Law Ruler
by ProfitSolv

Buyer's Guide on
Integrations
with Legal CRM

Your legal client relationship management (CRM) platform plays a vital role in scaling your practice's client base and services, but it's not the only software you'll use in your law firm operations.

A whole host of other legal technologies out there can help you provide better client experiences, more effective legal guidance, and run a more profitable practice. Integrations can support your law firm in areas like:

- Productivity
- Billing
- Communications
- Marketing

As you cultivate your firm's tech stack, you want all the software in your roster to fully integrate with your CRM—otherwise, you risk duplicating efforts and wasting resources. If you're looking to improve in any of the above areas, check out these **effective integrations**.

Productivity

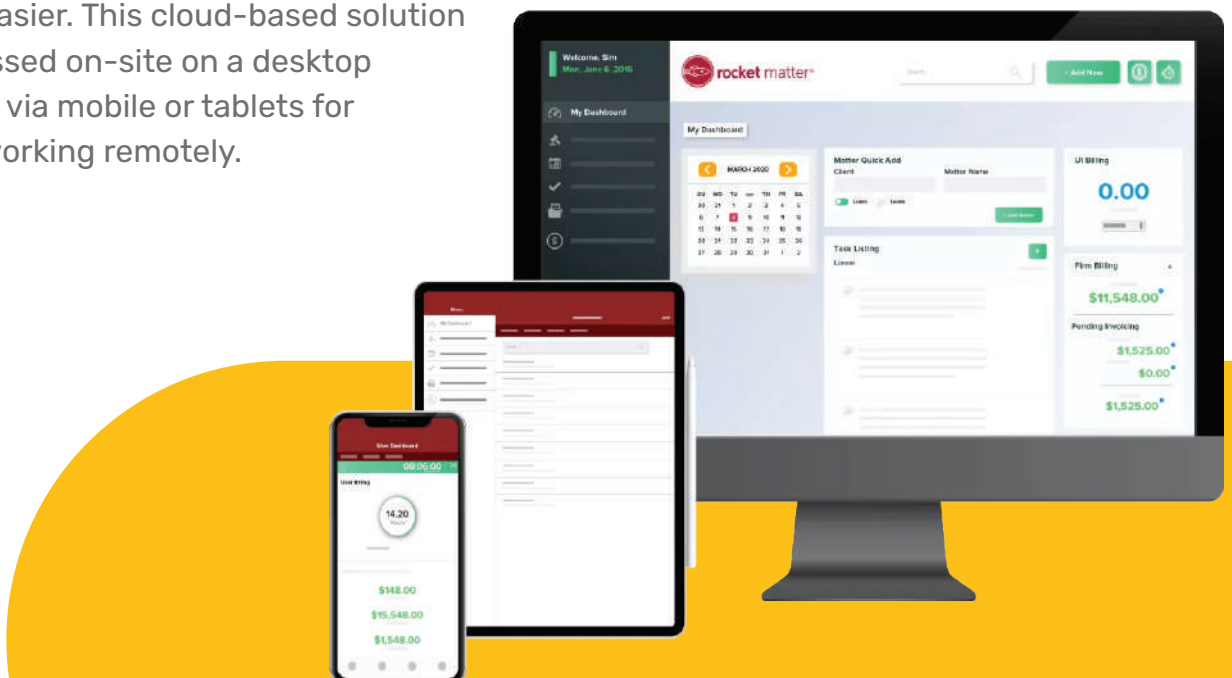When your attorneys and legal staff can work productively throughout the day, they can:

- Accomplish their work goals more easily
- Reduce stress and improve work/life balance
- Collaborate more effectively with colleagues and clients

On the other hand, your firm can make the most of your firm's resources. Legal practice management software offers helpful tools to streamline workflows, so finding one that complements your CRM is important.

Rocket Matter

Rocket Matter's legal practice management software is designed to make the lives of lawyers a whole lot easier. This cloud-based solution can be accessed on-site on a desktop computer, or via mobile or tablets for employees working remotely.
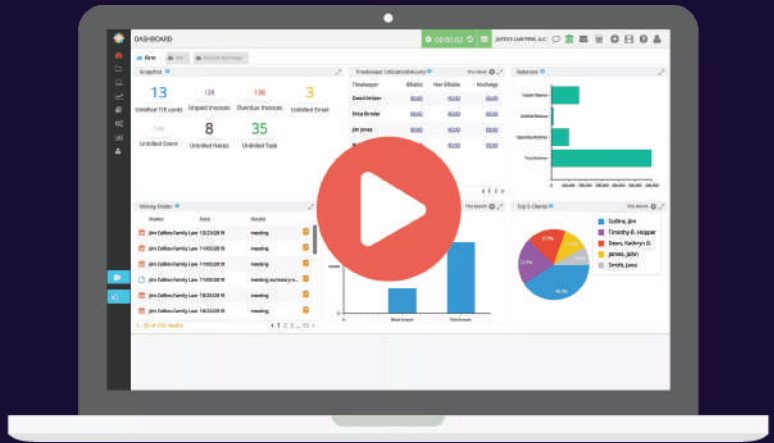
Law Ruler + Rocket Matter

When you integrate with Law Ruler, Rocket Matter immediately puts all of the information collected from your clients immediately to work.

- Law Ruler's intake form data field maps and syncs directly to custom fields in Rocket matter. All intake communication is visible so everyone can easily see client history and status.

- **Document automation tools** help you create legal documents in seconds. The document creator identifies merge fields and notifies you of errors, so the final document is perfect.

- Any documentation shared during the intake process, such as evidence, is ported into Rocket Matter, so you have complete records of client matters.

Rocket Matter offers robust **legal project management solutions** as well. You can even create matters in Rocket Matter from within Law Ruler. Once you have the lead ready to convert to a matter, all you have to do is press the "Send to Rocket Matter" button from the action menu.

CosmoLex

Another legal practice management software, [CosmoLex](#) offers free built-in credit card processing with no monthly fee, built-in trust accounting, free data migration assistance, and more.

One of the biggest headaches within a law firm is having to input the same data twice. This can eat up your billable hours, but CosmoLex lets you save time by merging information from custom fields set up in your CRM.

After you've retained your lead as a client, you can click "convert to a matter," and the following information is sent to CosmoLex:

- Productivity
- Billing
- Communications
- Marketing

CosmoLex also checks duplicate contacts when the information syncs—if one already exists, it prevents double entry. If one doesn't, you have the option to create a new contact within CosmoLex's practice management software.

Time and billing

Time and billing can be tedious tasks. With so many options for invoicing a client, it can be a headache to efficiently bill and track time. However, implementing a time and billing integration can streamline the process.
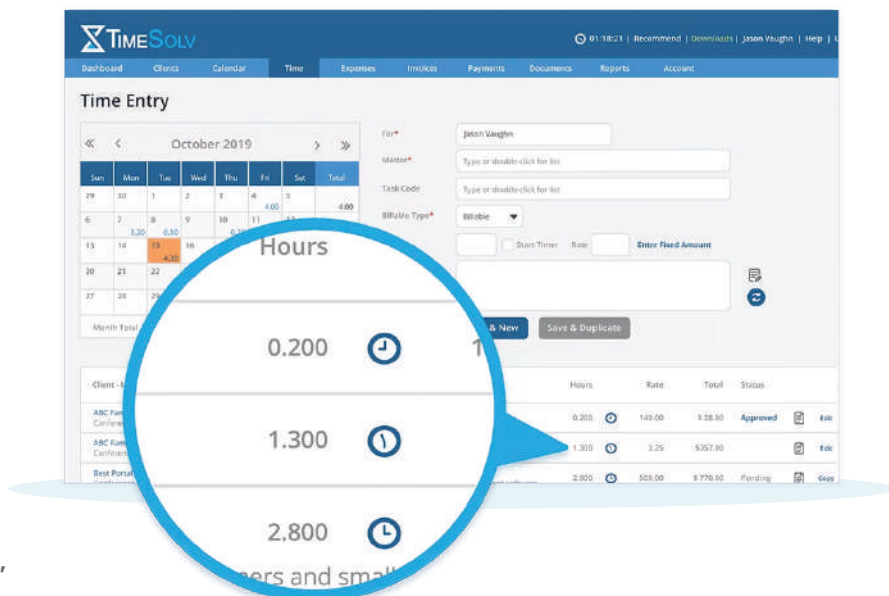
TimeSolv

Timesolv is a web-based billing solution for attorneys that's ranked #1 in usability. If you struggle with clients not paying their invoices, tracking or expenses taking too long, creating a budget, and customizing invoices, TimeSolv can help you establish more effective, profitable processes.

When you use TimeSolv's mobile app, you can track time and expenses no matter where you're located. Switch effortlessly between PC and Mac, or your iPhone and computer. You can run multiple timers, and starting one timer automatically pauses another.

Flexible billing templates allow your firm to get invoices out faster. Clients can pay online, so you get paid faster, and TimeSolv implements LEDES billing and automatic tax calculations to ensure there are no errors in your bills.

Communication

Communication is key in any business, and law firms are no different. To make the most of your legal CRM, integrate with these powerful communication tools.

Smith.Ai

If you find picking up the phone distracts from your billable hours and tasks, then **Smith.ai's friendly virtual receptionists** may be the answer. A quick pick-up allows you to secure clients. **78% of consumers** purchase from the first company that responds to them.

By answering every call on the first ring, Smith.ai helps you funnel more clients to your firm.

You can set your preferences to create (from Law Ruler's softphone):

- Chat descriptions
- Call summaries
- Contact information
- Call recordings

Smith.ai also understands how urgent calls need to be answered immediately. Every call is marked by type and level of urgency and then ranked within Law Ruler. This makes it easy for any employee to reach out to the most important leads first.

With your client intake calls handled by Smith.ai, it leaves you more time in your day to focus on billable tasks and increase cash flow.

When you use Smith.ai with Law Ruler, you never miss an important piece of data on a client either. Each interaction by Smith.ai is automatically logged in Law Ruler.

Calendaring and email integrations

Every firm has a different preference regarding calendars and email, so your legal CRM should offer a wide range of integrations with common email and calendaring platforms like:

- Google/Gmail
- Office 365
- Exchange
- Outlook
- Apple Mail
- Yahoo!

Marketing

Strategic marketing is key to bringing in your ideal clients, but for your marketing to be effective, you need to deploy the right tools. In particular, you should implement software that helps you track and analyze your marketing efforts.

Law Ruler offers powerful marketing automation tools, and when combined with the right integrations, it becomes even more effective. Consider the following:

CallRail

CallRail allows marketing teams to better track their digital marketing efforts through tracking leads in chat, forms, and calls. CallRail's straightforward analytics enables firms to optimize their marketing campaigns and make informed decisions about targeting leads and directing marketing spend.

Mailgun

If you're tired of your firm's email communications falling into spam folders, you can solve the problem by integrating with **Mailgun**, a third-party cloud email provider.

Mailgun protects your sender reputation through a series of authentication protocols. This prevents spammers from pretending to be you and damaging client relationships. Plus, the more you authenticate your email, the more likely you appear in someone's inbox rather than their spam email.

Check out Mailgun's other helpful features, like send-time optimization, email routing, and email analytics.

Simplify your client intake with

⚖ Law Ruler
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Every one of these useful software integrates with **Law Ruler**, a robust CRM made with lawyers in mind. With Law Ruler, you can:

- Organize your leads, prospects, and existing clients
- Automate tasks for critical communication
- Streamline your process

Plus, marketing automation features send personalized texts and emails, giving potential clients a positive first impression. When clients feel heard, they're more likely to consider working with your firm.

Ensure you never miss a lead again and **schedule a demo** with Law Ruler today.