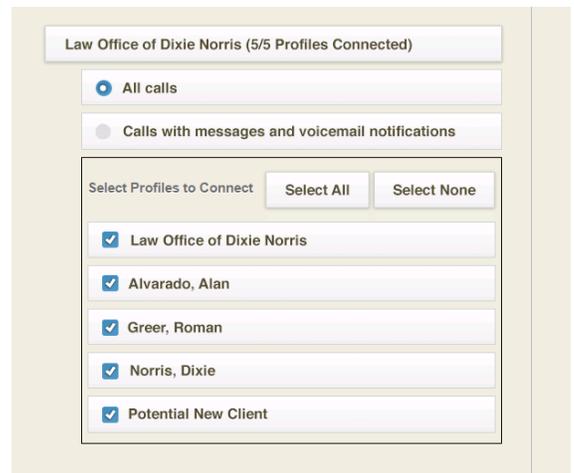
On the Applications page, you will see a section for Lexicata where you can enter in your Authorization Token to authorize the integration between Ruby and Lexicata.

Once authorized and connected, you will see your first message from Ruby in your Lexicata inbox, confirming you have successfully linked your Ruby and Lexicata accounts.

Account	
E-Mail Notifications	▶
Password	▶
Applications	▶

☑ Lexicata

To authorize Ruby to send your call data into your Lexicata account, you need an authorization token.

Go to https://lexicata.com/users/sign_in Sign in, navigate to Settings and click on Website. Generate and save the token. Then you can copy and paste the token below.

Authorize Token

[ ]

[Authorize]

Ruby Receptionist | Ruby | 1-866-611-7829   *February 29, 2016 at 7:02 PM* ✅ ❌

URL: Ruby

MESSAGE:
Congratulations! You have successfully linked your Ruby Receptionist calls to your Lexicata account. Now all your calls, messages and voicemails handled by Ruby will be added as leads in your Lexicata account.


SELECT WHICH RUBY PROFILE DATA TO SEND

Within your Ruby account, you can select which contacts and/or call profiles from that directory you'd like connected with your Lexicata account. For example, if you have a specific profile set up within Ruby for potential new clients, you can choose to send just that profile into your Lexicata account.

Law Office of Dixie Norris (5/5 Profiles Connected)
◉ All calls
○ Calls with messages and voicemail notifications

Select Profiles to Connect	Select All	Select None

☑ Law Office of Dixie Norris
☑ Alvarado, Alan
☑ Greer, Roman
☑ Norris, Dixie
☑ Potential New Client

YOUR LEXICATA INBOX

Once authorized and connected, Ruby will automatically send all call data into your Lexicata inbox.

Search Contacts/Matters 🔍 ➡ 📬 11 ➕ ⚙ Hello,

➜ When a new call handled by Ruby comes into Lexicata, you will get a notification on your inbox.

➜ Each new call from Ruby will show as an item in your inbox, with the name of the caller (if available), and their phone number at the top of the message.

Portland OR | | (503) 555-5555   *March 10, 2016 at 3:52 PM* ✅ ❌

URL: A call handled by Ruby Receptionists

MESSAGE:
---------- Call Information ---------- From Caller Id: Portland OR From Caller Number: (503)555-5555 Date: 3/10/2016 3:13:47 PM Total Call Duration: 00:02:00 Receptionist Duration: 00:02:00

➜ The source URL will display as "A call handled by Ruby Receptionists" number at the top of the message.
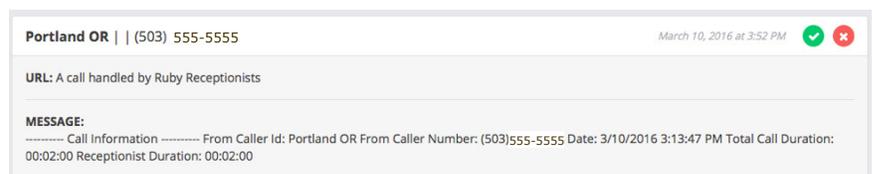
UNDERSTANDING RUBY MESSAGES

At the top of a message you will see the callers name and phone number. If you've set up your Ruby account so that receptionists gather caller's email and how they heard about your business, these gather fields will populate in the Lexicata fields for email and source respectively. The message area will display additional call data including the caller ID, the duration of the call, and the time the receptionist spent on the call. Lastly, any actions resulting from the call, such as the receptionist taking a message or the caller being sent to voicemail, are included at the end of the inbox message.

Inbox

Lil Debbie | widdle@babytalk.sp | 383820437865   *September 14, 2016 at 7:37 PM*

Source: Avvo

MESSAGE:
---------- Call Information ---------- From Caller Id: Portland OR From Caller Number: (503) 9   Date: 9/14/2016 10:31:25 PM Total Call Duration: 00:01:00 Receptionist Duration: 00:01:00 ---------- Call Message ---------- From Name: Lil Debbie From Number: From Company: Regarding: Animal crackers in my soup Email: widdle@babytalk.sp How heard?: Avvo Actions: Sent To Voicemail To: Paris, Genyva Genyva's Test Account Date: 09/14/2016 10:32 PM Caller ID: Portland OR (503)   Ruby Receptionist: Genyva Paris

ADD CALLER AS CONTACT

From each message, you can easily add the caller as a contact. Simply click the green checkmark icon and select "Add Contact." The form will prepopulate with the caller's name and number. The message will display in the Note Body area of the form.

From there it's easy to select the lead status and add or edit the source to create your new contact. If you've asked Ruby to collect an email or how heard from your caller, this information will display in the corresponding Lexicata form fields.

USING THE QUICK INTAKE FORM

As with contacts, you can easily add callers as leads using Lexicata's Quick Intake form.

When using the Quick Intake form, you will have the opportunity to add additional information, such as matter type and estimate value. Again, some of this information may be in the message from your Ruby Receptionist. Simply scroll the Note Body field to the message section and you can find all the details your Ruby Receptionist captured for you about this new opportunity.