

CATALOGUE 2026

CompanyMesh

Catalogue of CRM, ERP & automation modules

devlooper

DESIGN & SUPPORT

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Foundation

`core.platform` Secure, customisable foundation

Let's build your tool

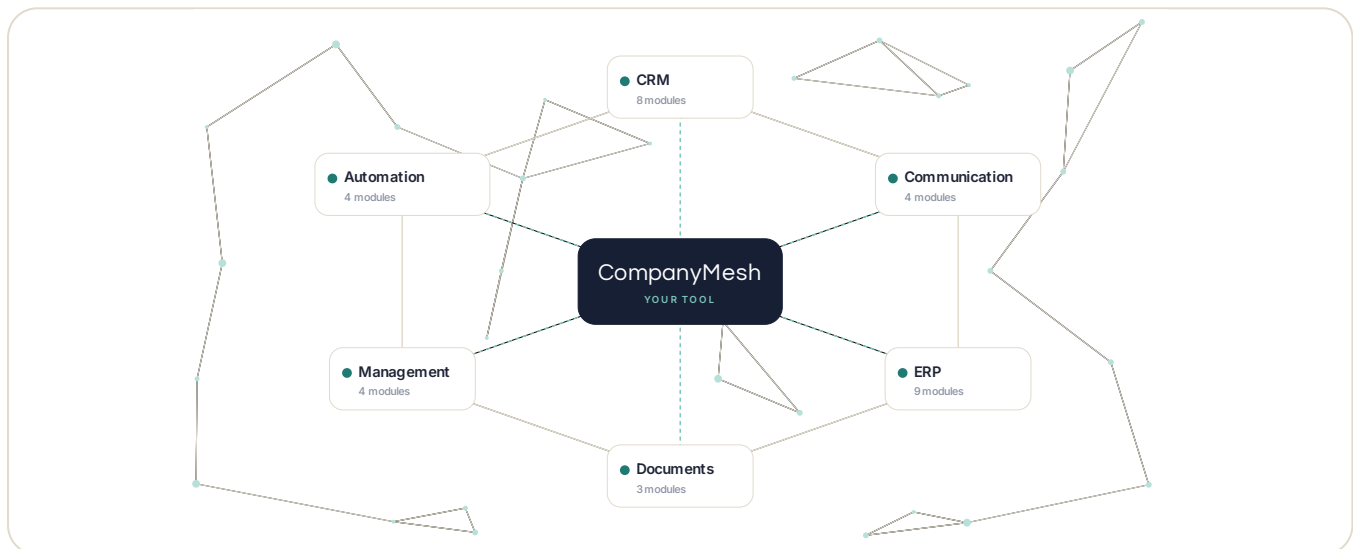
What you can count on

Your business software, built around you

Businesses pile up software: a CRM for sales, a spreadsheet for prices, an app for invoicing, another one for documents... Every tool has its own logic, its duplicate data entry and its blind spots.

CompanyMesh takes the opposite approach. It is a modular business management suite (CRM, ERP, documents, communication, automation) designed and run by **Devlooper**. You choose the modules you need. We connect them to each other, to your existing tools and to your data, to form **one consistent tool: yours**.

Our belief: good software fades into the background. It fits the way you work, speaks your language and saves you time every day. Your teams work more efficiently, with less stress, and actually enjoy using it.



Three principles

Modular

The modules you need, nothing more, nothing less. Add the others when you need them.

Connected

Your data flows from one module to the next and into your existing tools, with no re-keying.

Tailored

The tool adapts to your business, your teams and every user, not the other way round.

CRM, ERP, Documents: what are we talking about?

This catalogue is organised into **building blocks** (broad areas), each made up of **modules** (consistent sets of features). Here are the key concepts.

The building blocks

CRM — Customer relations

A CRM (*Customer Relationship Management*) brings together everything about your customers and prospects: contacts, opportunities, quotes, appointments, marketing, client portal.

Communication

Email, telephony, team messaging and video calls, linked to your files.

ERP — Operations & finance

An ERP (*Enterprise Resource Planning*) runs your operations: invoicing, payments, banking, accounting, catalogue, stock, purchasing and logistics.

Documents

A DMS (*Document Management System*) files, shares, protects and gets your documents signed, right next to your customer files.

Management & productivity

Projects, dashboards, internal feedback and statistics.

Automation & integrations

Automatic rules, connectors, APIs, artificial intelligence and a website connected to the tool.

Foundation

Security, access rights and personalisation, included in every project.

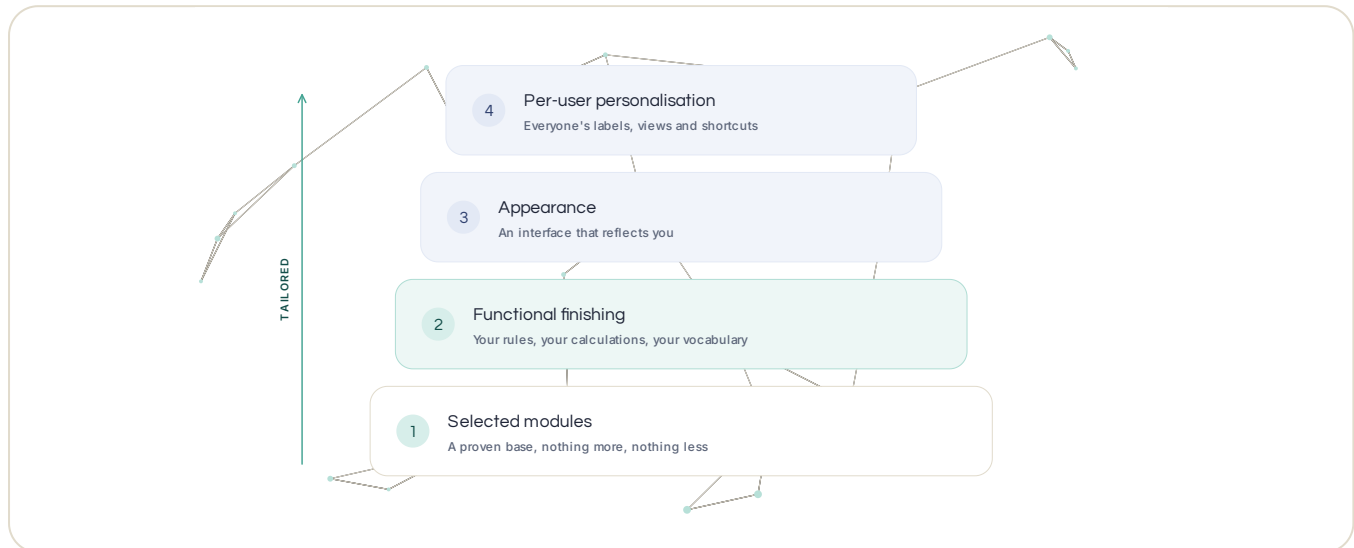
How to read a module sheet

Each module describes the need it addresses, what you gain, its illustrated features, the **available integrations** with market tools and the modules it works with.

The illustrations are **previews**: they show the spirit of the tool, not a fixed screen. Your version will use your vocabulary, your stages and the look you prefer.

Ready-made modules, a tailored result

We don't sell off-the-shelf software for you to configure alone. We start from a proven base of modules, then shape it with you, layer by layer.



The layers of tailoring

Anything is possible, right down to a touch of **gamification** to motivate your teams when it makes sense.

1 Choosing the modules

Together, we pick the modules that serve your business. A need isn't in the catalogue yet? We build it: it becomes a feature, a new module or dedicated development, whichever serves your project best.

2 Functional finishing

We connect the modules to each other and to your business rules: your stages, your calculations, your documents, your legal obligations and your vocabulary. Your sales team says "proposal", not "quote"? The tool says "proposal".

3 Look and feel

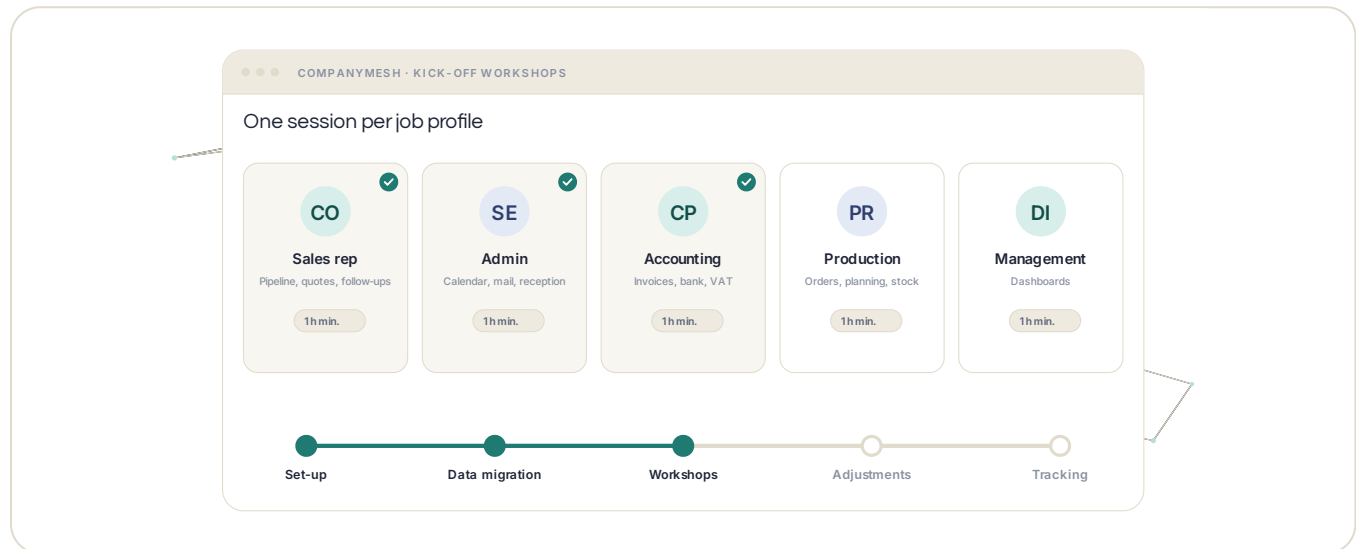
The interface draws on the tools your teams already know and like. Colours, layout, information density: it reflects you.

4 Per-user personalisation

Everyone works their own way. If Monique in accounting likes to sort her files with colour labels, she gets colour labels. These personal settings don't affect your figures, your invoicing or your compliance: they simply make each user more effective.

We stay by your side, from launch to everyday use

Successful software is software people actually use. Our support is an integral part of the project.



How we work

Set-up

Installation, configuration of the selected modules and connection of your tools.

Data migration

Customers, products, history, documents: we bring in what you already have, so you start with a tool that is already populated.

Workshops per job profile

For each profile in your company (sales, administration, accounting, production...), we hold at least a one-hour session with a representative. That way we understand exactly what everyone's day looks like.

Adjustments

These sessions and the first user feedback lead to concrete adjustments: one more field, one less step, a shortcut, an automation.

Long-term follow-up

The tool grows with your company. New needs? New modules are added.

See it before you decide

By appointment, we run **demonstrations on anonymised versions** of tools our clients use in production. Anonymised screenshots can also be sent on request.

BUILDING BLOCK · 8 MODULE(S)

CRM — Customer relations

Everything about your customers and prospects: from the first request to the signature, and beyond.

`crm.contacts`

Customers & contacts

Everything you know about your customers, in one place.

`crm.leads`

Prospecting & lead capture

Every request captured, qualified and followed up without delay.

`crm.pipeline`

Pipeline & opportunities

Every deal in its place, every stage under control.

`crm.quotes`

Quotes & sales proposals

Polished proposals, sent in minutes.

`crm.pricing`

Pricing & margins

The right price, the right margin, on every quote.

`crm.agenda`

Calendar & appointments

Appointments that book themselves.

`crm.marketing`

Marketing & campaigns

The right message, to the right customers, at the right time.

`crm.portal`

Customer portal

Your customers follow their project on their own.

Customers & contacts

Everything you know about your customers, in one place.

The screenshot displays the CompanyMesh CRM interface for a customer named 'Atelier Nérévance'. The interface is divided into several sections:

- Header:** 'COMPANYMESH · CUSTOMERS' and 'Atelier Nérévance' with an 'Active customer' status badge.
- AT A GLANCE:** A summary section on the left containing:
 - Lifetime revenue: €48,200
 - Open balance: €1,850 (highlighted in orange)
 - Sales rep: Julie M.
 - Customer since: 2021
 - Contacts: 3
- HISTORY:** A vertical timeline on the right showing recent interactions:
 - Invoice F-2026-104 paid (Transfer received · yesterday)
 - Outbound call · 8 min (Julie M. · delivery update)
 - Quote D-2026-221 signed (E-signature)
 - Follow-up scheduled (Thursday 10:00)
 - Showroom appointment (Measurements taken)
- Bottom Right:** A 'Record completed' notification with a green checkmark, showing 'Company register BE0123.456.789' and an 'Active company' status badge.

Everything you know about your customers, in one place.

Customer information is often scattered: an address book here, emails there, invoices somewhere else. The Customers & contacts module brings it all together in a single, living record. Everyone on the team instantly knows who they're talking to, what has been said and what still needs doing.

A 360° view

Contact details, conversations, quotes, orders, invoices and documents on one record.

Reliable data

Duplicates detected, company details verified, full history kept.

Shared follow-up

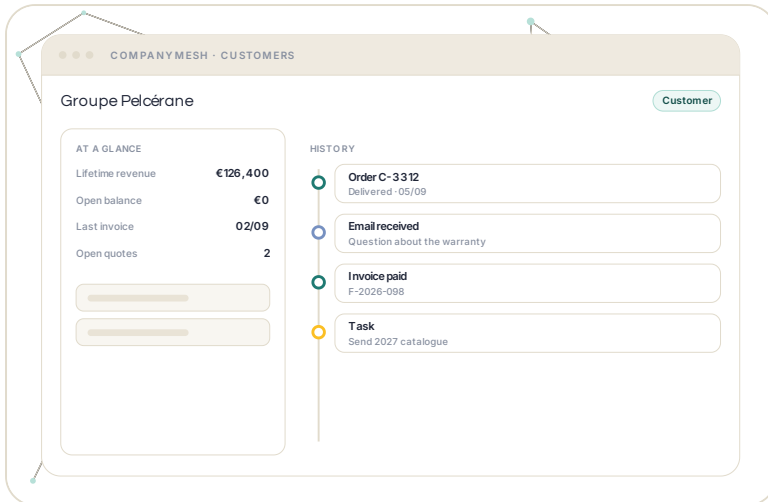
Any colleague can pick up a customer without losing information.

Sales oversight

Revenue, balance and activity visible at a glance.

In this module

- 1 A 360° customer record
- 2 Companies and private customers
- 3 Clean, verified data
- 4 Dedicated sales reps and teams
- 5 Search and segments
- 6 Bringing in your existing data



1 A 360° customer record

The whole relationship, on a single page.

In practice, the record brings together contact details, contacts, addresses, quotes, orders, invoices, documents and a timeline of every interaction. Key indicators (lifetime revenue, open balance, last invoice) are calculated automatically.

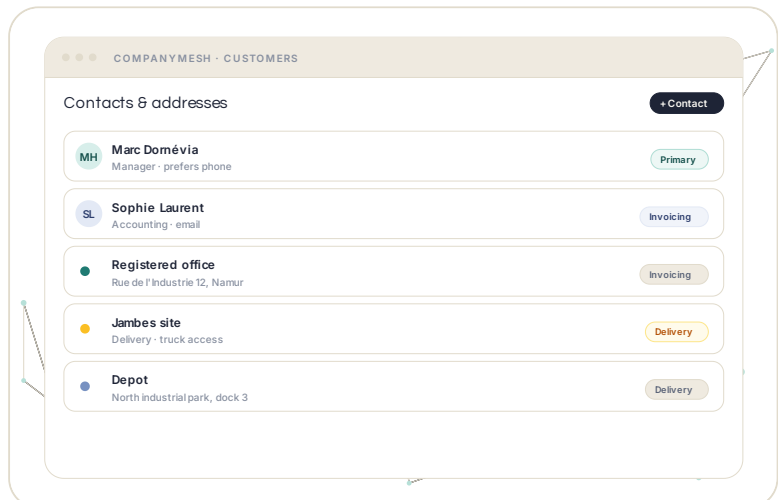
What it enables

- Timeline of emails, calls, appointments and notes
- Lifetime revenue and customer balance
- Quick actions: create a quote, view orders, view invoices
- Documents filed per customer

2 Companies and private customers

Every type of customer, handled the right way.

A record can represent a company with its various contacts, or a private individual. The fields adapt: company and VAT numbers on one side, personal details on the other. Billing, delivery and site addresses are managed separately.



What it enables

- Several contacts per company, with role and preferred channel
- Multiple labelled addresses (head office, site, depot...)
- Several emails and phone numbers per contact
- A main contact defined for each customer

3 Clean, verified data

Fewer errors, more confidence.

Duplicates are spotted as data is entered and can be merged in one click, with the history kept. A company number is all it takes to complete the record from official registers, and the VAT number can be checked automatically.

What it enables

- Duplicate detection and merging
- Auto-fill from company registers
- EU VAT number checks
- Alternative IDs to find a former customer

4 Dedicated sales reps and teams

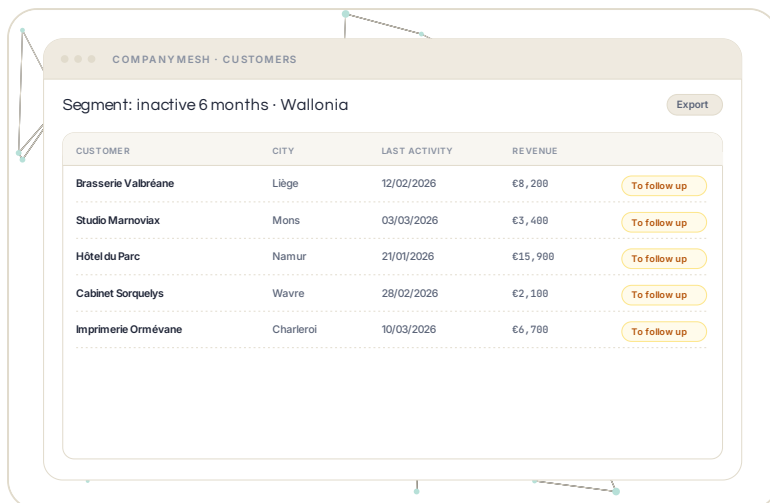
Everyone has their customers, all in the same team.

Each customer has a dedicated sales rep, and several reps can share the same account. Visibility rules define who sees what: personal portfolio, team, or the whole company. History stays shared or partitioned, as you need.

SALES REP	CUSTOMERS	REVENUE 12 MONTHS	ACTIVE	VISIBILITY
Julie M.	42	€312,000	●	Portfolio
Marc D.	37	€268,500	●	Portfolio
Key accounts team	12	€540,000	●	Team
Management	—	—	●	All

What it enables

- Dedicated rep and customer origin
- Several reps on the same account
- Visibility by role or by portfolio
- Reassign a portfolio in a few clicks



5 Search and segments

Find the right customer in a second.

Instant search covers names, contacts, numbers, addresses and references. Saved filters and segments let you find, for example, every customer inactive for six months in a given region, then export them or launch a campaign.

What it enables

- Typo-tolerant full-text search
- Filters by status, activity, area, sales rep, revenue
- Saved, shared segments
- Excel / CSV export

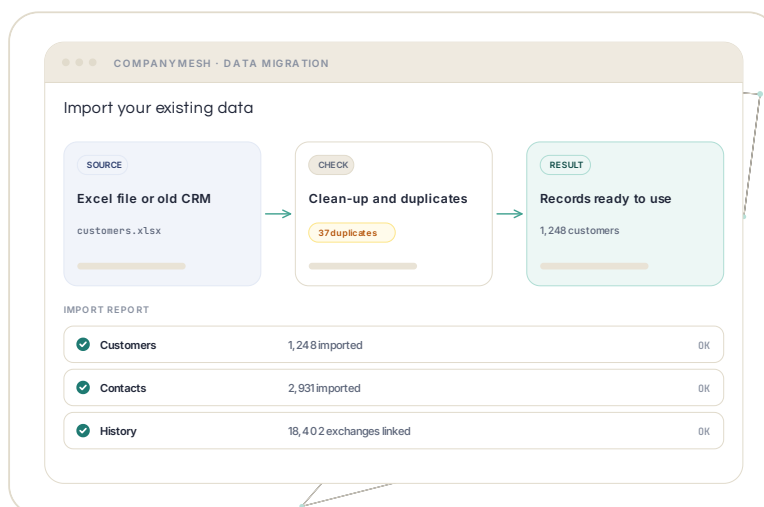
Example — Find a customer from just a phone number during a call.

6

Bringing in your existing data

Start with a tool that's already populated.

We import your customers, contacts and history from your files or your old software. The data is cleaned, de-duplicated and linked together before go-live.



What it enables

- Import from Excel, CSV or a previous CRM
- Assisted clean-up and de-duplication
- Former IDs preserved
- Additional imports at any time

TAILORED

Adapted to your business

Do you work with private customers, companies, architects, building sites or franchisees? The customer record uses **your** categories, **your** fields and **your** rules. Several delivery addresses, several contacts, one dedicated sales rep or a whole team: we structure the record the way your business thinks.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Email & calendar

Microsoft 365

Outlook / Exchange

Gmail

Google Contacts

Company registers

CBE / KBO

French company directory

VIES

Import & migration

HubSpot

Salesforce

Pipedrive

Excel / CSV

WordPress / WooCommerce

Telephony

3CX

Ringover

Aircall

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.leads` Prospecting & lead capture

`crm.pipeline` Pipeline & opportunities

`crm.quotes` Quotes & sales proposals

`comms.mail` Integrated email

`dms.documents` Document management & media library

`dms.compliance` Verification & compliance

Let's talk about your future tool

Tailored demo, by appointment.

companymesh.eu
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Prospecting & lead capture

Every request captured, qualified and followed up without delay.

COMPANYMESH · NEW REQUESTS

Today's requests

6 new

NR Comptoir Nerquais
Website form · 120 m² shop fit-out

Score 86

4 min ago

HP Hôtel du Parc
Inbound call · 14-room renovation

Score 74

09:12

SK Studio Mamoviaux
Trade fair · 40 m² office

Score 52

08:47

BL Brasserie Valbréane
Referral · Terrace

To qualify

yesterday

CM Cabinet Sorquelys
Email · Callback request

To qualify

yesterday

✓ Request assigned

Comptoir Nerquais → Julie M.
Namur area · Retail

Notified

Every request captured, qualified and followed up without delay.

Website form, phone call, trade fair, referral: requests come in from everywhere and some get lost. The Prospecting module centralises every new contact, enriches it, qualifies it and hands it to the right person. You reply faster and you know where your best customers come from.

No lost requests

Every source lands in the same queue.

A fast response

Automatic assignment and an instant alert to the right sales rep.

Measured sources

You know which channels really pay off.

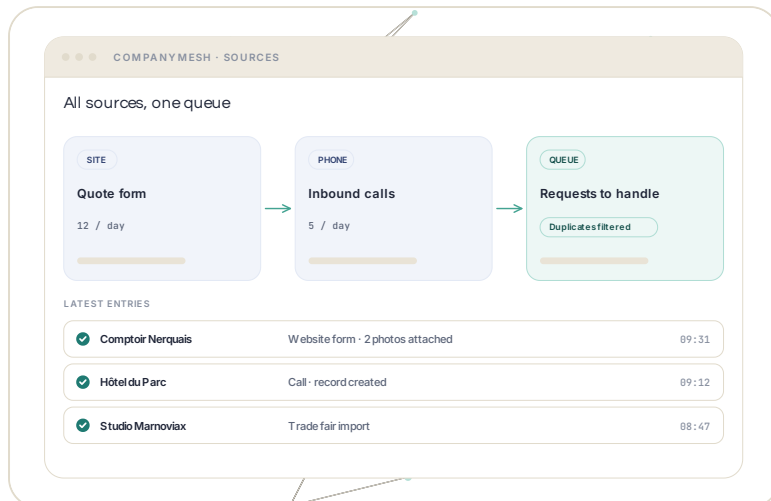
A polished first contact

Personalised pages and links for every prospect.

In this module

- 1 One queue for every request
- 2 Forms that qualify
- 3 Qualification and scoring
- 4 Automatic assignment
- 5 Personalised links and pages
- 6 Source measurement

FEATURES



1 One queue for every request

Website, phone, trade fair: it all lands here.

Every incoming request automatically creates a prospect record, whatever its source: website form, email, call, trade-fair import, partner API. Duplicates are recognised and the source is recorded so you can measure your channels.

What it enables

- Intake from the website, email, API or an import
- Source and originating campaign kept
- Automatic de-duplication of requests
- Prospect attachments linked (plans, photos...)

2 Forms that qualify

The right questions, from the very first click.

Forms are built in steps, with conditional questions: what comes next depends on previous answers. The answers feed straight into the prospect's record and score.

COMPANYMESH · FORM

Quote request · step 2 / 3

Project type: Full renovation

Approximate area: 120 m²

Desired timeframe: Before March 2027

Show the budget question (checked)

Ask for photos (checked)

LOGIC

- If renovation → question on current condition
- If area > 100 m² → score +15
- If lead time < 1 month → high priority

What it enables

- Multi-step, conditional forms
- Spam protection
- Fields adapted to your business
- Embeddable on any website

COMPANY MESH - QUALIFICATION

Prospects to qualify

PROSPECT	BUDGET	LEAD TIME	SCORE	STATUS
Comptoir Nerquais	€40-60k	3 months	86	Qualified
Hôtel du Parc	> €100k	6 months	74	Qualified
Studio Marnovix	€10-20k	2 months	52	In progress
Brasserie Valbréane	—	—	—	To qualify
Private customer Dubois	< €5k	Urgent	31	Off target

3 Qualification and scoring

Focus on the most promising requests.

Each prospect gets a qualification status and a score based on criteria you choose: budget, timeframe, area, project size, engagement. Ready prospects become opportunities in one click.

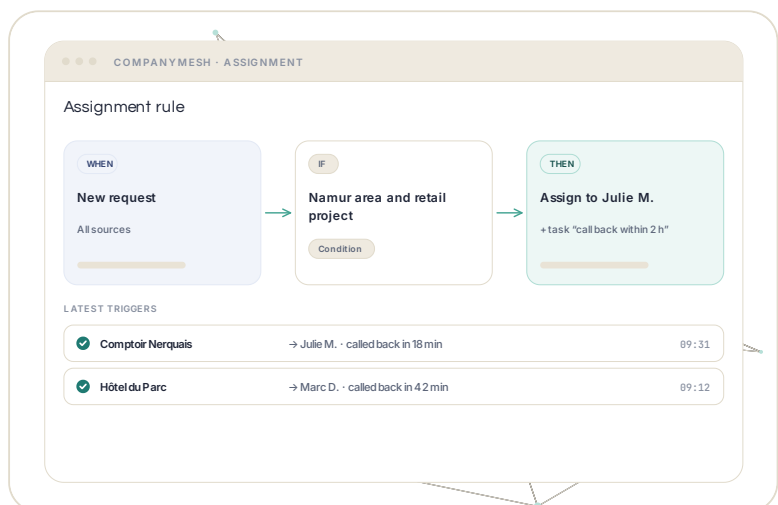
What it enables

- Custom qualification criteria
- Automatic scoring and prioritisation
- Conversion to an opportunity with all details carried over
- Loss reasons to analyse what you miss

4 Automatic assignment

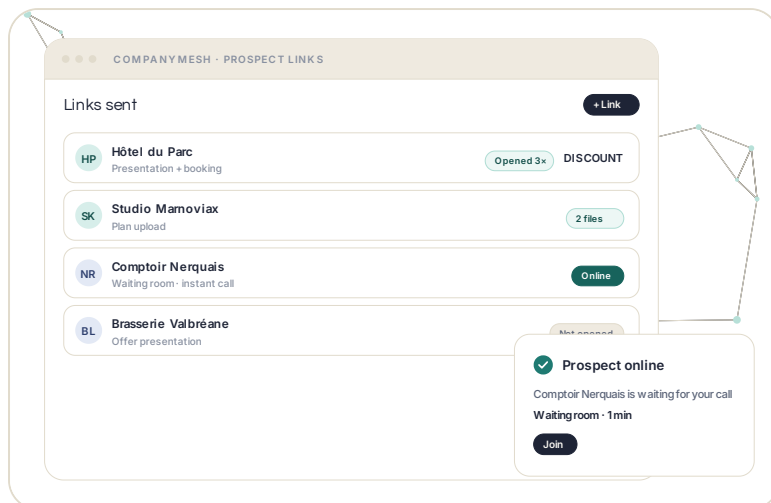
The right sales rep, notified straight away.

Rules distribute new requests by area, product, language or each rep's workload. The assigned person receives a notification and a first-contact task.



What it enables

- Rules by area, product, language or round robin
- Instant notification
- Time to first contact tracked
- Reassignment if a request goes unanswered



5 Personalised links and pages

A tailored first impression.

Send a prospect a personal link: offer presentation, appointment booking, document upload or a waiting room for an immediate call. You see when they open it.

What it enables

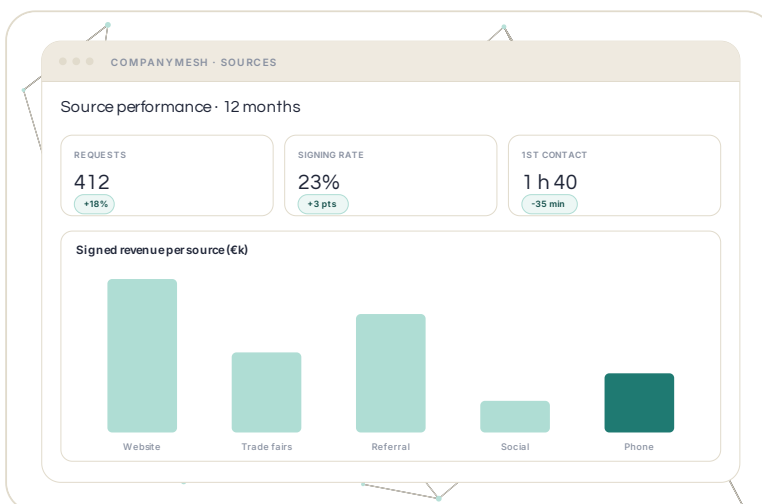
- Personalised prospect pages with an offer
- Secure file upload
- Built-in appointment booking
- Tracking of opens and actions

Example — After a trade fair, every visitor receives a link to book a 15-minute call.

6 Source measurement

Invest where it pays off.

A dashboard links each source to its results: number of requests, conversion rate, signed revenue. At last you know what your website, trade fairs and ads are really worth.



What it enables

- Requests and conversions by source
- Average response time
- Revenue generated per channel
- Period-over-period comparison

TAILORED

Adapted to your business

Your website form asks the questions that matter for **your** business: area, budget, timeframe, project type... Qualification criteria and assignment rules (by area, by product, by available sales rep) are defined with you during the workshops.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Websites & forms

WordPress

WooCommerce

Shopify

PrestaShop

Webflow

Advertising & social

Meta (Facebook / Instagram)

LinkedIn

Google Ads

Automation

Zapier

Make

n8n

Webhooks

Messaging

Microsoft 365

Gmail

WhatsApp Business

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

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`crm.marketing` Marketing & campaigns

`auto.web` Connected website

`auto.api` API & connectors

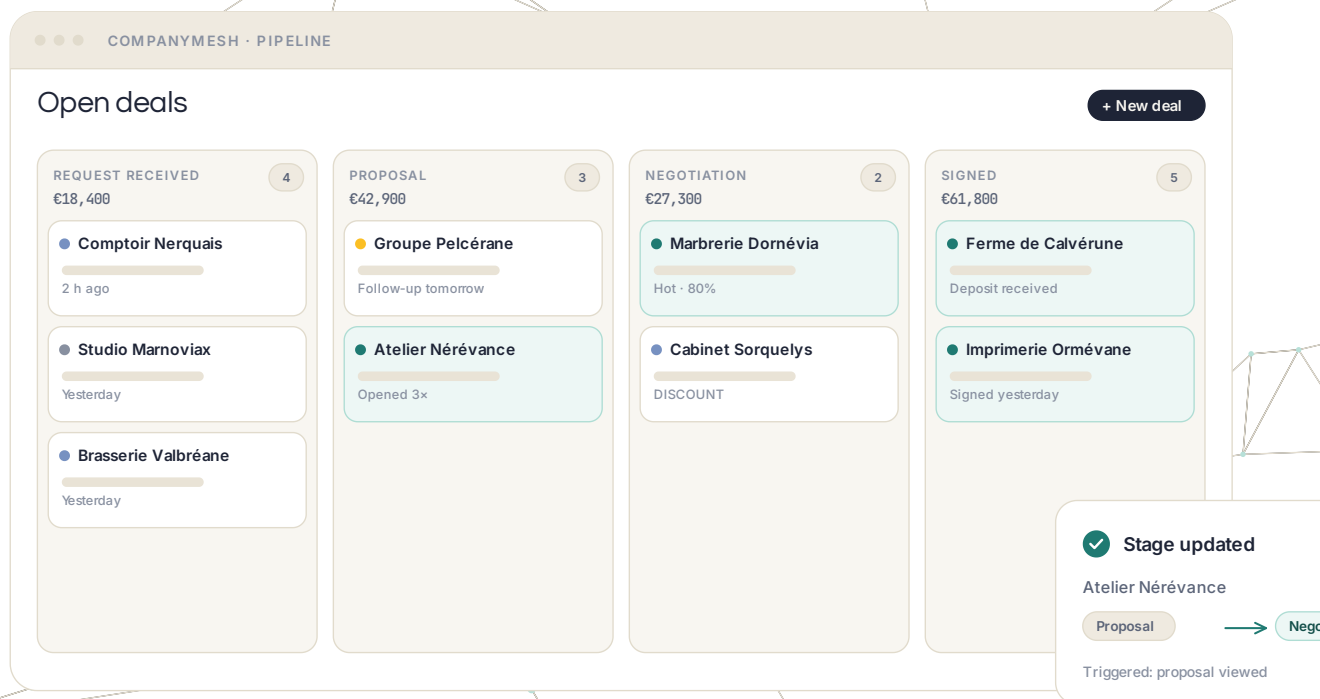
Let's talk about your future tool

Tailored demo, by appointment.

companymesh.eu
simon@devlooper.io
+32 490 46 81 17

Pipeline & opportunities

Every deal in its place, every stage under control.



Every deal in its place, every stage under control.

Today your opportunities live somewhere between a spreadsheet, an inbox and your sales reps' memory. The Pipeline module puts every deal on one clear board, from first contact to signature and beyond. At a glance you see what's moving, what's stuck and what deserves your attention today.

An instant overview

Your sales activity and expected revenue, at a glance.

No forgotten deals

Follow-ups, priorities and history are tracked for you.

Less data entry

Deals move forward on their own as soon as an action happens.

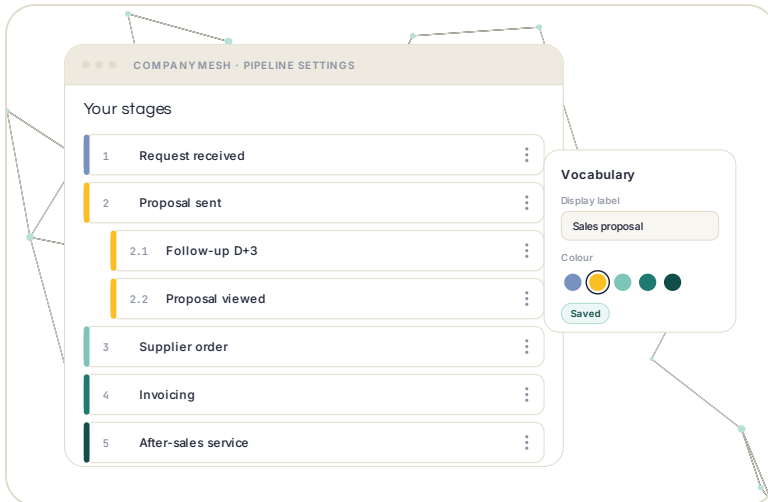
A tool that reflects you

Your stages, your words, your colours.

In this module

- 1 Stages that follow your process
- 2 An overview as a board or a list
- 3 Clear priorities every morning
- 4 Deals that move forward on their own
- 5 A deal record that tells the whole story
- 6 Put on hold, archive, restore
- 7 Follow-ups that never slip

FEATURES



1

Stages that follow your process

Your sales cycle, the way you live it.

In practice, you define your pipeline stages, their order, colour and label. A stage can contain sub-stages to detail a longer phase (supplier price request, follow-up, internal approval...). Key stages for your business can be locked to guarantee consistent tracking across the whole team.

What it enables

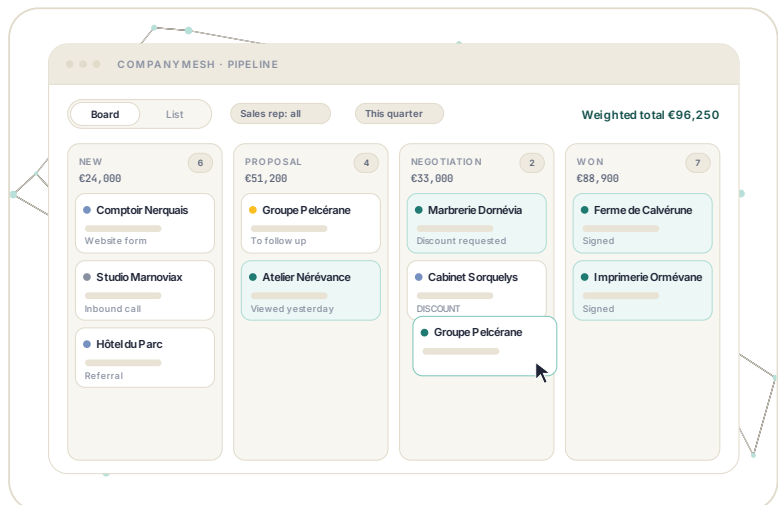
- Unlimited stages and sub-stages, reorderable at any time
- Custom colours to spot a phase at a glance
- Adapted vocabulary ("file", "offer", "site"...)
- Protected system stages to secure your processes

2

An overview as a board or a list

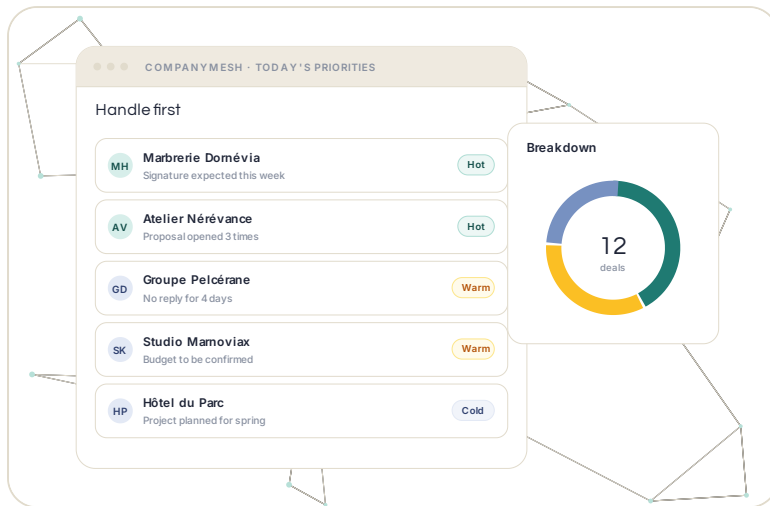
Drag, filter, decide.

The board shows your deals in stage columns. A simple drag and drop moves a deal forward. Each column shows the number of deals and the expected amount. The list view lets you sort and filter precisely to prepare a sales meeting or a team check-in.



What it enables

- Board (kanban) and list views, as each user prefers
- Filters by sales rep, period, source, amount or priority
- Totals per stage and weighted revenue
- Automatic deal numbering (custom prefix and format)



3 Clear priorities every morning

Cold, warm, hot: you know where to act.

Each deal carries a temperature and a probability of closing. Combined with the latest activity and customer signals (proposal viewed, reply received...), they feed a list of deals to handle first. Your sales reps start their day in the right place.

What it enables

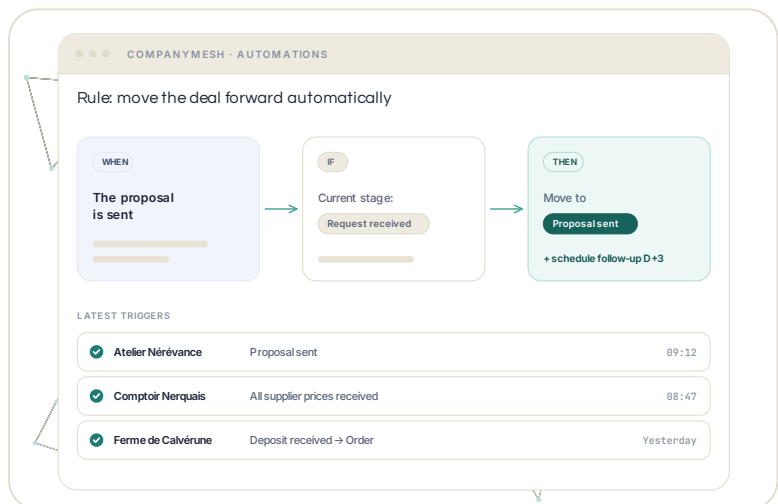
- Cold / warm / hot levels and signing probability
- Alerts on deals with no activity for too long
- "Handle first" list per sales rep
- Visual breakdown of the portfolio

Example — A proposal is opened three times in two days: the deal jumps to the top of the list with the "hot" status.

4 Deals that move forward on their own

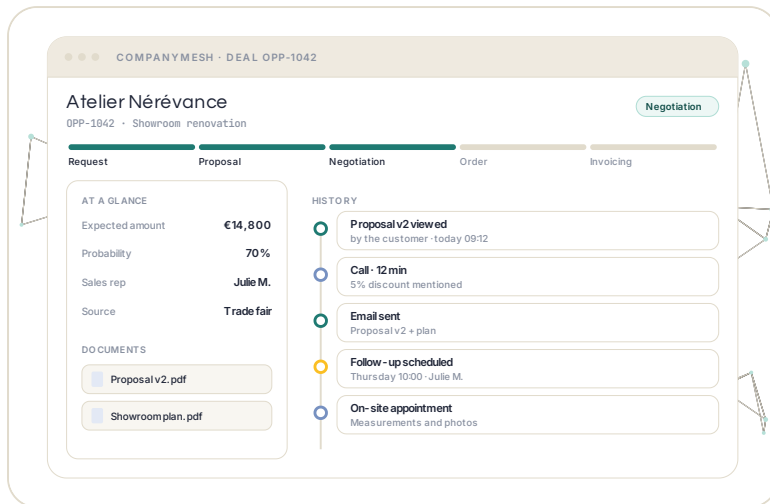
When something happens, the pipeline follows.

You define simple rules: **when** an action happens, **if** the deal is at a given stage, **then** it moves to the next stage. A proposal generated, an email sent, all supplier prices received, a deposit paid: the pipeline updates itself with no re-keying, and every trigger is logged.



What it enables

- "When / if / then" rules configured without development
- Chained actions: stage change, scheduled follow-up, team notification
- Triggers: proposal generated or sent, supplier reply, payment, signature...
- Log of every automation run



5 A deal record that tells the whole story

The full history, in one place.

Each opportunity has its own record: expected amount, probability, sales rep in charge, contact origin, documents, successive proposals and the history of interactions (emails, calls, appointments, notes). A colleague can take over a deal in two minutes without asking anyone.

What it enables

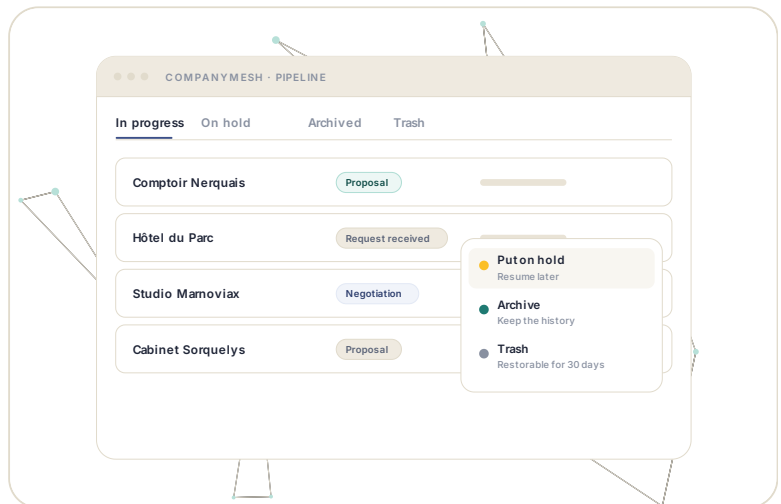
- Stage progress bar
- Timeline of emails, calls, appointments and notes
- Linked proposals and documents, versions kept
- Contact origin and dedicated sales rep

6

Put on hold, archive, restore

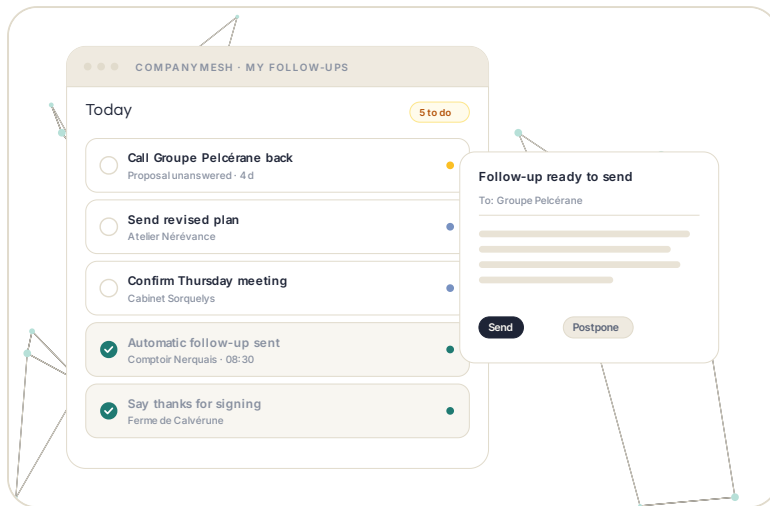
A clean pipeline, without losing anything.

A project postponed until spring? Put it on hold: it leaves the board without disappearing. A deal completed? Archive it with its full history. A data-entry mistake? The trash lets you restore it. Your board stays focused on what matters now.



What it enables

- "On hold", "archived" and "trash" statuses
- One-click restore
- History kept for your analysis and customer follow-up
- Permanent deletion reserved for authorised profiles



7 Follow-ups that never slip

The right follow-up, at the right time.

Follow-ups are scheduled from the deal or automatically after a stage. Each sales rep finds their list for the day, with messages prepared from your templates. They send, postpone or personalise in one click, and the action is added to the deal history.

What it enables

- Dated tasks and reminders, assigned to a team member
- Customisable email templates
- Automatic follow-ups after a period without reply
- Sync with everyone's calendar

TAILORED

Adapted to your business

Do you talk about “files”, “offers” or “proposals” rather than “opportunities”? Does your cycle have three stages, or twelve, with sub-stages at your suppliers? The pipeline follows **your** process and **your** vocabulary. We build it with your teams during the kick-off workshops, then fine-tune it as it's used.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Email & calendar

Microsoft 365

Outlook / Exchange

Gmail

Google Calendar

Telephony

3CX

Ringover

Aircall

Signature & payment

SignWell

Yousign

DocuSign

Stripe

PayPal

Mollie

Import & collaboration

HubSpot

Salesforce

Pipedrive

Excel / CSV

Slack

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.contacts Customers & contacts

crm.leads Prospecting & lead capture

crm.quotes Quotes & sales proposals

crm.pricing Pricing & margins

auto.workflows Automations

ops.dashboard Dashboards & search

Let's talk about your future tool

Tailored demo, by appointment.

companymesh.eu
simon@devlooper.io
+32 490 46 81 17

Quotes & sales proposals

Polished proposals, sent in minutes.

COMPANYMESH · SALES PROPOSAL

PROPOSAL

D-2026-221 · v2

Viewed

Counter fit-out	1	4,800.00
Custom furniture	6	7,200.00
Installation and finishing	1	1,950.00
Loyalty discount		-600.00
Total excl. VAT		13,350.00
VAT 21%		2,803.50
Total incl. VAT		16,153.50

Valid until 17/10/2026

CUSTOMER JOURNEY

✓ Sent

12/09 · 09:04

✓ Viewed 3×

Last: 14/09

● Signature

Pending

● 30% deposit

On signature

✓ Proposal opened

Atelier Nérévance

Just now · 3rd view

Follow up

CompanyMesh
BY devlooper

crm.quotes

Polished proposals, sent in minutes.

A quote often takes too long: copying prices, recalculating, formatting, sending, chasing. The Quotes & proposals module produces professional documents from your catalogue, tracks when the customer reads them and moves straight on to signature and payment.

More time to sell

Lines, discounts and totals calculated automatically.

A professional image

On-brand documents, with annexes and terms included.

Precise tracking

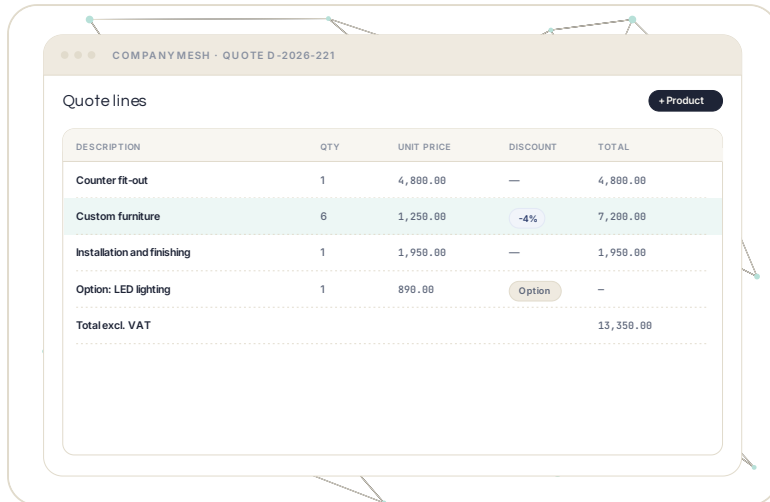
You know when the customer opens your proposal.

A fast close

E-signature and online deposit right away.

In this module

- 1 Fast editing from the catalogue
- 2 Documents that look like you
- 3 Versions, validity and contracts
- 4 Sending and read tracking
- 5 Online signature and deposit
- 6 Internal approval flow



1

Fast editing from the catalogue

Add a product, the rest follows.

Lines are filled in from your catalogue: description, unit, price, VAT. Line or global discounts, optional lines, notes and annexes are added in one click. Totals recalculate live.

What it enables

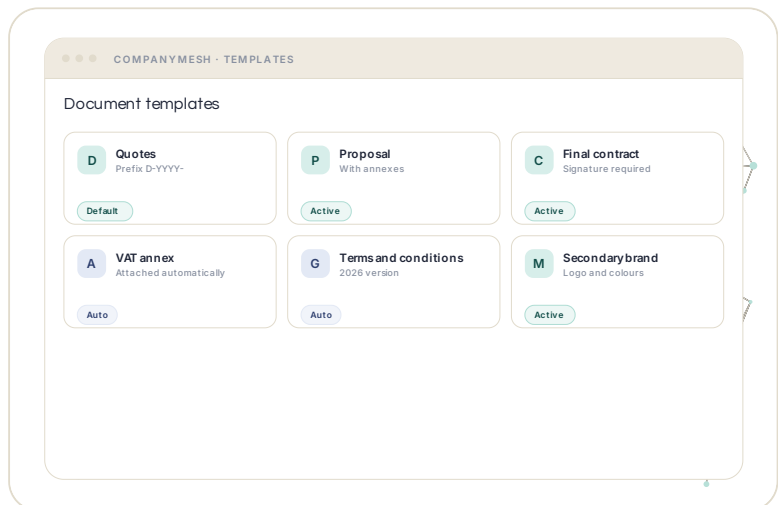
- Instant product search
- Line discounts and a labelled global discount
- Lines included in the proposal or not
- Notes, annexes and special terms

2

Documents that look like you

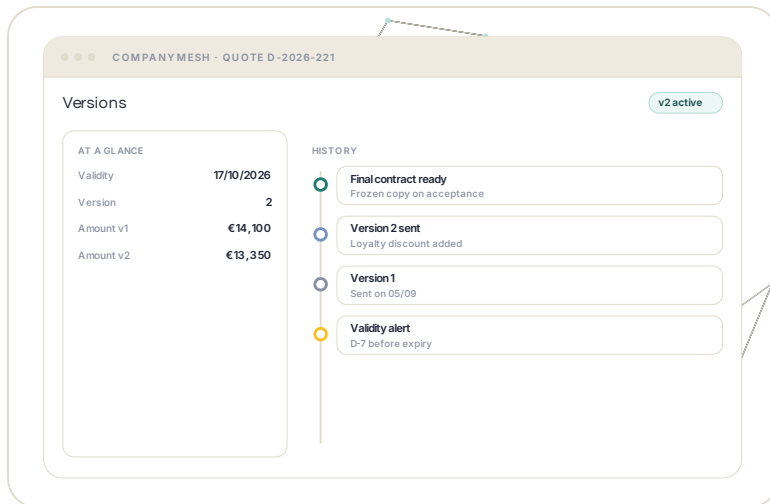
Your layout, your legal notices.

Every document uses your logo, colours, terms and conditions and mandatory notices. Several companies or brands can coexist, each with its own templates.



What it enables

- Custom document templates
- Configurable numbering (prefix, format)
- Terms and annexes attached automatically
- Multi-company and multi-brand



3 Versions, validity and contracts

From provisional to final, with no confusion.

Every change creates a new version, and the history stays available. A validity period is shown on the document. On acceptance, a frozen copy is kept and can become the final contract.

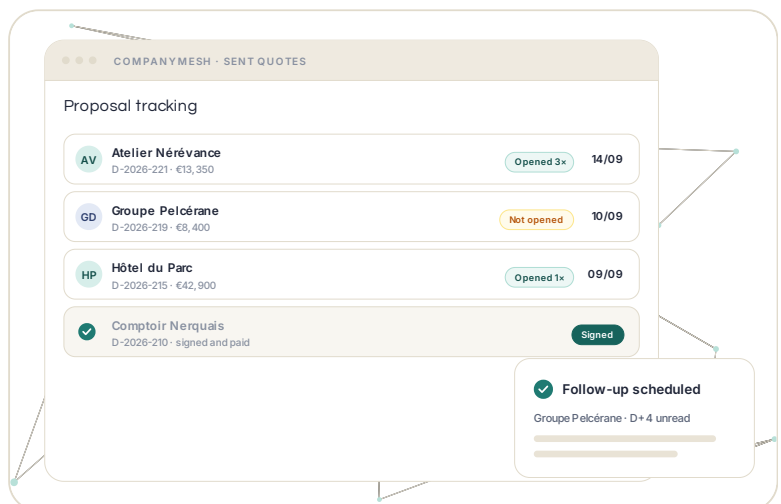
What it enables

- Successive versions and comparison
- Validity date and expiry alerts
- Frozen copy on acceptance
- Provisional quote → final contract

4 Sending and read tracking

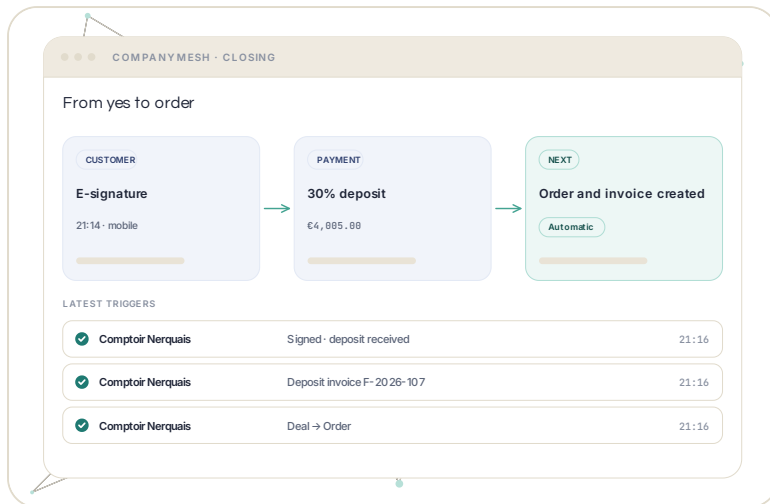
You know when to follow up.

The quote is emailed from the tool with a suitable message template. The customer views it online through a secure link: every opening is recorded and can move the deal forward automatically.



What it enables

- Email sending with templates
- Opening history
- Online viewing by the customer
- Automatic follow-up if there's no reply



5 Online signature and deposit

The customer says yes, everything follows.

The customer signs electronically and pays the deposit from the same link. The quote status, the deal stage and the deposit invoice update without any manual step.

What it enables

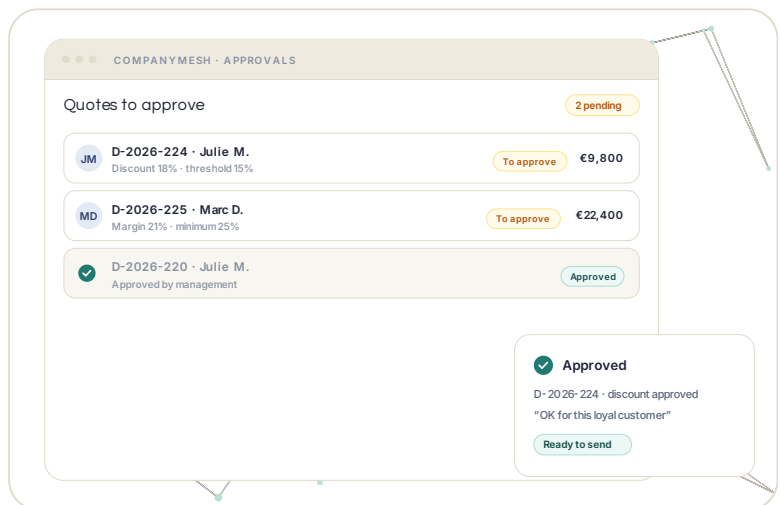
- Legally valid e-signature
- Deposit paid by card or bank transfer
- Status updated automatically
- Order and deposit invoice created

Example — Signed at 9 pm on a phone: by the next morning, the supplier order is ready.

6 Internal approval flow

The right margins, before sending.

Above a discount threshold or below a minimum margin, the quote is submitted for approval. The manager approves or comments in one click.



What it enables

- Discount and margin thresholds
- One-click approval
- Internal comments hidden from the customer
- Approval history

TAILORED

Adapted to your business

Quote, offer, sales proposal, provisional then final contract: we reproduce **your** documents, **your** legal notices, **your** annexes (VAT rates, usage rights, terms of sale) and **your** approval flow. The document template faithfully mirrors your layout.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

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The missing module

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Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

E-signature

SignWell

Yousign

DocuSign

Online payment

Stripe

PayPal

Mollie

Alma

Email

Microsoft 365

Outlook / Exchange

Gmail

Documents

PDF

Word

Google Drive

OneDrive / SharePoint

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.pipeline` Pipeline & opportunities

`crm.pricing` Pricing & margins

`erp.catalog` Product catalogue

`dms.esign` E-signature

`erp.payments` Online payments

`erp.billing` Invoicing

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Pricing & margins

The right price, the right margin, on every quote.

COMPANYMESH · QUOTE D-2026-221 · INTERNAL VIEW

Quote profitability

Margin 31%

LINE	COST	SALE	MARGIN	INDICATOR
Counter	3,120	4,800	35%	Optimal
Furniture ×6	5,040	7,200	30%	Optimal
Installation	1,560	1,950	20%	Acceptable
Transport	420	390	-8%	At risk
Total	10,140	14,340	29%	Optimal

Negative transport margin

Actual cost €420 · invoiced €390
Suggestion: €460

Apply

The right price, the right margin, on every quote.

Setting the right price means knowing your real cost, your delivery costs and your target margin. The Pricing module brings this information together and guides your sales reps: recommended price, possible discounts, alerts when a quote drops below the profitability threshold.

Profitability under control

Margins calculated line by line and across the whole quote.

Guided sales reps

Optimal, acceptable or risky price, shown live.

Consistent discounts

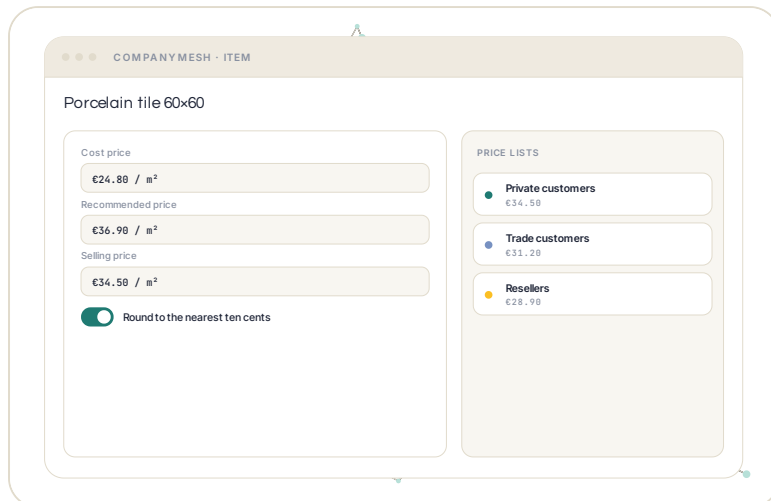
Volume tiers and price lists per customer type.

Prices always up to date

History, scheduled increases and supplier prices tracked.

In this module

- 1 Several prices per product
- 2 Live margin calculation
- 3 Volume-based pricing
- 4 Sales decision support
- 5 History and scheduled increases
- 6 Commissions and fees



1

Several prices per product

Cost, recommended, sold: everything is clear.

Each item carries its purchase price, recommended price and actual selling price. Separate price lists can apply depending on customer type, brand or sales channel.

What it enables

- Cost, recommended and selling prices
- Price lists per customer segment
- Multiple supplier prices per item
- Automatic commercial rounding

2 Live margin calculation

See profitability before you send.

In the quote, the margin on each line, on transport and on the total is shown in real time, visible internally only. Any change to a price or discount updates everything instantly.



What it enables

- Product margin, delivery margin and overall margin
- Display restricted to authorised profiles
- Updates on existing quotes
- Margin export by period

QUANTITY	UNIT PRICE	DISCOUNT	SHOWN TO CUSTOMER
1 to 9 bags	€18.99	—	Visible
10 to 49 bags	€17.48	-8%	Visible
50 to 99 bags	€16.19	-15%	Visible
1 pallet (48)	€15.50	-18%	Hidden

3 Volume-based pricing

Reward volume, automatically.

Define quantity tiers with their price or discount. The right tier applies automatically in quotes and orders, and can be shown to the customer.

What it enables

- Quantity-tier price grids
- Automatic application in quotes and orders
- Optional display to the customer
- Compatible with margin calculation

4 Sales decision support

Optimal, acceptable or risky price.

Margin targets colour-code every price: green, orange or red. An alert warns the sales rep before a quote below the threshold is sent, and a summary shows each rep's practices.

Quotes below threshold			Target 28%
JM	D-2026-224 · Julie M. Margin 19% · discount 18%	At risk	€9,800
MD	D-2026-225 · Marc D. Margin 23%	Acceptable	€22,400
JM	D-2026-226 · Julie M. Margin 34%	Optimal	€4,150
MD	D-2026-227 · Marc D. Margin 30%	Optimal	€12,700

Alert before sending

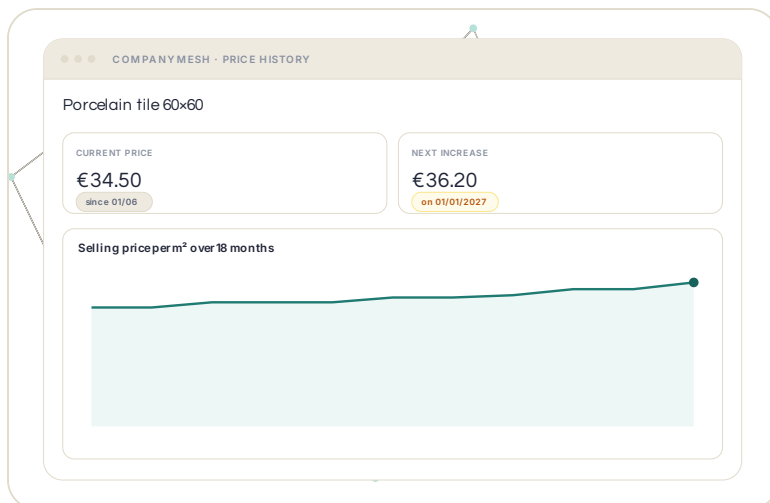
Margin 19% < target 28%

Suggested price: €10,900

[Adjust](#) [Request approval](#)

What it enables

- Margin targets per family or customer
- Visual indicators on every line
- Alert below the recommended threshold
- Summary view per sales rep



5 History and scheduled increases

Anticipate price changes.

Every price change is logged with its context. An increase can be scheduled for a specific date: it applies automatically, with no re-keying.

What it enables

- Full price history
- Prices scheduled by date
- Updates after supplier feedback
- Excel import / export for annual negotiations

6 Commissions and fees

Your remuneration, calculated without errors.

For brokerage or intermediary businesses, a percentage commission is added on goods and transport. The rate is set per deal, within the limits you define.

COMPANYMESH - DEAL

PROPOSAL
Deal 2026-418
6% commission

Tiles 60x60 - 42 m²	1,449.88
Haulage (0.6t x €83)	49.88
Delivery dept 83 - 6 pal.	652.88
6% mandate commission	129.85
Total excl. VAT	2,279.85

SETTINGS

- **Rate**
6% (from 0.1 to 30%)
- **Base**
Goods + haulage
- **Display**
Separate line

What it enables

- Configurable percentage commission
- Choice of calculation base (goods, transport...)
- Minimum and maximum limits
- Detail shown on the customer document or not

Example — Search-mandate commission calculated on goods and haulage, from 0.1% to 30%.

TAILORED

Adapted to your business

Price per m², per pallet, per tonne or per hour, mandate commission, transport included or not: we model **your** way of calculating a price, including its rounding and exceptions. You set the margin targets, by product family or by customer.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Price list import

Excel / CSV

Supplier APIs

EDI

Accounting

Inqom

Exact Online

Pennylane

Odoo

E-commerce

WooCommerce

Shopify

PrestaShop

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.quotes **Quotes & sales proposals**

erp.catalog **Product catalogue**

erp.suppliers **Suppliers & purchasing**

erp.logistics **Orders, delivery & transport**

ops.dashboard **Dashboards & search**

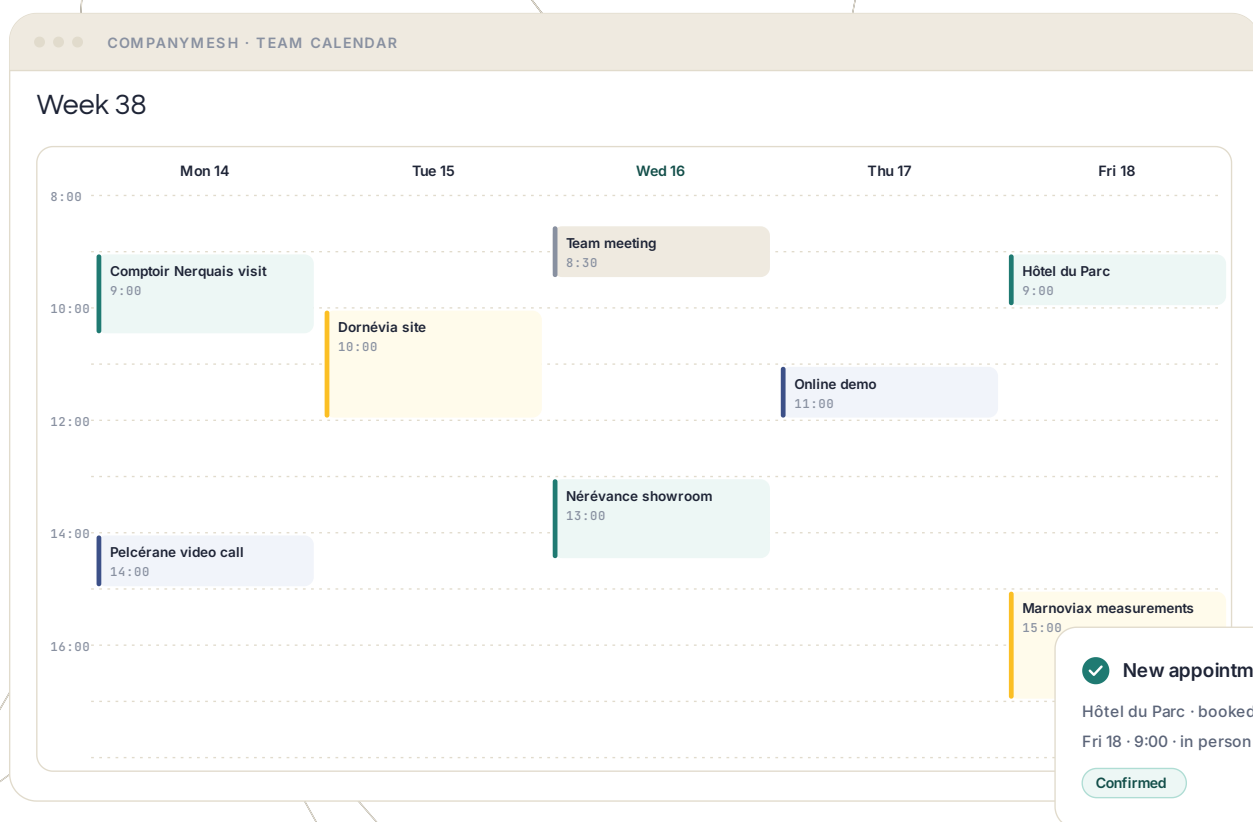
Let's talk about your future tool

Tailored demo, by appointment.

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simon@devlooper.io
+32 490 46 81 17

Calendar & appointments

Appointments that book themselves.



Appointments that book themselves.

Going back and forth to set an appointment wastes everyone's time. The Calendar module publishes your availability, lets customers book online and organises the whole team's schedule, in person, by video or on site.

Less back and forth

Customers pick a free slot on their own.

A coordinated team

Shared calendars, colours per person, team views.

Appointments kept

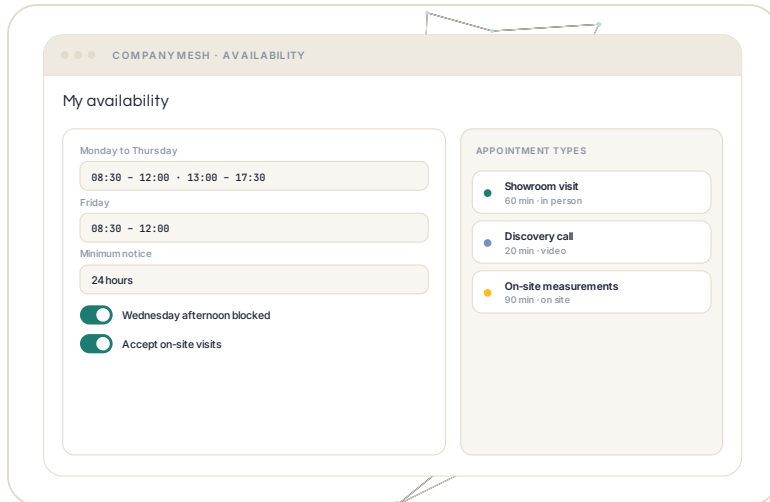
Automatic confirmations and reminders.

Everything linked to the customer

Each appointment is added to the customer history.

In this module

- 1 Availability under control
- 2 Online booking
- 3 Team calendar
- 4 Confirmations and reminders
- 5 Sync with your calendars



1 Availability under control

You decide when people can book you.

Define your open slots, blocked days, breaks and the minimum notice before an appointment. Each team member has their own settings.

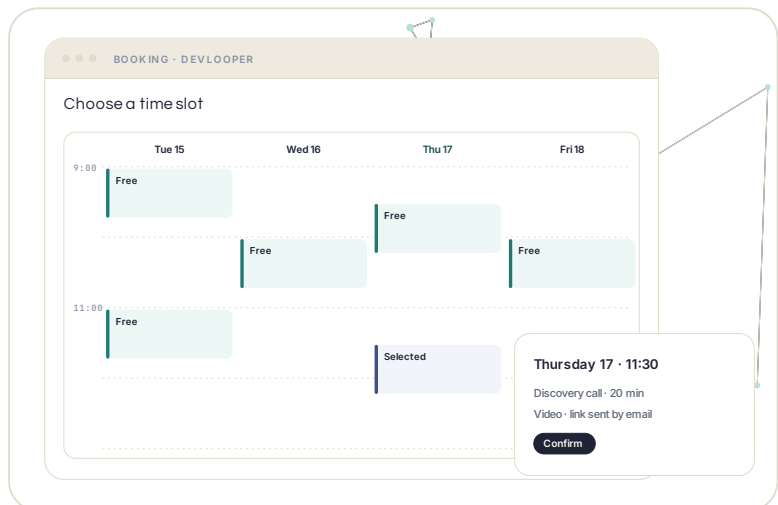
What it enables

- Time slots per day and per person
- Blocked days and unavailable periods
- Minimum booking notice
- Availability per appointment type

2 Online booking

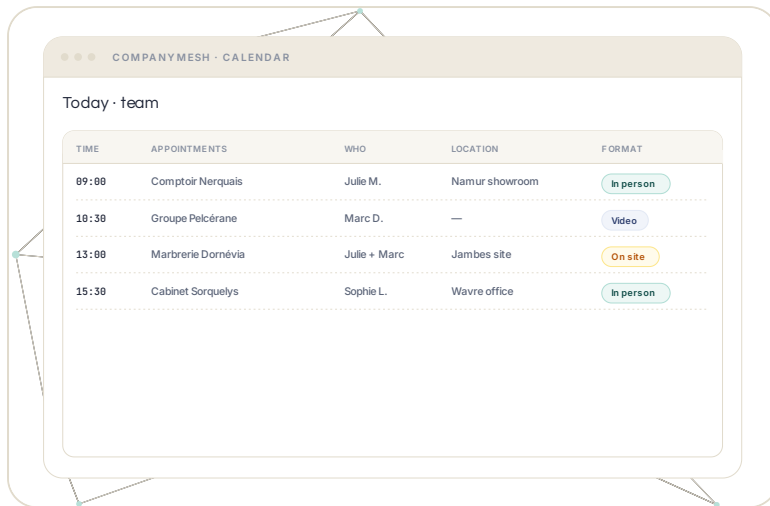
Your customer chooses, you confirm.

A booking page, embeddable on your website or sent as a link, only offers slots that are really free. The customer chooses the format: in person, video or on site.



What it enables

- On-brand booking page
- Choice of appointment format
- Custom pre-booking questions
- Instant email confirmation



3 Team calendar

Who's doing what, and where.

A week or month view brings the team's calendars together, each with its own colour. Appointments can involve several colleagues and an office or site address.

What it enables

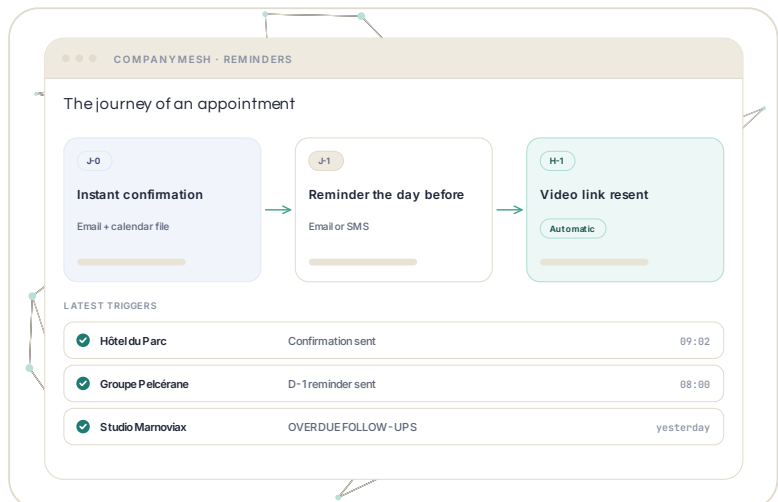
- Day, week and month views
- Colours per team member
- Appointments with several participants
- Office addresses and meeting locations

4

Confirmations and reminders

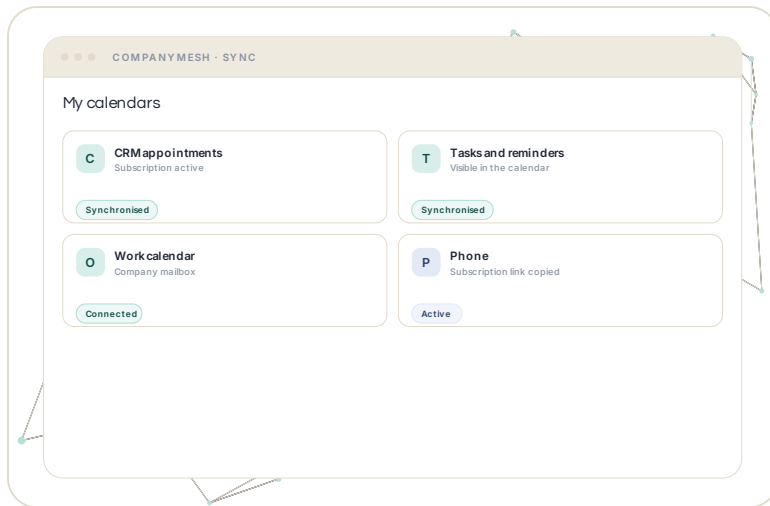
Fewer oversights, fewer missed appointments.

Each booking triggers a confirmation, then reminders before the appointment. Customers can reschedule or cancel themselves, within the limits you set.



What it enables

- Confirmation and reminder emails
- Optional SMS reminders
- Self-service rescheduling and cancellation
- Video link included automatically



5 Sync with your calendars

One calendar, wherever you are.

Appointments show up in your phone or email calendar through a calendar subscription. CRM tasks and reminders appear there too.

What it enables

- Calendar subscription (ICS)
- Tasks and reminders visible in the calendar
- Works on phone and computer
- Optional two-way sync

TAILORED

Adapted to your business

Durations, appointment types, notice periods, travel areas, blocked days, rooms and office addresses: the calendar follows **your** organisation. The booking page uses your visual identity.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Calendars

Google Calendar

Outlook / Microsoft 365

Apple Calendar (ICS)

Video

Built-in CompanyMesh video

Microsoft Teams

Google Meet

Zoom

Notifications

Email

SMS (Twilio, Vonage)

WhatsApp Business

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.leads` Prospecting & lead capture

`crm.contacts` Customers & contacts

`comms.visio` Sovereign video conferencing

`crm.portal` Client portal

`ops.projects` Projects & production

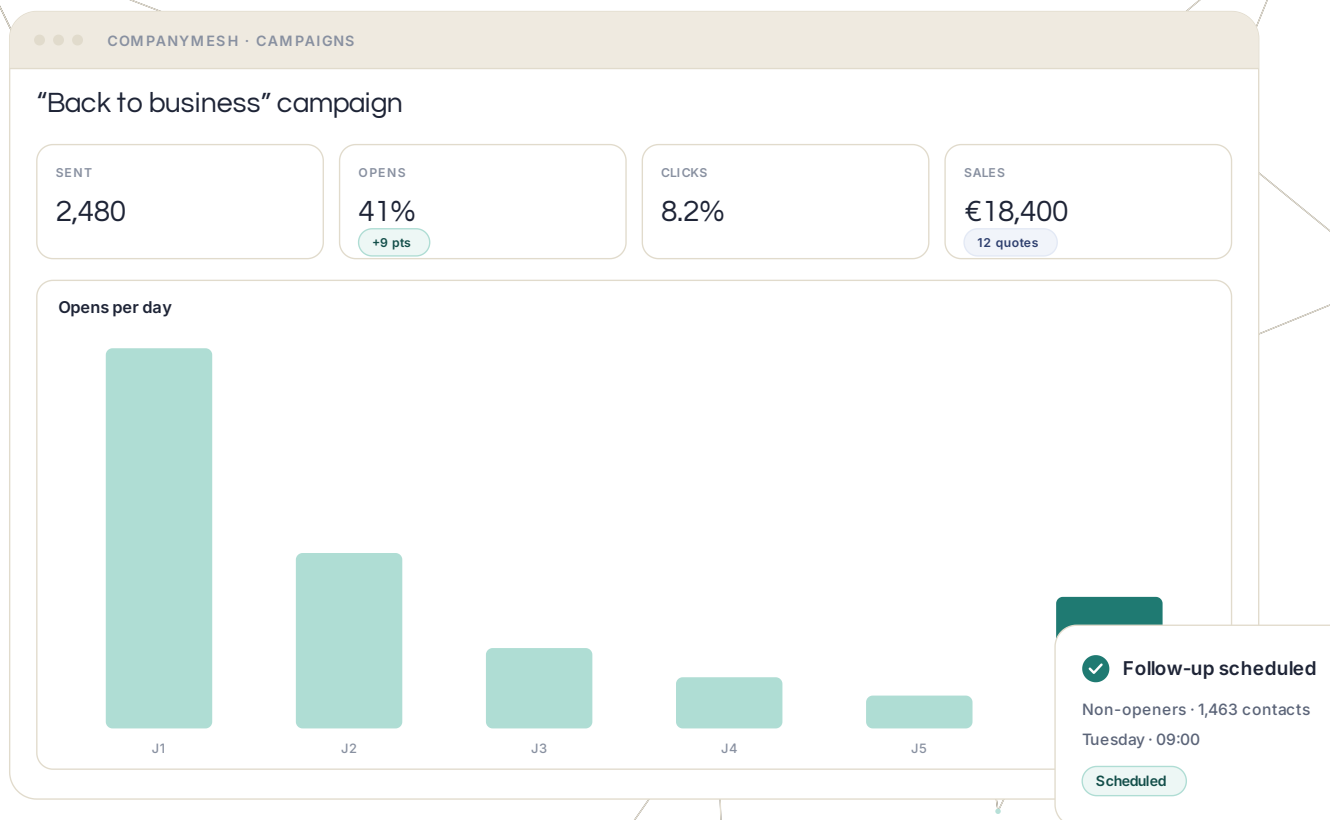
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Marketing & campaigns

The right message, to the right customers, at the right time.



The right message, to the right customers, at the right time.

Your customer data is gold for your marketing. The Marketing & campaigns module turns your segments into mailing lists, sends email campaigns, runs your promotions and posts to social media, tracking results all the way to the sale.

Targeted campaigns

Lists built from real customer data.

Promotions under control

Codes, periods and conditions managed in one place.

A steady presence

Scheduled posts across your networks.

Measured results

Opens, clicks and sales linked to every campaign.

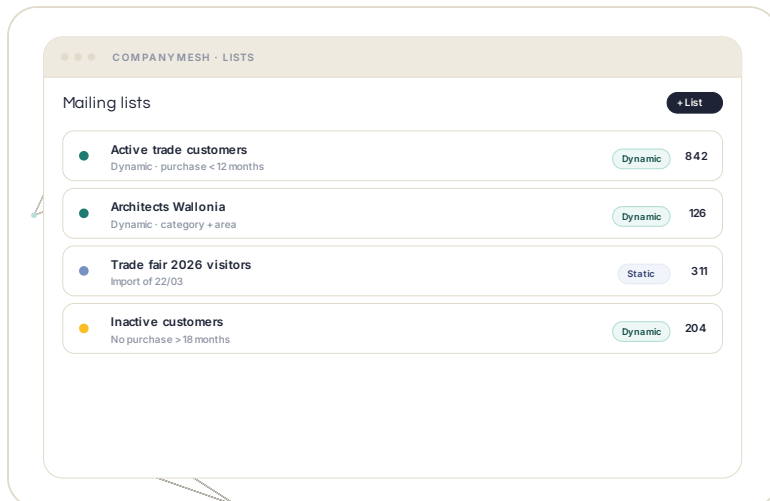
In this module

- 1 Lists and segments
- 2 Email campaigns and newsletters
- 3 Promotions and offers
- 4 Social media
- 5 Campaign results

1 Lists and segments

Your targets, always up to date.

Build static or dynamic lists from any customer criterion. Dynamic lists update themselves whenever a customer enters or leaves the segment.



What it enables

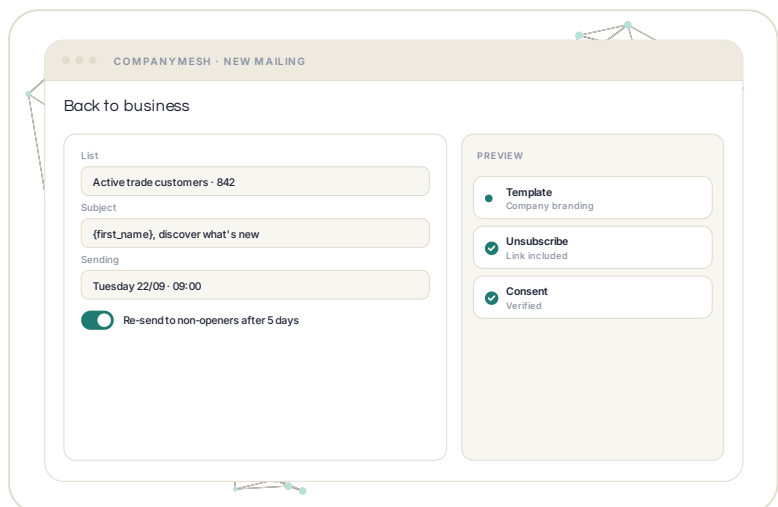
- Static and dynamic lists
- Consent and unsubscribe management
- Combinable criteria (sector, purchases, area...)
- Marketing contact import

2

Email campaigns and newsletters

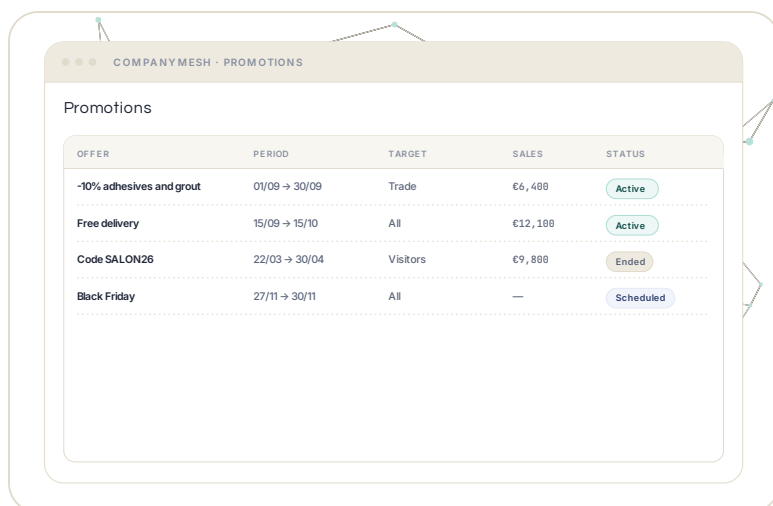
Professional mailings, without yet another tool.

Write your messages from templates in your house style, personalised with customer data. Schedule the send and track opens and clicks.



What it enables

- Templates in your brand identity
- Scheduled sending
- Personalisation by customer field
- Open and click statistics



COMPANYMESH · PROMOTIONS

Promotions

OFFER	PERIOD	TARGET	SALES	STATUS
-10% adhesives and grout	01/09 → 30/09	Trade	€6,488	Active
Free delivery	15/09 → 15/10	All	€12,188	Active
Code SALON26	22/03 → 30/04	Visitors	€9,888	Ended
Black Friday	27/11 → 30/11	All	—	Scheduled

3 Promotions and offers

Discounts that are controlled and measurable.

Create promotions with a period, conditions and eligible products. They apply in quotes, orders and your connected online shop.

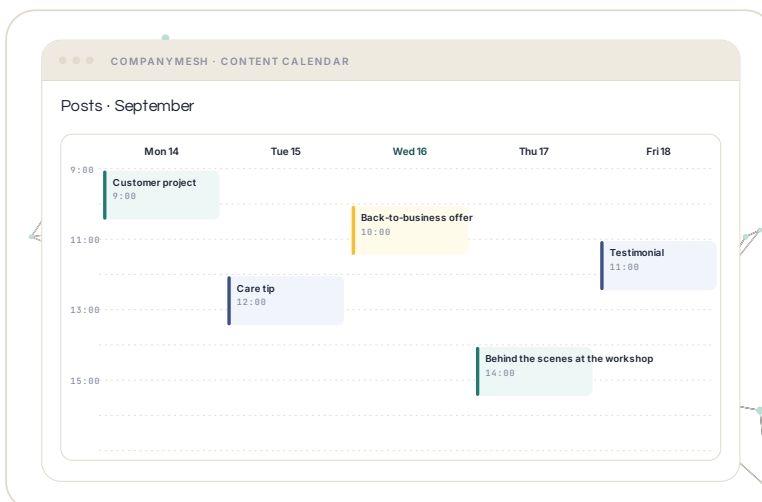
What it enables

- Promo codes and automatic offers
- Validity period and conditions
- Targeted products and customers
- Tracking of the sales generated

4 Social media

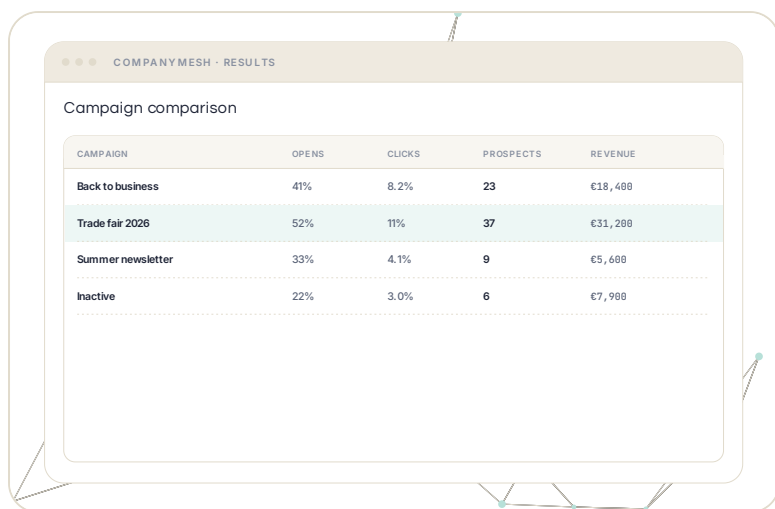
Post and schedule straight from the tool.

Prepare your posts, schedule them across several networks and see all the reactions in one place. Enquiries received by message become leads.



What it enables

- Editorial calendar
- Multi-network publishing
- Interaction tracking
- Incoming messages turned into leads



COMPANYMESH · RESULTS

Campaign comparison

CAMPAIGN	OPENS	CLICKS	PROSPECTS	REVENUE
Back to business	41%	8.2%	23	€18,488
Trade fair 2026	52%	11%	37	€31,288
Summer newsletter	33%	4.1%	9	€5,688
Inactive	22%	3.0%	6	€7,988

5 Campaign results

From click to sale.

Every campaign shows its sends, opens, clicks, leads generated and the revenue it brought in. Compare your actions and adjust your budget.

What it enables

- Dashboard per campaign
- Campaign comparison
- Sales attribution
- Results export

TAILORED

Adapted to your business

Monthly newsletter, seasonal follow-up, trade fair invitation, an offer for trade customers only: we prepare **your** templates and **your** scenarios with you, in line with GDPR and your consent rules.

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CONNECTORS

Available integrations

Compatible with the tools you already use:

Emailing

Brevo

Mailchimp

Microsoft 365

SMTP

Social media

Meta (Facebook / Instagram)

LinkedIn

X

TikTok

Messaging

WhatsApp Business

SMS (Twilio, Vonage)

Analytics

Analytics CompanyMesh

Google Analytics

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.contacts Customers & contacts

crm.leads Prospecting & lead capture

ops.analytics Sovereign web analytics

auto.workflows Automations

auto.web Connected website

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Customer portal

Your customers follow their project on their own.

CLIENT PORTAL · MARBRERIE DORNÉVIA

Hello Marc

2 to approve

Project · Jambes showroom

Stage 3 / 5 · Manufacturing in progress

In progress

Deliverable · Plans v2

Uploaded yesterday by the team

To approve

Invoice F-2026-104

Due 30/09

Pay online €2,855

Invoice F-2026-098

Paid on 02/09

Paid

Message from Julie

"Delivery confirmed Thursday"

New

✓ Delivery approved

Plans v2 · approved by Marc Dornévia

14/09 · 10:42

Next stage

Your customers follow their project on their own.

"Where's my order?", "Could you send me the invoice again?": questions like these keep your teams busy. The customer portal gives every customer secure access to their projects, documents, invoices and conversations. Your customers feel reassured, your teams get their time back.

Reassured customers

Progress, documents and invoices available at any time.

Fewer interruptions

Answers are self-service.

Centralised conversations

Messages and files linked to the right project.

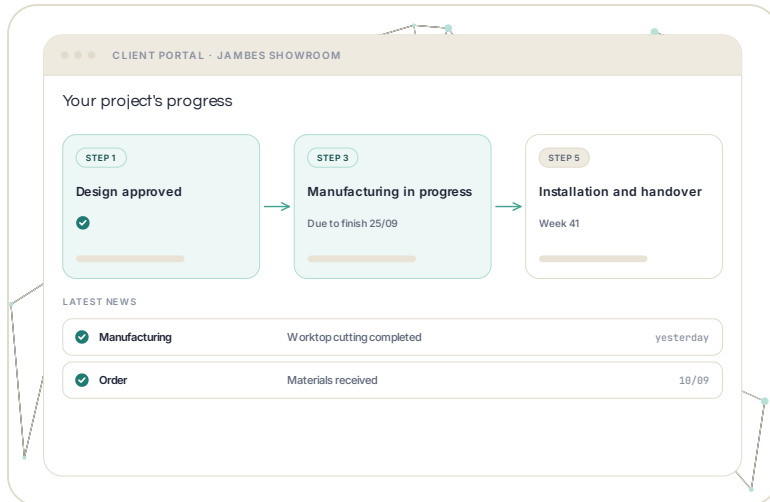
A modern image

A portal in your name, simple and secure.

In this module

- 1 Live project tracking
- 2 Documents and shared drive
- 3 Messages and support
- 4 Approvals and deliveries
- 5 Secure, multi-user access

FEATURES



1 Live project tracking

Every stage visible to your customer.

Customers see how their projects or orders are progressing, with the stages you choose to make visible. Internal tasks stay internal.

What it enables

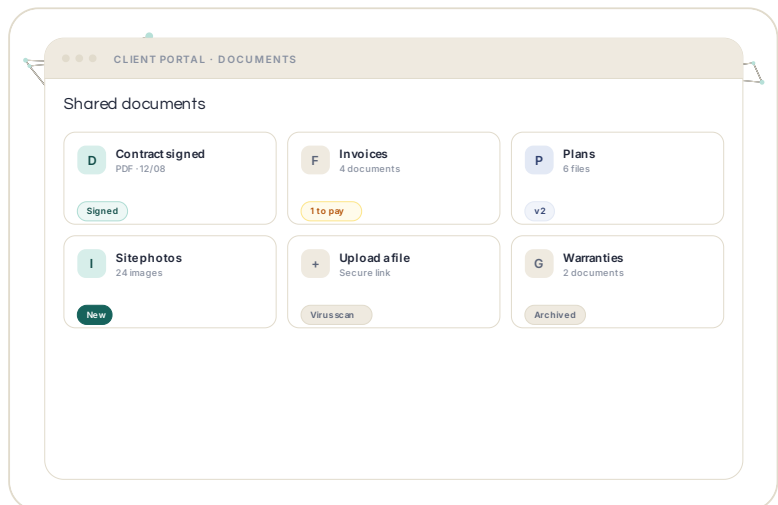
- Visible status and stages
- Notifications at every step forward
- Visibility set per project
- Several projects per customer

2

Documents and shared drive

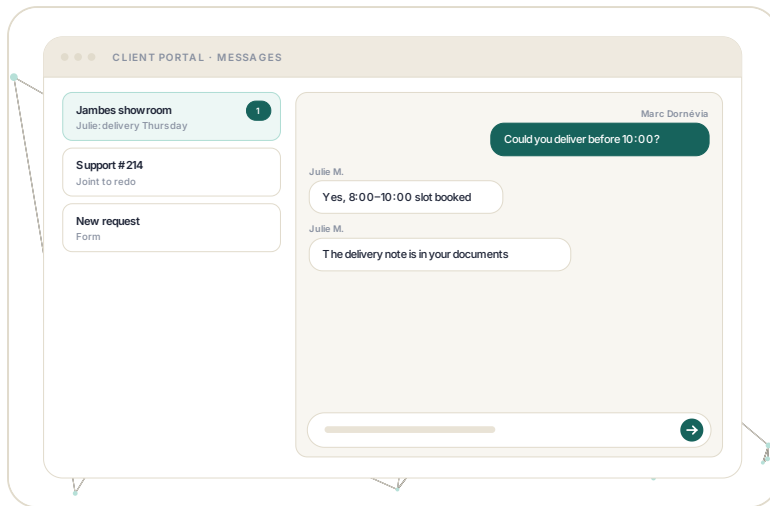
Everything they need, neatly filed.

Quotes, contracts, invoices, plans, photos: shared documents are organised and ready to download. Customers can also upload their own files through a secure link, with a quota and virus scanning.



What it enables

- Shared drive per customer
- Tracked sharing (who opened what)
- Secure upload links
- Online invoices and payments



3 Messages and support

One clear channel, linked to the project.

Customers talk to your team from their portal, project by project. Support requests become tickets that are tracked through to resolution.

What it enables

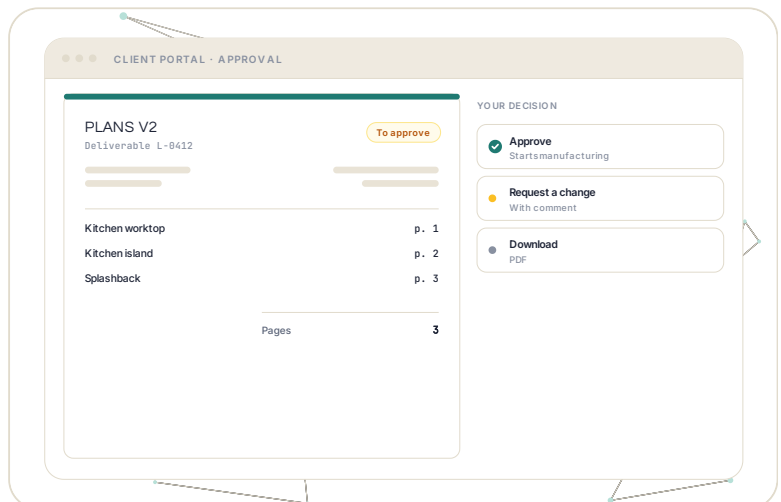
- Messaging per project
- Support requests and tickets
- Custom request forms
- Full history

4

Approvals and deliveries

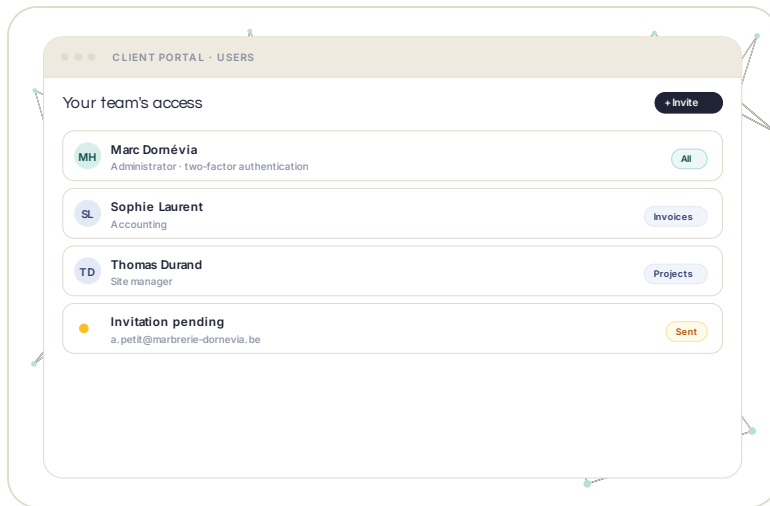
The customer approves in one click.

Mock-ups, deliverables, delivery notes: customers approve or comment directly. Approval moves the project forward and is time-stamped.



What it enables

- Deliverable approval
- Comments and change requests
- Time-stamped acceptances
- Next stage triggered automatically



5 Secure, multi-user access

Every person on the customer's team gets their own access.

A customer can invite several colleagues with different rights. Sign-in by password, temporary link or Google / Microsoft account, with two-factor authentication.

What it enables

- Several users per customer
- Rights per user
- Simplified sign-in and two-factor authentication
- Shared secrets vault (access details, credentials)

TAILORED

Adapted to your business

You decide what your customers see and what they can do: visible stages, shared documents, delivery sign-off, support requests, custom forms. The portal carries your colours and your own domain name.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Sign-in

Google

Microsoft

Apple

Two-factor authentication

Payment

Stripe

PayPal

Mollie

Storage

Google Drive

OneDrive / SharePoint

Dropbox

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.contacts` Customers & contacts

`dms.documents` Document management & media library

`erp.billing` Invoicing

`comms.chat` Team chat & real time

`comms.visio` Sovereign video conferencing

`ops.feedback` Internal feedback & support

Let's talk about your future tool

Tailored demo, by appointment.

companymesh.eu
simon@devlooper.io
+32 490 46 81 17

BUILDING BLOCK · 4 MODULE(S)

Communication

Email, phone, team messaging and video calls, linked to your files.

`comms.mail`

Built-in email

Your emails, finally filed in the right place.

`comms.phone`

Telephony & CTI

The phone rings, the customer record opens.

`comms.chat`

Internal & real-time messaging

Your team talks, right where the work is.

`comms.visio`

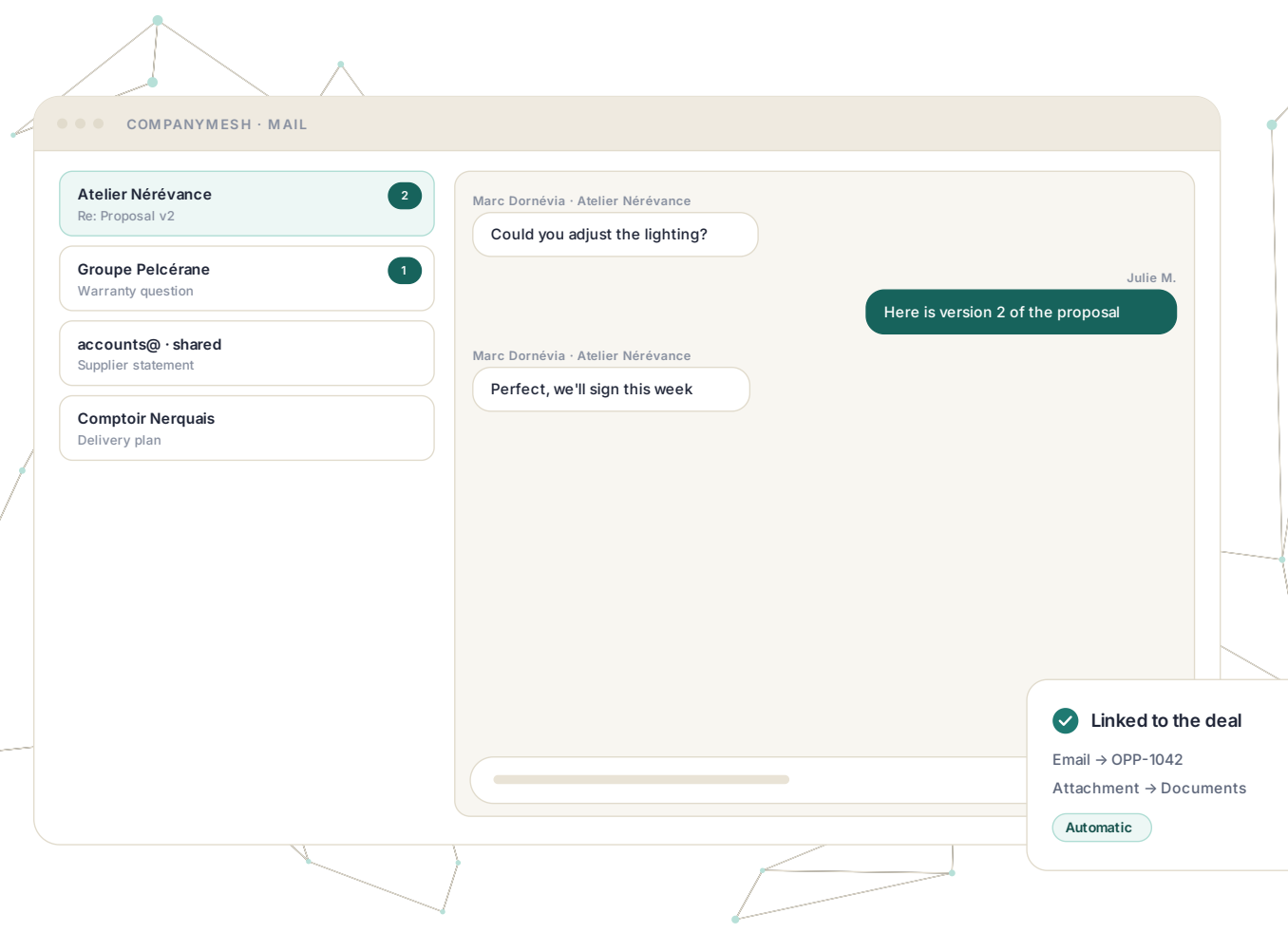
Sovereign video conferencing

Your online meetings, on your own infrastructure.

COMMUNICATION

Built-in email

Your emails, finally filed in the right place.



Your emails, finally filed in the right place.

Conversations with your customers live in individual inboxes and vanish the moment a colleague is off. Built-in email connects your existing mailboxes to the tool: every email sent or received is filed automatically on the right customer, quote or order.

A shared history

Every exchange visible to the people who are allowed to see it.

Less copy-and-paste

Send quotes and invoices straight from the tool.

Consistent messages

Templates and signatures shared across the team.

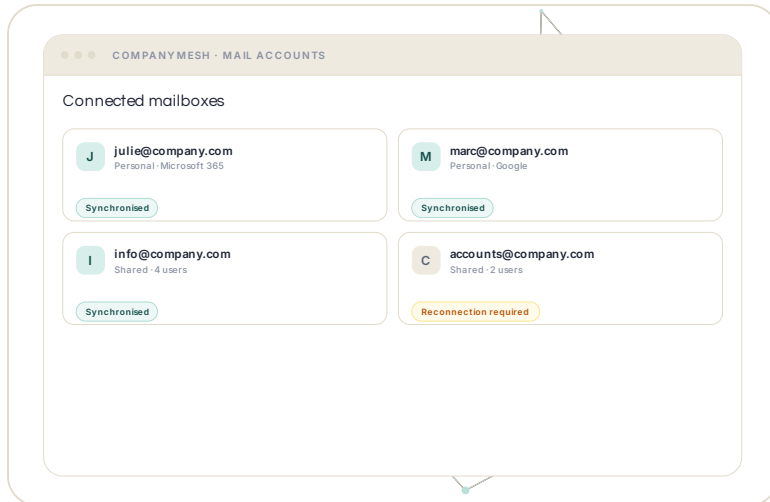
Keep your mailboxes

You keep your current email, fully synchronised.

In this module

- 1 Your mailboxes, connected
- 2 Automatic filing
- 3 Templates and signatures
- 4 Reliable, tracked sending
- 5 A unified inbox

FEATURES



1 Your mailboxes, connected

Your habits stay exactly as they are.

Connect your Microsoft 365 or Gmail accounts, or any IMAP mailbox. Emails sync both ways: whatever you send from the tool shows up in your sent items.

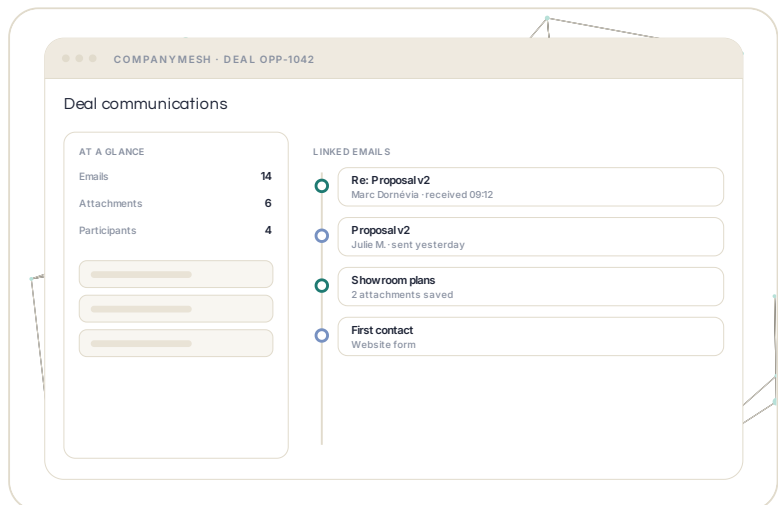
What it enables

- Secure connection (OAuth) or IMAP / SMTP
- Access rights per mailbox and per user
- Personal and shared mailboxes
- Automatic folder synchronisation

2 Automatic filing

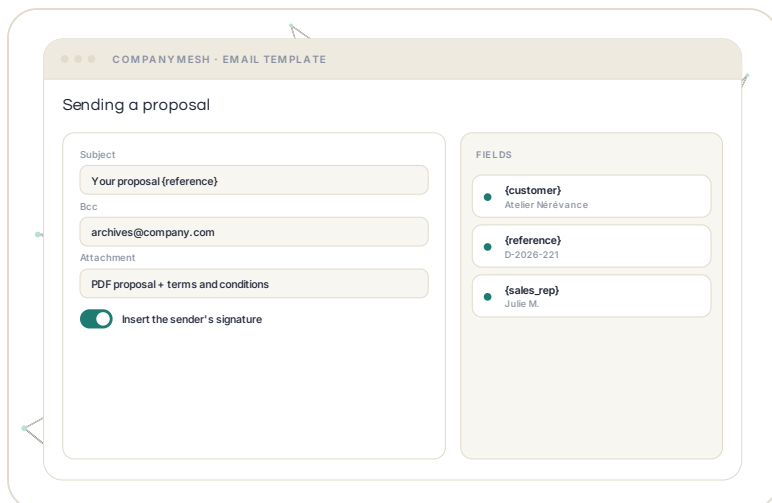
Every email in its place.

Emails are linked to the right customer, project, quote or order, based on the sender's address and the references detected. Conversation threads are rebuilt.



What it enables

- Filing by contact and by reference
- Attachments saved to documents
- Grouped conversation threads
- One-click manual filing



3 Templates and signatures

One shared tone, fast messages.

Create templates for every situation (sending a quote, confirming a deposit, a reminder) with the project's fields filled in automatically. Every user has their own signature.

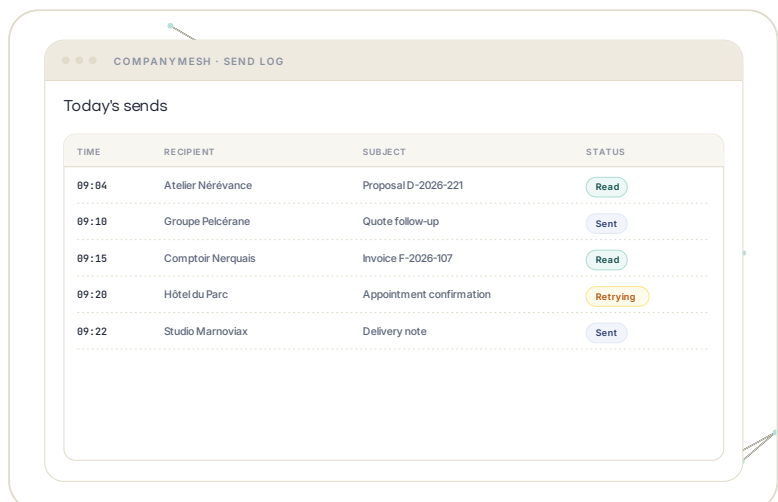
What it enables

- Templates with dynamic fields
- Fixed or generated attachments
- Predefined CC and BCC
- Signatures per user

4 Reliable, tracked sending

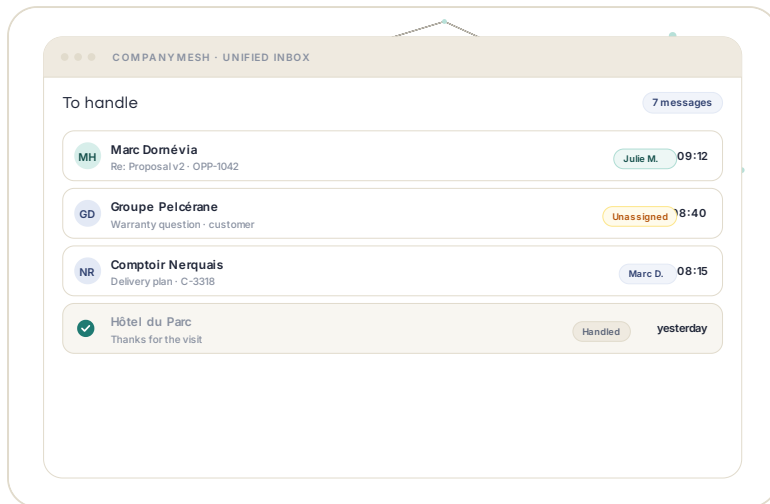
You know what went out, and what was read.

Emails go through a sending queue that handles provider limits and retries. Optional open tracking tells you when a message has been read.



What it enables

- Sending queue with retries
- Optional open tracking
- Sending log
- Controlled bulk sending



5 A unified inbox

The whole team, one view.

One view brings together the unhandled messages from every mailbox you can access. Search by customer, project or keyword, with the full history on the record.

What it enables

- Unified multi-account view
- Search by customer or reference
- Read / handled status
- Assign a message to a colleague

TAILORED

Adapted to your business

Shared mailboxes (info@, accounts@), personal mailboxes, filing rules, message templates for every stage of **your** process: we set up email around your organisation and everyone's access rights.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Email providers

Microsoft 365

Outlook / Exchange

Gmail / Google Workspace

IMAP / SMTP

Transactional sending

Brevo

Dedicated SMTP

Documents

PDF

OneDrive / SharePoint

Google Drive

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.contacts` Customers & contacts

`crm.quotes` Quotes & sales proposals

`erp.billing` Invoicing

`comms.chat` Team chat & real time

`auto.workflows` Automations

Let's talk about your future tool

Tailored demo, by appointment.

companymesh.eu
simon@devlooper.io
+32 490 46 81 17

COMMUNICATION

Telephony & CTI

The phone rings, the customer record opens.

COMPANYMESH · INBOUND CALL

Groupe Pelcérane · Pierre Pelcérane

Call in progress 02:14

AT A GLANCE

Number	+32 81 00 00 00
Sales rep	Marc D.
Open deals	2
Balance	€0

HISTORY

- Quote D-2026-219 unread**
Sent 4 days ago
- Last call · 6 min**
12/09 · warranty question
- Order C-3312 delivered**
05/09
- Email received**
Catalogue request

✓ **Record opened**
Call recognised in 0.3 s
Transcription on
[Take a note](#)

The phone rings, the customer record opens.

On the phone, every second counts. The Telephony module connects your phone system to the tool: when a call comes in, the customer's record pops up with their latest interactions. Calls are logged, and can be recorded and transcribed so nothing slips through.

A personal welcome

You know who's calling before you pick up.

A complete history

Every call lands on the customer's record.

Calls from your screen

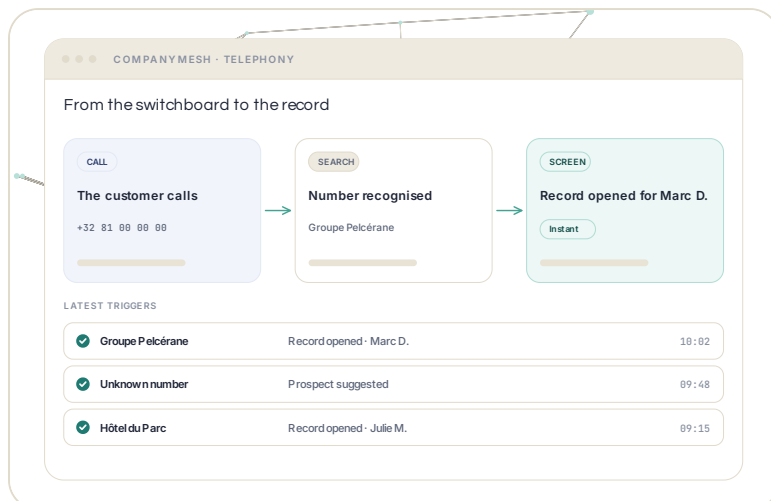
Click to call, no dialling.

Automatic call notes

Recording and transcription available.

In this module

- 1 Screen pop on incoming calls
- 2 Call from the tool
- 3 Call history
- 4 Recording and transcription
- 5 Routing and availability



1

Screen pop on incoming calls

Who's calling, and why.

On every incoming call, the number is looked up in your contacts. The record opens on the colleague's screen with their open projects and latest interactions. An unknown number offers to create a new lead.

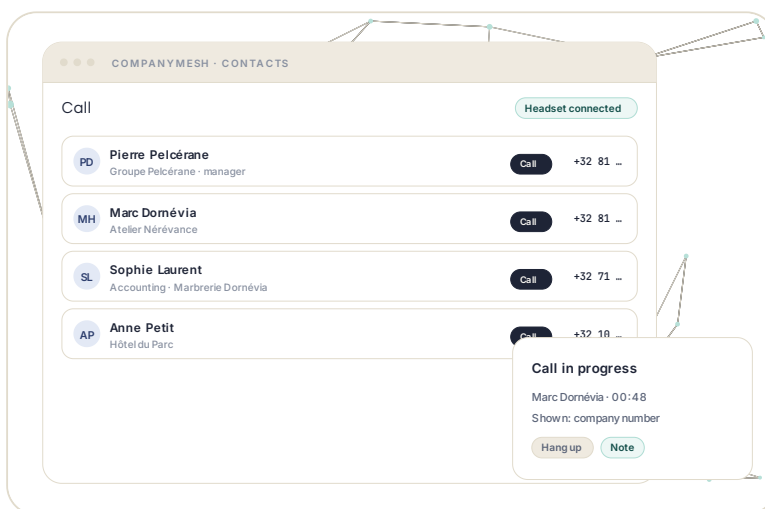
What it enables

- Instant lookup by number
- Record opens automatically
- Quick creation for unknown numbers
- Relevant colleagues notified

2 Call from the tool

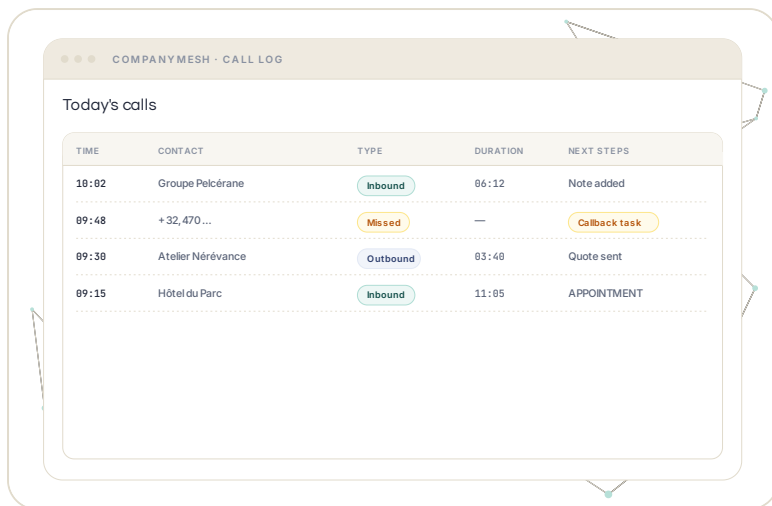
One click on the number is all it takes.

Outgoing calls start from any record, through your phone system or right in the browser. The person you call still sees your usual number.



What it enables

- Click to call
- In-browser calls (headset)
- Company number displayed
- Several numbers per team member



3 Call history

Every call counts.

Incoming, outgoing and missed calls are logged with their duration and linked to the customer. Missed calls create a call-back task.

What it enables

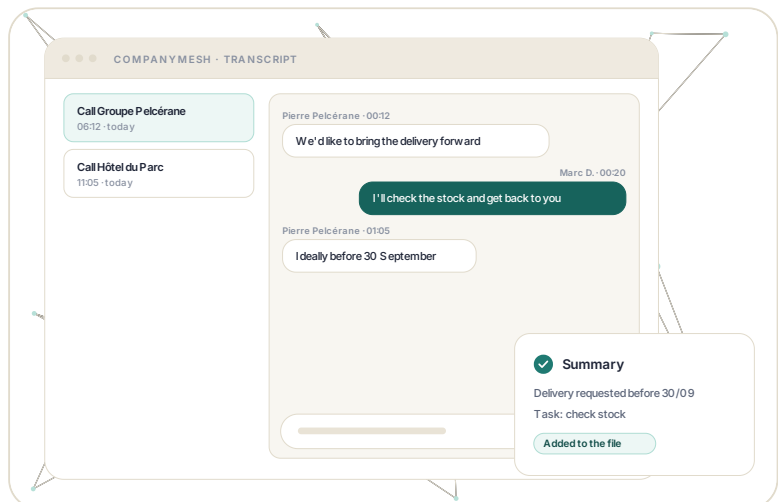
- Full log per customer and per team member
- Missed calls turned into tasks
- Call notes
- Call statistics

4

Recording and transcription

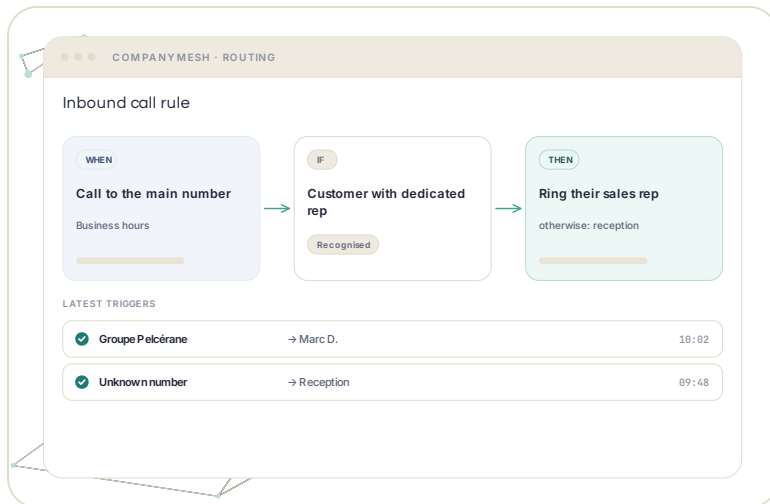
The call notes write themselves.

Calls can be recorded, in line with your duty to inform callers, then transcribed automatically. The text can be read and searched from the record.



What it enables

- Recording enabled per line
- Automatic transcription
- Search within transcripts
- Configurable retention periods



5 Routing and availability

The right person, at the right time.

Decide who receives calls based on opening hours, teams or the calling customer. Sales reps get their own customers, even through the main number.

What it enables

- Routing by team and opening hours
- Customers directed to their sales rep
- Forwarding when someone is away
- Team availability board

TAILORED

Adapted to your business

An existing phone system, forwarded personal numbers, routing by team or by opening hours: we connect **your** telephony as it is, and agree with you what should be recorded, transcribed or notified.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Phone systems & carriers

3CX

Telnyx

Ringover

Aircall

Twilio

Vonage

Transcription

Speechmatics

OpenAI

Mistral

Messaging

SMS

WhatsApp Business

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.contacts` Customers & contacts

`crm.pipeline` Pipeline & opportunities

`comms.chat` Team chat & real time

`auto.ai` Built-in AI

`ops.dashboard` Dashboards & search

Let's talk about your future tool

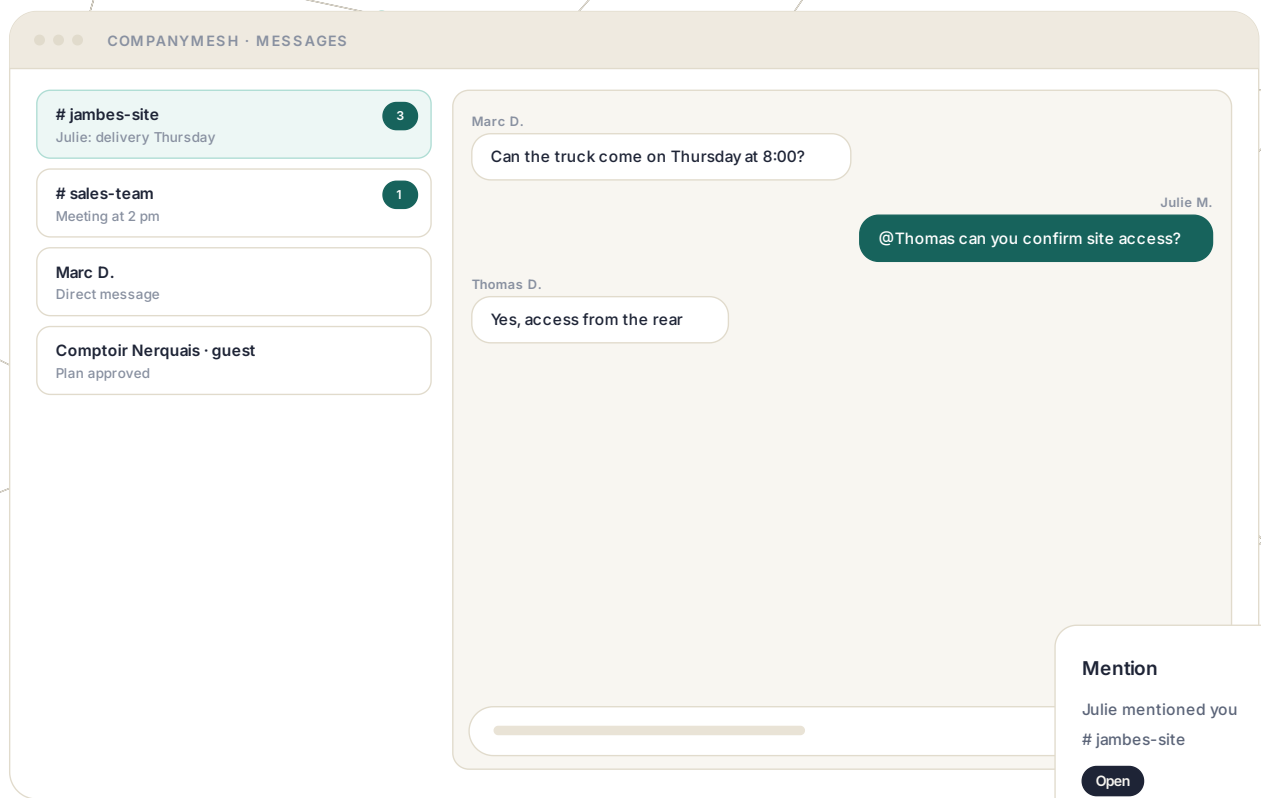
Tailored demo, by appointment.

companymesh.eu
simon@devlooper.io
+32 490 46 81 17

COMMUNICATION

Internal & real-time messaging

Your team talks, right where the work is.



Your team talks, right where the work is.

Internal conversations scattered across personal messaging apps leave no trace in your projects. Built-in messaging lets your team talk project by project, with real-time notifications, and bring in a customer or partner when needed.

Conversations in context

Every discussion linked to its customer or project.

Live information

Real-time notifications and mentions.

Guests under control

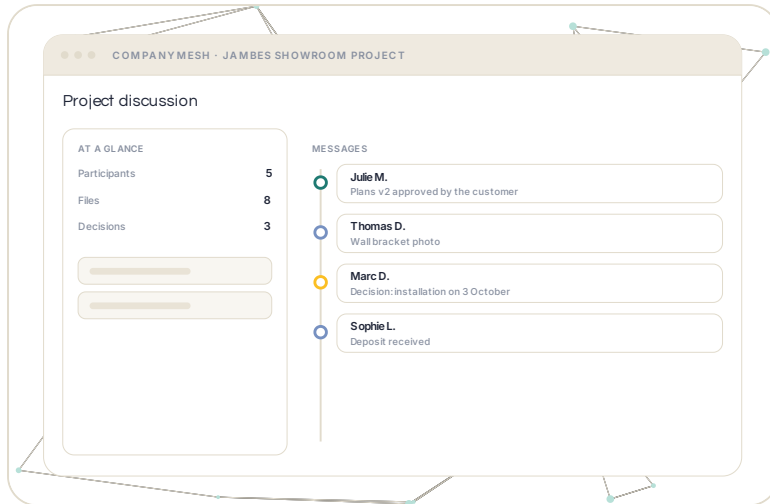
Customers and partners invited without creating an account.

A lasting record

Decisions stay in the history.

In this module

- 1 Conversations per project
- 2 Team channels and direct messages
- 3 Real time and mentions
- 4 External guests
- 5 External channels



1 Conversations per project

Context, always within reach.

Every customer, project or order can have its own conversation. Messages, files and decisions stay linked to the project, open to the people authorised to see them.

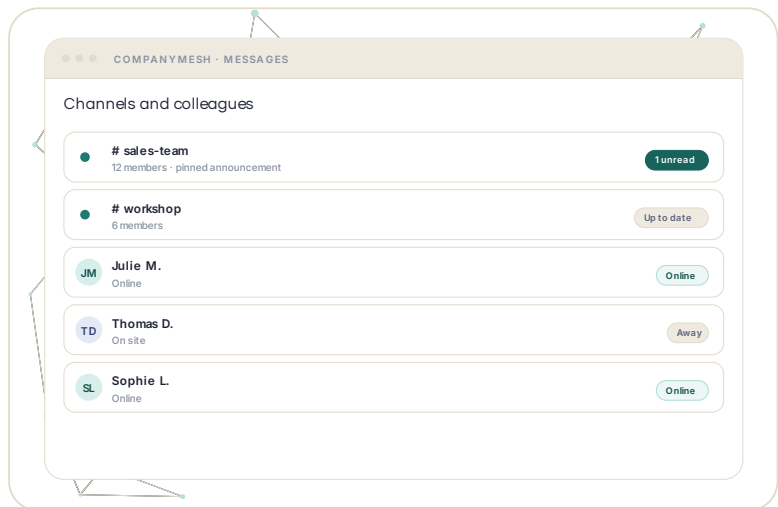
What it enables

- Conversation thread per project
- File sharing
- History kept
- Access rights inherited from the project

2 Team channels and direct messages

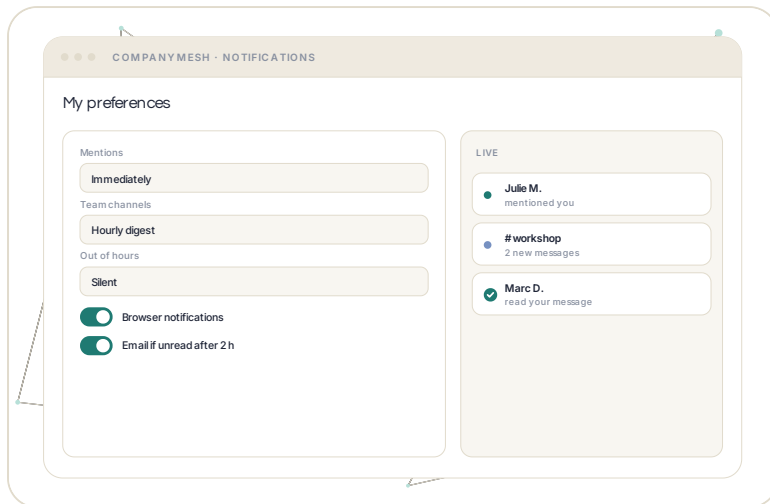
Chat fast, without leaving the tool.

Channels per department and direct messages between colleagues, with a presence indicator. Important announcements can be pinned.



What it enables

- Channels per team or department
- Direct messages
- Online presence
- Pinned messages



3 Real time and mentions

The right person, alerted straight away.

Messages arrive instantly. An @name mention notifies a colleague, and every user chooses how and when they are alerted.

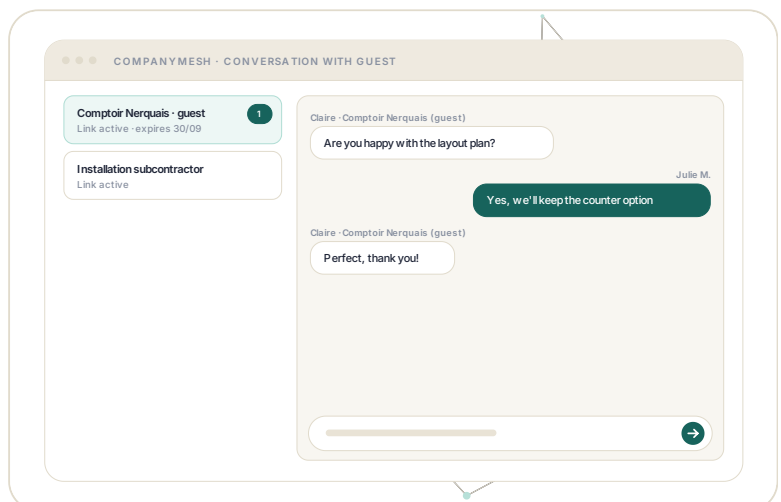
What it enables

- Instant messages
- Mentions and notifications
- Preferences per user
- Unread counters

4 External guests

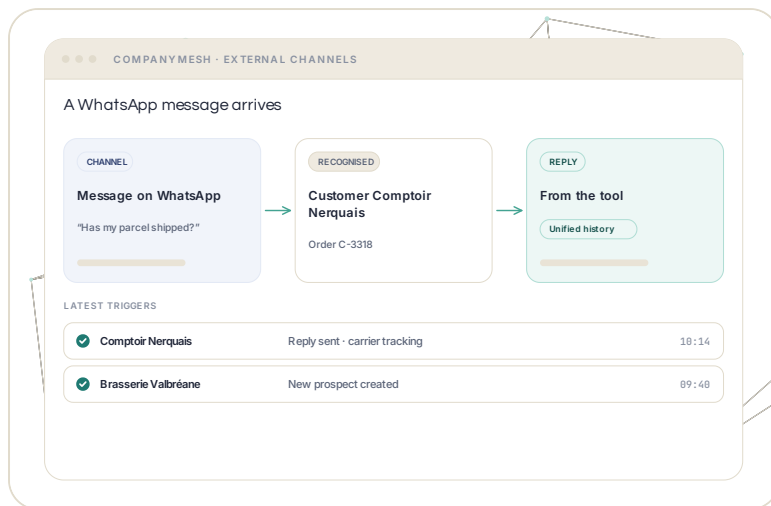
A customer in the loop, with a single link.

Invite a customer, subcontractor or supplier into a conversation with an access link. They only see what concerns them.



What it enables

- Secure invitation links
- Access limited to the conversation
- Guest identity displayed
- Revocable at any time



5 External channels

WhatsApp and Messenger, in the same thread.

Messages received on your external channels flow into the tool and onto the customer's record. Your replies go out from the same interface.

What it enables

- Centralised inbox
- Reply from the tool
- Linked to the customer
- Unified history

TAILORED

Adapted to your business

Channels per team, per site or per customer, notification rules, external guests, bridges to other messaging apps: we organise conversations the way **your** team already works.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Messaging apps

WhatsApp Business

Messenger

Slack

Microsoft Teams

Notifications

Email

Browser notifications

Mobile app

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`comms.mail` Integrated email

`comms.visio` Sovereign video conferencing

`crm.portal` Client portal

`ops.projects` Projects & production

`ops.feedback` Internal feedback & support

Let's talk about your future tool

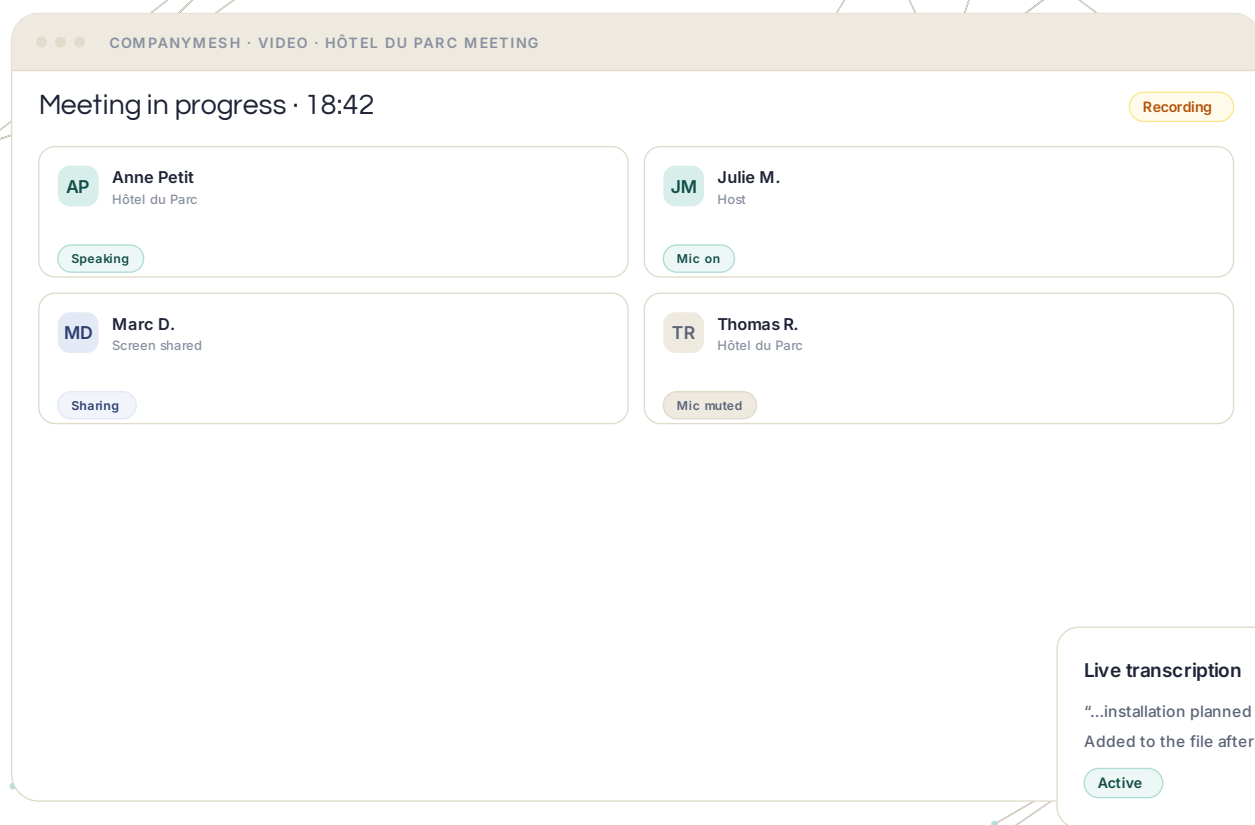
Tailored demo, by appointment.

companymesh.eu
simon@devlooper.io
+32 490 46 81 17

COMMUNICATION

Sovereign video conferencing

Your online meetings, on your own infrastructure.



Your online meetings, on your own infrastructure.

Client appointments, team meetings, demos: video calls are now part of every day. The Video Conferencing module builds them right into the tool, on your own dedicated server, with no third-party account. Meetings are linked to appointments and client files.

No third-party accounts

Your clients join with a simple link, nothing to install.

Data under your control

Streams and recordings hosted on your dedicated infrastructure.

Everything connected

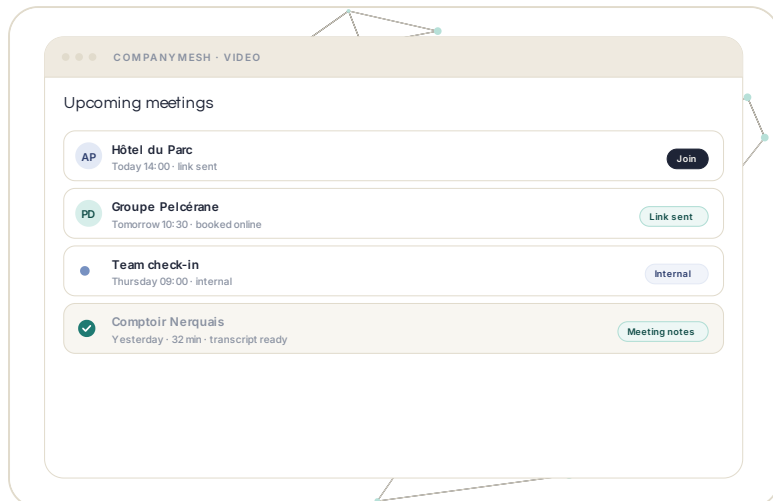
Each meeting linked to its appointment and its client.

Meeting minutes

Recording and transcription available.

In this module

- 1 Meetings linked to appointments
- 2 Waiting room
- 3 A complete meeting
- 4 Recording and transcription
- 5 Dedicated infrastructure



1

Meetings linked to appointments

The link is ready the moment it's booked.

Every video appointment generates its own room and link, sent to the client automatically. One-off meetings are created in one click from a record or a conversation.

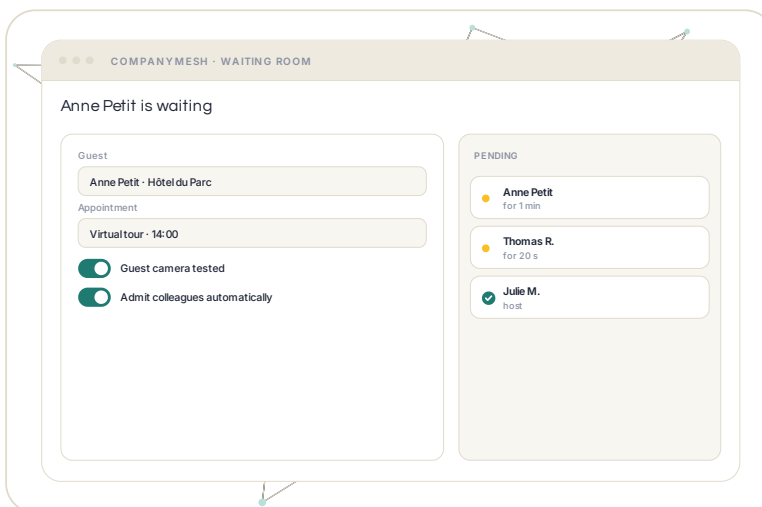
What it enables

- Room created at booking
- Link sent automatically
- One-off meetings in one click
- History per client

2 Waiting room

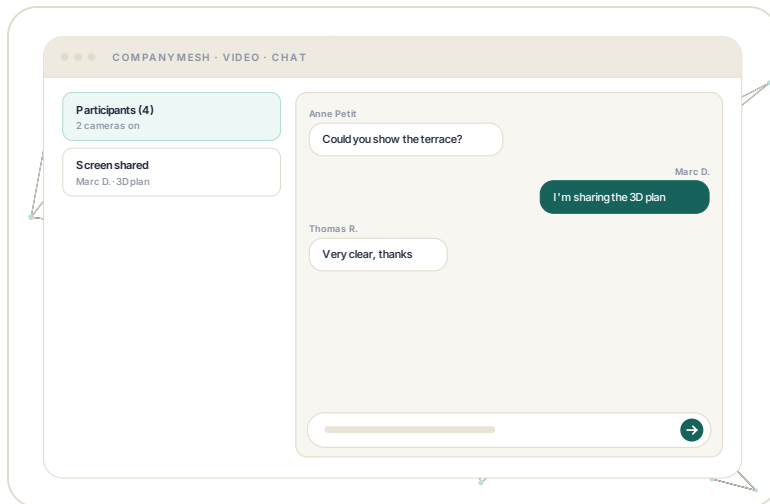
You decide who comes in.

Participants wait in a waiting room that carries your branding until you let them in. A prospect can even wait for an instant call from their personal link.



What it enables

- Branded waiting room
- Admission by the host
- Instant call from a prospect link
- Nothing to install for guests



3 A complete meeting

Everything you need, nothing you don't.

Video, audio, screen sharing and chat, right in the browser. Meetings stay light and stable, even with several participants.

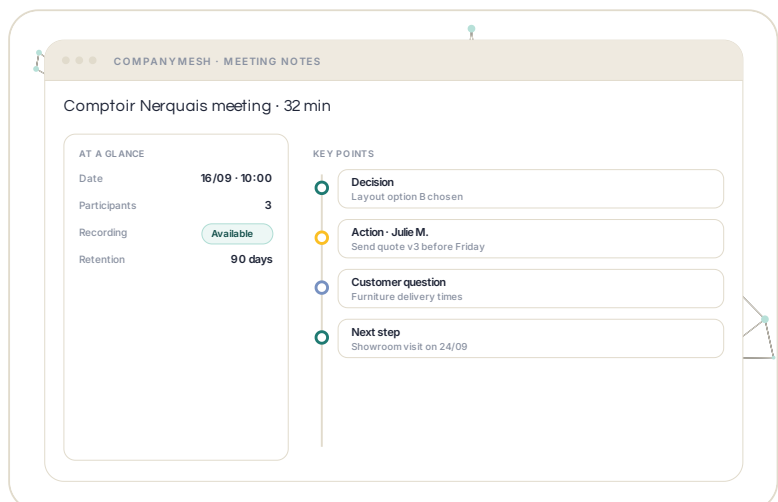
What it enables

- Screen sharing
- Chat
- Multiple participants
- Runs in the browser

4 Recording and transcription

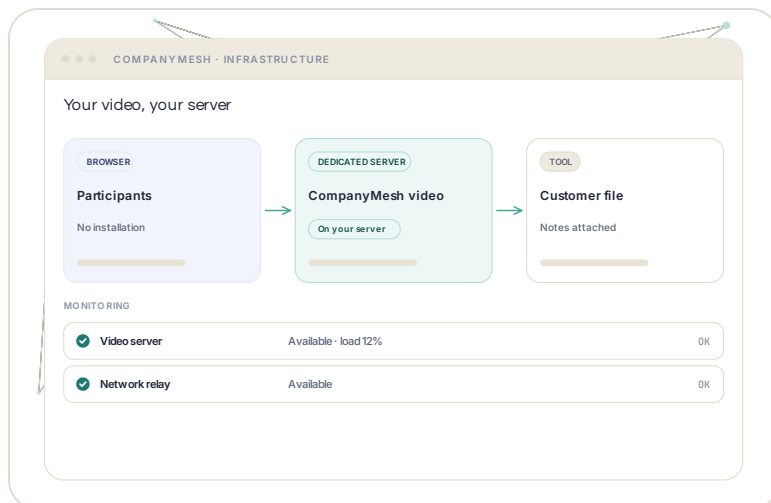
Find out what was said.

Meetings can be recorded with participants' consent, then transcribed. The minutes are attached to the appointment and the client file.



What it enables

- On-demand recording
- Automatic transcription
- Minutes in the client file
- Configurable retention



5 Dedicated infrastructure

Privacy by design.

Video conferencing runs on your own dedicated server, separate from the rest of the tool. No account with a video provider needed, and no per-participant subscription.

What it enables

- Dedicated video server
- Encrypted communications
- No third-party account
- Monitoring included

TAILORED

Adapted to your business

Waiting room, branding in your company colours, recording retention period, authorised participants: video calls follow **your** privacy rules and **your** way of welcoming clients.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

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02

The missing module

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03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Calendar

Google Calendar

Outlook / Microsoft 365

ICS

Transcription

Speechmatics

OpenAI

Mistral

Connectable alternatives

Microsoft Teams

Google Meet

Zoom

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.agenda Calendar & appointments

crm.portal Client portal

comms.chat Team chat & real time

auto.ai Built-in AI

crm.leads Prospecting & lead capture

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BUILDING BLOCK · 9 MODULE(S)

ERP — Operations & finance

Invoicing, payments, banking, accounting, catalogue, stock, purchasing and logistics.

`erp.billing`

Invoicing

Accurate invoices, sent on time, paid faster.

`erp.einvoicing`

E-invoicing

Ready for Peppol and the French reform, effortlessly.

`erp.payments`

Online payments

Your customers pay in one click, your accounts update themselves.

`erp.banking`

Banking & reconciliation

Your bank accounts, reconciled automatically.

`erp.accounting`

Accounting link

Your accountant gets everything, without you lifting a finger.

`erp.catalog`

Product catalogue

A rich, accurate catalogue, shared everywhere.

`erp.stock`

Stock & procurement

The right stock, in the right place, at the right time.

`erp.suppliers`

Suppliers & purchasing

Your suppliers reply, you compare, you order.

`erp.logistics`

Orders, delivery & transport

From order to delivery, every step under control.

Invoicing

Accurate invoices, sent on time, paid faster.

COMPANYMESH · INVOICING

INVOICE

F-2026-104

Paid

Showroom fit-out (balance)	1	9,345.00
Installation and finishing	1	1,950.00
Deposit already invoiced		-4,005.00
Total excl. VAT		7,290.00
VAT 21%		1,530.90
To pay		8,820.90

Structured reference · due in 30 days

CYCLE

✓ Deposit F-2026-091
Paid on 14/08

✓ Final invoice sent
12/09 · email + link

✓ Paid
15/09 · Stripe

● Posted
Today's export

✓ Payment received
F-2026-104 · €8,820.90
Reconciled automatically

Paid

Accurate invoices, sent on time, paid faster.

Invoicing is where work turns into cash. The Invoicing module generates your invoices from quotes and orders, handles deposits, final invoices and credit notes, meets your legal obligations and tracks every payment until it's collected.

Zero re-keying

Invoices created straight from the quote or order.

Guaranteed compliance

Numbering, legal notices and a full change history.

Faster collection

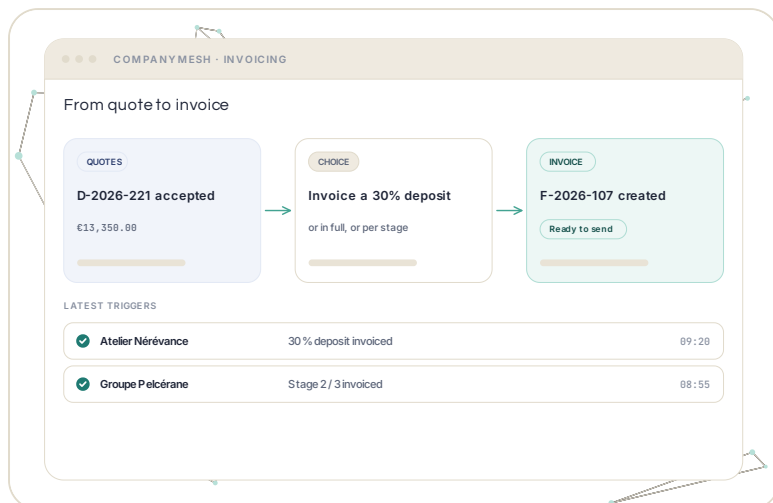
Instant sending, payment link and reminders.

A clear view

Outstanding amounts, late payments and revenue in real time.

In this module

- 1 Invoices in one click
- 2 Deposits, final invoices and credit notes
- 3 Numbering and compliance
- 4 Sending and reminders
- 5 Tracking receivables



1 Invoices in one click

From accepted quote to invoice sent.

The invoice picks up the lines from the quote or order, with discounts and VAT rates. Invoice in full, in part or by milestone.

What it enables

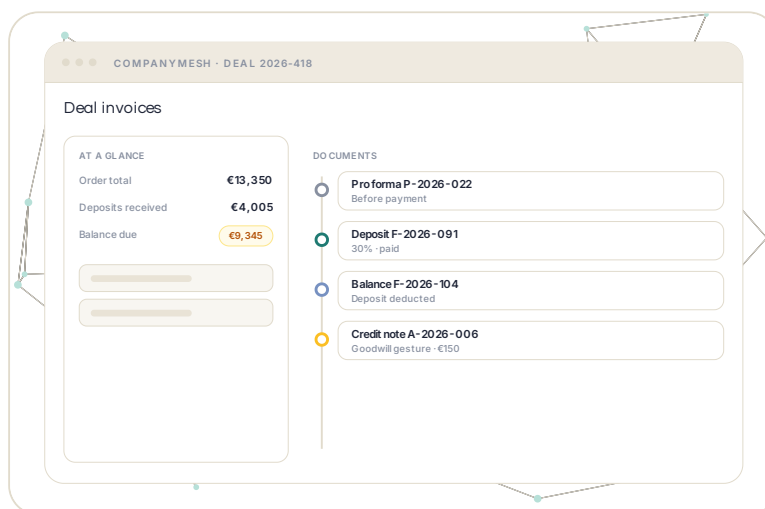
- Created from a quote or order
- Partial or milestone invoicing
- Multiple VAT rates
- Discounts and notices carried over

2

Deposits, final invoices and credit notes

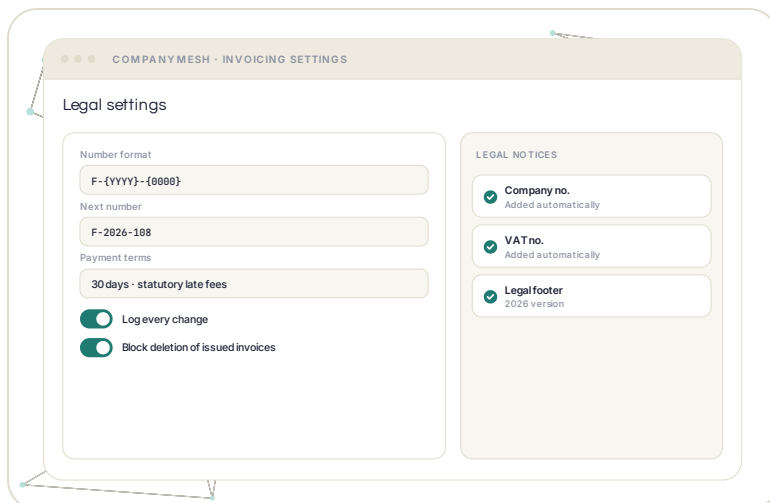
Every scenario, handled properly.

Deposit and final invoices follow one another, with amounts already received deducted automatically. Credit notes and replacement invoices stay linked to the original invoice.



What it enables

- Deposit and final invoices
- Automatic deduction of deposits
- Credit notes and replacement invoices
- Pro formas with separate numbering



3 Numbering and compliance

Flawless documents.

Numbering is sequential and configurable. Legal notices, company identifiers and payment terms are added automatically, and every change is logged.

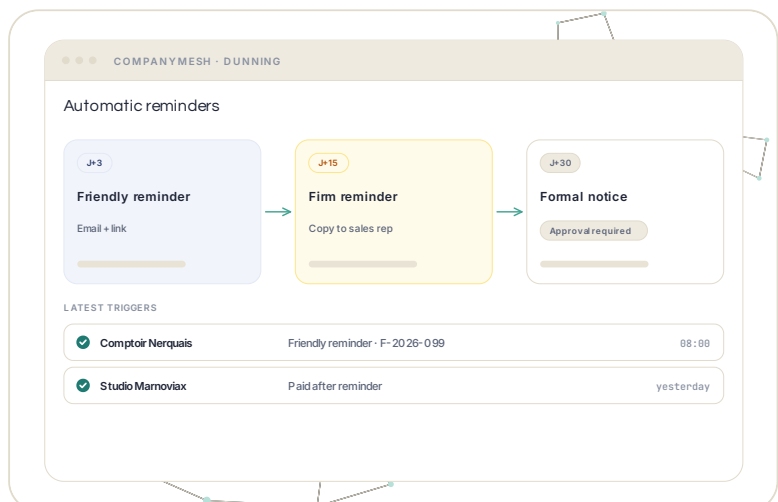
What it enables

- Configurable sequential numbering
- Legal notices and issuer identifiers
- Change history
- Payment terms and late-payment penalties

4 Sending and reminders

Fewer unpaid invoices, without thinking about it.

Invoices go out by email with a payment link. Escalating reminders kick in automatically based on the due date, with messages to match.



What it enables

- Sent by email or e-invoicing network
- Online payment link
- Automatic escalating reminders
- Paid status updated automatically



5 Tracking receivables

Who owes you what, at a glance.

A dashboard shows invoiced revenue, open invoices, late payments and average payment times, by client and by period.

What it enables

- Outstanding and overdue amounts per client
- Average payment times
- Revenue by period
- Export for accounting

TAILORED

Adapted to your business

Deposit and final invoices, pro formas, credit notes, multi-rate VAT invoices, notices specific to **your** sector, email templates: we reproduce your documents and your workflow, including your particularities (deposit on order, balance on delivery...).

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Payment

[Stripe](#)[PayPal](#)[Mollie](#)[Qonto](#)

E-invoicing

[Peppol](#)[Super PDP](#)[Billit](#)[Chorus Pro](#)

Accounting

[Inqom](#)[Exact Online](#)[Yuki](#)[Pennylane](#)[Odoo](#)

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

[crm.quotes](#) **Quotes & sales proposals**[erp.payments](#) **Online payments**[erp.einvoicing](#) **E-invoicing**[erp.banking](#) **Banking & reconciliation**[erp.accounting](#) **Accounting link**[auto.workflows](#) **Automations**

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simon@devlooper.io
+32 490 46 81 17

E-invoicing

Ready for Peppol and the French reform, effortlessly.

COMPANYMESH · E-INVOICING

Transmissions Network active

INVOICE	CUSTOMER	CHANNEL	FORMAT	STATUS
F-2026-104	Atelier Nérévance	Peppol	UBL	Delivered
F-2026-105	Comptoir Nerquais (FR)	Accredited platform	Factur-X	Accepted
F-2026-106	Private customer Dubois	Email	PDF	Sent
F-2026-107	Groupe Pelcérane	Peppol	UBL	In progress
A-2026-006	Studio Marnoviaux	Peppol	UBL	Delivered

✓ **Invoice delivered**
F-2026-104 · via Peppol
Acknowledgement received
Compliant

Ready for Peppol and the French reform, effortlessly.

E-invoicing is becoming mandatory between businesses in Belgium and is being rolled out across France. The E-invoicing module sends and receives your invoices in the official formats, through an accredited platform, straight from the tool.

Regulatory compliance

Official formats and networks supported.

Direct delivery

The invoice reaches your customer with no printing and no email.

Automated receipt

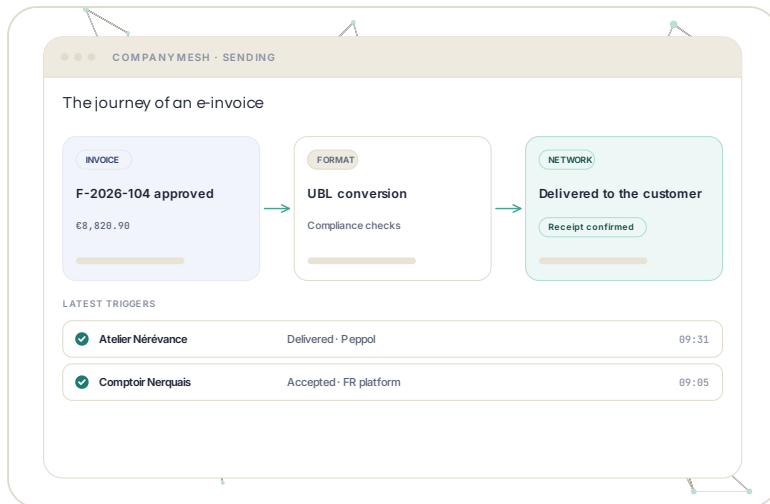
Supplier invoices arrive already structured.

Fewer errors

VAT numbers and recipients checked.

In this module

- 1 Sending e-invoices
- 2 Receiving supplier invoices
- 3 Directory and checks
- 4 Viewing and conversion
- 5 Gradual activation



1 Sending e-invoices

Your invoices, in the official format.

Every invoice can be sent in a structured electronic format to customers who are set up for it, over the right network. The delivery status flows straight back into the tool.

What it enables

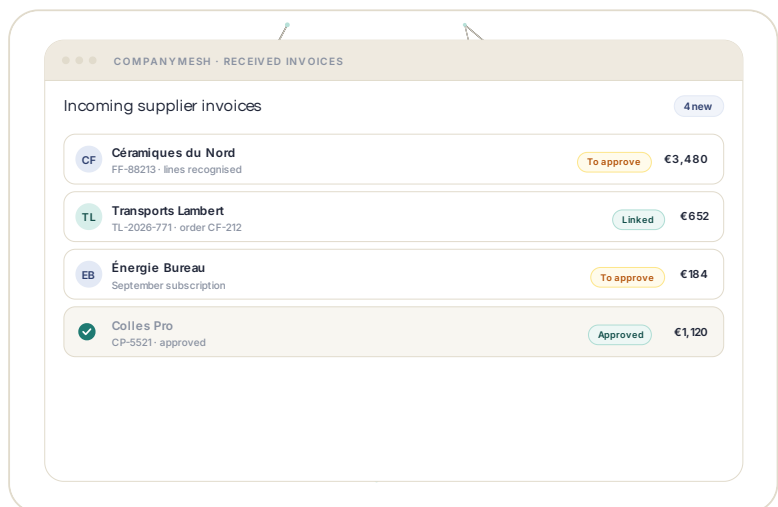
- UBL and Factur-X formats
- Delivery and processing statuses
- Delivery through an accredited platform
- Credit notes supported

2

Receiving supplier invoices

Incoming invoices, ready to read.

Invoices received over the network arrive structured: supplier, amounts and lines are recognised, then matched to the corresponding purchases.



What it enables

- Electronic inbox
- Matching with purchase orders
- Structured, usable data
- Approval workflow

3 Directory and checks

The right recipient, every time.

Before sending, the tool checks that the customer can be reached on the network and that their VAT number is valid.

Customers who aren't set up receive the invoice by email.

What it enables

- Network directory lookup
- Intra-EU VAT number check
- Automatic fallback to email
- VAT regime per customer

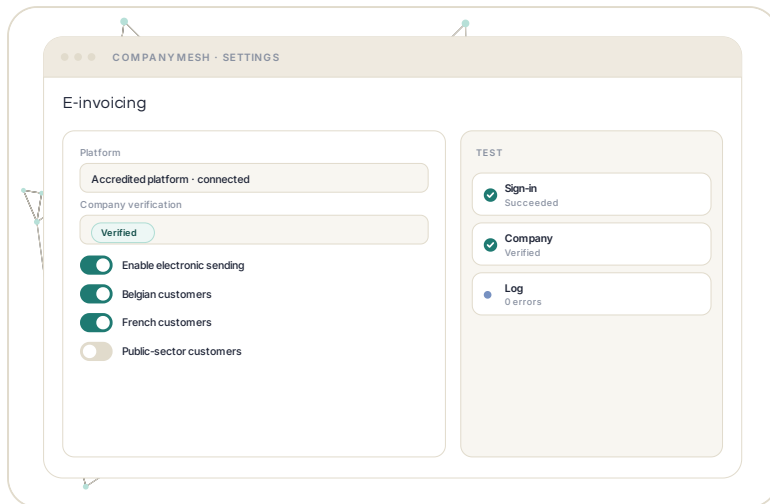
4 Viewing and conversion

A UBL file you can actually read.

Any e-invoice file you receive can be viewed like a regular PDF, for archiving or for passing on to a colleague.

What it enables

- UBL file viewer
- Conversion to PDF
- Both formats archived
- Download on demand



5 Gradual activation

You decide when to switch.

E-invoicing is switched on from the settings once your company has been verified. Nothing is sent until you say so.

What it enables

- Connection test before activation
- Off by default
- Activation by customer type
- Transmission log

TAILORED

Adapted to your business

Belgian, French or European customers, public bodies, private individuals: we set up the right channels for **your** customer base, and you switch over at your own pace, without disrupting your current invoicing.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

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03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Networks & platforms

Peppol

Super PDP

Billit

Chorus Pro

Formats

UBL

Factur-X

CII

PDF

Checks

VIES

Peppol Directory

Business directory (FR)

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

erp.billing Invoicing

erp.accounting Accounting link

erp.suppliers Suppliers & purchasing

dms.compliance Verification & compliance

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simon@devlooper.io
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Online payments

Your customers pay in one click, your accounts update themselves.

The screenshot displays the 'COMPANYMESH · PAYMENTS' interface. It features a section titled 'Today's payments' with a total amount of €+12,480. Below this, there is a list of five payment transactions, each with a status icon, a description, and a status label with the amount. A callout box on the right highlights a successful deposit received from 'Comptoir Nerquais'.

Today's payments			€+12,480
NR	Comptoir Nerquais 30% deposit · card	Succeeded	€4,005
AV	Atelier Nérévance Invoice F-2026-104 · link	Succeeded	€8,820
PD	Private customer Dubois Pay in 3 instalments	Accepted	€1,890
BL	Brasserie Valbréane Card declined	Failure	€640
SK	Studio Marnoviaux Partial refund	Refunded	€-120

✓ **Deposit received**

Comptoir Nerquais · €4,005
Deal unlocked → order

Automatic

Your customers pay in one click, your accounts update themselves.

A payment link in a quote or invoice cuts the time it takes to get paid dramatically. The Online payments module accepts cards, bank transfers and instalment payments, and updates the status of your documents automatically.

Faster collection

Instant payment straight from the quote or invoice.

A wide choice of payment methods

Card, bank transfer, wallets, pay in instalments.

No manual matching

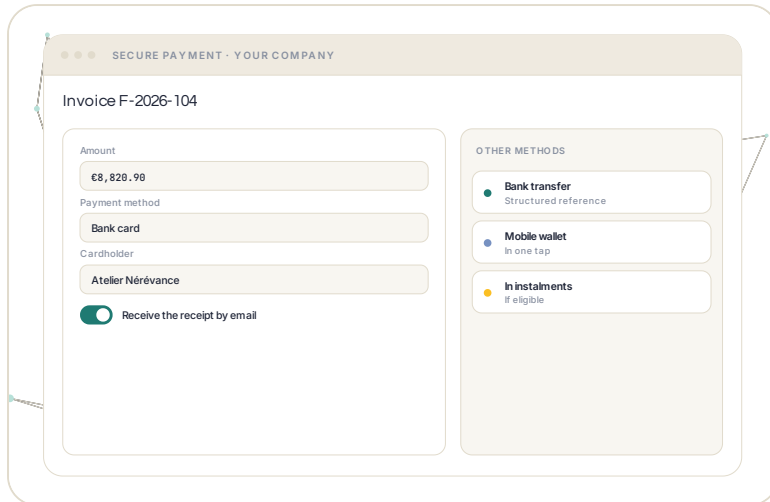
Statuses updated automatically.

Secured deposits

The order starts once the deposit is in.

In this module

- 1 Payment links
- 2 Deposits and release
- 3 Pay in instalments
- 4 Automatic statuses
- 5 Bank transfers and direct debits



1 Payment links

Paying has never been this easy.

Every quote or invoice can carry a secure payment link. Your customer picks a payment method and pays in seconds, from a computer or phone.

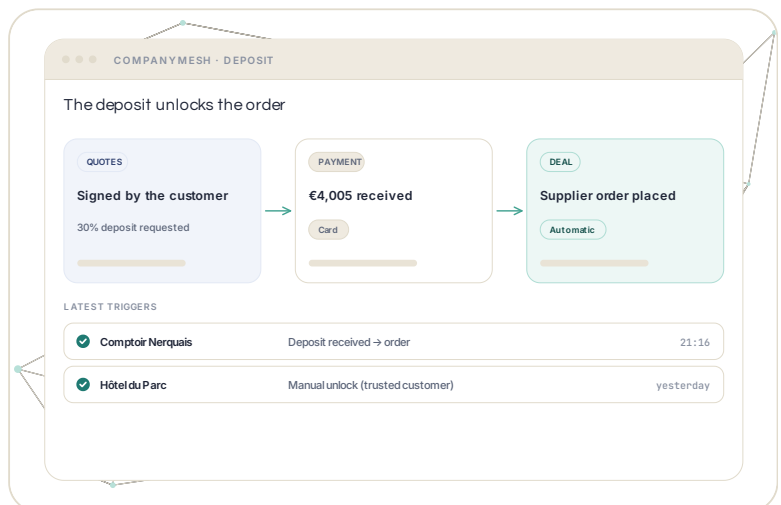
What it enables

- Links on quotes, invoices and the customer portal
- Card and wallet payments
- A payment page in your branding
- Receipt sent automatically

2 Deposits and release

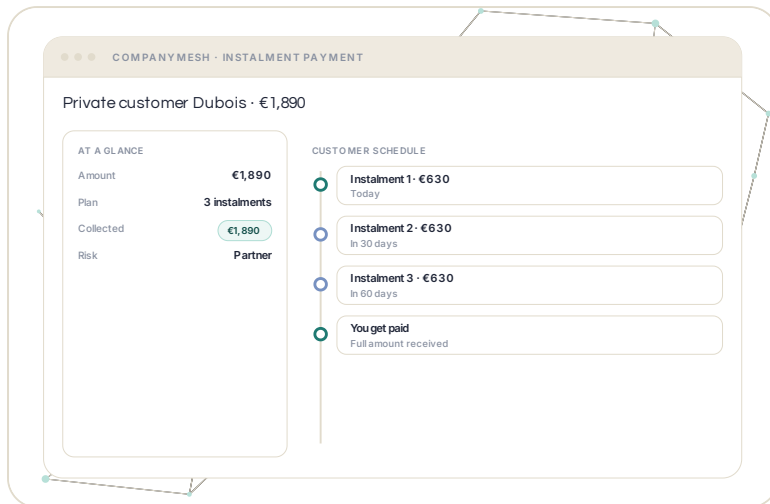
Payment sets the next step in motion.

A paid deposit automatically releases the next steps: confirmation, supplier order, scheduling. You can also release a trusted customer manually.



What it enables

- Deposit as a percentage or a fixed amount
- Automatic release of the deal
- Manual release for trusted customers
- Custom payment instructions



3 Pay in instalments

Extra convenience for your private customers.

Offer payment in instalments through a specialist partner. You get paid, your customer spreads the cost.

What it enables

- Pay in 2, 3 or 4 instalments
- Eligibility checked by the partner
- Full payment to you
- Handling of declines and drop-offs

4 Automatic statuses

No more matching payments by hand.

Notifications from payment providers update quotes, orders and invoices: paid, partially paid, failed, refunded. Every event is logged.

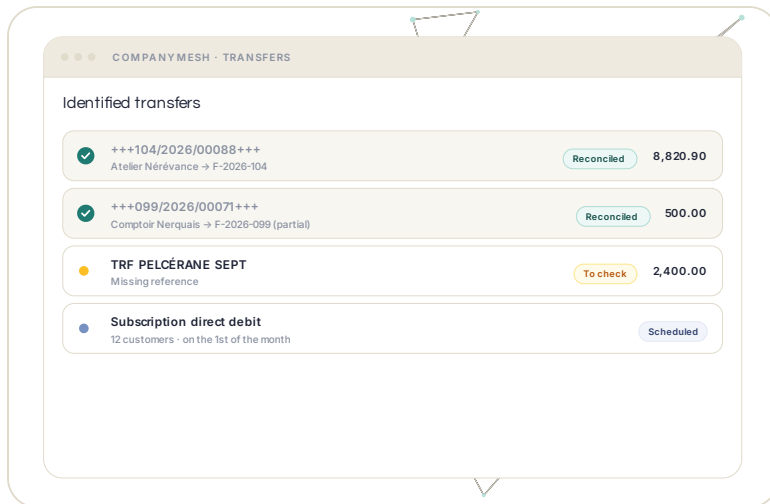
COMPANYMESH - PAYMENT EVENTS

Log

TIME	DOCUMENT	EVENT	AMOUNT
21:16	D-2026-210	Paid	4,095.00
17:02	F-2026-099	Partially paid	500.00
15:40	F-2026-102	Failed - card	640.00
11:15	F-2026-095	Refunded	-120.00
09:30	F-2026-104	Paid	8,820.90

What it enables

- Real-time updates
- Partial payments
- Refunds
- Payment event log



5 Bank transfers and direct debits

For large and recurring amounts.

Transfers are identified using the structured payment reference and bank reconciliation. Subscriptions can be collected automatically by direct debit.

What it enables

- Structured payment reference
- Reconciliation with your bank
- Recurring direct debits
- Payment statement per customer

TAILORED

Adapted to your business

A deposit on signature, the balance on delivery, instalments for private customers, bank transfer for trade customers: we configure payment methods and rules to suit **your** customers and **your** amounts.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

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The missing module

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03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Payment providers

Stripe

PayPal

Mollie

Alma

GoCardless

Banking

Qonto

Ponto

E-commerce

WooCommerce

Shopify

PrestaShop

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`erp.billing` Invoicing

`crm.quotes` Quotes & sales proposals

`erp.banking` Banking & reconciliation

`crm.portal` Client portal

`auto.workflows` Automations

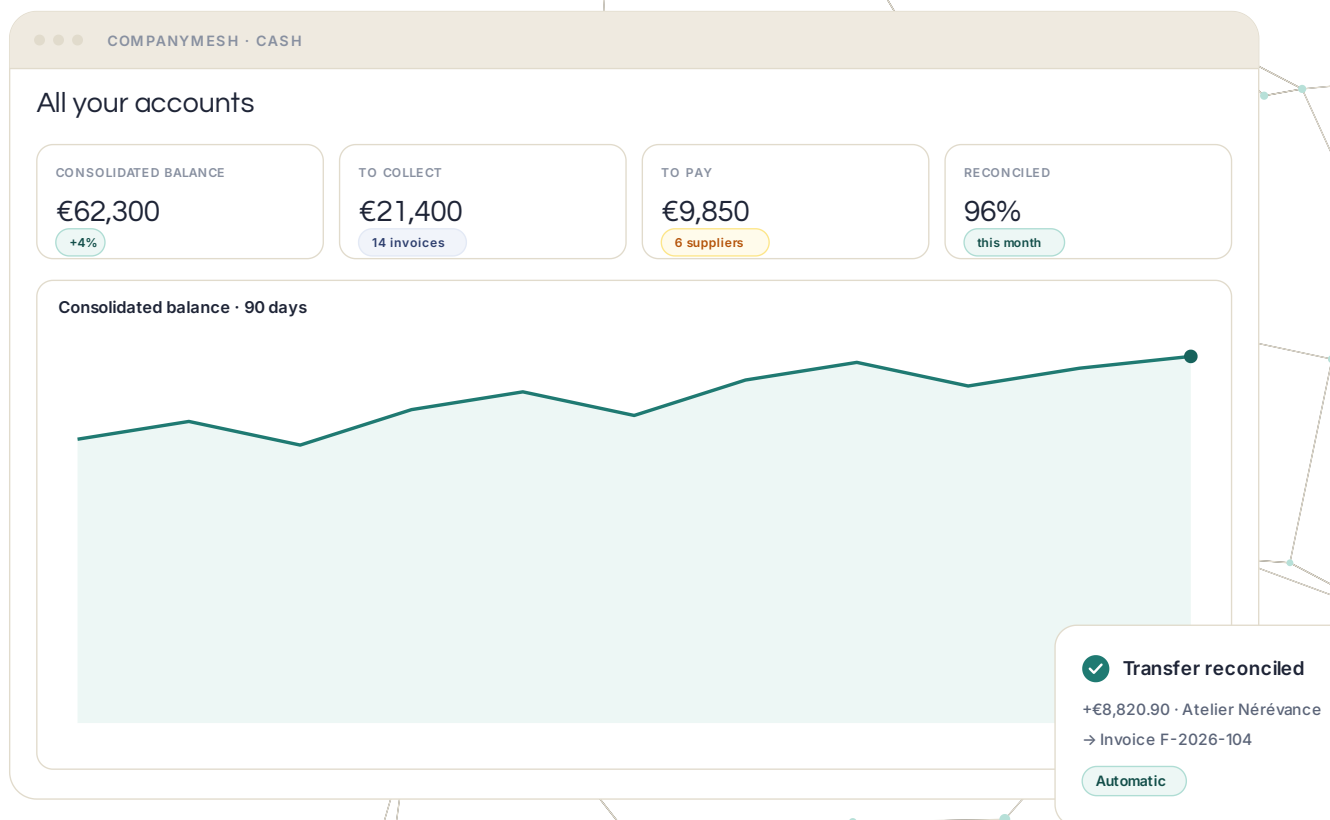
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simon@devlooper.io
+32 490 46 81 17

Banking & reconciliation

Your bank accounts, reconciled automatically.



Your bank accounts, reconciled automatically.

Ticking off bank statements line by line takes hours. The Banking module connects your accounts to the tool: transactions come in on their own, get matched to invoices and expenses, and your cash position is visible in real time.

Automatic matching

Payments are matched to the right invoices.

Visible cash flow

Balances and transactions across all your accounts.

Secure transfers

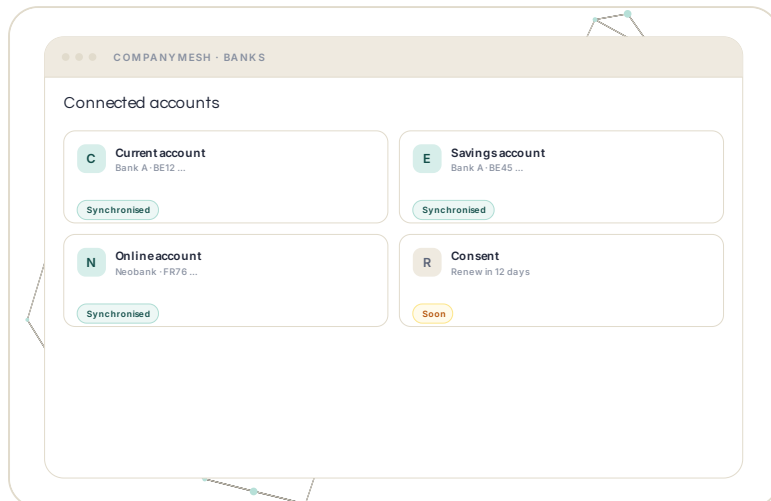
Supplier payments prepared, then approved with strong authentication.

Lighter bookkeeping

Fewer documents to hand over, fewer discrepancies.

In this module

- 1 Connected accounts
- 2 Automatic reconciliation
- 3 Real-time cash position
- 4 Supplier payments
- 5 Expense categorisation



1 Connected accounts

Your transactions, no exports needed.

Your business accounts are linked through a licensed bank connection. Transactions are retrieved automatically, read-only, with your renewable consent.

What it enables

- Licensed bank connection (open banking)
- Multiple banks and accounts
- Automatic synchronisation
- Statement import as a complement

2 Automatic reconciliation

Every payment finds its invoice.

Transactions are matched to invoices using amounts, payment references and document numbers. Uncertain cases are put forward for your approval.

DATE	LABEL	AMOUNT	PROPOSAL	STATUS
15/09	+++104/2026/00088+++	+8,820.90	F-2026-104	Reconciled
15/09	COMPTOIR NERQUAIS DEPOSIT	+4,005.00	F-2026-107	Reconciled
14/09	TRF PELCÉRANE SEPT	+2,400.00	F-2026-097 + 098	To be confirmed
14/09	TRANSPORTS LAMBERT	-652.00	TL-2026-771	Reconciled
13/09	BANK CHARGES	-12.40	Fees category	Filed

What it enables

- Matching by reference and amount
- Partial and grouped payments
- Suggestions for ambiguous cases
- Invoice statuses updated



3 Real-time cash position

You know exactly where you stand.

A dashboard consolidates your account balances and how they evolve, along with expected receipts and planned outgoings.

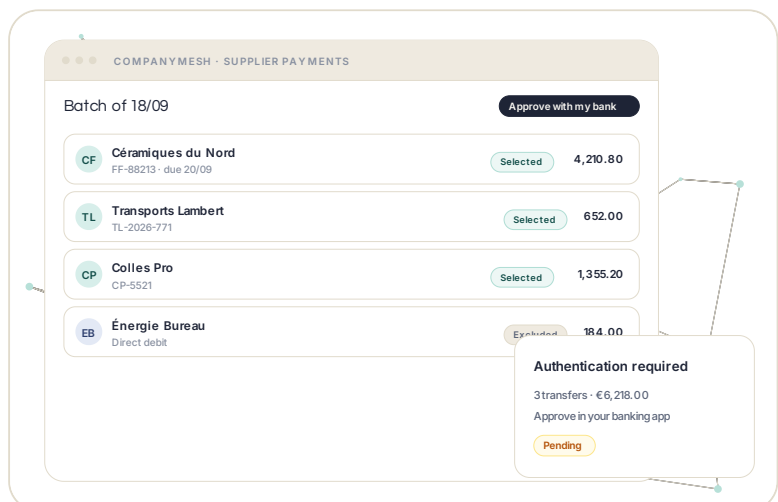
What it enables

- Consolidated balances
- Trends over the period
- Expected receipts
- Planned outgoings

4 Supplier payments

Prepared in the tool, approved by you.

Supplier invoices due for payment are grouped into a batch. The transfer is initiated from the tool and approved with your bank's strong authentication. No transfer leaves without you.



What it enables

- Supplier payment batches
- Approval with strong authentication
- No silent transfers
- History of payments made

COMPANYMESH · EXPENSES

September expenses

LABEL	CATEGORY	AMOUNT	RECEIPT
Fuel station	Vehicles	-86.48	✓
Drawing software	Subscriptions	-49.88	✓
Client lunch	Entertainment	-72.58	Missing
Workshop supplies	Purchasing	-214.98	✓

5 Expense categorisation

Your expenses, sorted.

Expenses are categorised according to your rules and linked to their receipts, ready to be passed on to your accountant.

What it enables

- Categorisation rules
- Receipts attached
- Missing receipt alerts
- Accounting export

TAILORED

Adapted to your business

Several banks, several companies, specific matching rules (deposits, grouped payments, fees): we adapt the rules to **your** flows, and you always keep control over ambiguous cases.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

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The missing module

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03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Banks & aggregators

Qonto

Ponto (Isabel Group)

Belfius

BNP Paribas Fortis

ING

KBC

Formats

CODA

CAMT.053

CSV

Accounting

Inqom

Exact Online

Yuki

Pennylane

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

erp.payments Online payments

erp.billing Invoicing

erp.accounting Accounting link

ops.dashboard Dashboards & search

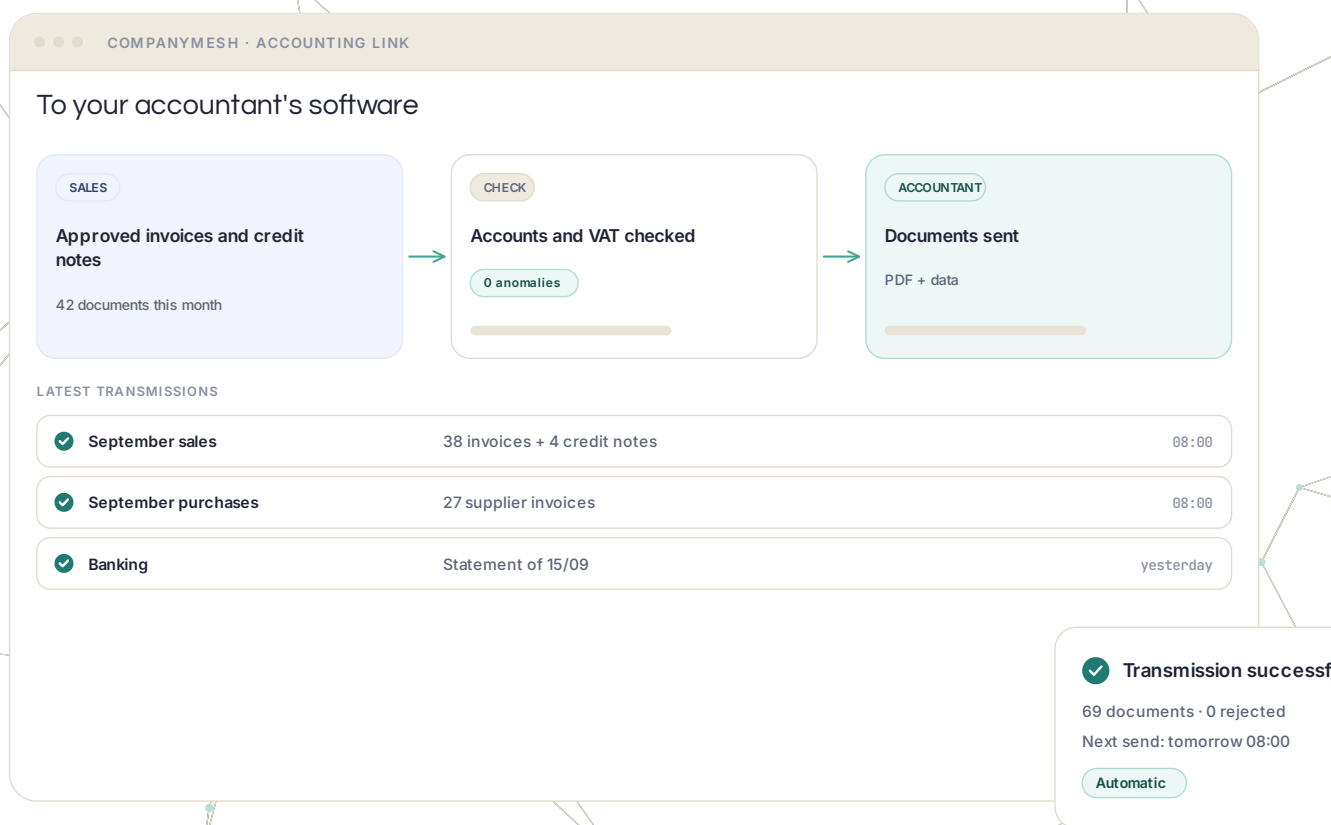
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Accounting link

Your accountant gets everything, without you lifting a finger.



Your accountant gets everything, without you lifting a finger.

Every month, gathering invoices, payments and receipts for your accountant is a chore. The Accounting Link module prepares your entries and documents and sends them automatically to your accounting firm's software, with the right accounts and the right VAT codes.

No more manual handovers

Invoices and documents sent automatically.

Clean entries

Accounts and VAT codes applied as soon as you invoice.

A more efficient accountant

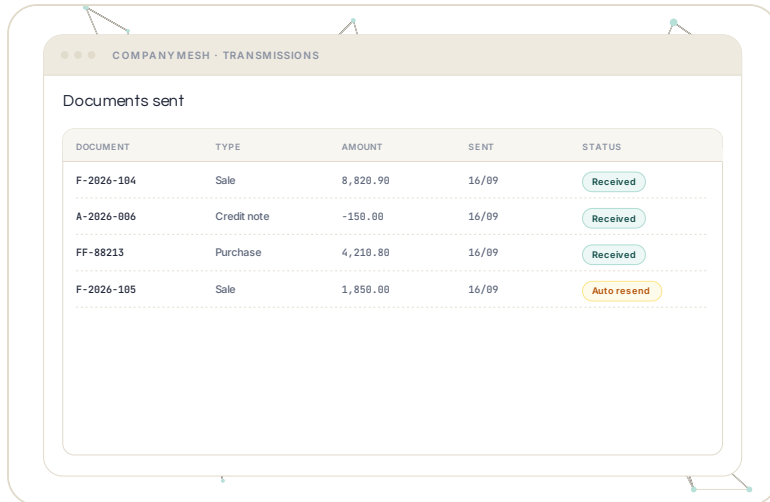
Fewer questions, less back and forth.

A faster close

Complete, up-to-date data.

In this module

- 1 Automatic transfer
- 2 Accounts and VAT codes
- 3 Supplier documents
- 4 Exports and journals
- 5 Checks before sending



1 Automatic transfer

Documents go out on their own.

Sales invoices, credit notes and approved supplier invoices are sent to the accounting software at the frequency you choose, with their PDF and structured data.

What it enables

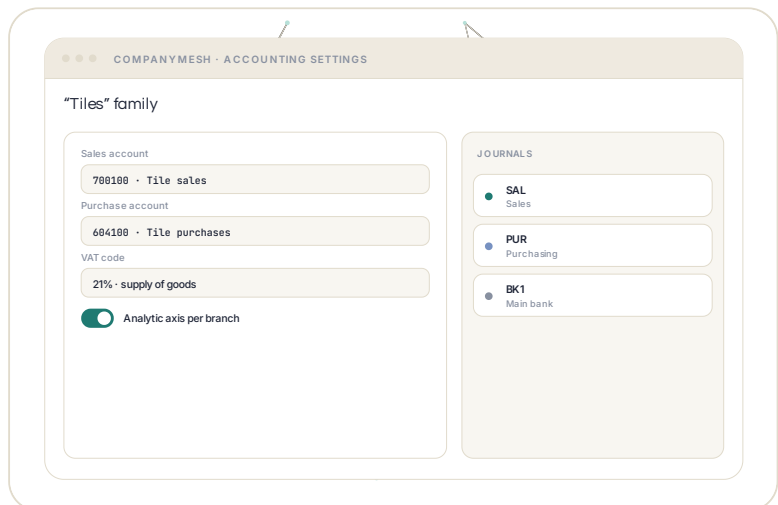
- Automatic or on-demand sending
- Tracking of transferred documents
- PDF and structured data
- Resend in case of error

2

Accounts and VAT codes

The right posting, right from the start.

Every item, category or client carries its own ledger account and VAT code. Entries reach your accountant already posted.



What it enables

- Custom chart of accounts
- Sales and purchase journals
- VAT codes per transaction
- Cost centres



3 Supplier documents

Purchases too, effortlessly.

Supplier invoices, once received and approved, follow the same path, with their supporting document and a link to the matching order.

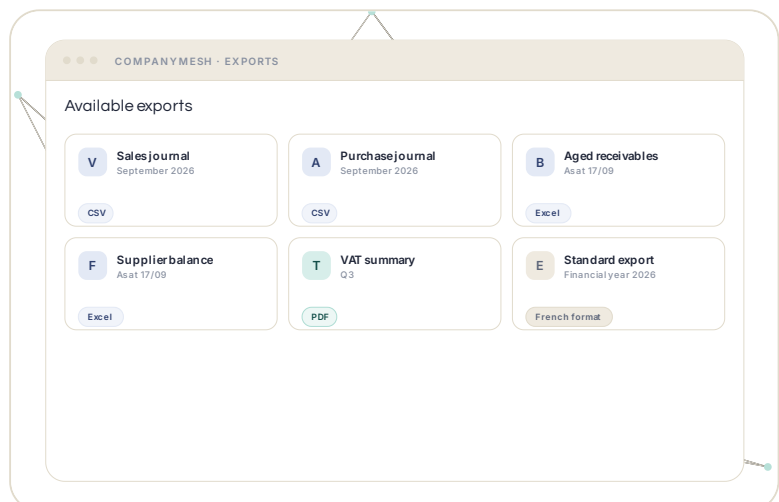
What it enables

- Purchase invoices transferred
- Supporting documents attached
- Link to orders
- Payment status passed on

4 Exports and journals

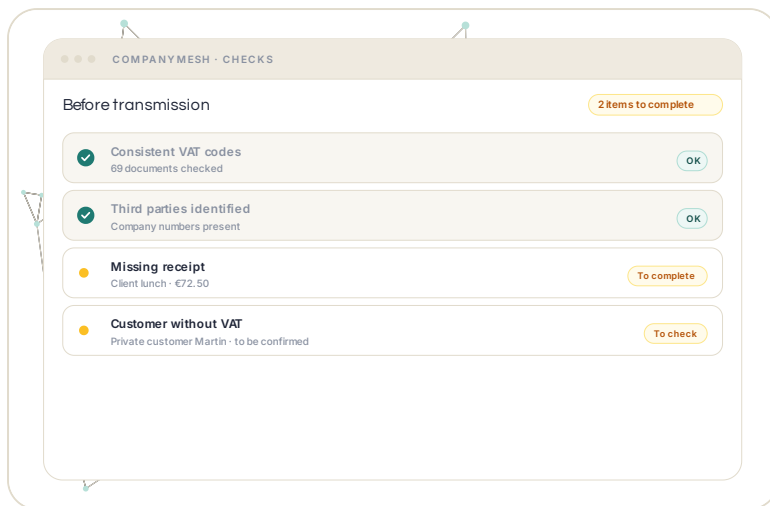
Data ready for analysis.

Export your journals, customer and supplier balances or VAT listings for any period, in the formats your accounting firm expects.



What it enables

- Sales and purchase journals
- Aged balances
- VAT summaries
- CSV and standard formats



5 Checks before sending

Fewer errors to fix.

Before each transfer, the tool checks that supporting documents are present, that rates are consistent and that third-party identifiers are in order, and flags anything that needs completing.

What it enables

- Missing documents flagged
- Consistent VAT rates
- Complete third-party details
- Transfer report

TAILORED

Adapted to your business

Chart of accounts, journals, VAT codes, cost centres, your accounting firm's software: we set up the link with **your** accountant, respecting the way they work. Tax returns remain their responsibility.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

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CONNECTORS

Available integrations

Compatible with the tools you already use:

Accounting software

Inqom

Exact Online

Yuki

Pennylane

Odoo

Accountable

Formats

UBL

CSV

FEC export (France)

Banking

CODA

Qonto

Ponto

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

erp.billing Invoicing

erp.banking Banking & reconciliation

erp.einvoicing E-invoicing

erp.suppliers Suppliers & purchasing

ops.dashboard Dashboards & search

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Product catalogue

A rich, accurate catalogue, shared everywhere.

COMPANYMESH · CATALOGUE

"Pietra" porcelain tile 60×60

Published

SPECIFICATIONS

Format	60 x 60 cm
Thickness	10 mm
m ² / box	1.44
Boxes / pallet	40
Use	Indoor floor

VARIANTS

Pietra Sand · matt

Ref. PT-6060-SA · in stock

Pietra Grey · matt

Ref. PT-6060-GR · in stock

Pietra Anthracite · polished

Ref. PT-6060-AN · made to order

Suggested accessory

C2 adhesive · grey grout

✓ Technical sheet generated

PDF · 2 pages

Synced with the website

Up to date

A rich, accurate catalogue, shared everywhere.

Incomplete product sheets, prices that differ from one document to the next, a website that's out of date: a poorly kept catalogue is expensive. The Catalogue module centralises your items, their variants, technical specifications and media, and feeds them into your quotes, your website and your data sheets.

A single source of truth

The same information in quotes, on the website and in documents.

Complete product sheets

Structured technical specifications and photos.

Easier sales

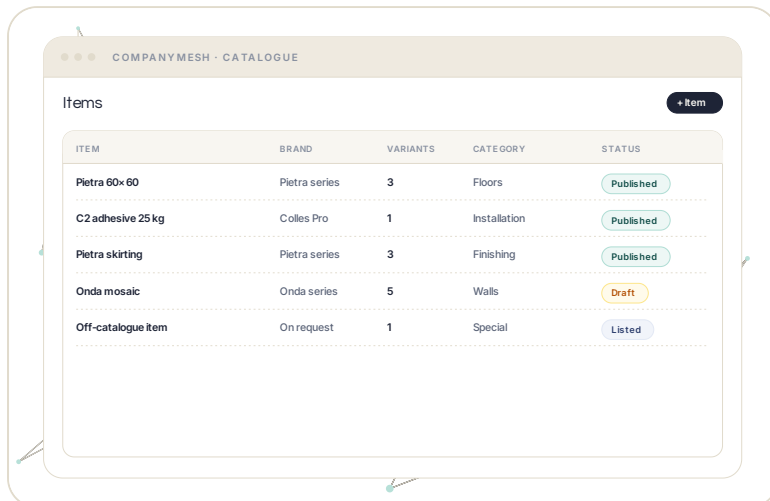
Cross-selling and correctly calculated pack sizes.

Fast updates

Bulk imports and synchronisation with your website.

In this module

- 1 Product sheets and variants
- 2 Technical specifications
- 3 Units and packaging
- 4 Cross-selling and add-ons
- 5 Imports and synchronisation



ITEM	BRAND	VARIANTS	CATEGORY	STATUS
Pietra 60x60	Pietra series	3	Floors	Published
C2 adhesive 25 kg	Colles Pro	1	Installation	Published
Pietra skirting	Pietra series	3	Finishing	Published
Onda mosaic	Onda series	5	Walls	Draft
Off-catalogue item	On request	1	Special	Listed

1 Product sheets and variants

All your items, properly structured.

Each product groups its variants (sizes, colours, finishes), with their references, prices, images and availability. Brands, ranges and models organise the catalogue.

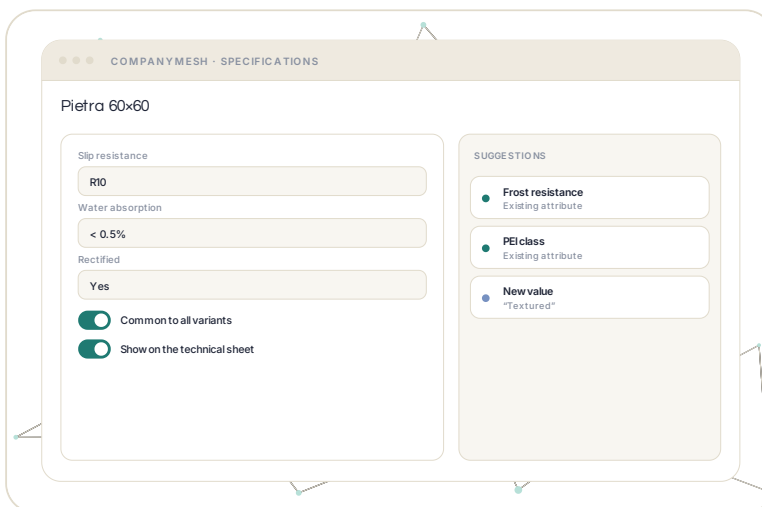
What it enables

- Variants and options
- Brands, ranges and models
- Categories and tags
- Images per product and per variant

2 Technical specifications

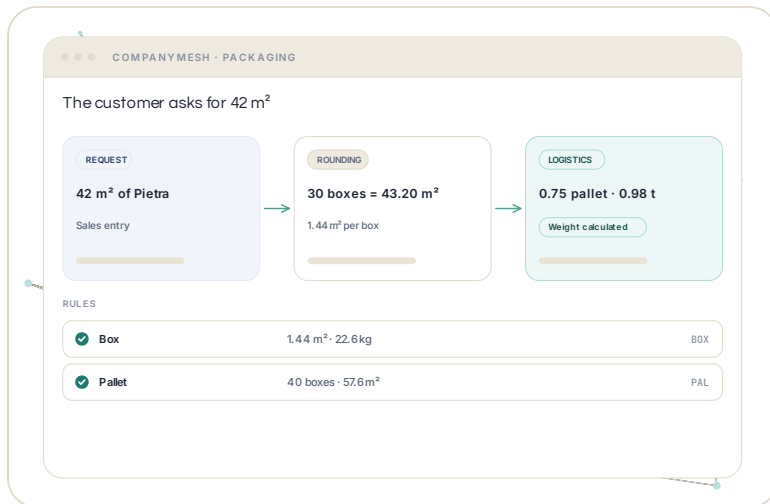
Comparable, reusable data.

Technical specifications are entered in a structured table, with suggestions based on existing attributes. They feed quotes, the website and PDF data sheets.



What it enables

- Dynamic specifications table
- Standardised attributes and values
- Shared or per-variant specifications
- PDF data sheet generated



3 Units and packaging

Sell by the m², the box or the pallet.

Define the sales unit, the contents of a box and the number of boxes per pallet. Quantities are rounded to the pack size automatically, and the weight is calculated for shipping.

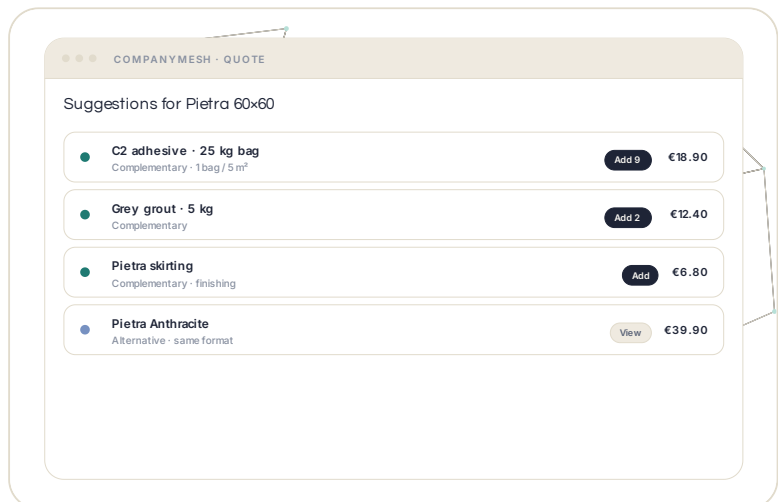
What it enables

- Units: m², piece, linear metre, bag...
- Multiple box and pallet sizes
- Rounding to pack size
- Weight and dimensions for logistics

4 Cross-selling and add-ons

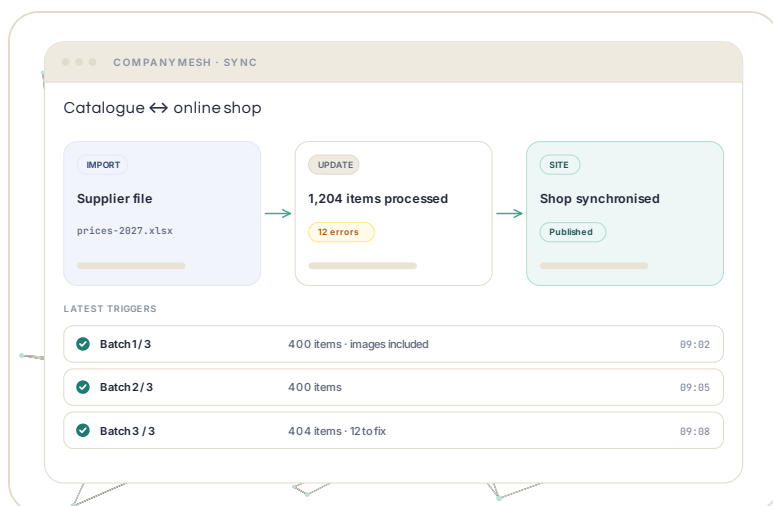
Don't forget the adhesive with the tiles.

Link each product to its accessories and alternatives. They're suggested in quotes and on the website to grow the average basket.



What it enables

- Complementary products
- Substitute products
- Suggestions in quotes
- Displayed on the website



5 Imports and synchronisation

An up-to-date catalogue, everywhere.

Import or update thousands of items from a file or a supplier. The catalogue syncs with your online shop, both ways if needed.

What it enables

- Bulk imports with tracking
- Synchronisation with the website
- Non-catalogue items created on the fly
- Drafts before publishing

TAILORED

Adapted to your business

Tiles sold by the m², by the box and by the pallet, tools with variants, fixed-price services, non-catalogue products listed on request: we model **your** sales units, **your** specifications and **your** product families.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

E-commerce

WooCommerce

WordPress

Shopify

PrestaShop

Import

Excel / CSV

Supplier APIs

Product feeds

Media

Google Drive

OneDrive / SharePoint

Dropbox

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.quotes Quotes & sales proposals

crm.pricing Pricing & margins

erp.stock Stock & replenishment

erp.suppliers Suppliers & purchasing

auto.web Connected website

Let's talk about your future tool

Tailored demo, by appointment.

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+32 490 46 81 17

Stock & procurement

The right stock, in the right place, at the right time.

COMPANYMESH · STOCK

Availability 2 alerts

ITEM	WAREHOUSE	SUPPLIER	THIRD-PARTY DEPOT	CUSTOMER LEAD TIME
Pietra Sand	320 m ²	1,800 m ²	—	48 h
Pietra Anthracite	0	640 m ²	—	5 days
C2 adhesive 25 kg	12 bags	—	200 bags	48 h
Onda mosaic	4 m ²	0	—	Running low
Pietra skirting	210 lm	900 lm	—	48 h

Restock suggested
Onda mosaic · 60 m²
Fastest supplier: 4 days
[Order](#)

The right stock, in the right place, at the right time.

A best-seller out of stock, too much of something else, a delivery date you can't keep: stock management has a direct impact on customer satisfaction. The Stock module brings your different sources together (warehouse, supplier, third-party depot) and shows availability you can rely on.

Reliable availability

Customers know the real lead time.

Multiple sources, one view

In-house stock, dropshipping and third-party warehouses.

Fewer stock-outs

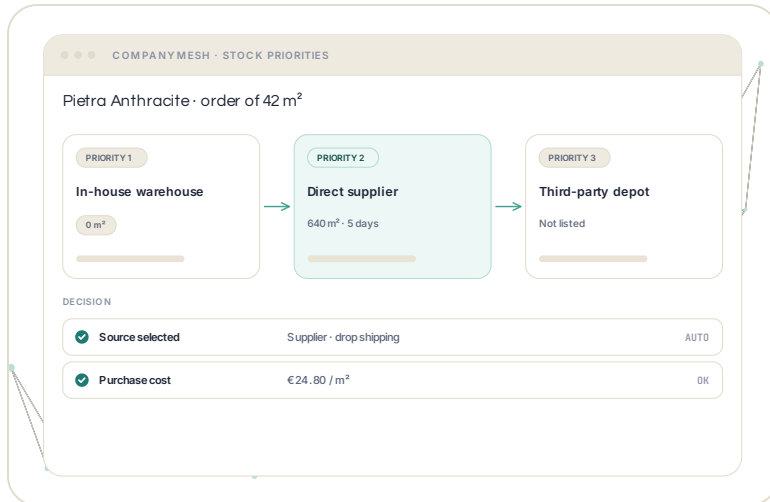
Alert thresholds and suggested reorders.

Less data entry

Supplier stock synced automatically.

In this module

- 1 Multiple stock sources
- 2 Smart delivery times
- 3 Movements and stocktakes
- 4 Alerts and replenishment
- 5 Supplier sync



1 Multiple stock sources

One item, several origins.

Each item can be available from in-house stock, from a supplier via direct delivery or from a third-party warehouse. Priorities decide which source is used when an order comes in.

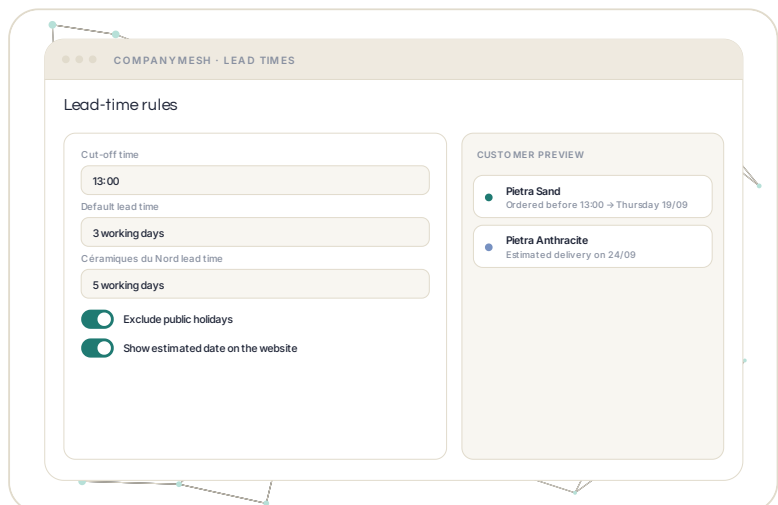
What it enables

- In-house stock, dropshipping, third-party warehouse
- Priorities between sources
- Source visible in the back office
- Cost per source

2 Smart delivery times

"Order before 1 pm, delivered Thursday."

The lead time shown is calculated from the product lead time, the supplier lead time or the default one, together with the cut-off time and working days. It appears on your website and in your quotes.



What it enables

- Product / supplier / default lead-time hierarchy
- Order cut-off time
- Estimated delivery date
- Shown on the website and in the back office

COMPANYMESH · MOVEMENTS

Pietra Sand - warehouse

DATE	MOVEMENT	REFERENCE	QUANTITY	STOCK
17/09	Booked	C-3318	-43.2	320
16/09	Reception	CF-212	+288	363
15/09	Sale	C-3312	-57.6	75
12/09	Stock count	INV-09	-2.9	133

3 Movements and stocktakes

Every item in and out, tracked.

Goods received, sales, returns and adjustments keep quantities up to date. Cycle counts can be done from a tablet or phone.

What it enables

- Stock movement history
- Cycle counts
- Reservations against orders
- Adjustments with a stated reason

4 Alerts and replenishment

Get ahead of stock-outs.

Minimum thresholds trigger alerts and suggested supplier orders based on recent sales.

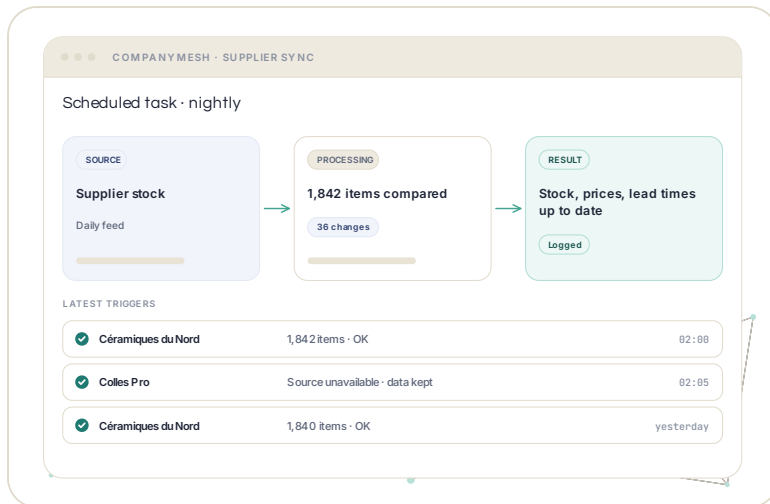
COMPANYMESH · REPLENISHMENT

Order suggestions

● Onda mosaic Stock 4 m² · threshold 20 m² · 30-day sales: 48 m²	Order 60 m²
● C2 adhesive 25 kg Stock 12 bags · threshold 40	Order 96
● Grey grout 5 kg Stock 34 · threshold 30	Watch
● Retro tile 20x20 No sales for 9 months	Dormant

What it enables

- Thresholds per item
- One-click supplier order
- Replenishment suggestions
- Slow-moving items flagged



5 Supplier sync

Your partners' stock, live.

Supplier stock, prices and lead times are fetched automatically by scheduled tasks. If a source is unavailable, a fallback mode keeps the last known data.

What it enables

- Scheduled tasks with a log
- Stock, prices and lead times imported
- Fallback mode when a source is down
- Adapted to each supplier's format

TAILORED

Adapted to your business

Your own warehouse first, then the fastest supplier; specific lead times per product or supplier; an order cut-off time: we turn **your** logistics rules into the availability and lead times your customers see.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Suppliers

Supplier APIs

EDI

Excel / CSV

FTP

E-commerce

WooCommerce

Shopify

PrestaShop

Logistics

Sendcloud

Boxtal

bpost

DHL

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

erp.catalog Product catalogue

erp.suppliers Suppliers & purchasing

erp.logistics Orders, delivery & transport

auto.api API & connectors

ops.dashboard Dashboards & search

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Suppliers & purchasing

Your suppliers reply, you compare, you order.

COMPANYMESH · DEAL 2026-418 · PRICE REQUESTS

Supplier replies 3 / 3 received

SUPPLIER	LIST PRICE	NET PRICE	AVAIL.	CHOICE
Céramiques du Nord	39.90	24.80	5 days	<button>Selected</button>
Faïences du Sud	41.20	26.10	3 days	<button>Compare</button>
Grès Italia	38.50	25.40	12 days	<button>Compare</button>

✓ **Price locked**

Pietra Anthracite · €24.80 / m²
Catalogue updated (indicative)

Line locked

Your suppliers reply, you compare, you order.

Asking several suppliers for prices, waiting for replies, comparing, chasing, ordering: purchasing is often run on email and spreadsheets. The Suppliers & purchasing module gives it structure, with a portal where your suppliers reply directly.

Faster purchasing

Price requests sent to several suppliers in one click.

Prices side by side

Replies compared, your choice locked on the deal.

Self-service suppliers

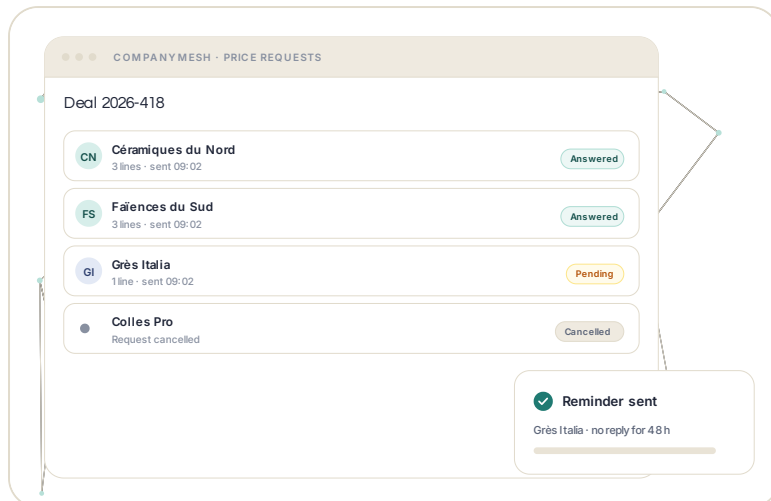
A portal to reply, send pro formas and share availability.

Tight follow-up

Orders, pro formas, deposits and deliveries all tracked.

In this module

- 1 Multi-supplier price requests
- 2 Compare and choose
- 3 Supplier portal
- 4 Orders and pro formas
- 5 Supplier records



1

Multi-supplier price requests

Consult several suppliers at once.

From a deal, send a price request for a single line or the whole basket to one or more suppliers. Every request is tracked: pending, answered, cancelled.

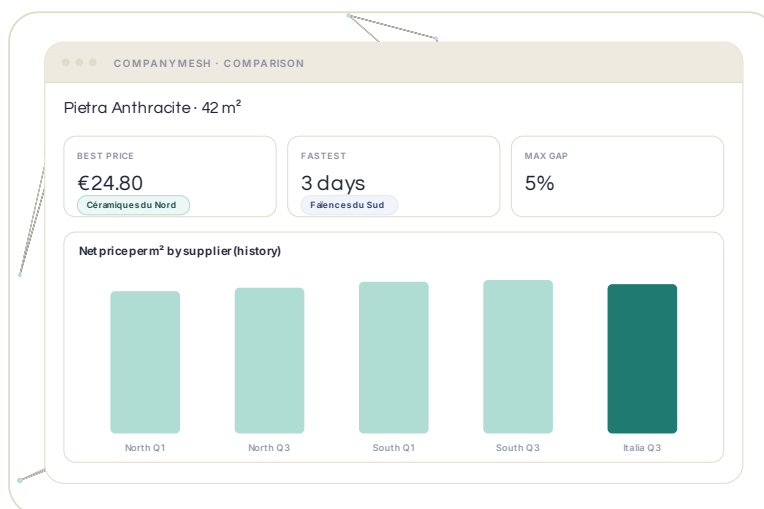
What it enables

- Request per line or per deal
- Several suppliers consulted
- Reply tracking
- Automatic reminders

2 Compare and choose

The best price, selected and locked.

Replies are shown side by side: list price, discounted price, availability. Choosing a supplier locks the price on the deal line and updates the indicative price in the catalogue.



What it enables

- Replies compared
- Selected price locked
- Indicative price updated
- Price history per supplier

3 Supplier portal

Your suppliers reply online.

Each supplier gets restricted access to their own requests. There they enter prices and unavailabilities, upload pro formas and confirm lead times.

What it enables

- Access limited to their own requests
- Prices and availability entry
- Pro forma upload
- Email notifications

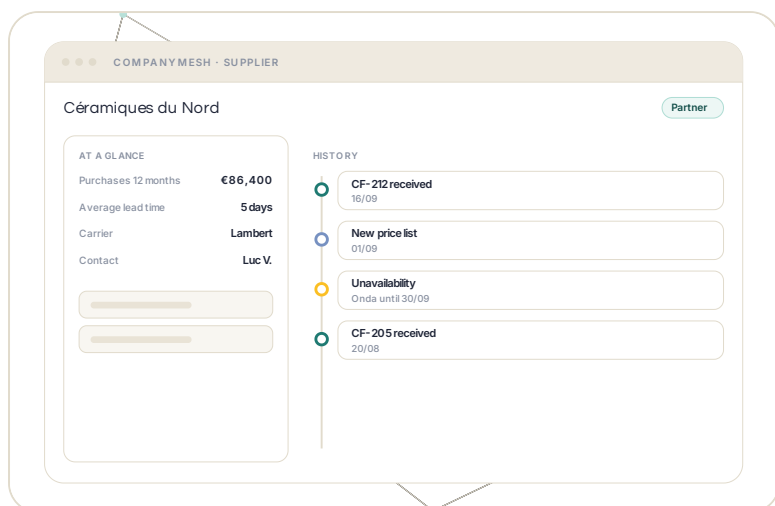
4 Orders and pro formas

From purchase order to goods received.

Issue forecast purchase orders, receive pro formas, and track deposits paid and goods received. Any discrepancies are flagged.

What it enables

- Supplier purchase orders
- Pro formas and deposits tracked
- Goods received and discrepancies
- Email sending with templates



5 Supplier records

Everything about your partners.

Contact details, contacts, terms, default carrier, company identifiers and purchase history, all on one record.

What it enables

- Contacts and addresses
- Default carrier
- Commercial terms
- Purchase volume and history

TAILORED

Adapted to your business

Suppliers abroad, linked carriers, pro formas with deposits, forecast orders: we follow **your** purchasing flow and **your** documents, and we define precisely what each supplier sees in their portal.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Exchanges

Email

Supplier portal

Supplier APIs

EDI

Supplier invoices

Peppol

Super PDP

Billit

Import

Excel / CSV

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

erp.stock Stock & replenishment

erp.logistics Orders, delivery & transport

erp.catalog Product catalogue

crm.pricing Pricing & margins

erp.accounting Accounting link

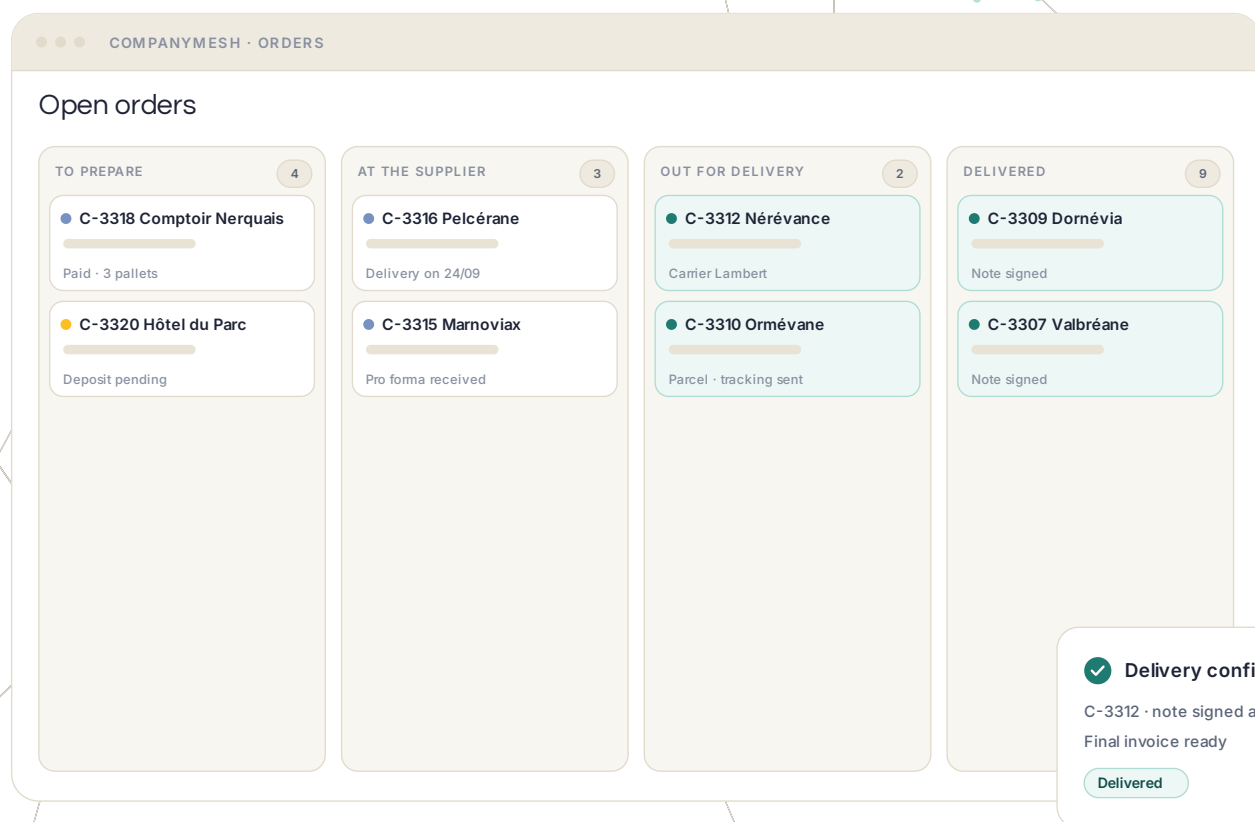
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Orders, delivery & transport

From order to delivery, every step under control.



From order to delivery, every step under control.

Once the sale is closed, it all comes down to execution: picking, shipping, delivering and charging the right price for transport. The Orders & logistics module tracks every order, calculates shipping costs from your rate tables and produces delivery notes and shipping documents.

Orders under control

Clear statuses, from confirmation to delivery.

Transport at the right price

Rate tables by zone, weight, pallets or tonnage.

Documented deliveries

Delivery notes and proof of delivery.

A connected web shop

Online orders pulled in automatically.

In this module

- 1 Order tracking
- 2 Transport rate tables
- 3 Carriers and couriers
- 4 Delivery notes
- 5 Parcel shipping

COMPANYMESH - ORDERS

All orders

N°	CUSTOMER	SOURCE	PAYMENT	DELIVERY
C-3320	Hôtel du Parc	Quotes	Deposit pending	To schedule
C-3318	Comptoir Nerquais	Quotes	Paid	To prepare
C-3317	Private customer Dubois	Website	Paid	Shipped
C-3312	Atelier Nérévance	Quotes	Deposit received	Out for delivery

1 Order tracking

Every order, its status, its history.

Orders come from accepted quotes, your web shop or manual entry. Picking, payment and delivery statuses are visible at a glance.

What it enables

- Orders from quotes or your website
- Order numbering and source
- Payment and delivery statuses
- Email templates for each step

2 Transport rate tables

Transport costs calculated, not guessed.

Costs are calculated from your rate tables: zone or postcode, number of pallets, weight, or rounded tonnage. Tables can be imported and exported in Excel for your annual negotiations.

COMPANYMESH - DELIVERY RATES

Delivery by area and pallets Export to Excel

AREA	1 PAL.	2 PAL.	4 PAL.	6 PAL.
Dept 13	€210	€320	€470	€598
Dept 83	€228	€345	€512	€652
Dept 06	€240	€362	€540	€690
Dept 2A / 2B	€395	€610	€920	€1,240

Transport calculation

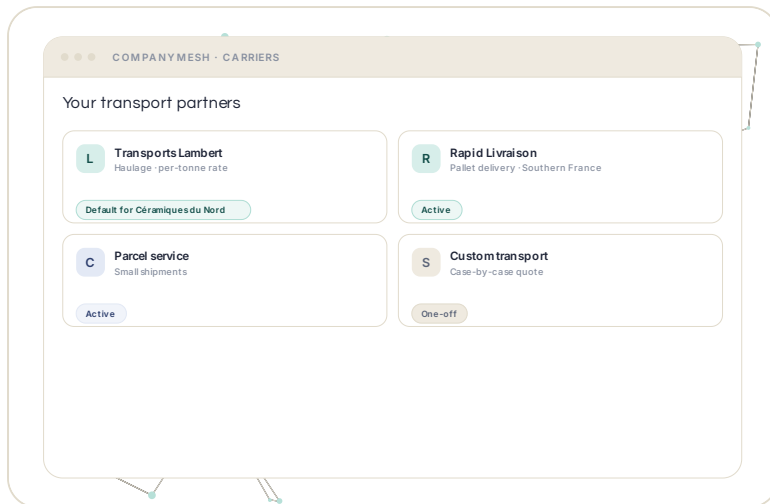
Haulage 0.526t → 0.6t × €83 = €49.80

Delivery dept 83 · 6 pallets = €652

Total €701.80

What it enables

- Rates by zone, postcode and pallets
- Excel import / export with history
- Haulage by weight or by the tonne
- Transport removable from the quote



3 Carriers and couriers

The right partner for every shipment.

Each carrier has its own record, rates and zones. A default carrier can be linked to a supplier, and custom transport can be added at any time.

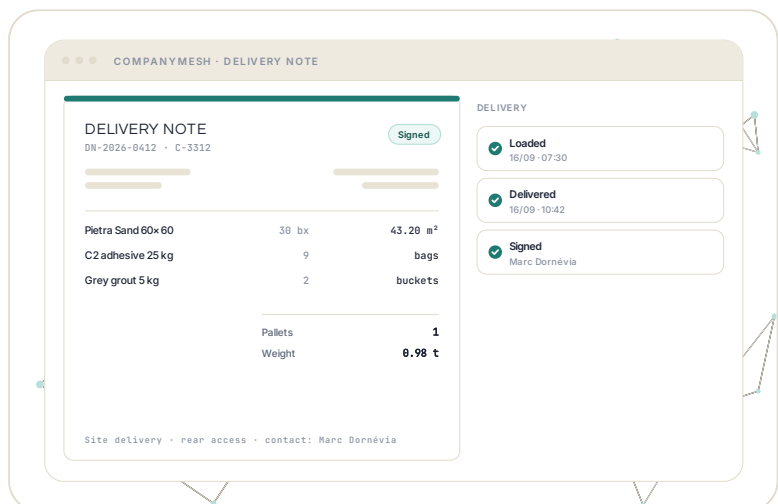
What it enables

- Carrier records
- Default carrier per supplier
- Custom transport
- Carrier access to their own deliveries

4 Delivery notes

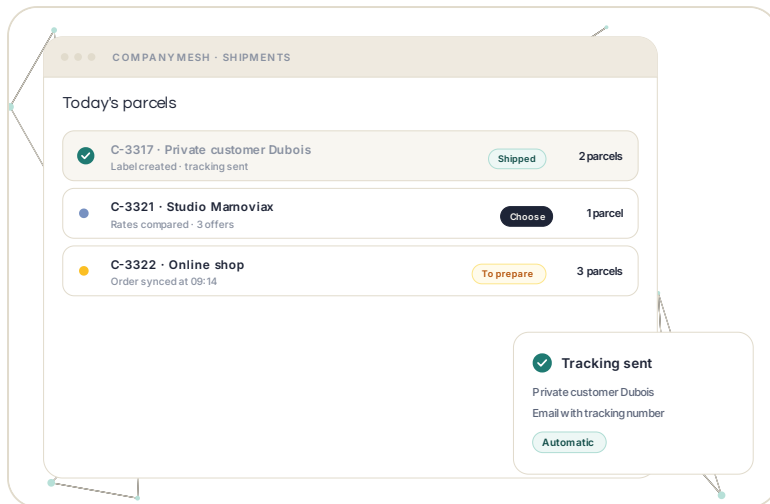
Clear paperwork for every shipment.

Delivery notes are generated from the order, with the address, on-site contact and instructions. They can be signed on receipt.



What it enables

- Generated delivery notes
- Delivery address and contact
- Access instructions
- Proof of delivery



5 Parcel shipping

Labels and tracking in a few clicks.

For parcels, carrier labels are created straight from the order, and the tracking number is sent to the customer automatically.

What it enables

- Carrier labels
- Parcel rate comparison
- Tracking number sent to the customer
- Online order sync

TAILORED

Adapted to your business

Haulage by the tonne, delivery priced by region and number of pallets, custom transport, customers who send their own carrier: we model **your** transport rules, and they stay editable at every annual negotiation (Excel import / export).

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Transport & shipping

Sendcloud

Boxtal

bpost

DHL

UPS

DPD

E-commerce

WooCommerce

Shopify

PrestaShop

Rate tables

Excel / CSV

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

erp.stock Stock & replenishment

erp.suppliers Suppliers & purchasing

erp.billing Invoicing

erp.payments Online payments

crm.quotes Quotes & sales proposals

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BUILDING BLOCK · 3 MODULE(S)

Documents

Electronic management of your documents: file, find, share, sign, verify.

`dms.documents`

DMS & media library

Every document found in seconds, and properly protected.

`dms.esign`

E-signature

Get documents signed in minutes, wherever your customer is.

`dms.compliance`

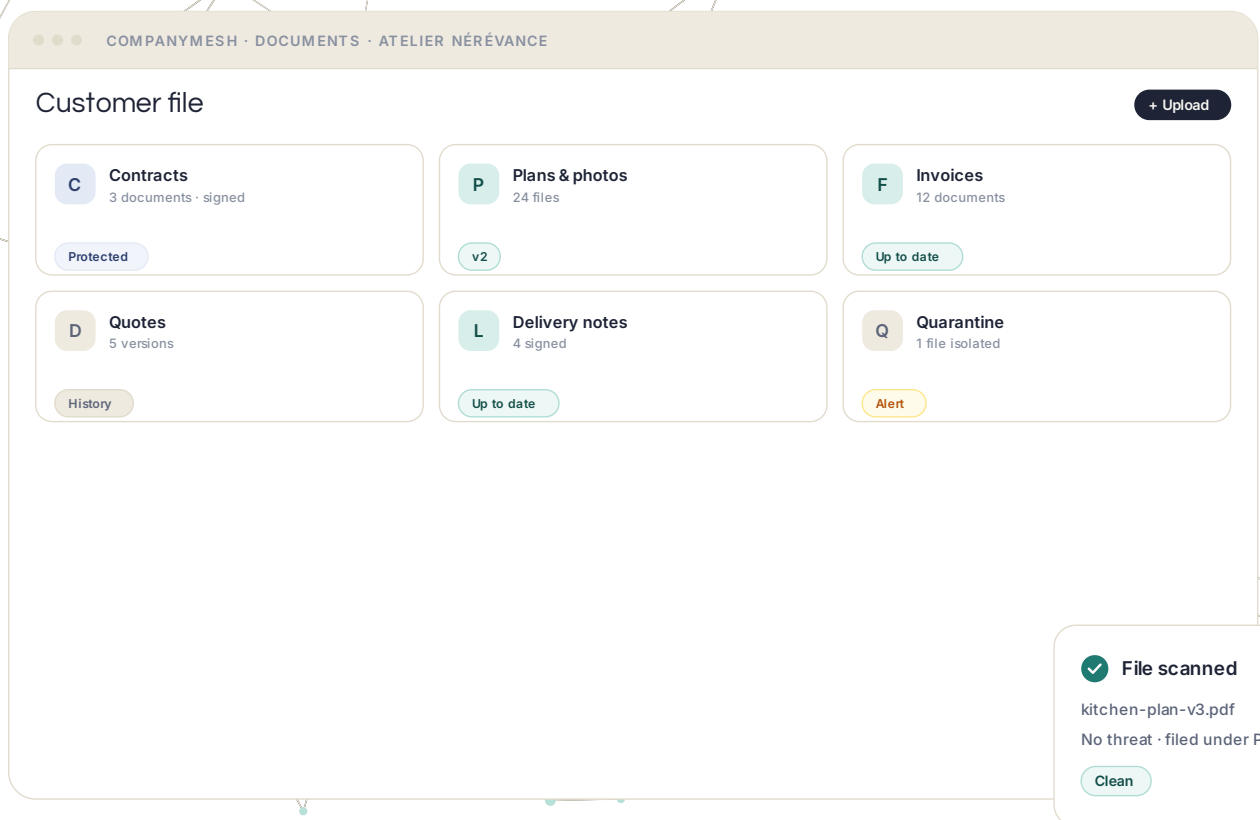
Verification & compliance

Know who you're dealing with before you commit.

DOCUMENTS

DMS & media library

Every document found in seconds, and properly protected.



Every document found in seconds, and properly protected.

A DMS (document management system) files, shares and protects your documents in the same place as your records. Contracts, plans, photos, invoices, templates: everything is filed, searchable, shared with the right people and scanned before it enters your system.

Everything in one place

Documents linked to customers, projects and orders.

Instant search

By name, customer, type or content.

Controlled sharing

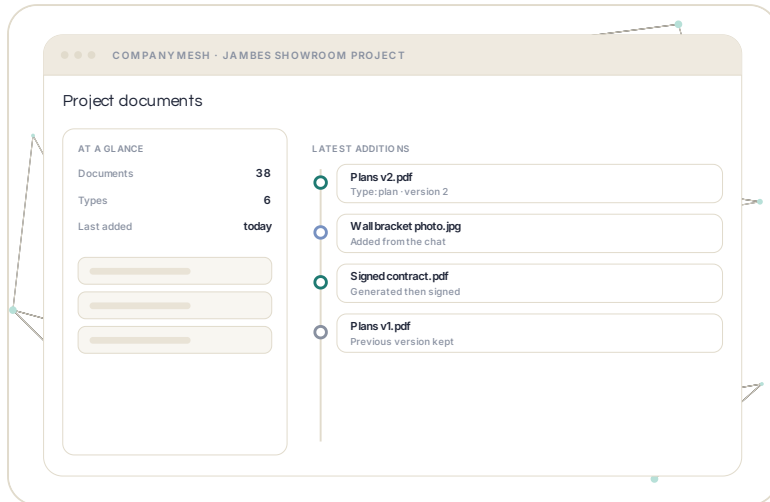
Secure links, precise permissions, tracked access.

Stronger security

Virus scanning and quarantine for uploaded files.

In this module

- 1 Automatic filing
- 2 Powerful search
- 3 Sharing and upload links
- 4 Precise access rights
- 5 Scanning and quarantine
- 6 Document generation



1 Automatic filing

Every document in the right place.

Documents you generate or receive are filed automatically in the right customer, project or order folder. Document types and tags make sorting easy.

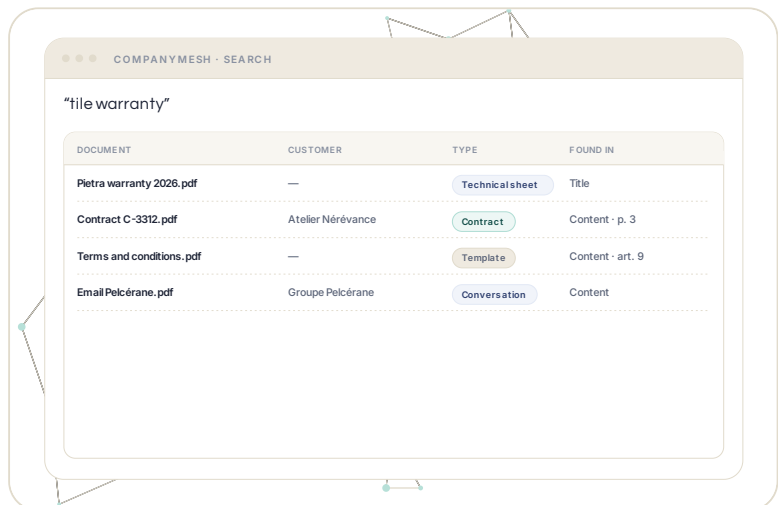
What it enables

- Linked to customers, projects and orders
- Document types and tags
- Every version kept
- Central media library (images, logos, videos)

2 Powerful search

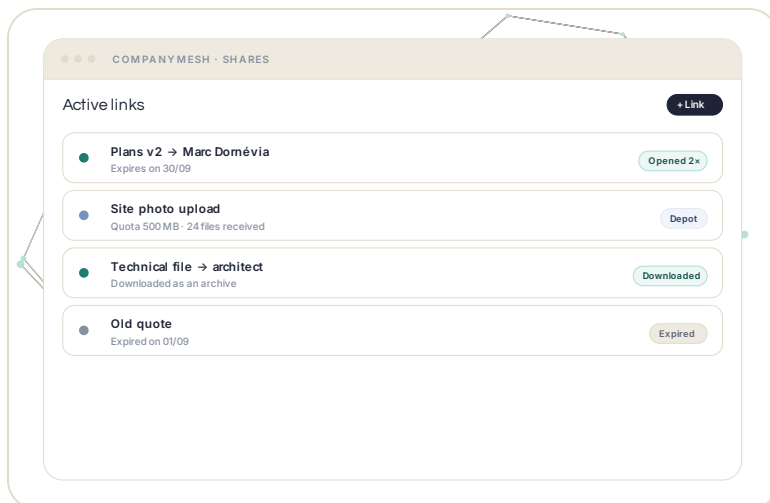
Find a document without remembering where it is.

Search covers names, metadata and, as an option, the content of the documents themselves thanks to text recognition.



What it enables

- Search by name, customer, type, date
- Full-text search in content (OCR)
- Combined filters
- Preview without downloading



3 Sharing and upload links

Exchange files, no attachments needed.

Share a document or folder through a secure link with an expiry date. Receive files from your customers through an upload link, with a quota.

What it enables

- Share links with expiry
- Upload links with quota
- Opens and downloads tracked
- Bulk download as an archive

4 Precise access rights

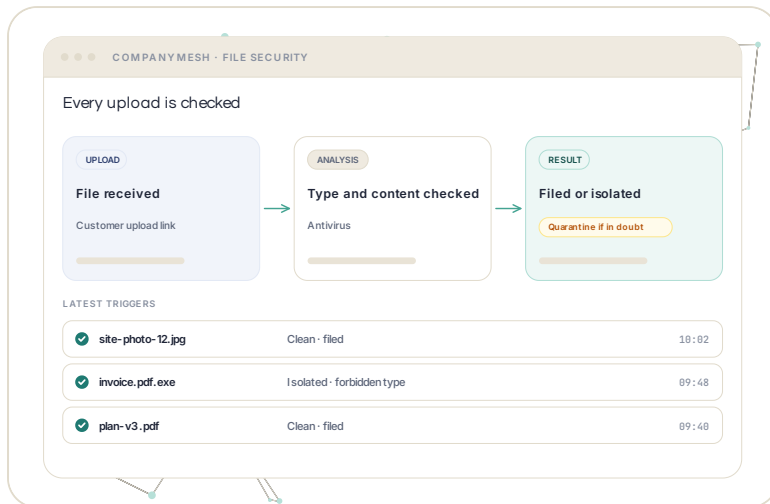
Everyone sees what they need to see.

Permissions are set by folder, by document type or by profile. Sensitive documents (payroll, contracts) stay restricted to authorised people.

TYPE	SALES REP	ACCOUNTING	WORKSHOP	CUSTOMER
Quotes & contracts	Edit	Read	None	Read
Invoices	Read	Edit	None	Read
Plans	Edit	None	Read	Read
HR documents	None	Vault	None	None

What it enables

- Permissions by folder and type
- Document vault for sensitive files
- Access log
- Limited access for customers and suppliers



5 Scanning and quarantine

No suspicious file gets in.

Every uploaded file is scanned. A suspicious file is isolated in quarantine and flagged, and never made available.

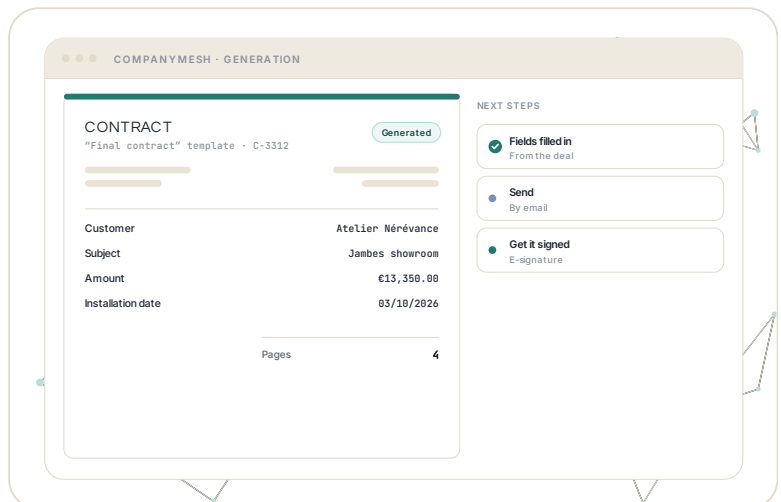
What it enables

- Virus scan on upload
- Automatic quarantine
- File type control
- Security alerts

6 Document generation

Your templates, filled in automatically.

Contracts, order forms, certificates and letters are generated as PDFs from templates and the record's data, ready to send or sign.



What it enables

- Document templates
- Fields filled in automatically
- PDFs in your house style
- Send or sign in one click

TAILORED

Adapted to your business

Folder structure, document types, permissions by profile, retention periods, automatically generated templates (contracts, order forms, certificates): we organise the DMS around **your** ways of working and **your** archiving obligations.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Storage

Google Drive

OneDrive / SharePoint

Dropbox

Documents

PDF

Word

Excel

Images

Document reading (OCR)

Apache Tika

OpenAI

Mistral

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

dms.sign E-signature

crm.portal Client portal

crm.contacts Customers & contacts

dms.compliance Verification & compliance

auto.ai Built-in AI

Let's talk about your future tool

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+32 490 46 81 17

E-signature

Get documents signed in minutes, wherever your customer is.

The screenshot displays the 'COMPANYMESH · E-SIGNATURE' interface. The main document area shows a 'FINAL CONTRACT' for 'C-3312 · Atelier Nérévance', marked as 'Signed'. The contract details include:

Subject	Jambes showroom
Amount	€13,350.00
Customer signatory	Marc Dornévia
Company signatory	Management
Pages	4

To the right, a 'FLOW' timeline shows the document's history:

- Sent** (14/09 - 09:04)
- Viewed** (14/09 - 18:30)
- Signed · Marc Dornévia** (14/09 - 21:14)
- Countersigned** (Automatic)

A final status box at the bottom right indicates: **Contract signed**, 'Archived with proof certificate', 'Deal → Order', and 'Automatic'.

Get documents signed in minutes, wherever your customer is.

Print, sign, scan, send back: paper signatures slow down every deal. The E-signature module sends your quotes, contracts and documents for online signature, tracks their status and automatically files the signed version in the record.

Faster agreements

Signing from a computer or a phone.

Legal validity

Electronic signatures compliant with the European framework.

Automatic tracking

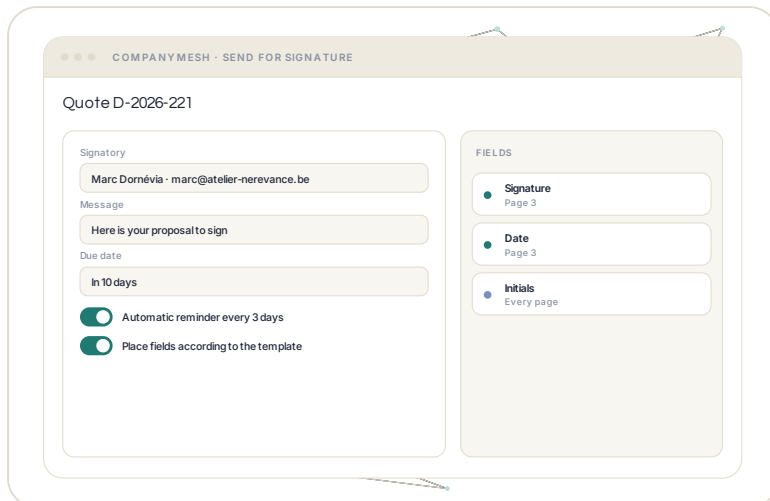
Sent, viewed, signed or declined, in real time.

Effortless archiving

Signed document and proof filed in the record.

In this module

- 1 Sending for signature
- 2 Real-time tracking
- 3 Multiple signatories
- 4 Signature levels
- 5 Archiving and proof



1 Sending for signature

One click from the document.

Quotes, contracts, purchase orders or any document in the DMS can be sent for signature straight from the tool. Signature fields are placed automatically according to the template.

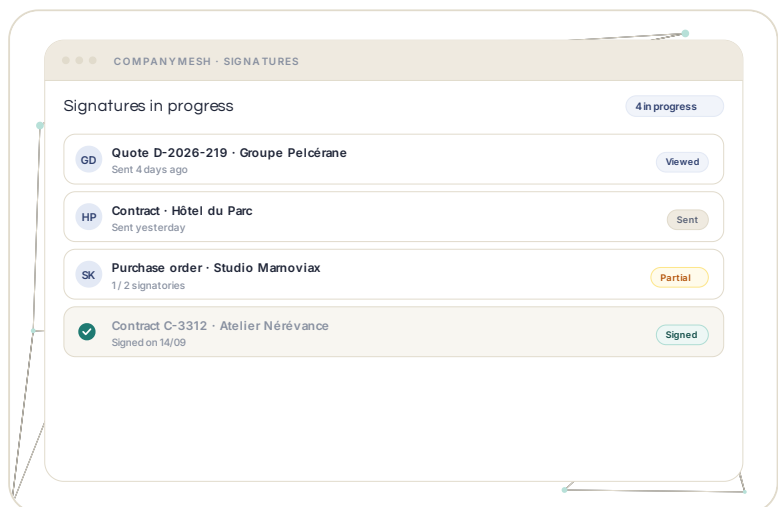
What it enables

- From any document
- Personalised message
- Predefined signature fields
- Automatic reminders

2 Real-time tracking

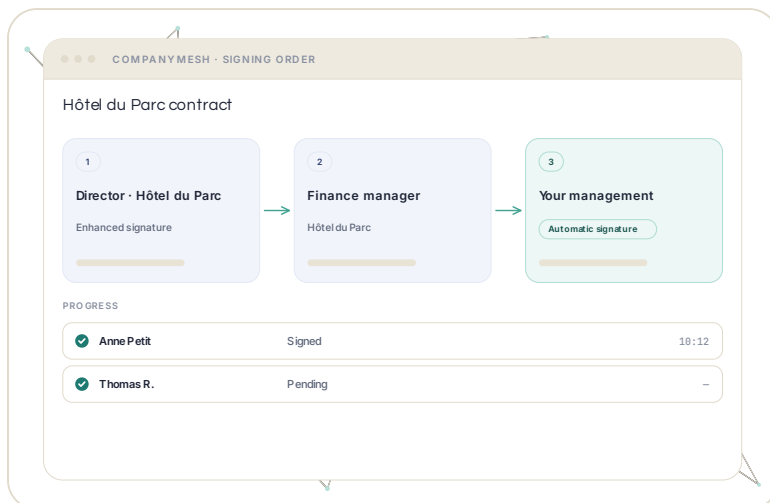
You know where every signature stands.

Every event (sent, viewed, signed, declined) updates the document and can move the deal forward. A single list brings together all signatures in progress.



What it enables

- Real-time statuses
- Deals move forward automatically
- List of signatures in progress
- Date and time of signature shown



3 Multiple signatories

Everyone signs in turn.

Add several signatories, with a signing order if needed: the customer first, then your management, for example. Your representative's signature can be added automatically.

What it enables

- Multiple signatories
- Legal representative's signature
- Signing order
- Internal and external signatories

4 Signature levels

The right level of security for every document.

Certified signatures for key contracts, simple signatures for everyday documents: you choose the right level, document by document.

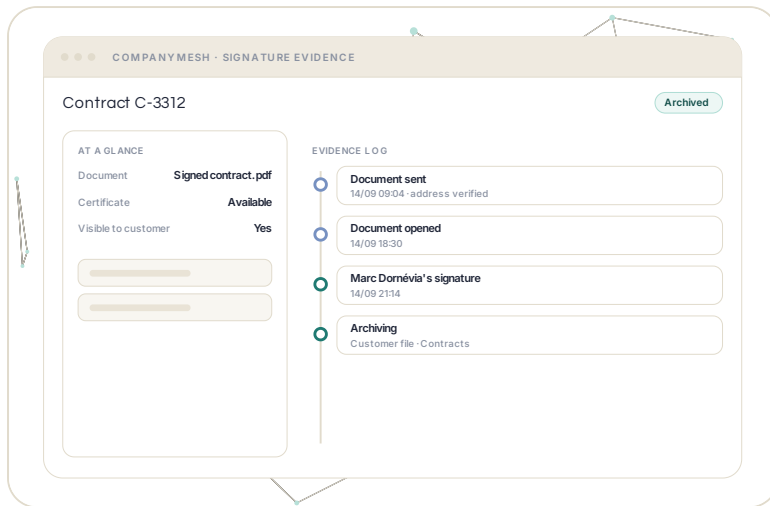
COMPANYMESH - SIGNATURE RULES

Level per document type

DOCUMENT	LEVEL	VERIFICATION	REMINDERS
Quotes < €10,000	Simple	Email	3 d
Quotes ≥ €10,000	Enhanced	Email + SMS code	2 d
Final contract	Enhanced	Email + SMS code	2 d
Delivery note	Simple	On site	—

What it enables

- Simple electronic signature
- Choice by document type
- Advanced signature with verification
- Compliant with the European framework



5 Archiving and proof

The signed version, right where it belongs.

The signed document and its certificate of proof are archived automatically in the record, available to authorised people.

What it enables

- Automatic archiving
- Certificate of proof
- Linked to the quote and the order
- Viewable from the customer portal

TAILORED

Adapted to your business

Simple signatures for everyday documents, advanced signatures for major contracts, several signatories in a set order, your legal representative's signature added automatically: the flow adapts to **your** documents and **your** customers.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Signature providers

SignWell

Yousign

DocuSign

Documents

PDF

CompanyMesh templates

Notifications

Email

SMS

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.quotes **Quotes & sales proposals**

dms.documents **Document management & media library**

erp.payments **Online payments**

dms.compliance **Verification & compliance**

auto.workflows **Automations**

Let's talk about your future tool

Tailored demo, by appointment.

companymesh.eu
simon@devlooper.io
+32 490 46 81 17

DOCUMENTS

Verification & compliance

Know who you're dealing with before you commit.

COMPANYMESH · VERIFICATION

Groupe Pelcérane SRL

Company number

BE0987.654.321

Legal form

Private limited company

Registered office

Chaussée de Namur 88, 5030 Gembloux

Signatory

Pierre Pelcérane · manager

☒ Freeze data at contract

CHECKS

☒ Register
Active company

☒ VAT
Valid · 17/09

☒ Identity
Verified online

☐ Evidence
Linked to the contract

☒ Verified third party

3 checks passed
No ID document stored

Compliant

Know who you're dealing with before you commit.

Checking a company, a VAT number or a signatory's identity takes time, and the result is often guesswork. The Verification & compliance module queries the official registers and offers online identity verification, without ever storing a copy of an ID document.

Verified third parties

Company data straight from the official registers.

Less risk

VAT, status and identity checked before the contract.

Proof on file

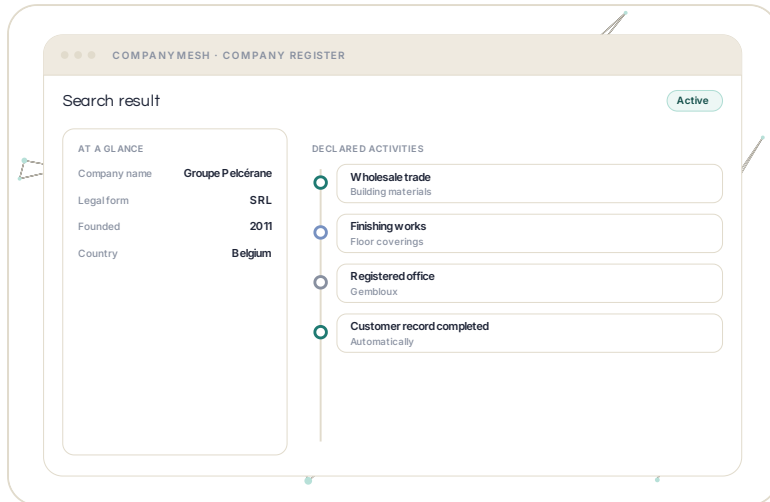
A snapshot of the data, frozen at the moment of signature.

Privacy respected

No copy of any ID document is stored.

In this module

- 1 Register lookup
- 2 EU VAT number check
- 3 Online identity verification
- 4 Proof frozen at contract
- 5 Control rules



1 Register lookup

One number, one complete record.

Starting from a Belgian or French company number, the tool retrieves the registered name, legal form, status, head office and activities, and fills in the customer record.

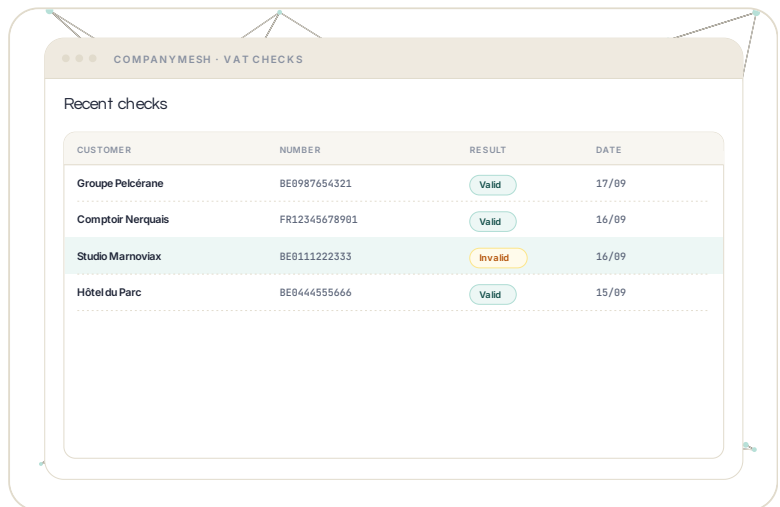
What it enables

- Belgian and French registers
- Active or struck-off status
- Head office and activities
- Updates on demand

2 EU VAT number check

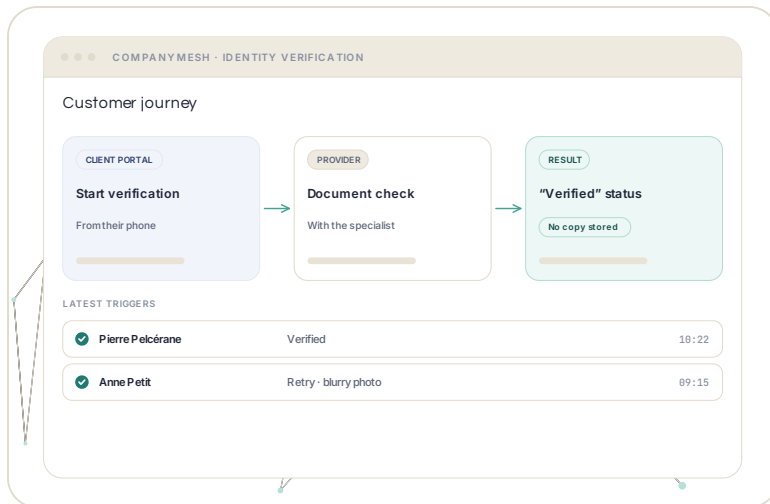
Invoices without nasty surprises.

The VAT number is checked against the European system before invoicing. The result and its date are kept on record.



What it enables

- European verification
- Time-stamped result
- Checks at creation and before invoicing
- Alert if a number is invalid



3 Online identity verification

Without ever storing an ID document.

Customers verify their identity through a specialist provider, straight from their portal. Only the status and, where available, the verified name and date of birth are kept.

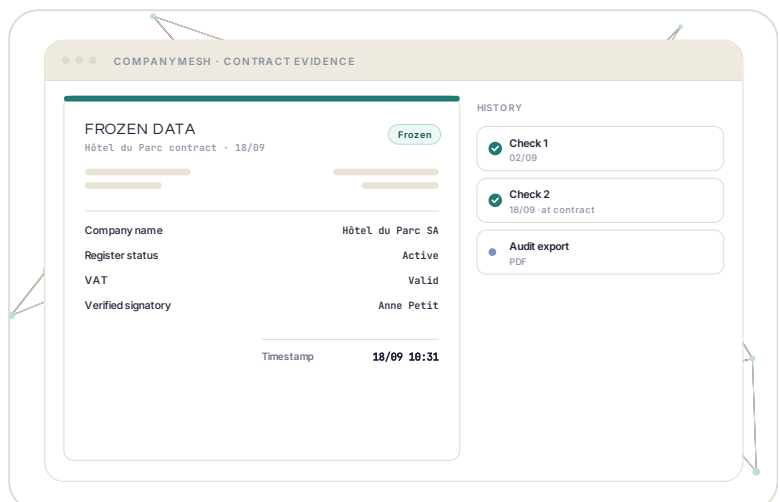
What it enables

- Secure online journey
- No copy of any document kept
- Verification status tracked
- Reminder if verification fails

4 Proof frozen at contract

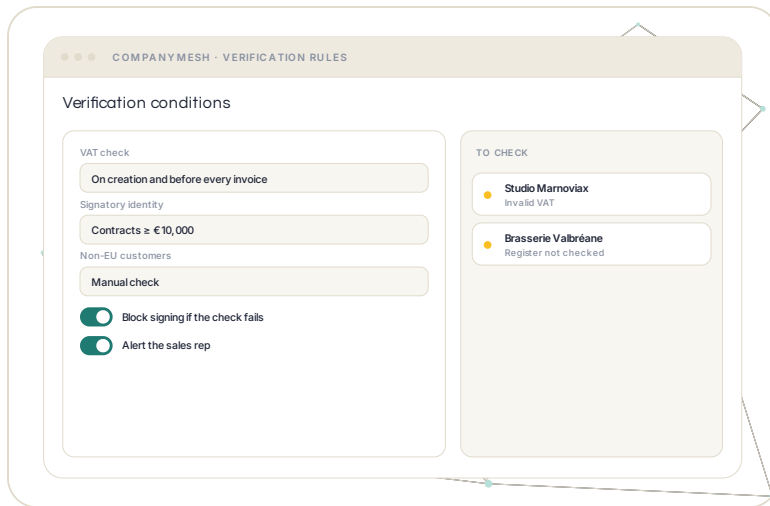
What was true when you signed.

When the contract is signed, the verified company data is frozen and attached to the document. You keep the proof, even if the register changes later.



What it enables

- Data frozen at signature
- Attached to the contract
- Verification history
- Export for audits



5 Control rules

The right level of scrutiny.

Decide when a check is mandatory and what happens if it fails: a simple alert or a blocked step.

What it enables

- Checks by amount, country or customer type
- Alert or block
- List of third parties to verify
- Log of all checks

TAILORED

Adapted to your business

Mandatory checks depending on amount, country or customer type, a hard block or a simple alert, identity verification when a customer account is opened: together we set the level of control that fits **your** business.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Company registers

BCE / KBO

Annuaire des entreprises (FR)

VIES

Identity

Stripe Identity

Signature

SignWell

Yousign

DocuSign

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.contacts Customers & contacts

dms.esign E-signature

erp.einvoicing E-invoicing

crm.portal Client portal

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BUILDING BLOCK · 4 MODULE(S)

Management & productivity

Organise production, track your indicators, handle feedback and measure your audience.

`ops.projects`

Projects & production

Your teams know what to do, and you know where they're at.

`ops.dashboard`

Dashboards & search

Your business at a glance, and everything a search away.

`ops.feedback`

Internal feedback & support

Every comment handled, every request followed through.

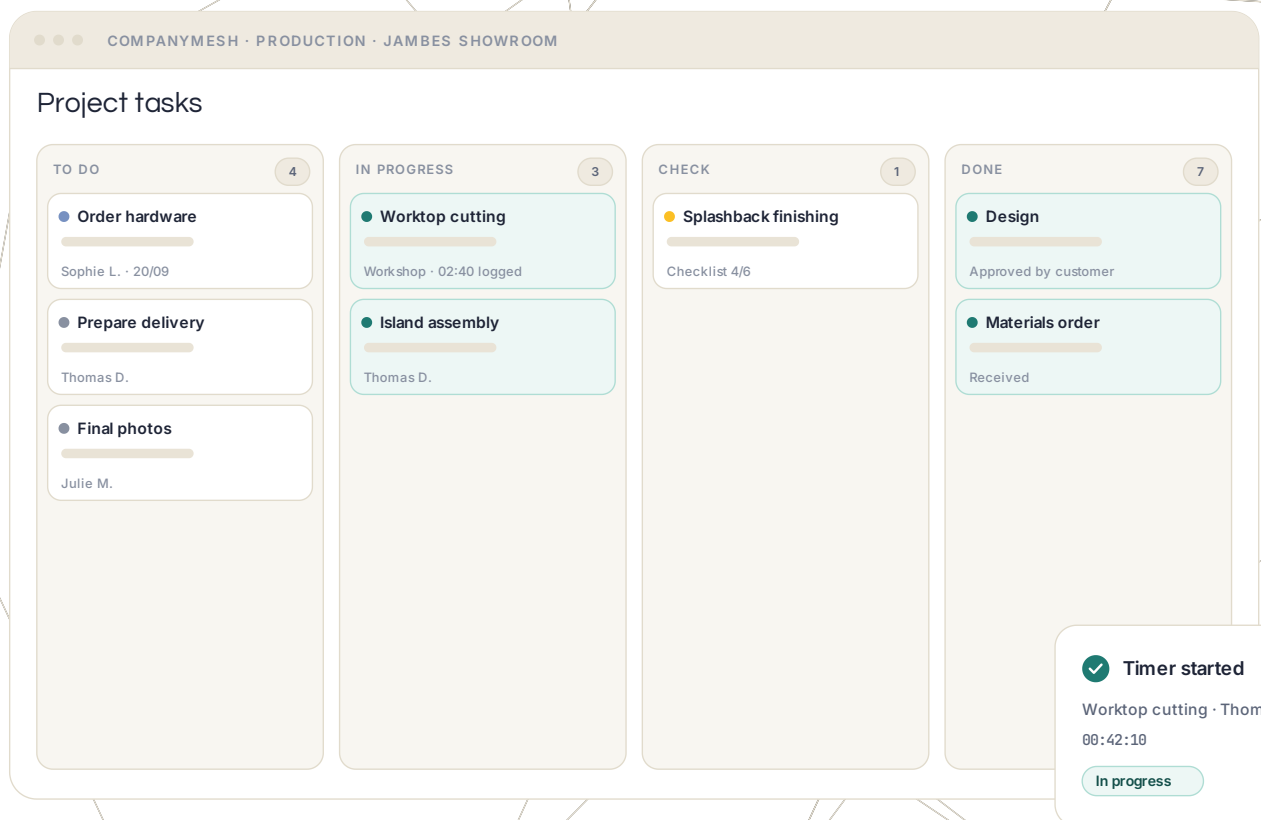
`ops.analytics`

Sovereign web analytics

Understand your visitors without giving away your data.

Projects & production

Your teams know what to do, and you know where they're at.



Your teams know what to do, and you know where they're at.

A signed sale turns into a project to deliver: tasks, people, deadlines, time spent. The Projects & production module organises that internal work on clear boards, linked to the customer file, without ever exposing your internal tasks to your customers.

Organised production

Tasks, owners and deadlines in one place.

Time under control

Time spent measured per task and per project.

A direct link to sales

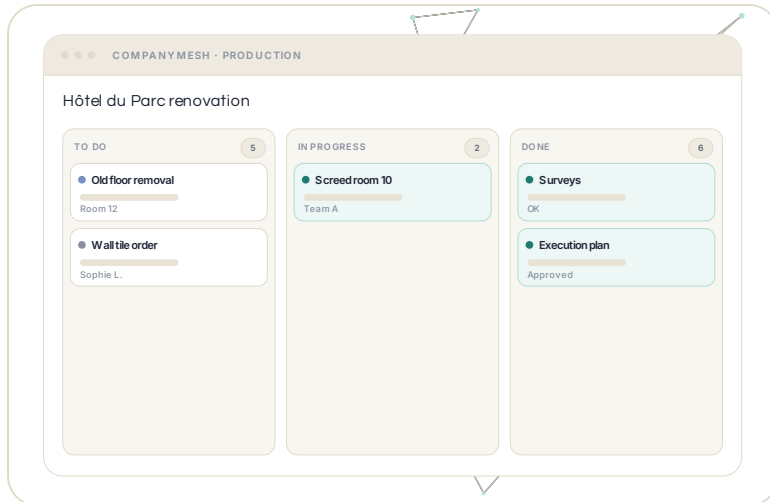
The project starts from the signed deal.

Quality you can track

Acceptance tests and checks documented.

In this module

- 1 Task boards
- 2 Assignment and deadlines
- 3 Time tracking
- 4 Linked to the customer file
- 5 Acceptance testing and quality checks



1 Task boards

Drag the tasks, move the project forward.

Every project has its own board: to do, in progress, done, or columns of your own. Tasks move with a single gesture and line up by priority.

What it enables

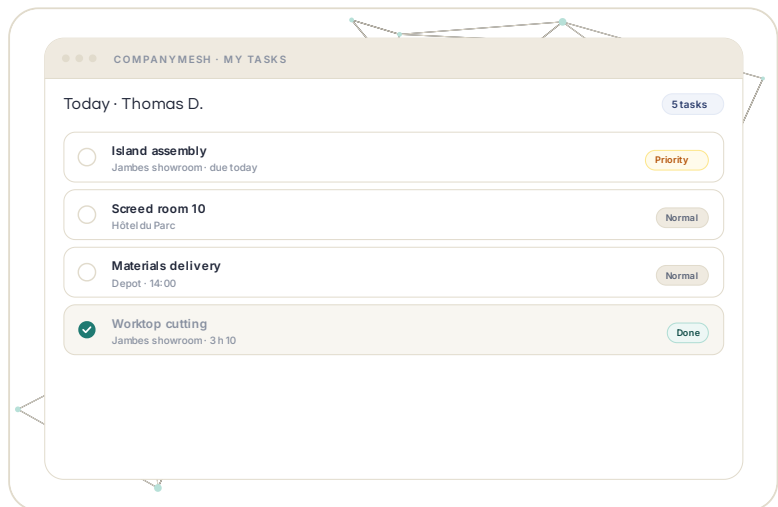
- Boards per project
- Customisable columns
- Ordering and priorities
- List view and board view

2

Assignment and deadlines

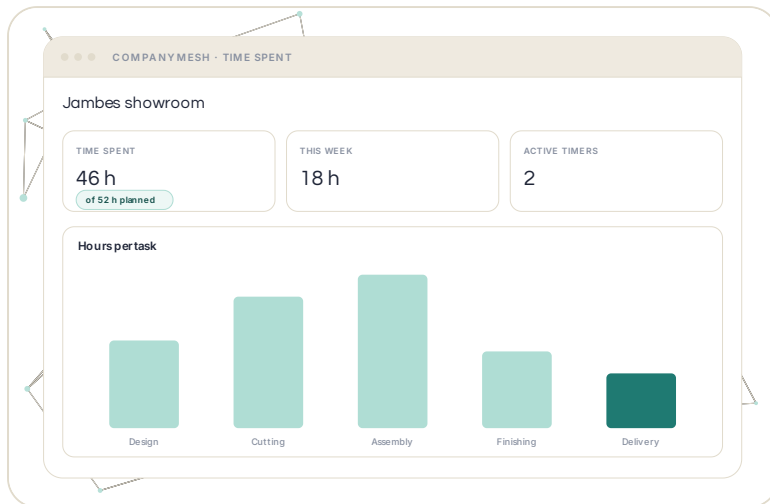
Everyone knows what's on their plate.

Assign each task to a team member with a deadline. Everyone sees their tasks for the day, across all projects.



What it enables

- An owner for each task
- Deadlines and reminders
- "My tasks" view
- Workload per team member



3 Time tracking

Time spent, measured without the effort.

Start a timer straight from the task. Time adds up per task, per project and per person, ready to analyse or invoice.

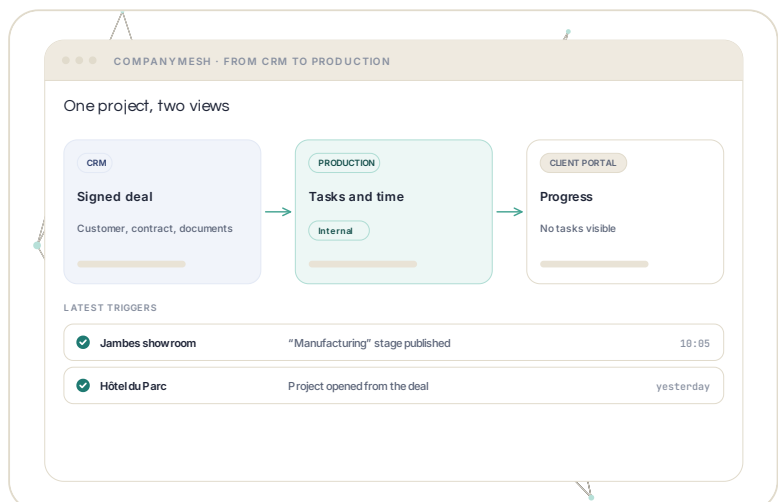
What it enables

- One-click timer
- Only one active timer per person
- Time per task and per project
- Export for invoicing

4 Linked to the customer file

From signature to production, without a break.

The project builds on the deal created in the CRM: customer, documents and history stay at hand. Customers see progress in their portal, never your internal tasks.



What it enables

- Project opened from the deal
- Shared documents and conversations
- Progress visible to the customer
- Internal tasks never exposed

COMPANYMESH · QUALITY CONTROL

Checklist · Finishing 4/6

- ☒ Even joints
Checked by Thomas D. OK
- ☒ Worktop alignment
Photo attached OK
- ☒ Sanitary silicone OK
- ☒ Cleaning OK
- ☐ Watertightness test
To do before delivery To do
- ☐ Final photo To do

5 Acceptance testing and quality checks

Deliver with nothing left out.

Checklists and test scenarios come with every project. Results are recorded before delivery.

What it enables

- Reusable checklists
- Test scenarios
- Recorded results
- Sign-off before delivery

TAILORED

Adapted to your business

Production columns, quality-control steps, assignment by workshop or team, recurring project templates: we shape the tool around **your** way of working, from building sites to software development.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Calendar

Google Calendar

Outlook / Microsoft 365

Collaboration

Slack

Microsoft Teams

GitHub

GitLab

Import

Trello

Asana

Excel / CSV

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.pipeline` Pipeline & opportunities

`crm.portal` Client portal

`comms.chat` Team chat & real time

`ops.dashboard` Dashboards & search

`erp.billing` Invoicing

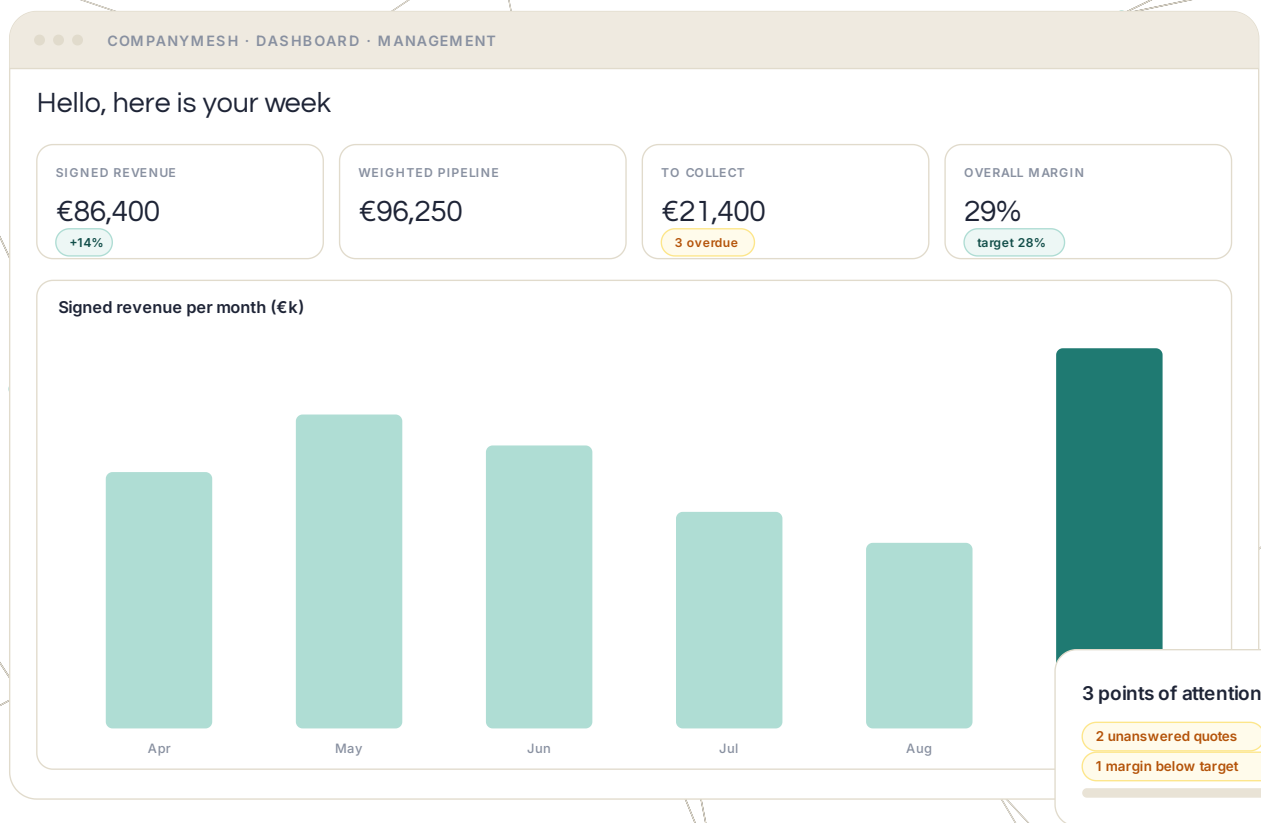
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Dashboards & search

Your business at a glance, and everything a search away.



Your business at a glance, and everything a search away.

Good decisions start with the right figures in front of you. The Dashboards module shows each profile the indicators and shortcuts that matter to them, and a global search instantly finds any customer, quote, order or invoice.

Informed decisions

Key indicators, always up to date.

A home screen per profile

Everyone sees what matters for their job.

Time saved

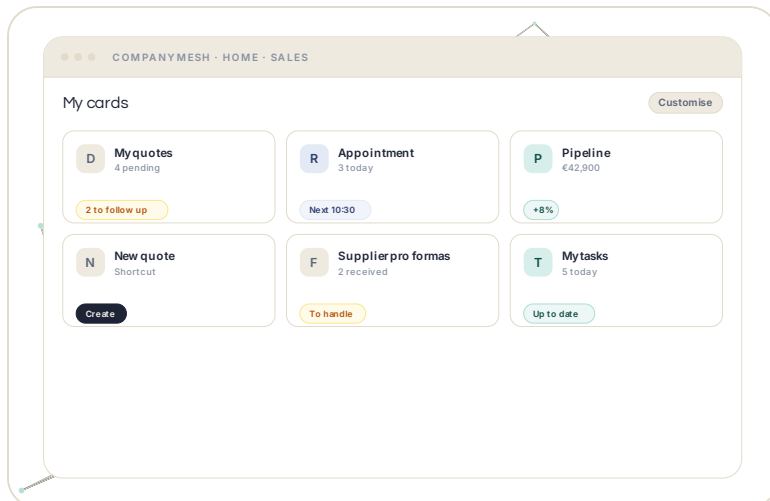
Global search and shortcuts.

Aligned teams

Shared targets and results.

In this module

- 1 Configurable cards
- 2 Key indicators
- 3 Per-rep view
- 4 Global search
- 5 Alerts and notifications



1 Configurable cards

Your dashboard, your way.

The dashboard is made up of cards: indicators, lists, charts, shortcuts. Each user can reorder them, and administrators define the cards for each role.

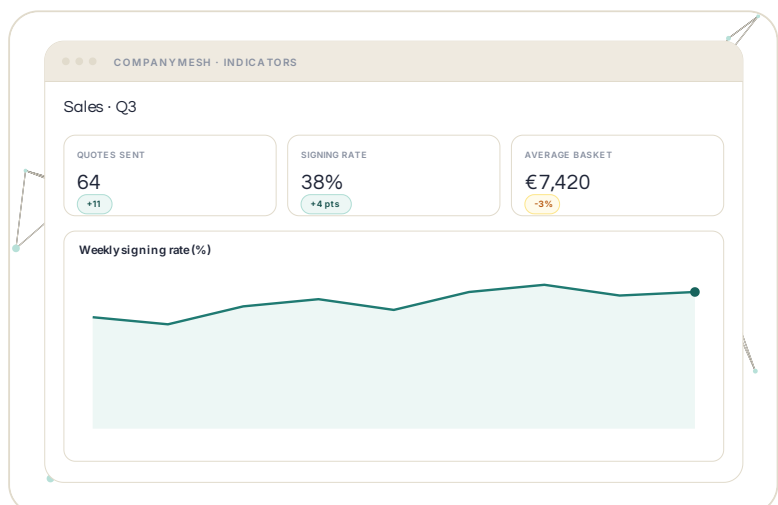
What it enables

- Cards by role
- Drag-and-drop rearranging
- Shortcuts to frequent actions
- Business-specific cards (e.g. pending supplier pro formas)

2 Key indicators

The figures that count, up to date.

Revenue, pipeline, collections, margins, lead times: indicators are calculated continuously from the tool's data, with comparison to previous periods.



What it enables

- Indicators calculated in real time
- Period comparison
- Targets and variances
- Drill down in one click

SALES REP	QUOTES	SIGNATURE	MARGIN	OVERDUE FOLLOW-UPS
Julie M.	28	42%	31%	0
Marc D.	24	35%	27%	2
Sophie L.	12	33%	30%	1

3 Per-rep view

Everyone's performance, no spreadsheet.

Each sales rep tracks their own results, and management compares portfolios: quotes sent, signing rate, margins, overdue follow-ups.

What it enables

- Individual results
- Overdue follow-ups
- Rankings and comparisons
- Margins per sales rep

4 Global search

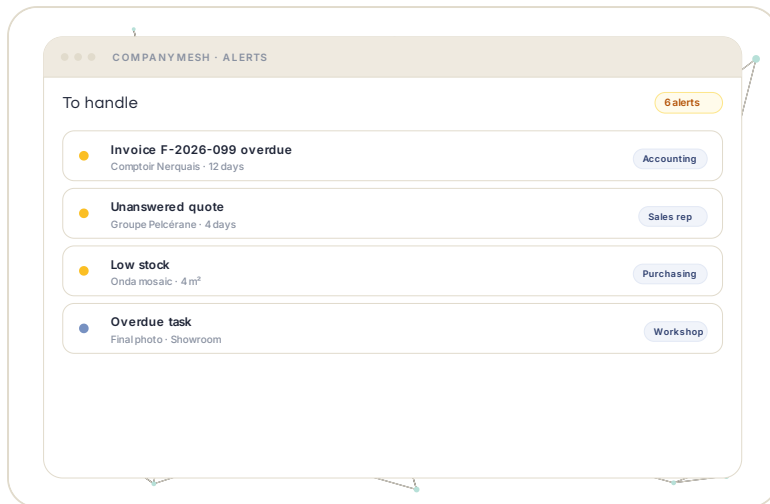
Type, find.

A single search bar looks across customers, contacts, products, quotes, orders and invoices. Results are grouped and take you straight to the record.

COMPANYMESH - SEARCH "PELCÉRANE"	
12 results	
GD	Groupe Pelcéraane Customer - Gembloux
PD	Pierre Pelcéraane Contact - manager
	D-2026-219 Quote - €8,400
	C-3316 Order - delivery 24/09
	F-2026-098 Invoice - paid

What it enables

- Cross-module search
- Typo tolerance
- Results grouped by type
- Keyboard shortcut



5 Alerts and notifications

What needs your attention.

Overdue invoices, unanswered quotes, low stock, overdue tasks: alerts reach the right profile, in the tool or by email.

What it enables

- Alerts by profile
- In-app and email notifications
- Preferences per user
- Alert history

TAILORED

Adapted to your business

Management indicators, sales rep cards, the accounts queue, workshop alerts: we build the dashboards around **your** figures and **your** priorities, then everyone can rearrange their own.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Data

All CompanyMesh modules

Excel / CSV

API

Analysis

Google Looker Studio

Power BI

Metabase

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.pipeline Pipeline & opportunities

erp.billing Invoicing

erp.banking Banking & reconciliation

ops.analytics Sovereign web analytics

crm.pricing Pricing & margins

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+32 490 46 81 17

Internal feedback & support

Every comment handled, every request followed through.

COMPANYMESH · FEEDBACK & SUPPORT

Processing queue 3 urgent

#	SUBJECT	SOURCE	URGENCY	STATUS
214	Joint to redo · Showroom	Customer	High	In progress
213	Incomplete invoice export	Team	High	Assigned
212	Idea: filter by branch	Team	Low	New
211	Client portal access	Customer	High	Resolved
210	Label to fix	Team	Low	Resolved

✓ Ticket resolved
#211 · Client portal access
Customer notified · 42 min
Resolved

Every comment handled, every request followed through.

A bug someone spotted, an idea for an improvement, a customer request: this kind of feedback often gets lost in conversations. The Feedback & support module captures it straight from the screen in question, assigns it and tracks it through to resolution.

Feedback with context

Page, screenshot and description sent in one click.

Clear follow-up

Every item has an owner and a status.

Customers who feel heard

Support tickets tracked all the way to a solution.

A tool that keeps improving

Your teams' ideas shape how it evolves.

In this module

- 1 One-click reporting
- 2 Assignment and handling
- 3 Customer support tickets
- 4 Priorities and response times
- 5 Knowledge base

1 One-click reporting

Context captured automatically.

From any screen, a button lets you report a problem or suggest an idea. The page in question and any attachments are saved with the feedback.

What it enables

- Feedback button on every screen
- Page and context recorded
- Screenshots and documents attached
- Urgency level

2

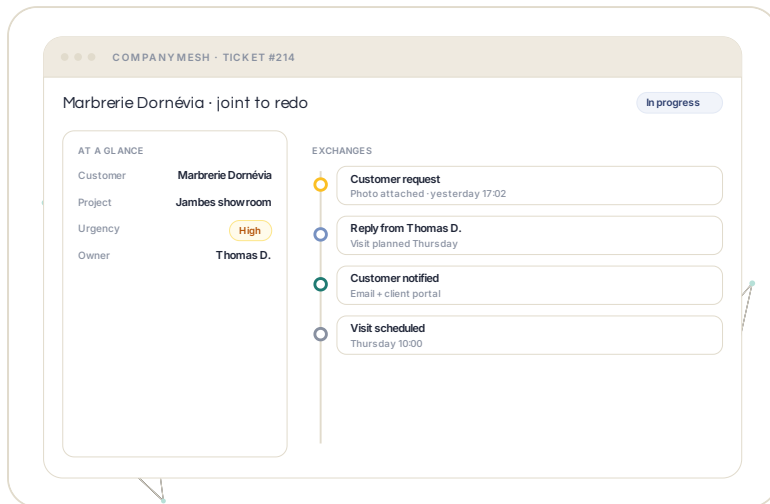
Assignment and handling

An owner for every piece of feedback.

Every item is assigned, discussed and tracked until it's resolved. Mentions let you bring a colleague in.

What it enables

- Assignment and status
- Comments with mentions
- Links between items
- Resolution date



3 Customer support tickets

Structured, reassuring support.

Your customers open requests from their portal. These become tracked tickets, with the full conversation history and a notification for every reply.

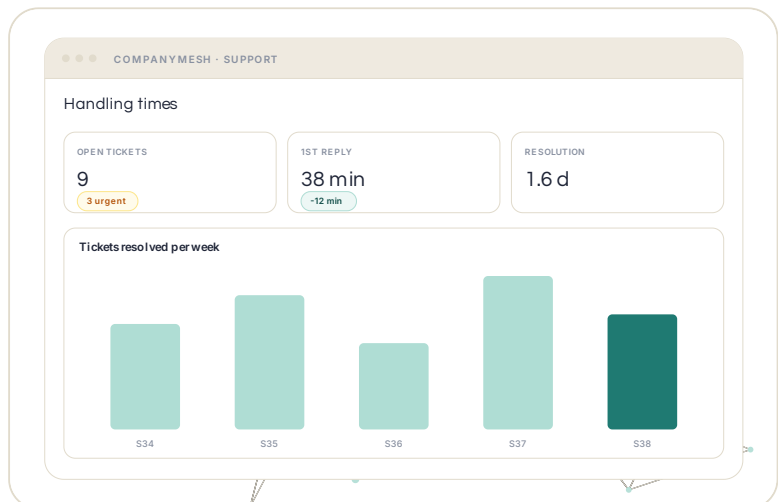
What it enables

- Requests from the customer portal
- Conversation history
- Reply notifications
- Dedicated request forms

4 Priorities and response times

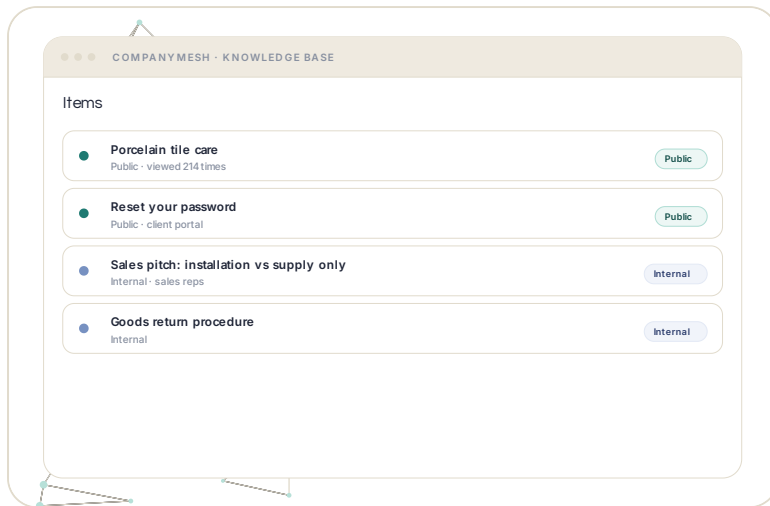
Deal with what matters first.

Urgency, category and age set the order of the queue. Alerts flag tickets that go beyond the expected response time.



What it enables

- Queue sorted by urgency
- Response times tracked
- Overdue alerts
- View by owner



5 Knowledge base

Answers, ready when you need them.

Recurring solutions become articles your team or your customers can look up, cutting down on repeat requests.

What it enables

- Internal and public articles
- Full-text search
- Links from tickets
- Talking points for your sales team

TAILORED

Adapted to your business

Categories, urgency levels, handling workflow, response times, who can report what: we set up support around **your** organisation, for your teams and your customers alike.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Communication

Email

Slack

Microsoft Teams

Technical tracking

GitHub

GitLab

Jira

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`crm.portal` Client portal

`comms.chat` Team chat & real time

`ops.projects` Projects & production

`dms.documents` Document management & media library

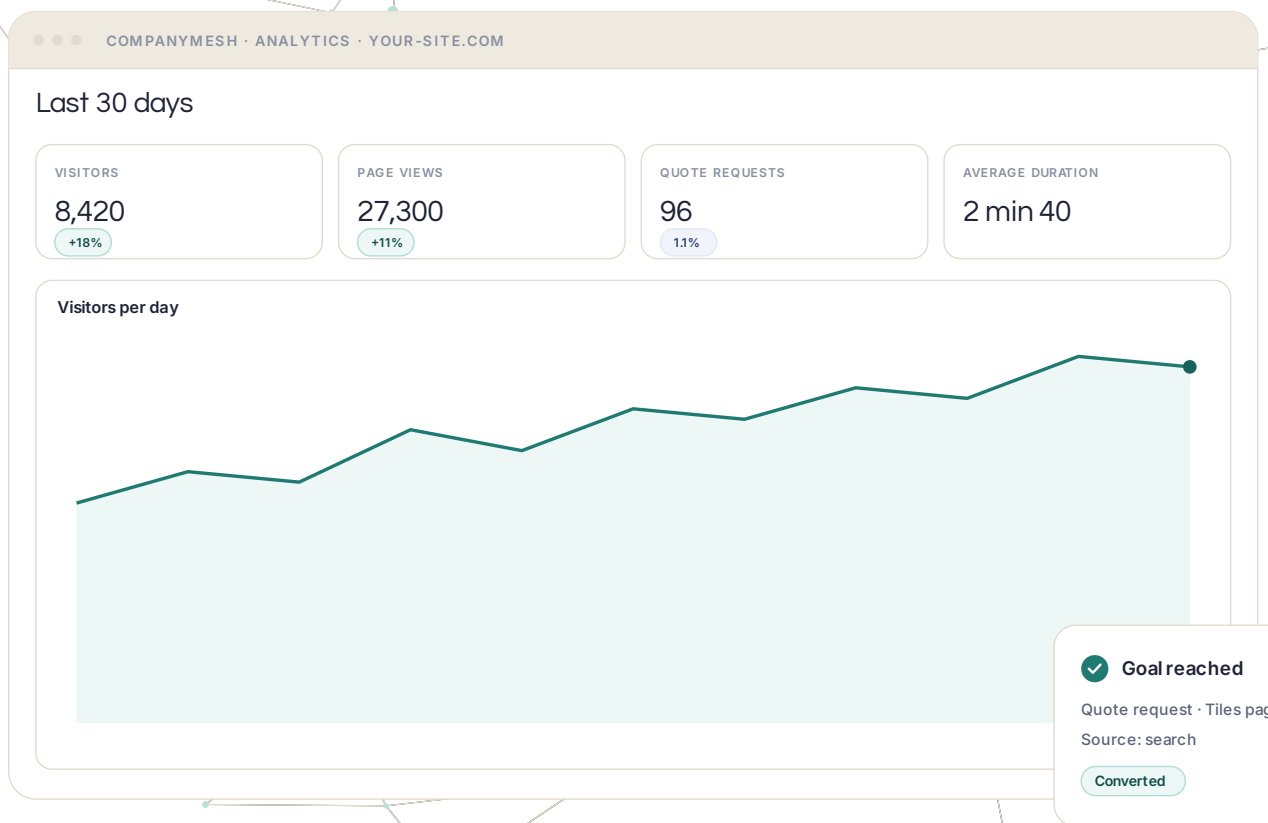
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Sovereign web analytics

Understand your visitors without giving away your data.



Understand your visitors without giving away your data.

Knowing where your visitors come from and what makes them convert is essential, but mainstream tools exploit your data. The Analytics module measures traffic on your websites on infrastructure you control, respects privacy, and links those figures to your sales results.

Data that belongs to you

Statistics on your own infrastructure, at your host.

Privacy respected

Lightweight tracking, no advertising profiling.

Figures that matter

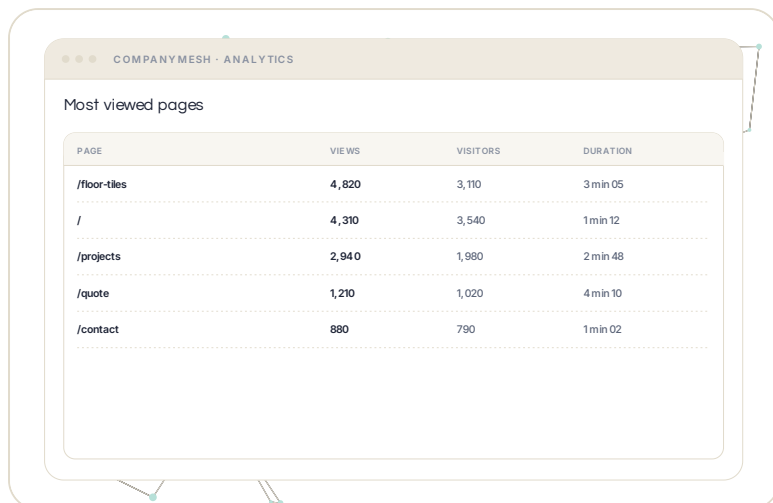
Page views, sources, conversions, in plain language.

A link to sales

Visits connected to enquiries and customers.

In this module

- 1 Traffic made clear
- 2 Traffic sources
- 3 Goals and conversions
- 4 Privacy first
- 5 Shared reports



1 Traffic made clear

The essentials, no jargon.

Visitors, page views, time on site, devices and countries appear on a readable dashboard, in real time or over the period of your choice.

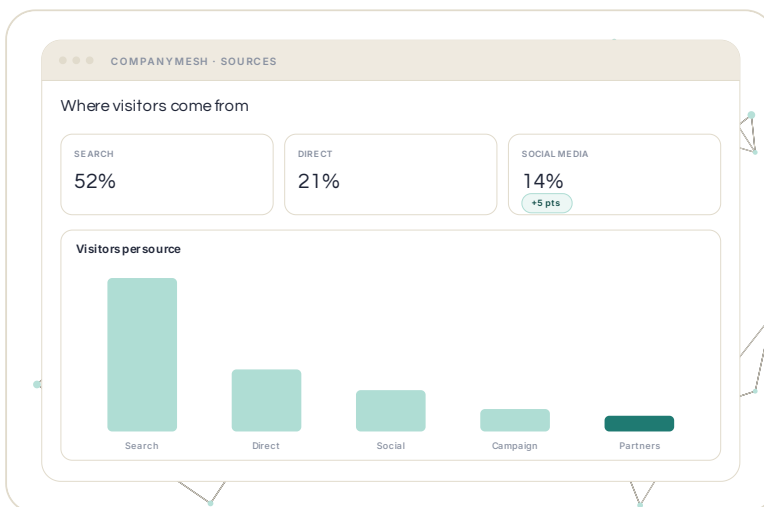
What it enables

- Visitors and page views
- Most-viewed pages
- Devices and countries
- Real time

2 Traffic sources

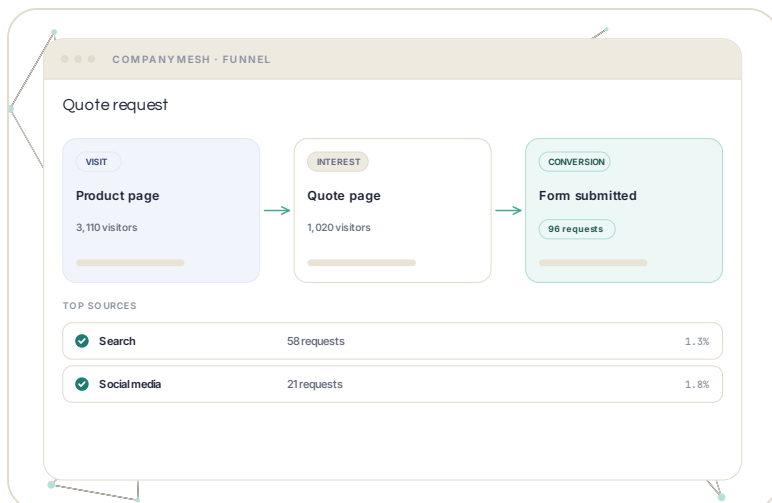
Where your visitors come from.

Search engines, social networks, campaigns, partner sites: every source is measured, with campaign parameter tracking.



What it enables

- Sources and referrers
- Campaign tracking
- Period comparison
- Landing pages



3 Goals and conversions

What drives enquiries.

Define your goals (form submitted, appointment booked) and track their conversion rate by source and by page.

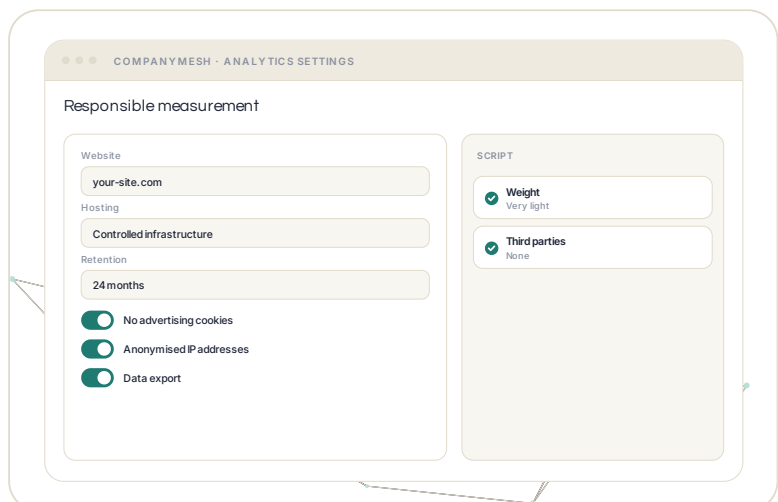
What it enables

- Custom goals
- Conversion rates
- Simple funnels
- Custom events

4 Privacy first

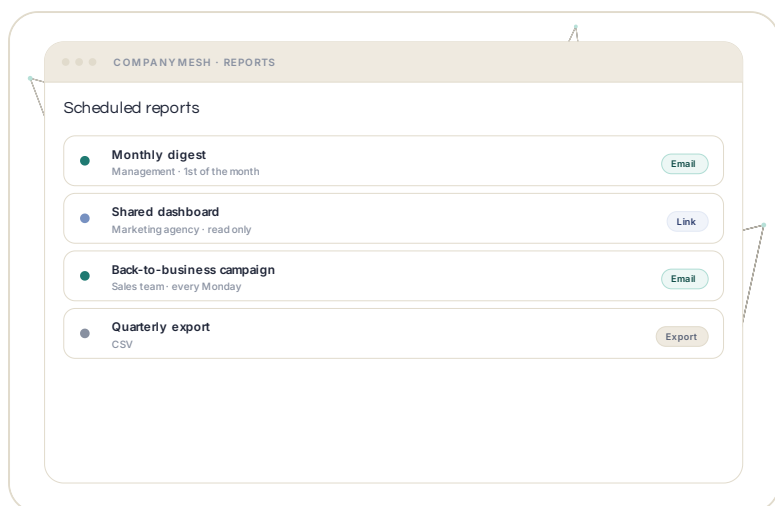
Lean, responsible measurement.

Tracking is lightweight, with no advertising cookies and no data resale, and runs on your own infrastructure. Your data stays yours.



What it enables

- No advertising profiling
- On your own hosting
- Lightweight script
- Exportable data



5 Shared reports

The right figures for the right people.

Share a dashboard with a customer or a team, and receive regular summaries by email.

What it enables

- Shared dashboards
- Email summaries
- Linked to the customer project
- Data export

TAILORED

Adapted to your business

Websites, key pages, conversion goals (quote request, appointment booking, download), reports shared with your customers or your teams: together we decide what's worth measuring.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Websites

WordPress

WooCommerce

Shopify

Any website

Add-ons

Google Search Console

Google Analytics (side by side)

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`auto.web` Connected website

`crm.leads` Prospecting & lead capture

`crm.marketing` Marketing & campaigns

`ops.dashboard` Dashboards & search

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BUILDING BLOCK · 4 MODULE(S)

Automation & integrations

Automate the repetitive, connect your tools, bring in AI and link your website.

`auto.workflows`

Automations

Repetitive tasks take care of themselves.

`auto.api`

API & connectors

Your tool talks to all the others.

`auto.ai`

Built-in AI

Artificial intelligence where it really helps, with costs kept in check.

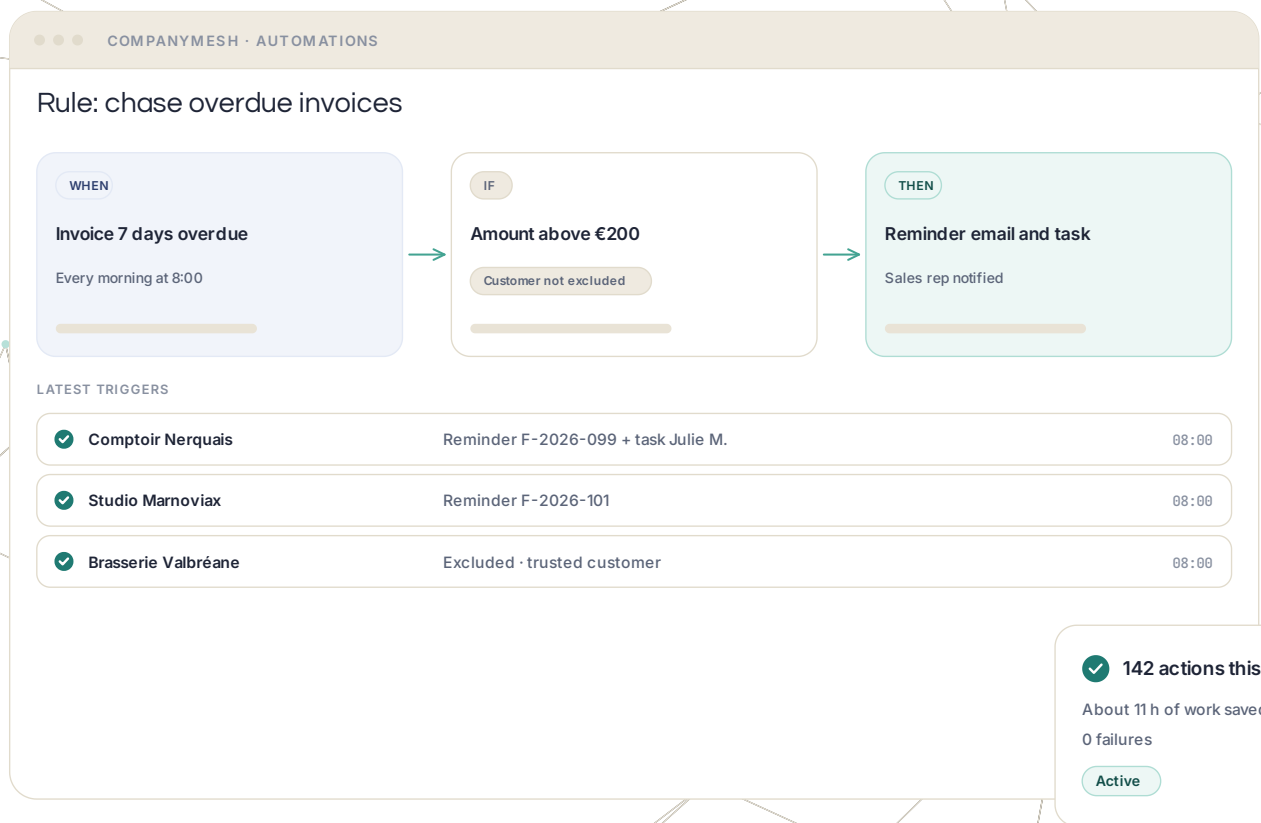
`auto.web`

Connected website

Your website and your tool, working as one.

Automations

Repetitive tasks take care of themselves.



Repetitive tasks take care of themselves.

Chasing, notifying, changing a status, creating a task, sending a document: much of your admin work follows simple rules. The Automations module runs them for you, reliably and traceably, so your teams can focus on what matters.

Time freed up

Repetitive actions are handled for you.

Nothing forgotten

Every rule applies, every time.

Full traceability

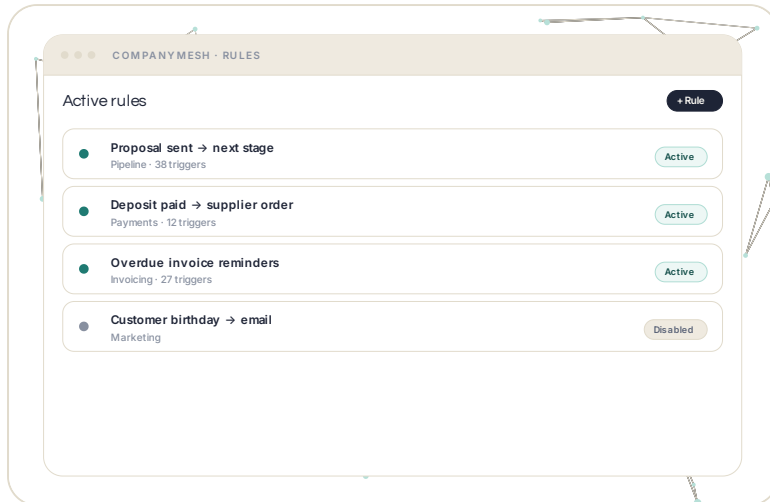
Every trigger is logged.

No development needed

Simple rules you can change at any time.

In this module

- 1 "When, if, then" rules
- 2 A library of actions
- 3 Scheduled tasks
- 4 Log and monitoring
- 5 Custom scenarios



1 “When, if, then” rules

You describe it, the tool does it.

A rule combines a trigger (an event), conditions and one or more actions. Rules are created and edited from the settings, with no development required.

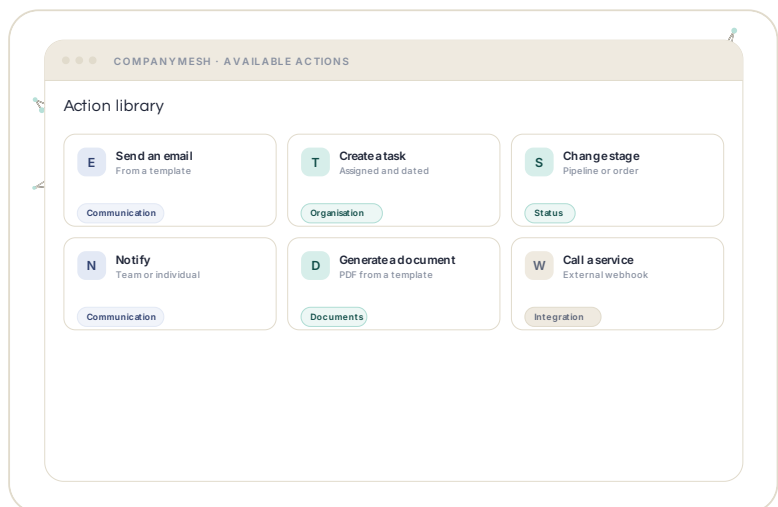
What it enables

- Triggers across all modules
- Chained actions
- Combinable conditions
- Instant switch on and off

2 A library of actions

Everything that can be automated.

Change a stage, send a template email, create a task, notify a team, generate a document, call an external service: actions combine freely.



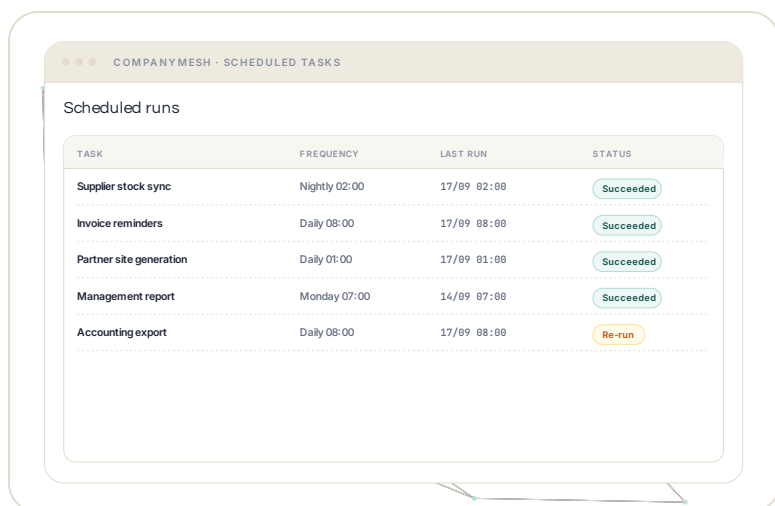
What it enables

- Emails and notifications
- Status and stage changes
- Tasks and reminders
- Document generation

3 Scheduled tasks

The right job, at the right time.

Jobs run at set times: syncs, reports, reminders, clean-ups. Even a website hosted without a scheduler can be driven from the platform.



TASK	FREQUENCY	LAST RUN	STATUS
Supplier stock sync	Nightly 02:00	17/09 02:00	Succeeded
Invoice reminders	Daily 08:00	17/09 08:00	Succeeded
Partner site generation	Daily 01:00	17/09 01:00	Succeeded
Management report	Monday 07:00	14/09 07:00	Succeeded
Accounting export	Daily 08:00	17/09 08:00	Re-run

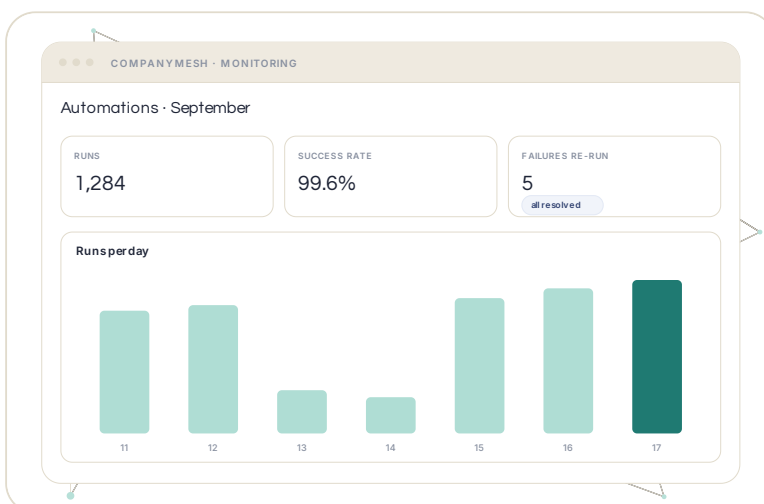
What it enables

- Daily, hourly and monthly runs
- Protected secrets
- Control of external websites
- Retry on failure

4 Log and monitoring

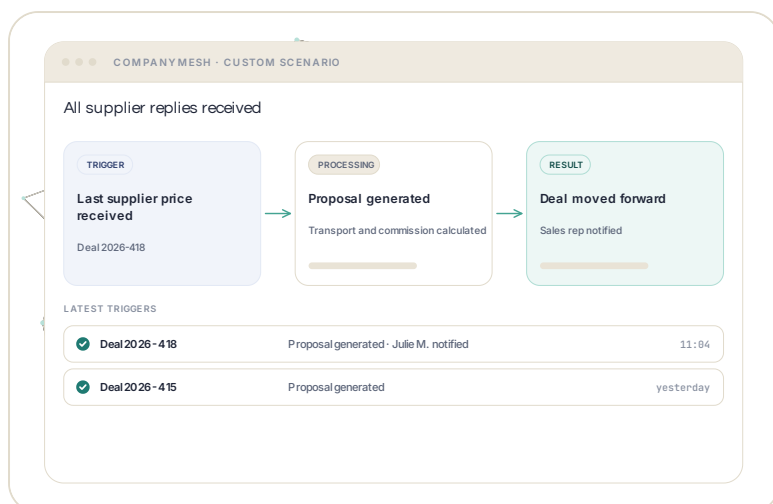
You know what happened.

Every run is recorded along with its result. Failures are flagged and can be run again.



What it enables

- Complete history
- Manual re-run
- Failure alerts
- Run statistics



5 Custom scenarios

When a simple rule is no longer enough.

For processes that span several tools or call for precise business logic, we build dedicated scenarios, monitored just like the rest.

What it enables

- Multi-tool processes
- Business-specific logic
- Unified monitoring
- Grows with your business

Example — As soon as all supplier prices are in, the deal moves forward, the proposal is generated and the sales rep is notified.

TAILORED

Adapted to your business

Together with your teams, we pinpoint the repetitive tasks in **your** day-to-day work and turn them into rules. More complex scenarios (several systems, detailed business conditions) are custom-built and plugged into the same log.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Automation platforms

Zapier

Make

n8n

Communication

Email

SMS

Slack

Microsoft Teams

Scheduled tasks

External websites

Shared hosting

API

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.pipeline Pipeline & opportunities

erp.billing Invoicing

auto.api API & connectors

auto.ai Built-in AI

comms.mail Integrated email

Let's talk about your future tool

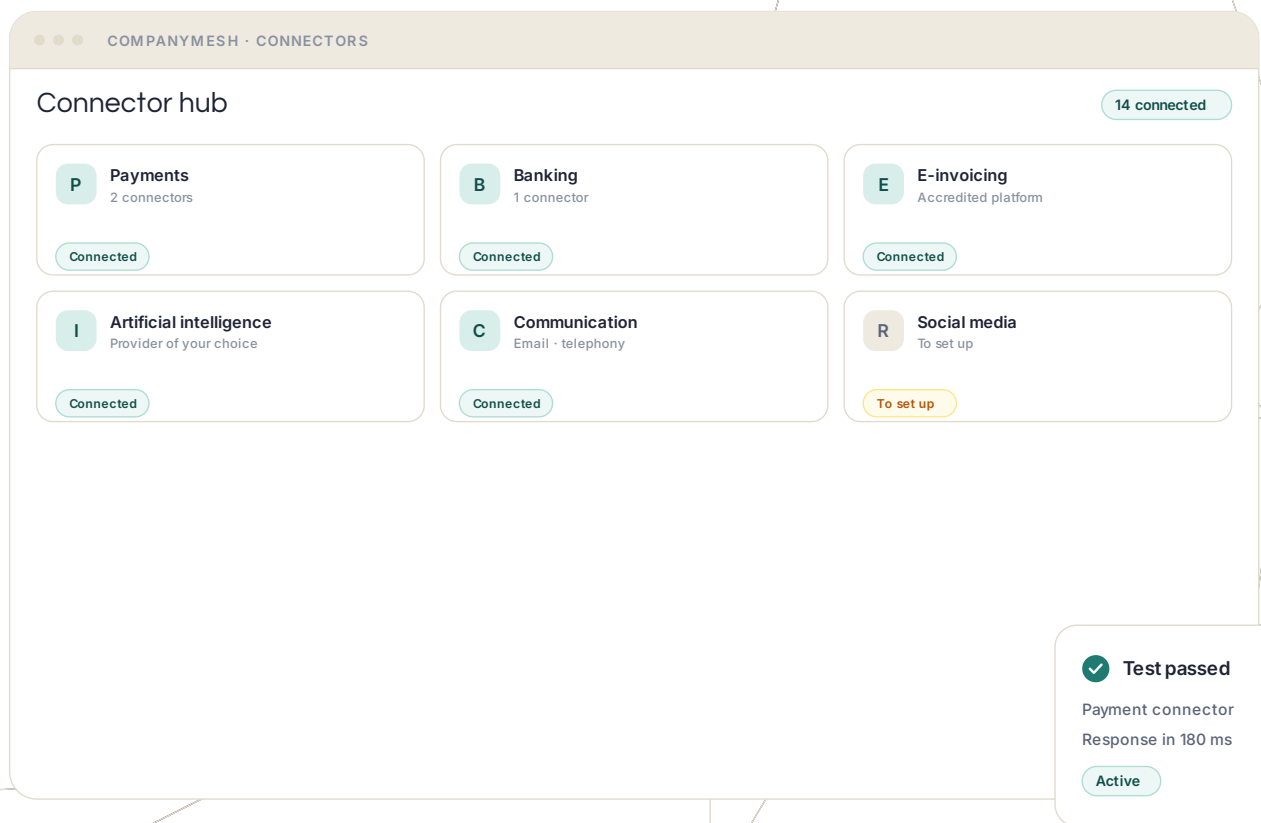
Tailored demo, by appointment.

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AUTOMATION & INTEGRATIONS

API & connectors

Your tool talks to all the others.



Your tool talks to all the others.

Your business already uses a whole set of tools: website, bank, accounting, suppliers, industry software. The API & connectors module links CompanyMesh to that ecosystem, with a hub of ready-to-use connectors and a secure API for everything else.

A connected ecosystem

Your tools exchange data automatically.

Ready-made connectors

Payment, banking, AI, email, social networks...

An open, secure API

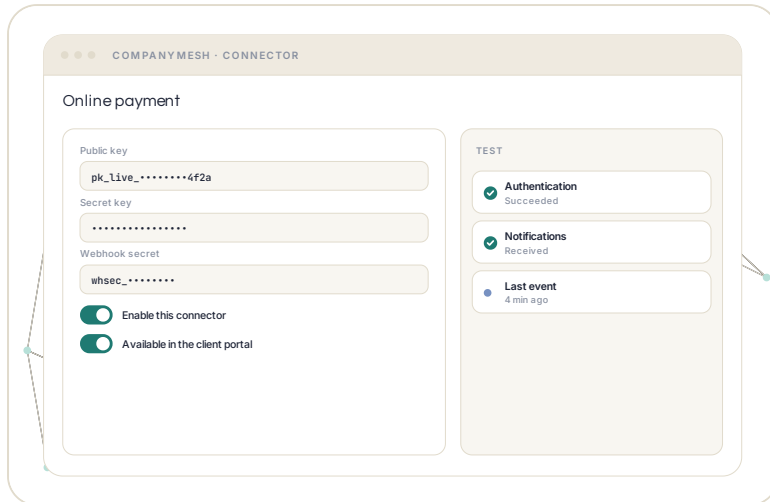
Keys per source, limited permissions, logged exchanges.

No dead ends

A tool that isn't covered yet? We'll connect it.

In this module

- 1 Connector hub
- 2 Ingestion API
- 3 Keys and security
- 4 Webhooks and events
- 5 Connected sites



1 Connector hub

Switch it on, test it, you're connected.

Connectors are grouped by category: payment, banking, e-invoicing, AI, communication, social networks, sign-in. Each connector is configured, tested and activated from the settings.

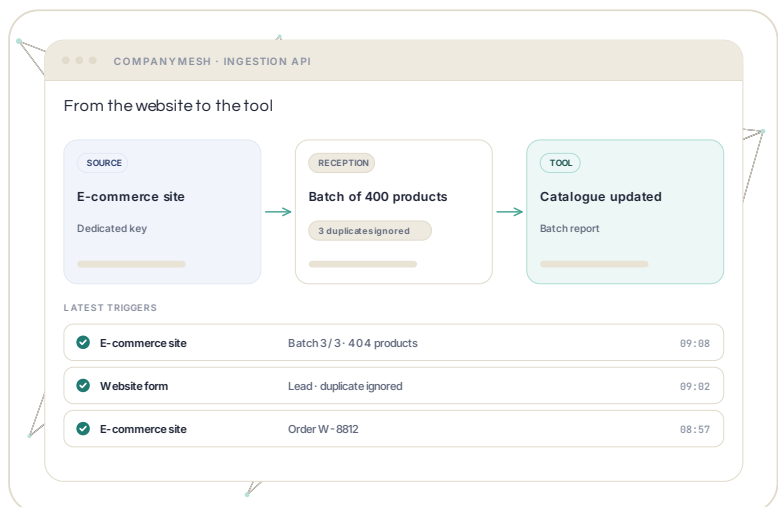
What it enables

- Connectors by category
- Built-in connection test
- Activation per space (team, customers)
- Status visible at a glance

2 Ingestion API

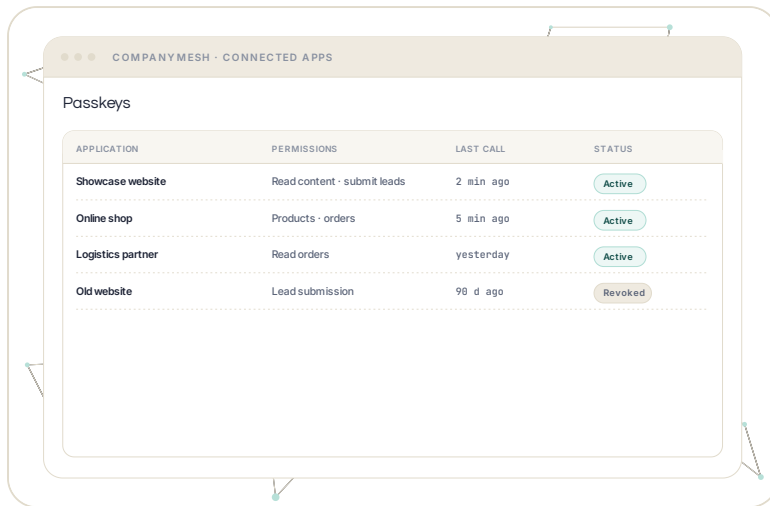
Your websites and partners feed the tool.

A secure API receives enquiries, products, orders or any other object from your websites and partners. Duplicate submissions are detected, and every batch comes with a report.



What it enables

- Incoming leads, products, orders
- Duplicate detection
- Batch reports
- Field mapping templates



3 Keys and security

Every source, its own permissions.

Each connected application has its own keys and its own permissions, limited to what it strictly needs. Secrets are encrypted and never shown in plain text.

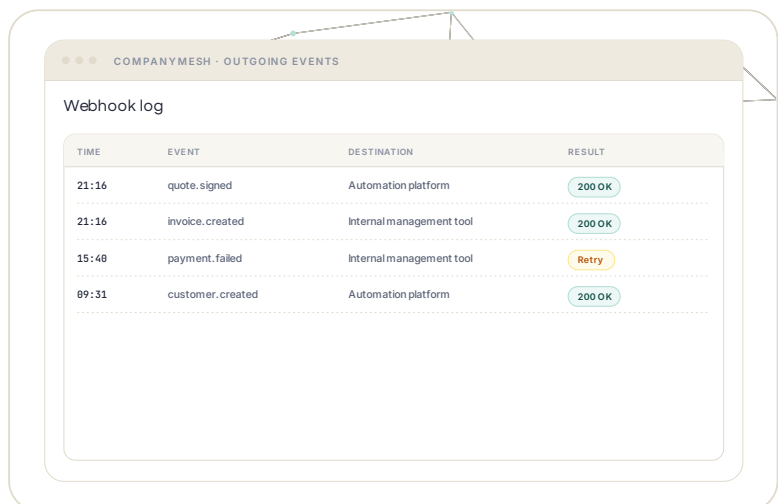
What it enables

- Keys per application
- Encrypted secrets
- Permissions limited by scope
- Instant revocation

4 Webhooks and events

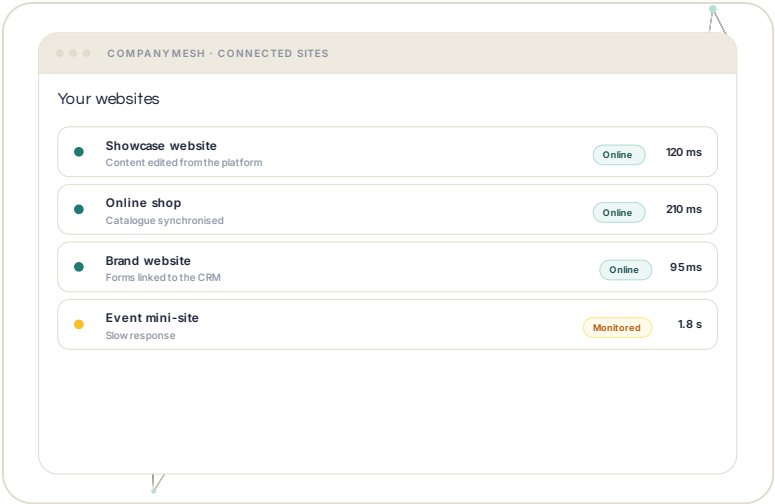
Keep your tools informed in real time.

Key events (new customer, signed quote, paid invoice) can be sent instantly to your other tools or to an automation platform.



What it enables

- Outgoing events
- Automatic retries
- Message signing
- Delivery log



5 Connected sites

Your satellite sites, managed from one place.

Your satellite websites and applications are registered, monitored and administered from the platform, with secure service-to-service access.

What it enables

- Register of connected sites
- Uptime monitoring
- Service-to-service access
- Centralised content editing

TAILORED

Adapted to your business

Every company has its own industry software, its long-standing supplier, its own exchange format. We analyse **your** tools and build the connections you need, whether they offer an API, a file export or just an email.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Payment & banking

Stripe

PayPal

Mollie

Alma

Qonto

Ponto

Email & telephony

Microsoft 365

Gmail

Brevo

3CX

Telnyx

Twilio

AI

OpenAI

Anthropic

Google Gemini

Mistral AI

Groq

Social networks & sign-in

Meta

LinkedIn

X

TikTok

Google

Microsoft

Apple

GitHub

Automation

Zapier

Make

n8n

Webhooks

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

auto.workflows Automations

auto.web Connected website

crm.leads Prospecting & lead capture

erp.stock Stock & replenishment

core.platform Secure, customisable foundation

Let's talk about your future tool

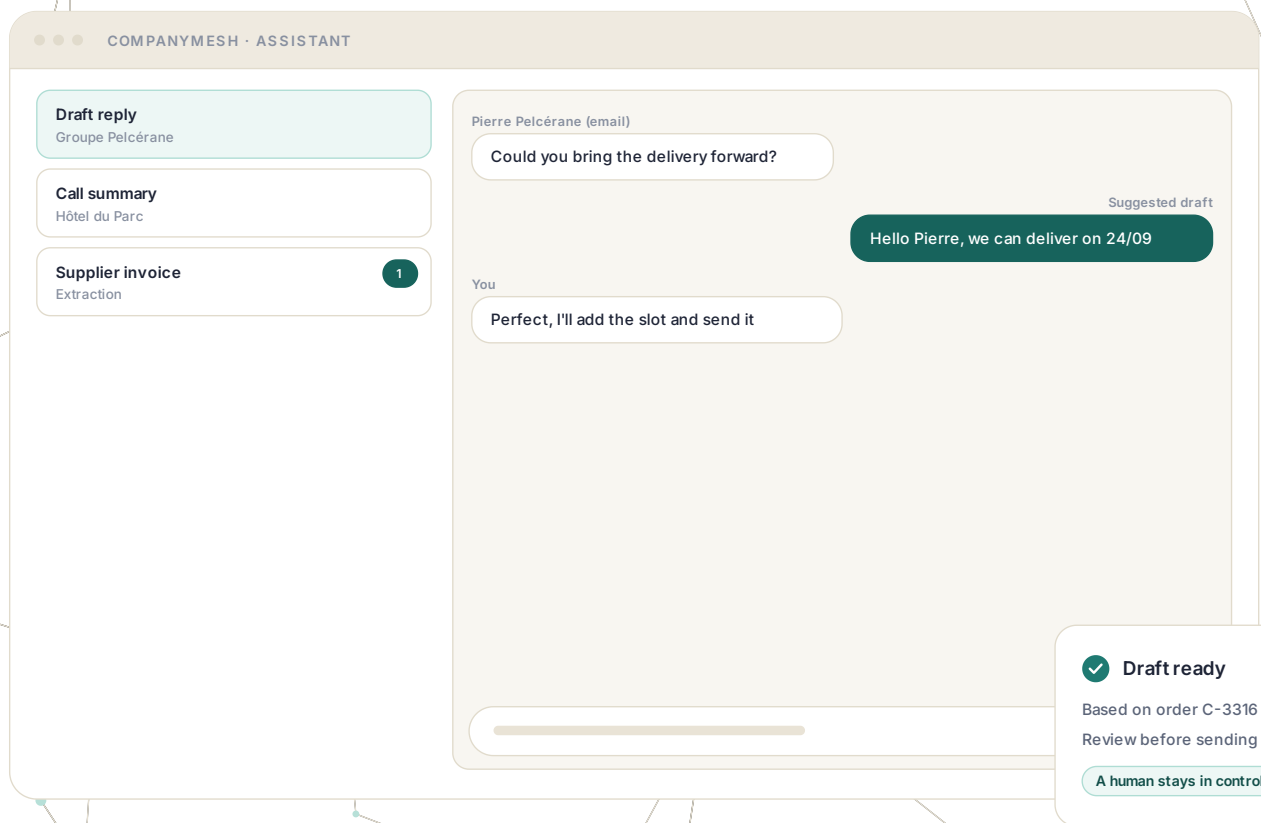
Tailored demo, by appointment.

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AUTOMATION & INTEGRATIONS

Built-in AI

Artificial intelligence where it really helps, with costs kept in check.



Artificial intelligence where it really helps, with costs kept in check.

AI can save a lot of time: summarising a call, drafting a reply, reading a document, answering frequently asked questions. The Built-in AI module puts it to work on specific tasks, with the provider of your choice and tight control over costs and data.

Real time savings

Summaries, drafts, data extraction, assistance.

Costs under control

Targeted uses, spending caps and usage tracking.

Your choice of provider

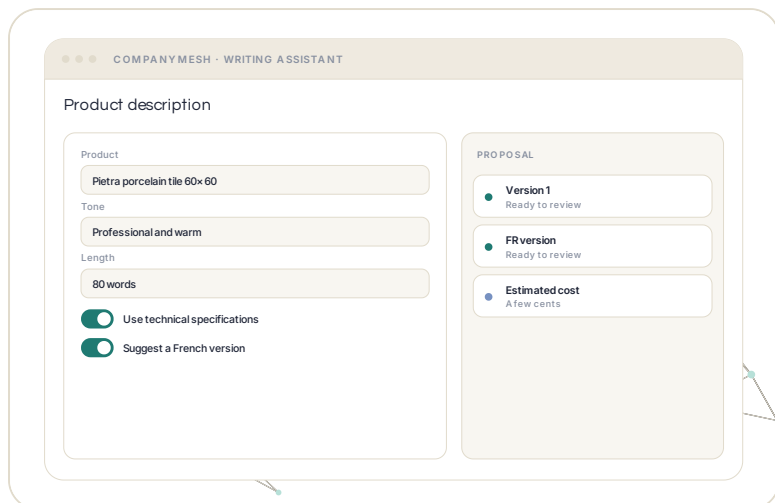
Several models, European ones included.

Protected data

Clear retention and deletion rules.

In this module

- 1 Writing assistant
- 2 Summaries and minutes
- 3 Assistant for your visitors
- 4 Document reading
- 5 Control over costs and data



1 Writing assistant

A first draft in seconds.

Draft a reply to an email, a product description or a follow-up based on the context of the file. The text is suggested; you review it and send it.

What it enables

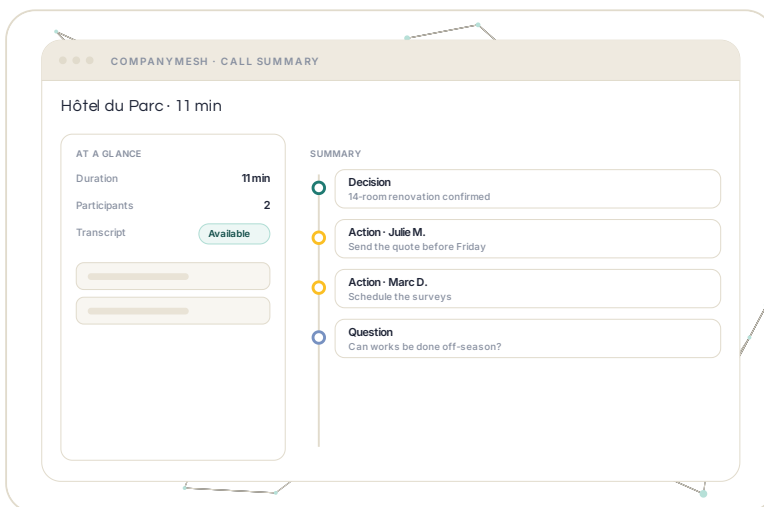
- Email drafts in context
- Product descriptions
- Rewording and translation
- Always approved by a person

2

Summaries and minutes

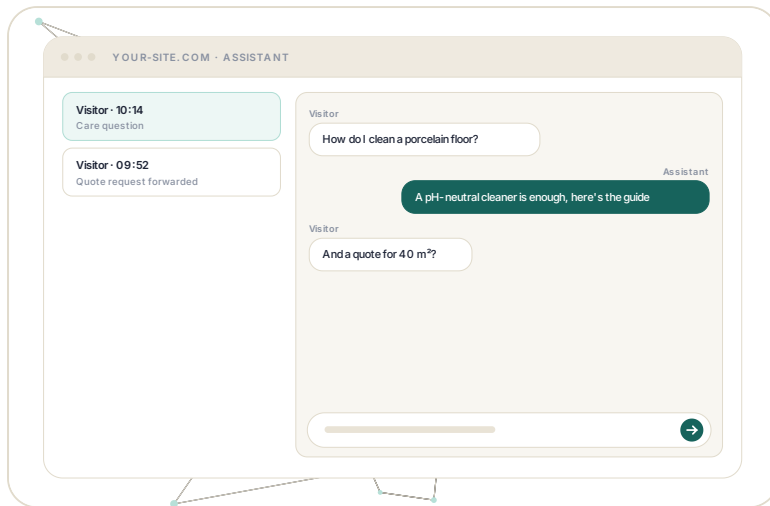
The key points of a call or meeting.

Call and video meeting transcripts are summarised: decisions, action points, open questions. Action points can be turned into tasks.



What it enables

- Call and meeting summaries
- Extracted action points
- Added to the file
- Turned into tasks



3 Assistant for your visitors

Instant answers, day and night.

An assistant on your website answers frequently asked questions from your knowledge base and passes qualified requests on to your team.

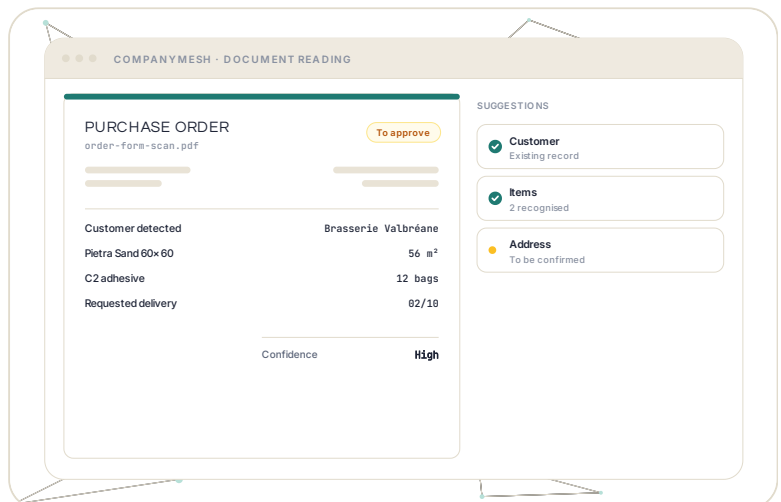
What it enables

- Answers based on your own content
- Requests passed to the CRM
- Conversation history
- Configurable automatic deletion

4 Document reading

Data extracted, not retyped.

Purchase orders, supplier invoices, technical data sheets: the AI suggests the key information to capture, and you approve it before it's saved.



What it enables

- Field extraction
- Suggested record matching
- Approval before saving
- PDF and image formats



5 Control over costs and data

AI, kept under control.

You choose the provider for each use. Usage is tracked, capped if needed, and conversations are deleted according to your rules.

What it enables

- Provider chosen per use
- Usage tracking
- Caps and alerts
- Data deletion rules

TAILORED

Adapted to your business

Together we pinpoint the tasks where AI makes a real difference in **your** line of work, and we roll it out in a controlled way, with no oversized subscription and no hit-and-miss automation: people stay in charge of every decision.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Model providers

OpenAI

Anthropic

Google Gemini

Mistral AI

Groq

Transcription

Speechmatics

OpenAI

Document reading

Apache Tika

Mistral AI

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`comms.phone` Telephony & CTI

`comms.visio` Sovereign video conferencing

`dms.documents` Document management & media library

`ops.feedback` Internal feedback & support

`auto.web` Connected website

Let's talk about your future tool

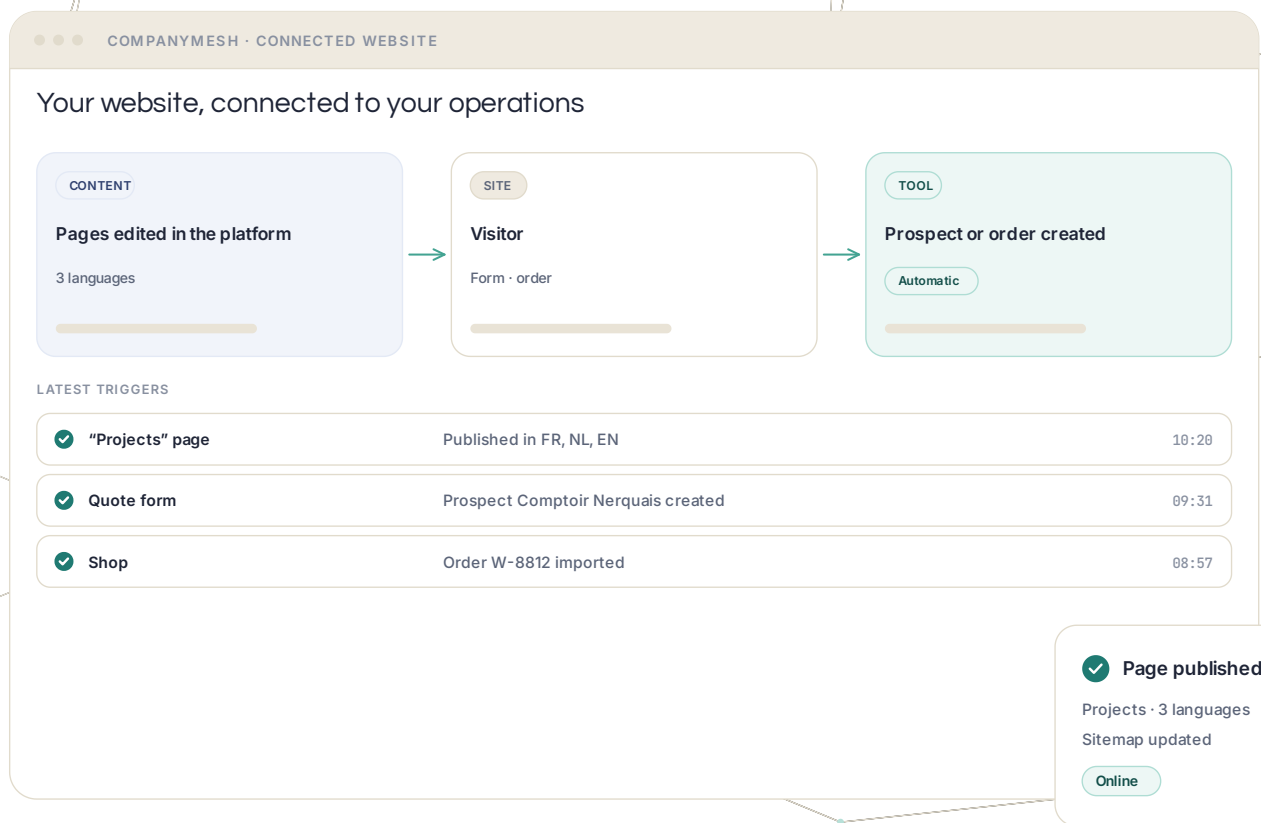
Tailored demo, by appointment.

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AUTOMATION & INTEGRATIONS

Connected website

Your website and your tool, working as one.



Your website and your tool, working as one.

Your website is often cut off from the way you run the business: frozen content, enquiries by email, a catalogue you update by hand. The Connected website module links your site to CompanyMesh: editable content, forms that feed the CRM, catalogue and orders kept in sync.

Up-to-date content

Edit your website without a developer.

Enquiries built in

Form submissions land straight in the CRM.

A synchronised catalogue

Products, prices and stock identical everywhere.

A multilingual website

French, Dutch, English and more.

In this module

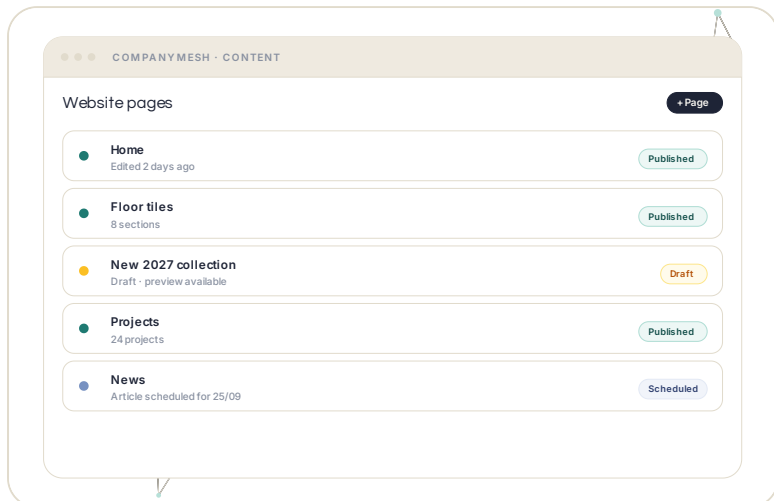
- 1 Editable content
- 2 Forms linked to the CRM
- 3 Synchronised catalogue and orders
- 4 Multilingual and SEO
- 5 Customer reviews and reassurance

FEATURES

1 Editable content

Update your website on your own.

Pages, sections, menus, news and media are all edited from the platform. Several websites can be managed in one place.



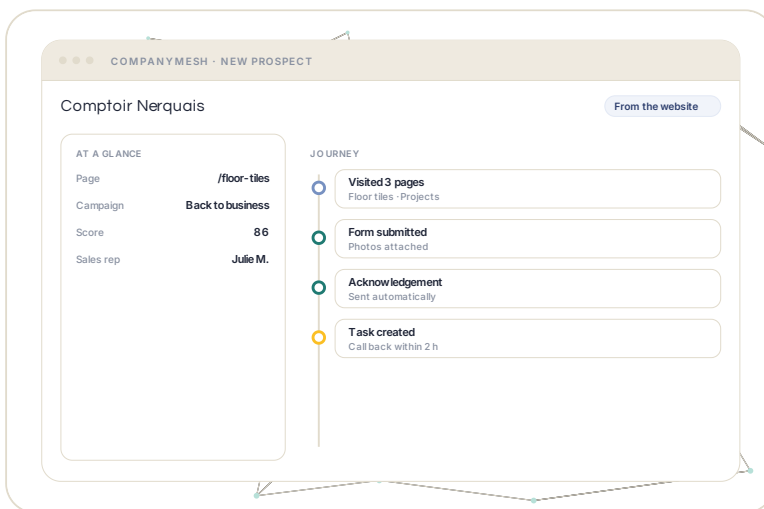
What it enables

- Page and section editing
- Menus and media
- Multiple sites managed
- Preview before publishing

2 Forms linked to the CRM

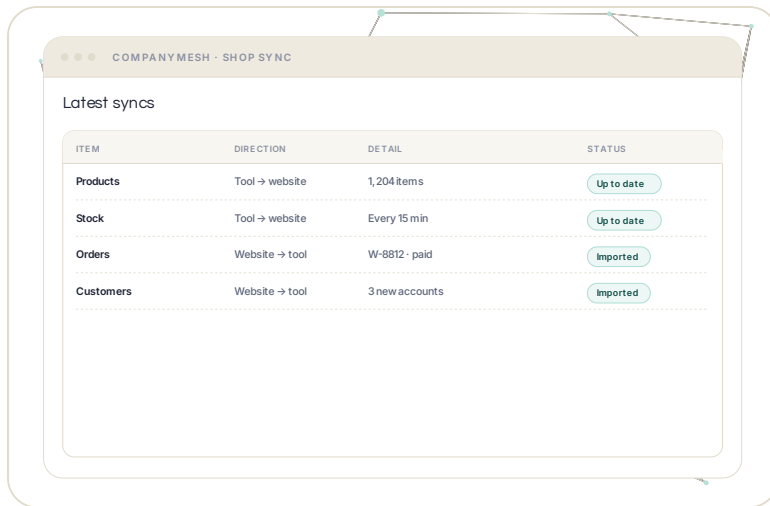
Every enquiry lands in the right place.

Website forms create leads directly in the CRM, with the source page and campaign, and trigger your automations.



What it enables

- Automatic lead creation
- Source page and campaign
- Spam protection
- Automatic acknowledgement



3 Synchronised catalogue and orders

An online shop that's always accurate.

Products, prices, stock and lead times come from the CompanyMesh catalogue. Orders placed online arrive in the tool together with their payment.

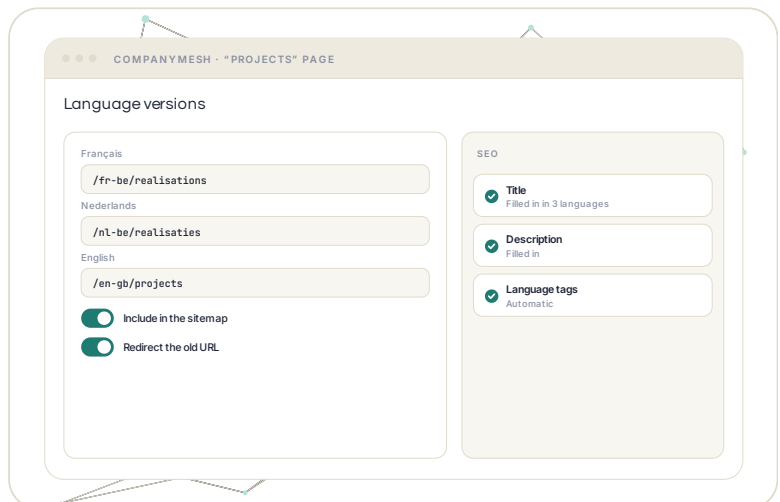
What it enables

- Product and stock synchronisation
- Online orders built in
- Linked payment
- Migration from an existing website

4 Multilingual and SEO

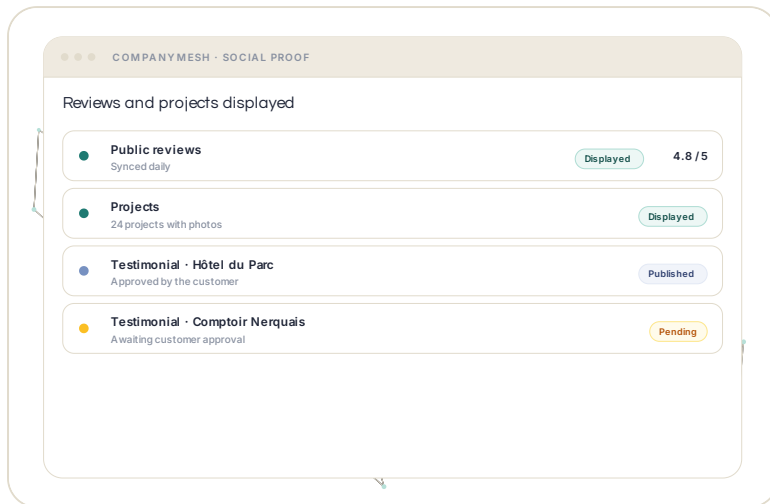
Visible, in all your languages.

Every piece of content exists in several languages with its own URLs. Sitemap, redirects and SEO tags are handled automatically.



What it enables

- Content per language
- Localised URLs
- Redirects
- Sitemap and tags



5 Customer reviews and reassurance

Put trust front and centre.

Your customers' public reviews and your past projects are displayed on the website, always up to date, to reassure your visitors.

What it enables

- Public reviews displayed
- Project gallery
- Testimonials approved by your customers
- Automatic updates

TAILORED

Adapted to your business

A new bespoke website or an existing one (WordPress, WooCommerce, Shopify...): we connect **your** site as it stands today, and develop it at your pace, without rebuilding everything.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

A workshop per profile

At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

CMS & e-commerce

WordPress

WooCommerce

Shopify

PrestaShop

Webflow

Search visibility

Google Search Console

XML sitemap

Reviews & reputation

Google Business Profile

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

crm.leads **Prospecting & lead capture**

erp.catalog **Product catalogue**

ops.analytics **Sovereign web analytics**

auto.api **API & connectors**

auto.ai **Built-in AI**

Let's talk about your future tool

Tailored demo, by appointment.

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BUILDING BLOCK · 1 MODULE(S)

Foundation

The foundation shared by every module: security, permissions, personalisation and operations.

core.platform

Secure, customisable foundation

Security, access rights and ease of use, included in every project.

FOUNDATION

Secure, customisable foundation

Security, access rights and ease of use, included in every project.

COMPANYMESH · ROLES AND PERMISSIONS

Permission tree

5 roles

PERMISSION	MANAGEMENT	SALES REP	ACCOUNTING	SUPPLIER
Deals · view	✓	✓	✓	Linked
Deals · edit	✓	✓	—	—
Margins · view	✓	Own only	✓	—
Invoices · issue	✓	—	✓	—
Price requests · reply	—	—	—	✓
Users · manage	✓	—	—	—

✓ **Secure sign-in**

Passkey + two-factor authentication
Access to all modules

Protected

Security, access rights and ease of use, included in every project.

Whichever modules you choose, they all sit on a shared foundation: user management, fine-grained access rights, secure sign-in, an activity log, backups and a customisable interface. That's what makes your tool dependable day to day, and a pleasure to use.

Serious security

Two-factor authentication, passkeys, activity log.

Precise permissions

Everyone gets exactly the access they need.

A tool that reflects you

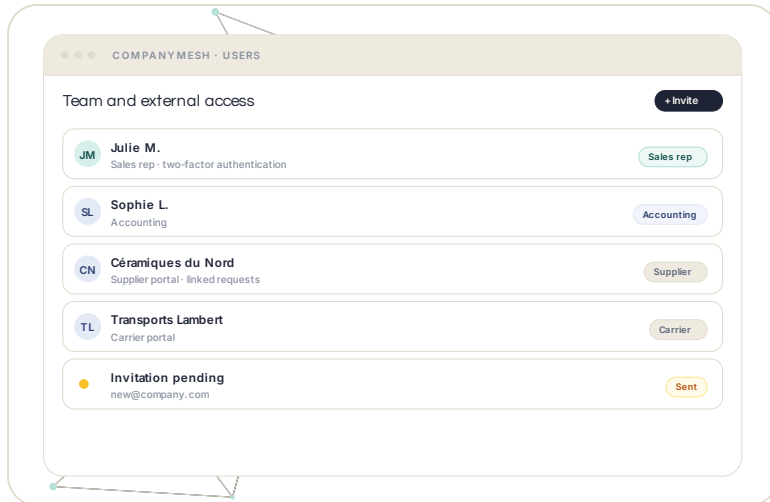
Colours, light or dark theme, per-user preferences.

A monitored platform

Backups, monitoring and well-managed updates.

In this module

- | | |
|--------------------------------|---------------------------|
| 1 Users, roles and permissions | 4 Password vault |
| 2 Secure sign-in | 5 Interface customisation |
| 3 Log and traceability | 6 Backups and monitoring |



1 Users, roles and permissions

Everyone in their place.

Create business roles and assign precise permissions, module by module and action by action, in a clear permissions tree. External profiles (customers, suppliers, carriers) get their own ring-fenced spaces.

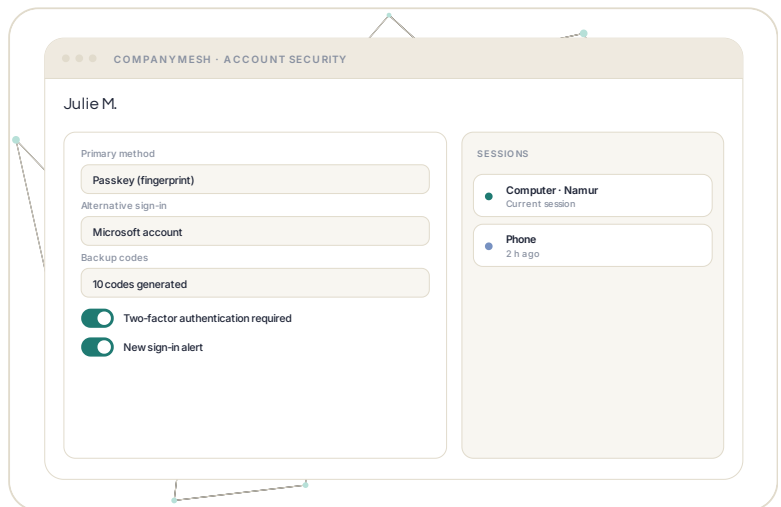
What it enables

- Detailed permissions tree
- Custom business roles
- Ring-fenced spaces for external users
- Invitations and temporary passwords

2 Secure sign-in

Easy for you, hard for everyone else.

Sign in with a password, a Google or Microsoft account, or biometric passkeys, with two-factor authentication. A single account gives access to all of the team's modules.



What it enables

- Two-factor authentication
- Passkeys
- Google, Microsoft and Apple sign-in
- Single access to every module

COMPANYMESH - AUDIT LOG

Sensitive actions

TIME	USER	ACTION	DETAIL
18:42	Sophie L.	Invoice issued	F-2026-108
18:15	Admin → Julie M.	Sign in as	Support - logged
09:58	Julie M.	Discount changed	D-2026-224 - 18%
09:30	Management	Role changed	Sales rep - margins

3 Log and traceability

Who did what, and when.

Sensitive actions are recorded. When an administrator signs in "as" a user to help them out, every action is logged as such.

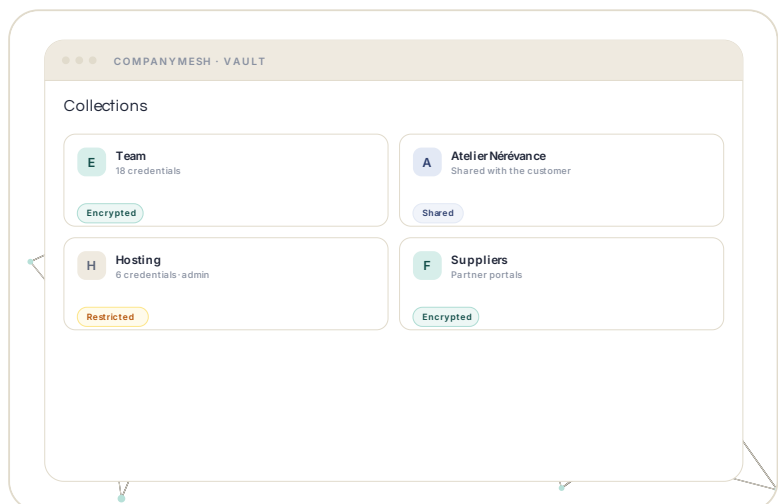
What it enables

- Audit log
- User activity
- Logged "sign in as"
- Active sessions visible

4 Password vault

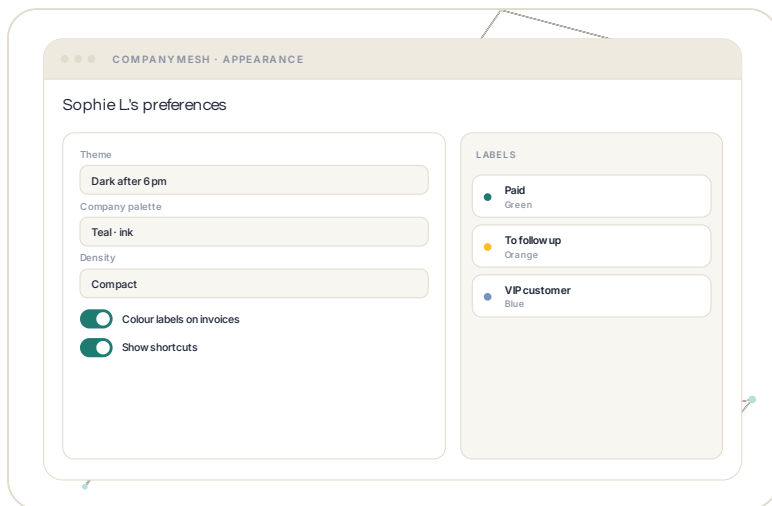
Shared credentials, kept safe.

A built-in vault stores the team's and projects' shared credentials, with collections per customer and precise permissions.



What it enables

- Encrypted vault
- Collections per team and per customer
- Secure sharing with a customer
- No plain-text passwords in messages



5 Interface customisation

A tool people enjoy using.

Company colours, custom palettes, light or dark theme, per-user display preferences: the interface adapts to everyone.

What it enables

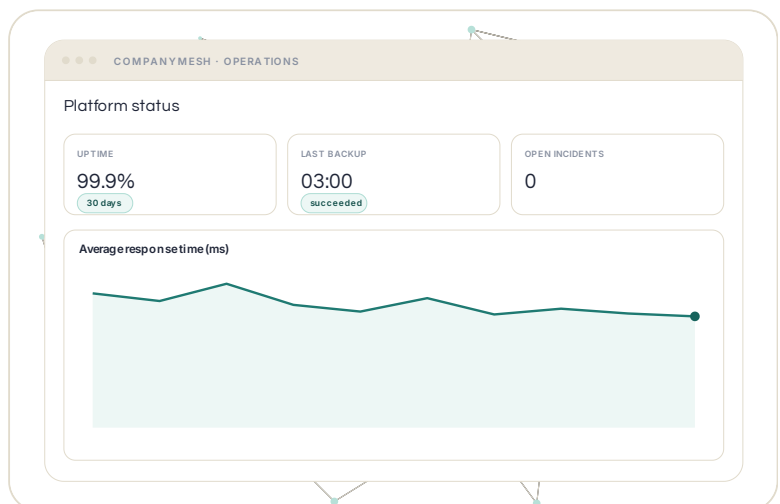
- Company brand guidelines
- Palettes and colour labels
- Light or dark theme
- Per-user preferences

6

Backups and monitoring

A platform that looks after itself.

Regular backups, service monitoring, incident tracking and well-managed updates: the infrastructure stays yours, at the host of your choice, and we run it for you.



What it enables

- Automatic backups
- Service monitoring
- Incident tracking
- Server updates and security
- Hosting at the provider of your choice, run by us

TAILORED

Adapted to your business

Business roles, separate spaces (team, customers, suppliers, carriers), multiple companies, brand guidelines, labels and personal views: the foundation adapts to **your** organisation, right down to each user's preferences.

This module never arrives alone

We install it, tune it to your rules and train your teams. And when part of your trade fits no box, we build it.

01

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At least an hour with every job concerned, to set the screens against real working days.

02

The missing module

A need nobody covers becomes a real module, designed for you and maintained like the rest.

03

Tuning as you go

One more field, one less step, an automation: the tool is adjusted while you use it.

CONNECTORS

Available integrations

Compatible with the tools you already use:

Sign-in

Google

Microsoft

Apple

GitHub

LinkedIn

Passkeys

Passwords

Vaultwarden (Bitwarden-compatible)

Monitoring

Operations dashboard

Email alerts

Non-exhaustive list: other tools can be connected to suit your needs.

Works with

`auto.api` API & connectors

`crm.portal` Client portal

`dms.documents` Document management & media library

`ops.dashboard` Dashboards & search

Let's talk about your future tool

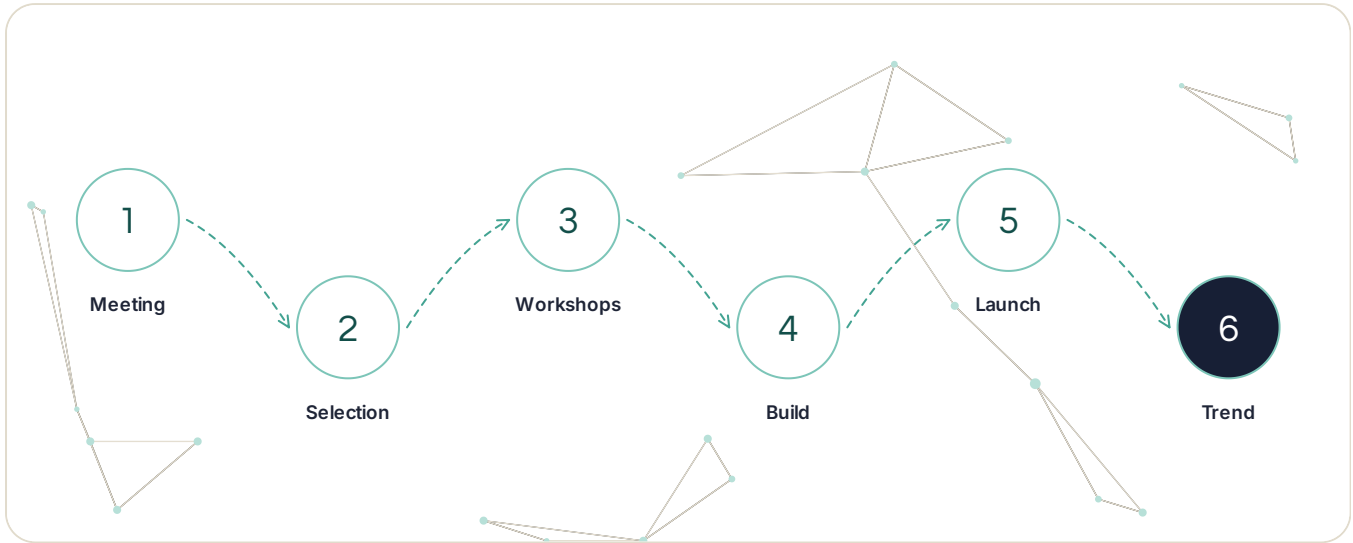
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+32 490 46 81 17

Let's build your tool



The steps of your project

1 Meeting

We get to know your business, your current tools and your priorities.

2 Selection

Together we put together your set of modules and identify specific needs.

3 Workshops

We meet your job profiles to fine-tune every detail.

4 Build

We assemble, connect and personalise your tool, including migration of your data.

5 Launch

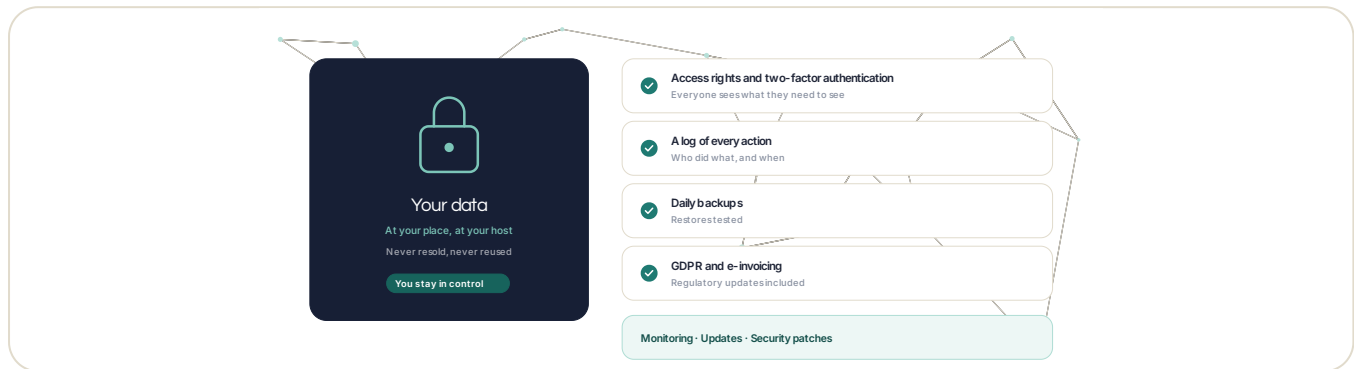
Your teams take over, with our support.

6 Evolution

We fine-tune based on real use and add new modules when you need them.

What you can count on

A business tool holds what your company keeps closest: your customers, your prices, your documents, your accounts. Before we even start, here is what we commit to.



Our commitments

Your data stays with you

The infrastructure is yours, at the host of your choice. You own it and you keep owning it: nothing is resold, nothing trains anything, and you export it all in a readable format whenever you decide.

Security, every day

Precise access rights down to the field, two-factor authentication, a log of every action, scanning of uploaded files, daily backups with tested restores.

Compliance kept current

GDPR, Belgian and French e-invoicing, archiving and mandatory statements: we track regulatory deadlines and adapt your tool before they apply.

The technical side is on us

Install, monitoring, backups, updates and security patches: we run your infrastructure for you, without ever owning it. An incident that stops your business comes before everything else.

Costs under control

Lean solutions, artificial intelligence included: no runaway usage, no recurring cost appearing without your say-so.

One person, not a helpdesk

Whoever answers knows your tool, your trade and your history. You never explain your business from scratch again.

The way we work

We don't hand over a tool and disappear. You keep the same team: the one that built your tool, and the one that will grow it with your business.