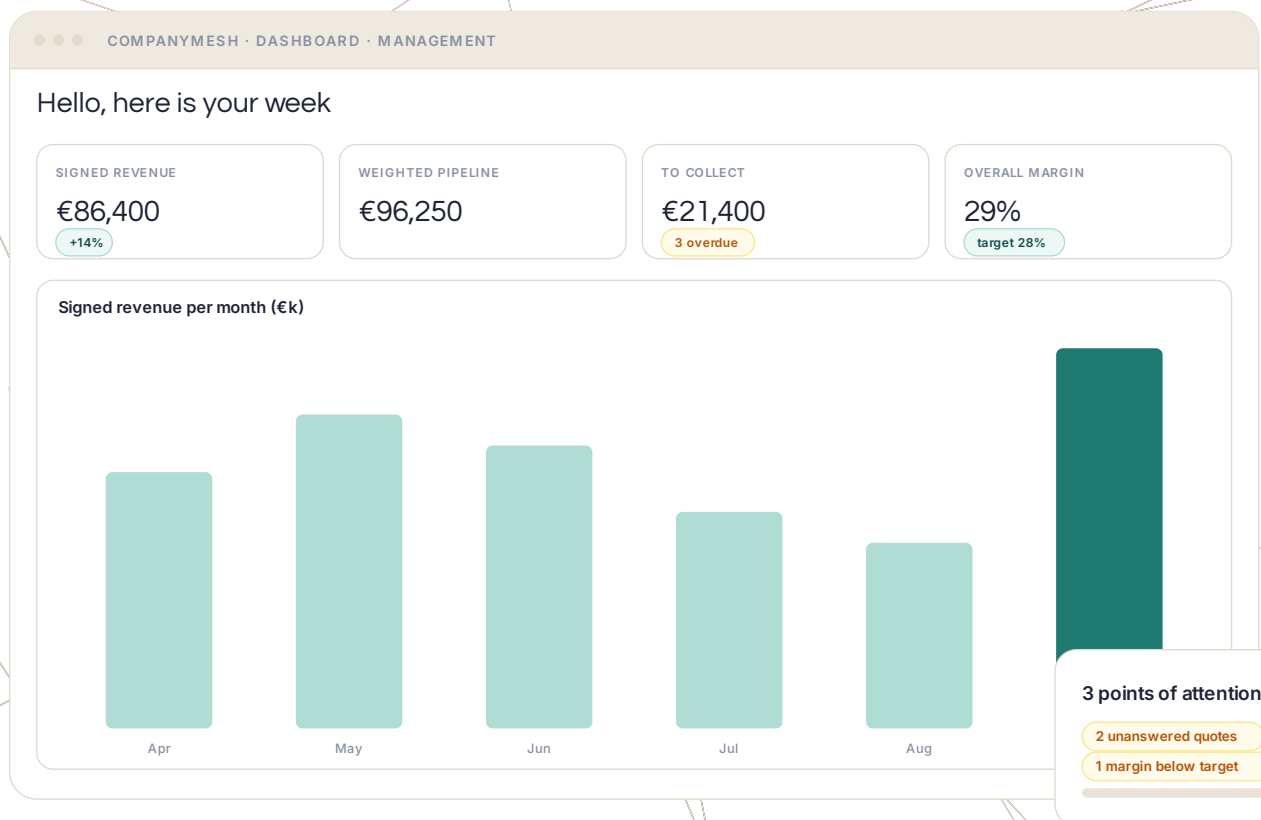


Dashboards & search

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

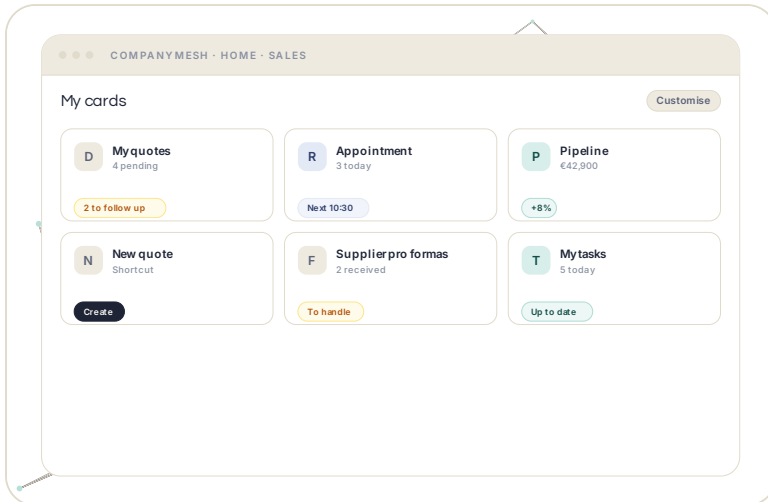
Global search and shortcuts.

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.

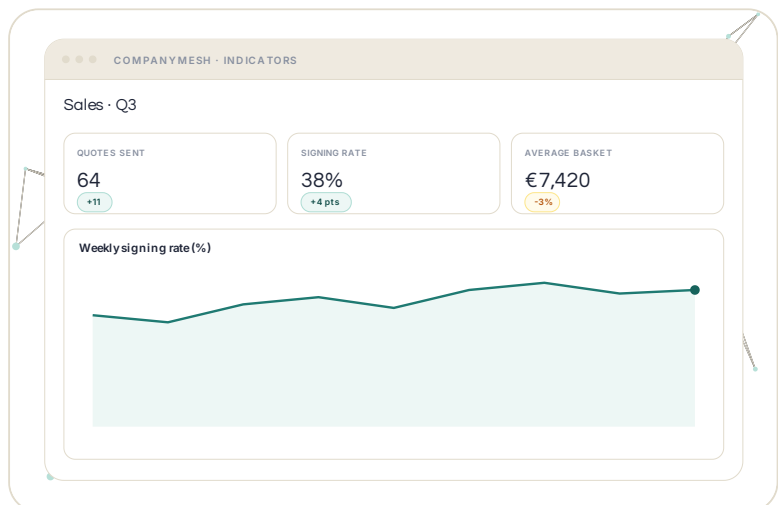
What it enables

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

4 Global search

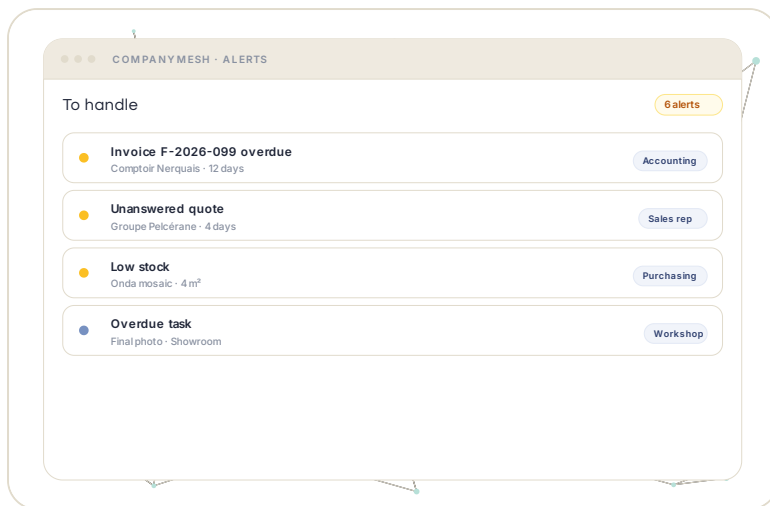
Type, find.

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
- Results grouped by type
- Typo tolerance
- 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

Let's talk about your future tool

Tailored demo, by appointment.

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