

CRM INTEGRATION FOR MICROSOFT TEAMS™

Go Connect Mari is a CRM integration solution for the Microsoft Teams Phone. It provides integration to contact-orientated business systems and CRM applications, offering a standard set of integration features with over 200 popular cross-vertical and vertical-specific applications.

This provides significant productivity gains, for example, know who is calling and quickly get their details on the screen or simply click on their contact number to automatically make your handset dial the number.

CRM integration features included with Mari:



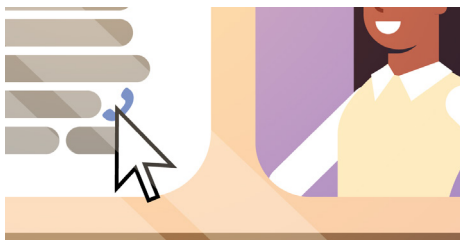
Contact Searching



Contact Popping



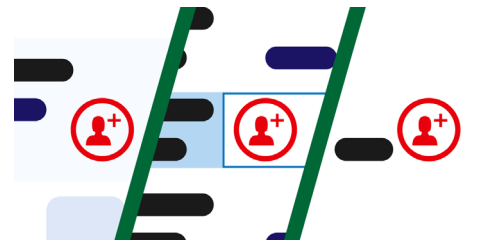
Caller Preview



Click-to-dial



Activity Logging*



Add Contact / Account

STANDARD INTEGRATIONS

CRM Viewer
<https://integrations.goconnectmari.com/>

70+ CRM integrations and business system applications are classified as STANDARD for Go Connect Mari. Integration features will vary by CRM. Use our [CRM Viewer](#) to see a full list of integrations and check the features supported.

STANDARD integrations available (for PC version) "out-of-the-box" include:

- 4me
- Accelerate
- Access Microsoft
- Access Profile
- ACT!
- Autotask PSA
- Bitrix24
- Call Connect GP (Patient Connect)
- Carerix
- clio
- ConnectWise Manage
- Dezrez
- Dynamics 365 Customer Engagement
- Dynamics CRM
- efficy
- eGroupware
- Exact Online
- FasterForward
- Flexkids
- FuseMetrix
- Goldmine
- Google Contacts
- HaloITSM
- HaloPSA
- Halo Service Desk
- HubSpot
- IBM Notes
- in2crm
- JobDiva
- Keap Max Classic
- LDAP
- Logical Office
- Maximizer
- MobileMax
- NetSuite
- ODBC
- Odoo
- Outlook
- PCHomes
- PerfectView Online CRM
- Quickbooks Online
- Really Simple Systems
- RecruitNow
- Redtail CRM
- Rezi
- Ridder IQ
- RPM
- Sage 50c
- Sage 200 with Sage CRM module
- Sage CRM 2018 R3
- Saleslogix
- Salesforce
- Salesforce Service Cloud
- Salos AutomaaT GO
- Simpicate
- SIS
- Sugar CRM
- Teamleader
- TechMan
- tel.search.ch
- Thinkka SAM
- TITAN
- vtiger CRM
- webCRM
- WebSolve
- WinSIMS
- Workbooks
- Yoobi
- Zendesk
- Zoho Bigin
- Zoho Creator
- Zoho CRM
- Zoho Recruit

CONTACT SEARCHING

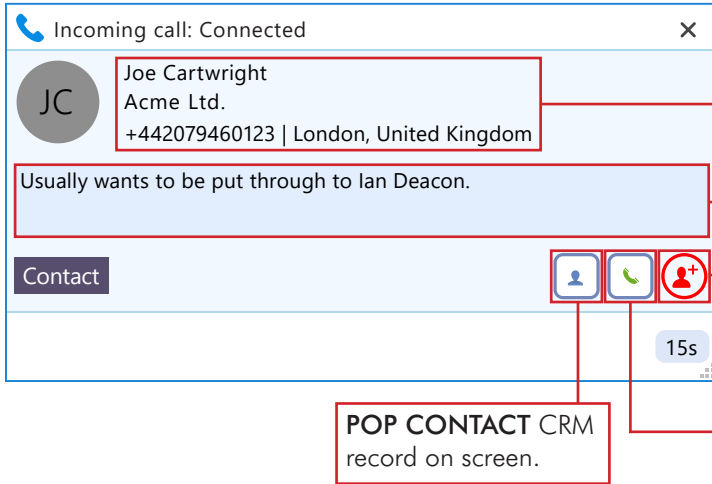
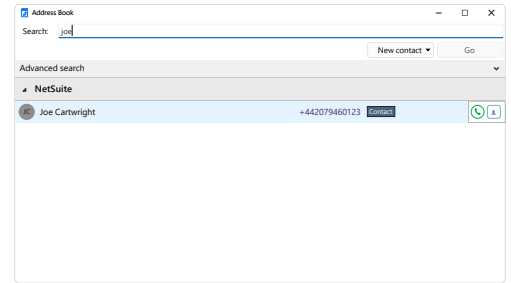
Concurrently searches integrated CRMs and enables Contact Popping or Click-to-dial from the results.

CLICK-TO-DIAL

Makes it possible to dial directly from the CRM.

CALLER PREVIEW

For both inbound and outbound calls, if a match for the caller is located in any integrated directories, the caller's summary details are displayed on screen allowing users to see who is calling them before they answer the call.



CALLER DETAILS are pulled from your CRM where available; caller's geographical data shown when not.

NOTES are also taken from the caller's contact record when found.

ADD NEW CONTACT records to your integrated CRMs or copy the data from one integrated CRM to a new contact record in another.

POP CONTACT CRM record on screen.

ADD CALL LOG records to your integrated CRM as required or have them added automatically at the end of each call.

ADD CONTACT / ACCOUNT

Add a new record to the CRM directly from the client Caller Preview Window or Call History page.

CONTACT POPPING

Manually or automatically "pop" a customer record when a match is found for an active call.

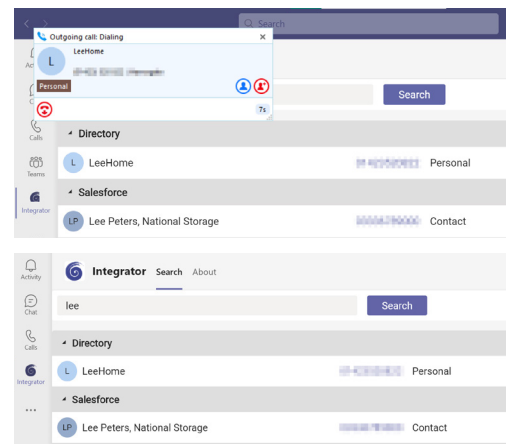
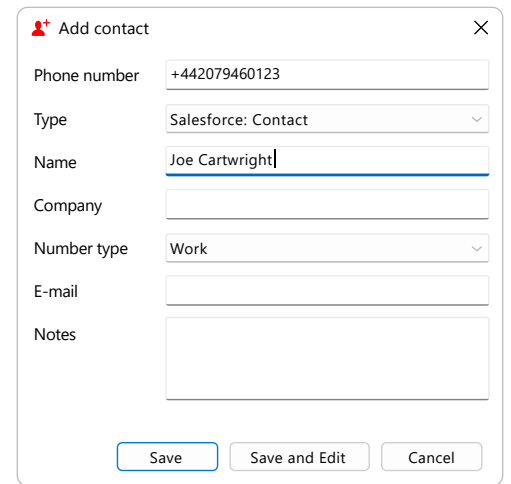
ACTIVITY LOGGING

Manually or automatically create an activity record of a call received within the CRM and easily add further notes.

SEARCH AND CALL FOR MICROSOFT TEAMS

Search and Call is a companion application that can be added to Microsoft Teams. It connects to Go Connect Mari and enables users access to key Mari features from within Microsoft Teams. Users of Search and Call can:

- Perform a search of contacts and display results in Microsoft Teams.
- Pop identified contact records
- Make a call through Mari from Microsoft Teams



To view our product overview video, please visit: <https://vimeo.com/823646147>

To learn more, visit us at <https://goconnectmari.com/> or speak to your Service Provider.



Leaders in
Computer Telephony
& CRM Integration