

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

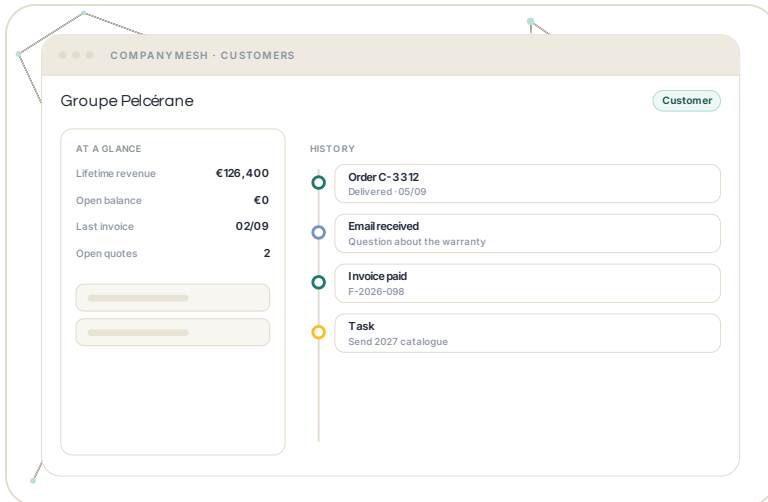
Any colleague can pick up a customer without losing information.

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.

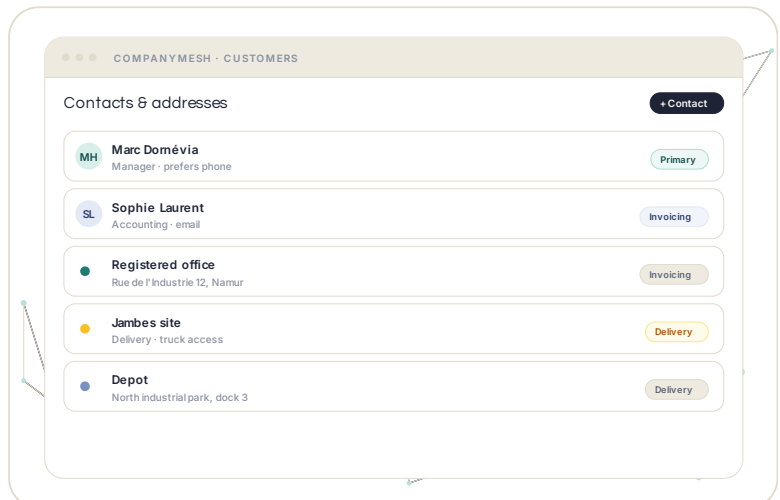
What it enables

- 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

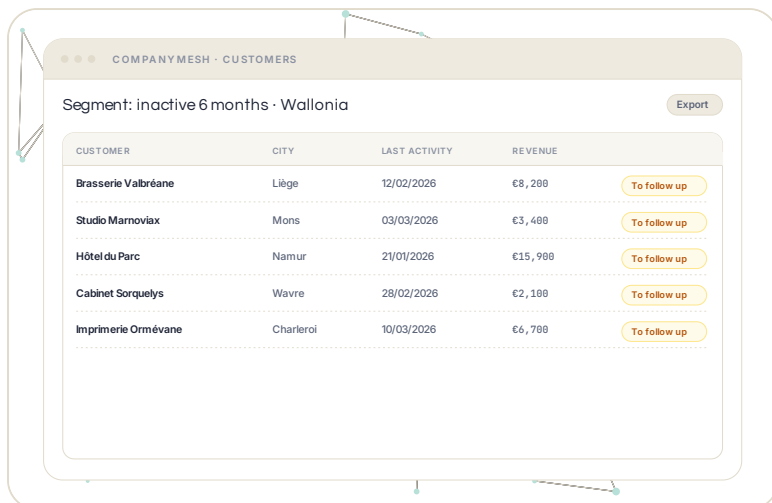
Everyone has their customers, all in the same team.

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

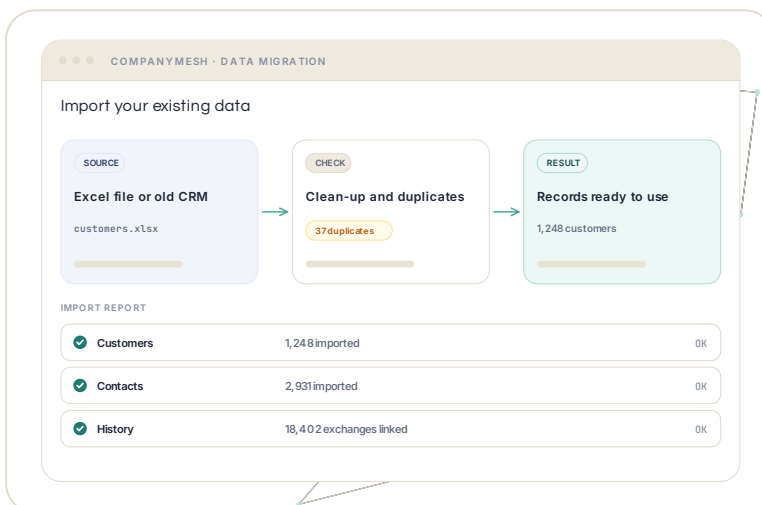
Example — Find a customer from just a phone number during a call.

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
simon@devlooper.io
+32 490 46 81 17