



How to integrate your Ruby & Rocket Matter accounts

Automatically have your Ruby call data, messages, and voicemail sent to your Rocket Matter account, making it easy to associate client communication with specific cases and matters. You'll save time and get more done with all your clients' details in one place!

HOW TO BEGIN SETUP

It's simple to set up through Ruby Receptionists customer login website. From your home page, click on "Integrations" under the Accounts section.



AUTHORIZE THE CONNECTION

On the Applications page, you can authorize Ruby to send your messages into your Rocket Matter account. To do this, simply click the "Authorize" button and you will be redirected to Rocket Matter to enter your Rocket Matter username and password to complete the authorization. Once authorized, you will be redirected back to the Ruby site.



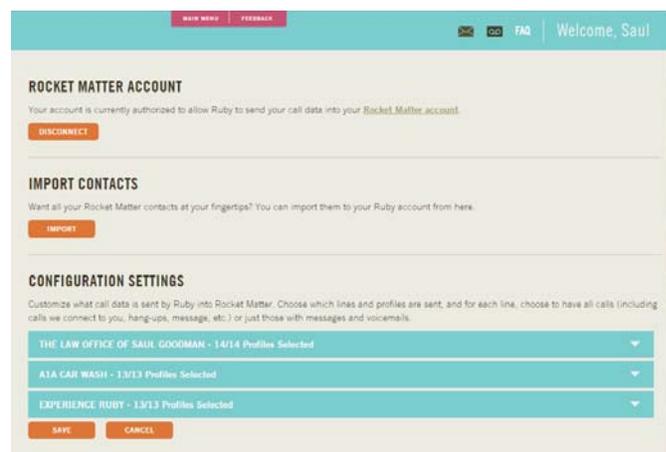
CHANGE YOUR DATA SYNC OPTIONS

When you authorize the connection, all Ruby's call data will be synced with Rocket Matter by default. If you'd rather have only calls with messages and voicemails sent to Rocket Matter, return to the Integrations section of your customer login website and under the Configuration Settings select "Calls with message and voicemail notifications."

IMPORT YOUR ROCKET MATTER CONTACTS

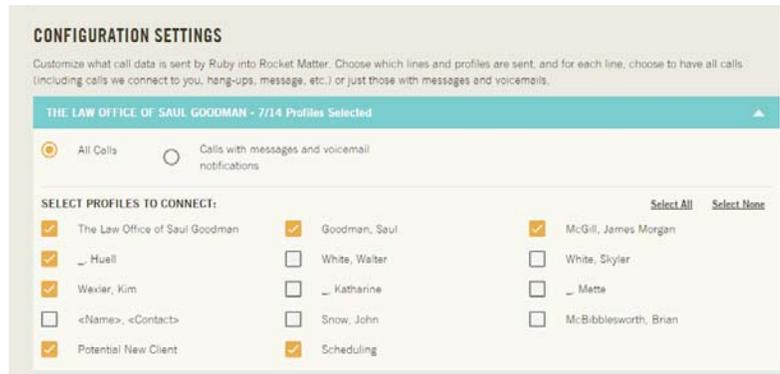
If you select "Import Contacts," our system will collect all of your Rocket Matter people contacts with a phone number and add them to the your Ruby Contacts. This ensures our receptionists have the most accurate caller details. Once imported, these contacts live in Ruby contacts and you can manage them for Ruby through the mobile app.

- ➔ You can import contacts from Rocket Matter as many times as you like! Ruby's system recognize duplicates and will only add the new contacts, or update existing contacts.
- ➔ You can see the last time you imported your contacts below the "Import Contacts" button.



SELECT WHICH RUBY ACCOUNT DATA TO SEND

If you have multiple company accounts with Ruby, you have the option to select which of your Ruby accounts you would like integrated with Rocket Matter. Within that account, you also select what contacts from that directory you'd like connected with your Rocket Matter account. In order to send contact details into Rocket Matter the user must exist in Rocket Matter.



YOUR ROCKET MATTER COMMUNICATION LOG

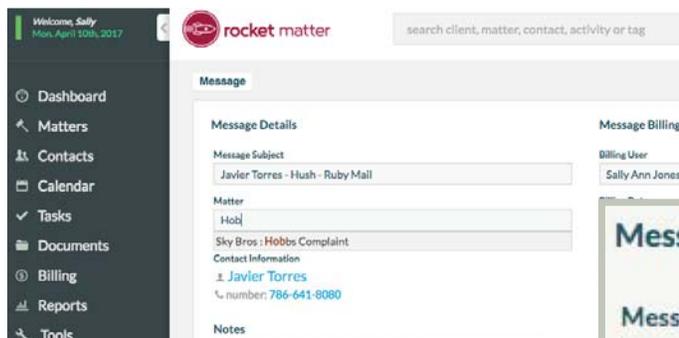
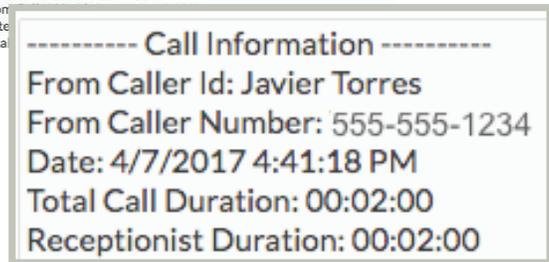
Once authorized and connected, Ruby will automatically send messages and voicemail notifications (or all calls depending on your preference) to your Rocket Matter account.

Notifications will be in the messages section of your Rocket Matter account. You can recognize Ruby messages as they will have the same subject as the familiar emails you currently receive from Ruby.



VIEW CALL DETAILS

Within the messages view, you can open the message to display all the call details, including the total call duration, which shows how much time you spent with a caller after we connected the call to you, making it easy to bill for that time. You can view this information in the notes section of the message and in the billing description.



ADD INFORMATION TO RUBY MESSAGES

From the message detail view, you can easily assign a matter, update the billing notes, or forward to another user in Rocket Matter.

