



# CRM Integration for **Microsoft Teams™**



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## Intro

Go Connect Mari is a CRM Integration solution for Microsoft Teams. 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.

Akixi offers Go Connect Mari as a value-added service exclusively for service providers wishing to enhance their Microsoft Teams PSTN Calling portfolio. By integrating Akixi's product into their offerings, service providers can differentiate themselves in the market, attract more customers, improve customer retention, and increase revenue streams.

# Product Overview

**Go Connect Mari** is a CRM Integration solution, designed to work with Microsoft Teams. It provides a core set of features that provide business customers with significant productivity gains. For example, with Go Connect Mari, call agents can know who is calling and quickly get the caller's details on screen, or simply click on their contact number

to automatically dial the number.

Go Connect Mari provides integration with **over 200** popular cross-vertical and vertical-specific contact-orientated business systems and CRM applications, bringing service response gains to business customers.

Go Connect Mari is focused on ensuring simplified operational processes, enabling service provider differentiation, and delivering an enhanced end-user experience to accelerate and maximize adoption. Go Connect Mari provides:



**Quick and simple customer onboarding**



**80+ "out-of-the-box" standard CRM integrations**



**An intuitive user-experience and interface**

## Features

### CRM Integration

- **Caller Preview** - Preview who is calling before the call is answered, and view additional caller details, including notes, all from the unobtrusive Caller Preview window.
- **Contact Searching** - Search the contact directories of multiple integrated CRM(s) simultaneously, and call or pop a contact from the results
- **Click-to-Dial** - With a single click, dial a contact's phone number from within your integrated CRM
- **Contact Popping** - Pop the caller's contact record within the integrated CRM automatically on incoming call, or manually via a single click
- **Add Contact / Account** - Add new contacts to the integrated CRM from multiple locations such as the live call Preview window, Call history and Missed calls pop up
- **Activity Logging** - Manually or automatically create an activity record of a call received within the integrated CRM and allows addition of notes
- **Related Data** - Quickly locate and view additional data related to the contact, including tickets, cases, activity records and emails.

Supported features may vary depending on the integration

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

# Helping partners become verticalization specialists

Go Connect Mari helps service providers target specific verticals, helping them to establish their value as a specialist. Go Connect Mari helps companies grow their business, one vertical at a time. Verticals include:

Healthcare	Automotive	Financial	Legal
<ul style="list-style-type: none"> <li>• athenahealth</li> <li>• Birdie</li> <li>• Cliniko</li> <li>• EMIS Web</li> <li>• Medicom</li> <li>• opticabase</li> <li>• Practice Hub</li> <li>• TPP systmone</li> </ul>	<ul style="list-style-type: none"> <li>• DealerSocket</li> <li>• Motiondata DMS</li> <li>• Soft4Leasing</li> <li>• RoadComm</li> <li>• Techman</li> <li>• Tekmetric</li> <li>• Websolve</li> </ul>	<ul style="list-style-type: none"> <li>• Admin Consult</li> <li>• Afas Online</li> <li>• AuditCase</li> <li>• CCH Central</li> <li>• Exact Online</li> <li>• FreeAgent</li> <li>• Practice Manager</li> <li>• Quickbooks</li> </ul>	<ul style="list-style-type: none"> <li>• Advice Pro</li> <li>• ALB</li> <li>• Clio</li> <li>• File Vine</li> <li>• Practice Case Management</li> <li>• PracticePanther</li> </ul>

## Standard “out-of-the-box” integrations include:

- |                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                    |
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| <ul style="list-style-type: none"> <li>• 4me</li> <li>• Accelerate</li> <li>• Access Microsoft</li> <li>• Access Profile</li> <li>• ACT!</li> <li>• Autotask PSA</li> <li>• Call Connect GP</li> <li>• Carerix</li> <li>• ConnectWise Manage (Patient Connect)</li> <li>• DATEV</li> <li>• Dezrez</li> <li>• Dynamics 365 Customer Engagement</li> <li>• Dynamics CRM</li> <li>• eGroupware</li> <li>• Envoy Taxi DispatchSystem</li> </ul> | <ul style="list-style-type: none"> <li>• Exact Online</li> <li>• Flexkids</li> <li>• Goldmine</li> <li>• Google Contacts</li> <li>• HaloITSM</li> <li>• HaloPSA</li> <li>• Halo Service Desk</li> <li>• HubSpot</li> <li>• IBM Notes</li> <li>• in2crm</li> <li>• intelli-CTi</li> <li>• JobDiva</li> <li>• Keap Max Classic</li> <li>• LDAP</li> <li>• Logical Office</li> <li>• Maximizer</li> <li>• MobileMax</li> </ul> | <ul style="list-style-type: none"> <li>• NetSuite</li> <li>• ODBC</li> <li>• OnContact CRM</li> <li>• Outlook</li> <li>• PCHomes</li> <li>• PerfectView Online CRM</li> <li>• PVC CRM</li> <li>• Really Simple Systems</li> <li>• Rezi</li> <li>• RobinHQ</li> <li>• RPM</li> <li>• Sage 50c</li> <li>• Saleslogix</li> <li>• Salesforce</li> <li>• Salesforce Service Cloud</li> <li>• Salos AutomaaT GO</li> <li>• SimPLICATE</li> </ul> | <ul style="list-style-type: none"> <li>• SIS</li> <li>• Sugar CRM</li> <li>• SuperOffice</li> <li>• Teamleader</li> <li>• TechMan</li> <li>• tel.search.ch</li> <li>• TITAN</li> <li>• vtiger CRM</li> <li>• webCRM</li> <li>• WebSolve</li> <li>• WinSIMS</li> <li>• Workbooks</li> <li>• Yoobi</li> <li>• Zendesk</li> <li>• Zoho CRM</li> </ul> |
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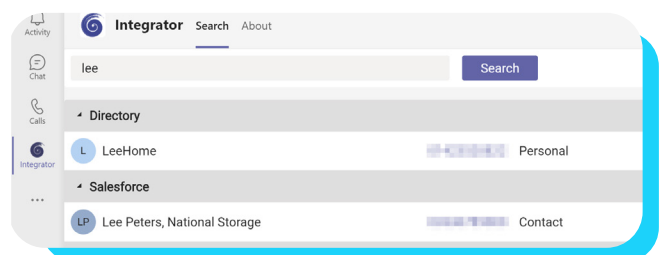
**CRM Viewer**

<https://integrations.goconnectmari.com>

## 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:

- Simultaneously search multiple address books and contact lists from inside Teams
- Click to Call from the retrieved contact list
- Click to open the contact record directly within the CRM



## Licensing

There is one license level available with Go Connect Mari.

The subscription model is per user/per month, and users are licensed via the Akixi licensing portal.

## Onboarding

Akixi partners enjoy a seamless onboarding experience with a dedicated team. Akixi will expertly train you in marketing, quoting, selling, and supporting our products, facilitating smooth integration into your operational systems. After setup, manage user subscriptions effortlessly. Akixi simplifies billing, charging partners a month in advance for active subscriptions at the month's start. It's that straightforward!

## Availability & Security

Akixi is ISO 27001 accredited.

## Support

Akixi provides partners with access to a wealth of product support materials and assets, such as brandable marketing collateral, video tutorials, product manuals, release documents as well as direct access to our product experts on the support team.

## Book a Demo

To learn more about our capability, [click here to book a demo](#)

## Get in touch

You can find out more at [www.akixi.com](http://www.akixi.com)

or contact our team who will be happy to help:

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