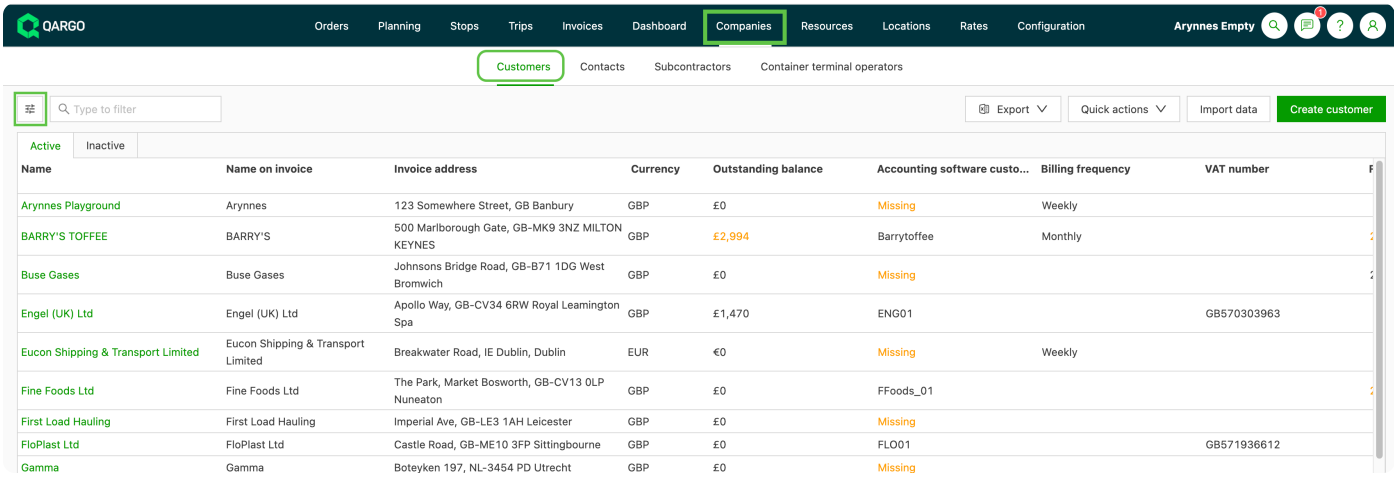
Customer CRM

This article introduces the customer CRM action 'Follow up' for a customer.

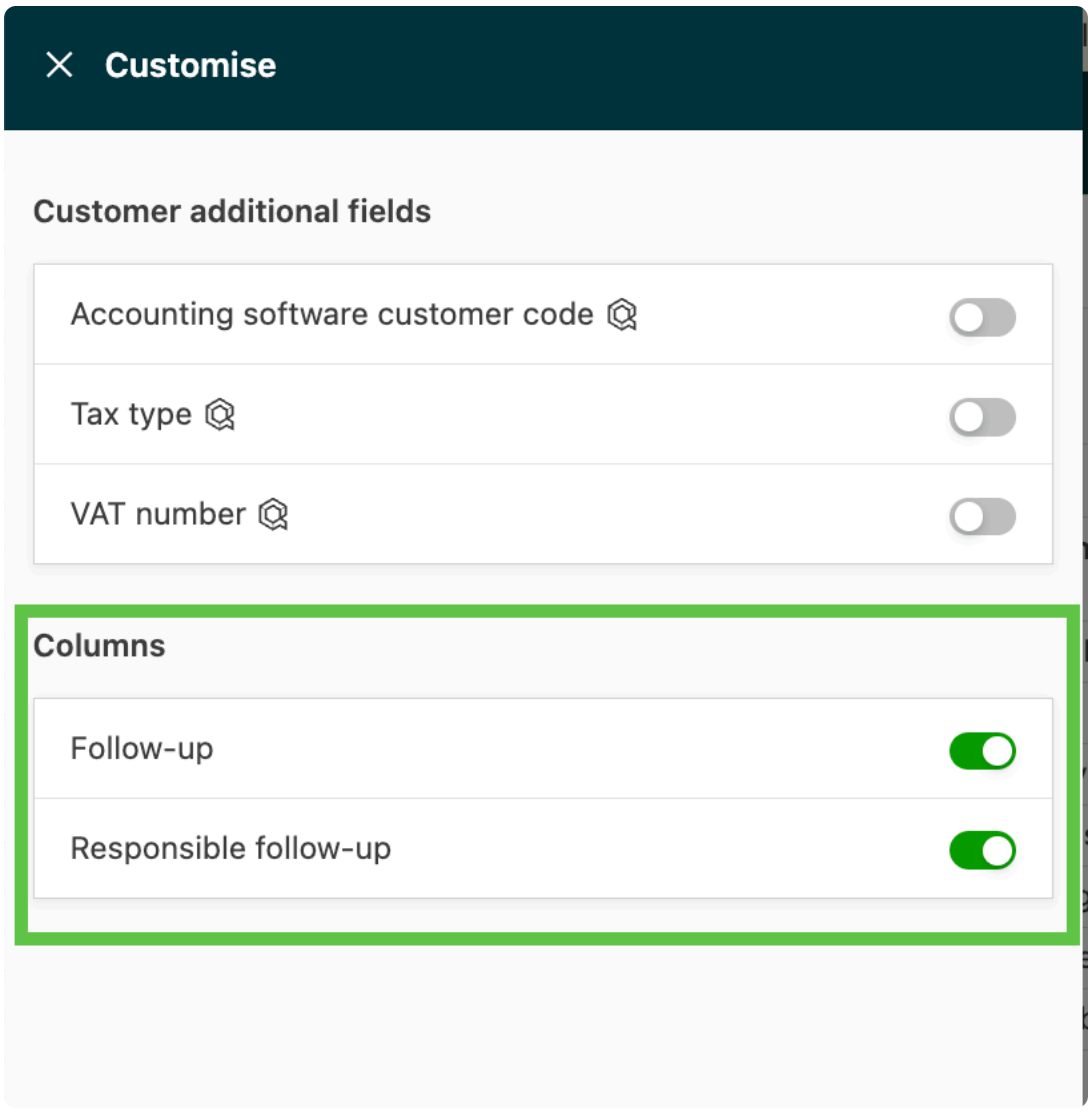
Updated January 11, 2026

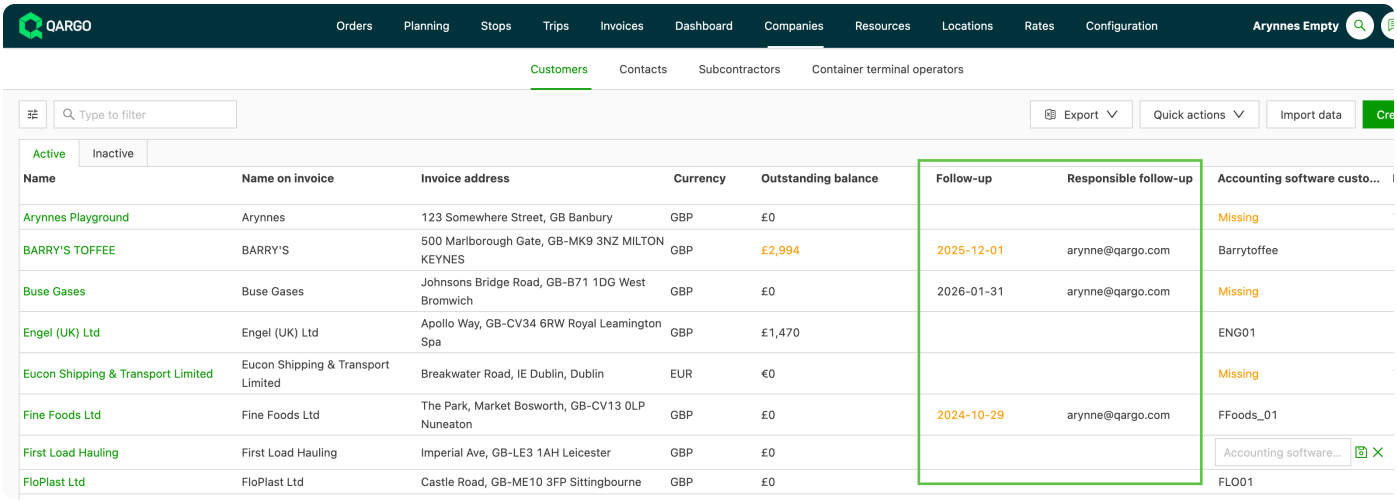
Use the CRM functionality in the company list and on the customer detail page. Users can now add a **follow-up date** to a customer and are automatically set as the person responsible for the follow-up.

- Both the **follow-up date** and the **follow-up responsible** are available as columns in the customer list through the **Edit columns** menu.

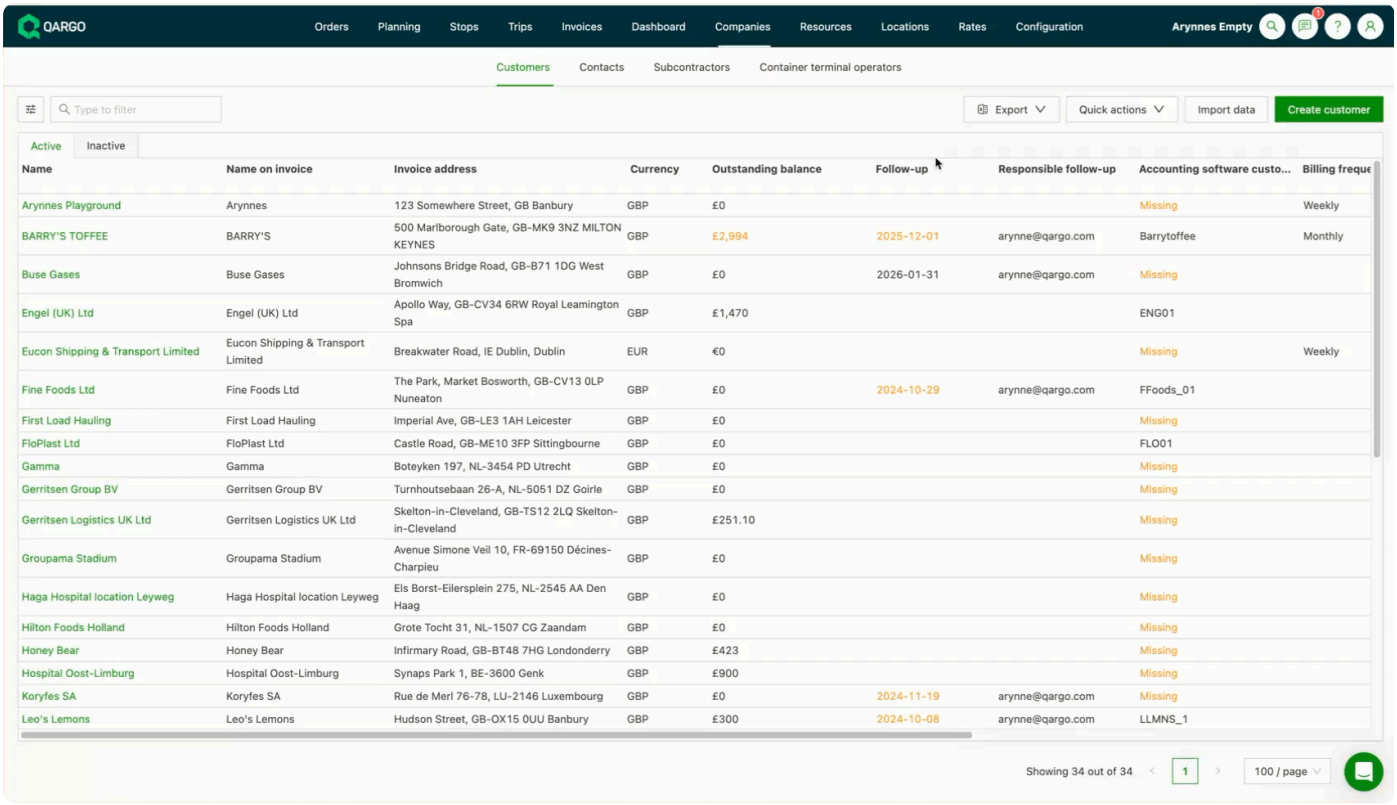


Name	Name on invoice	Invoice address	Currency	Outstanding balance	Accounting software custo...	Billing frequency	VAT number
Arynnes Playground	Arynnes	123 Somewhere Street, GB Banbury	GBP	£0	Missing	Weekly	
BARRY'S TOFFEE	BARRY'S	500 Marlborough Gate, GB-MK9 3NZ MILTON KEYNES	GBP	£2,994	Barrytoffee	Monthly	
Buse Gases	Buse Gases	Johnsons Bridge Road, GB-B71 1DG West Bromwich	GBP	£0	Missing		
Engel (UK) Ltd	Engel (UK) Ltd	Apollo Way, GB-CV34 6RW Royal Leamington Spa	GBP	£1,470	ENG01		GB570303963
Eucon Shipping & Transport Limited	Eucon Shipping & Transport Limited	Breakwater Road, IE Dublin, Dublin	EUR	€0	Missing	Weekly	
Fine Foods Ltd	Fine Foods Ltd	The Park, Market Bosworth, GB-CV13 0LP Nuneaton	GBP	£0	FFoods_01		
First Load Hauling	First Load Hauling	Imperial Ave, GB-LE3 1AH Leicester	GBP	£0	Missing		
FloPlast Ltd	FloPlast Ltd	Castle Road, GB-ME10 3FP Sittingbourne	GBP	£0	FLO01		GB571936612
Gamma	Gamma	Boteyken 197, NL-3454 PD Utrecht	GBP	£0	Missing		

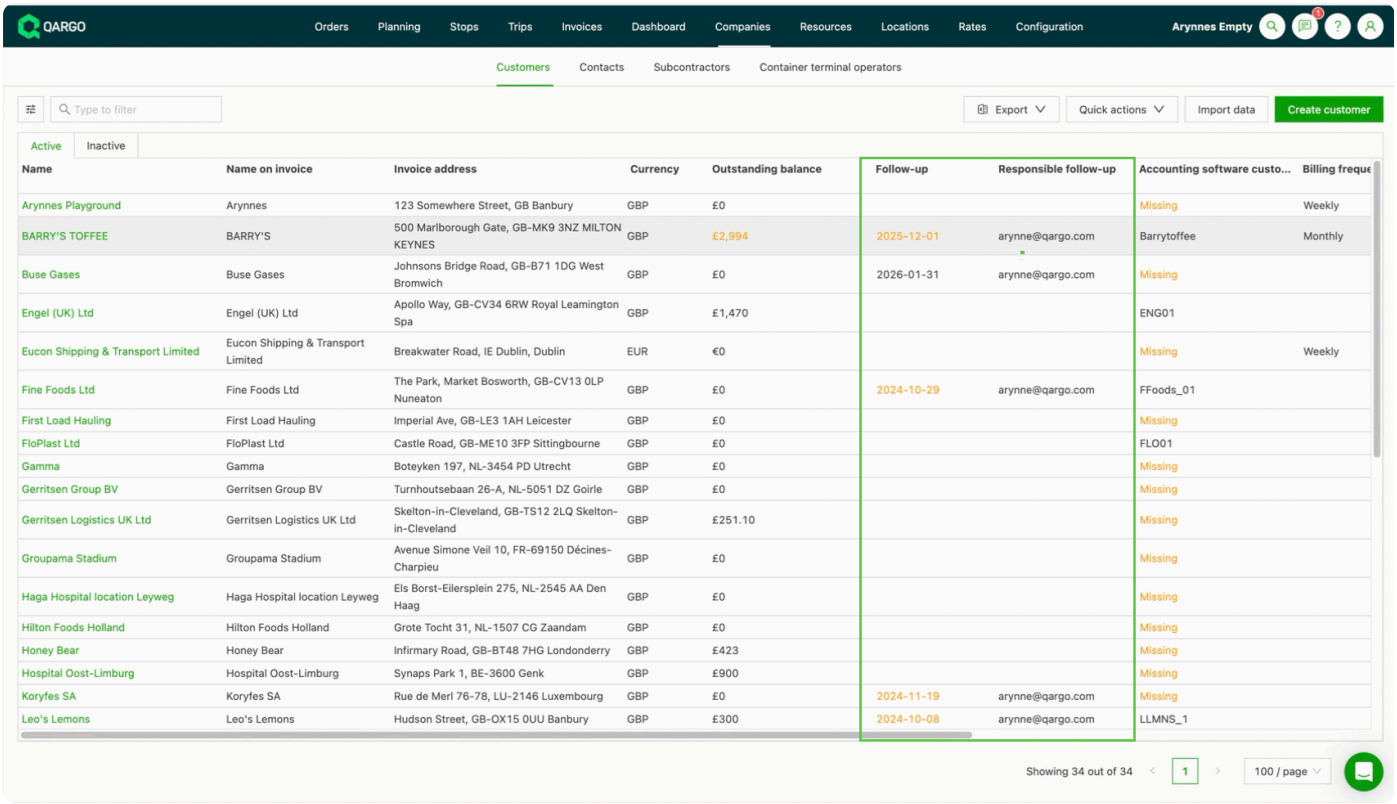




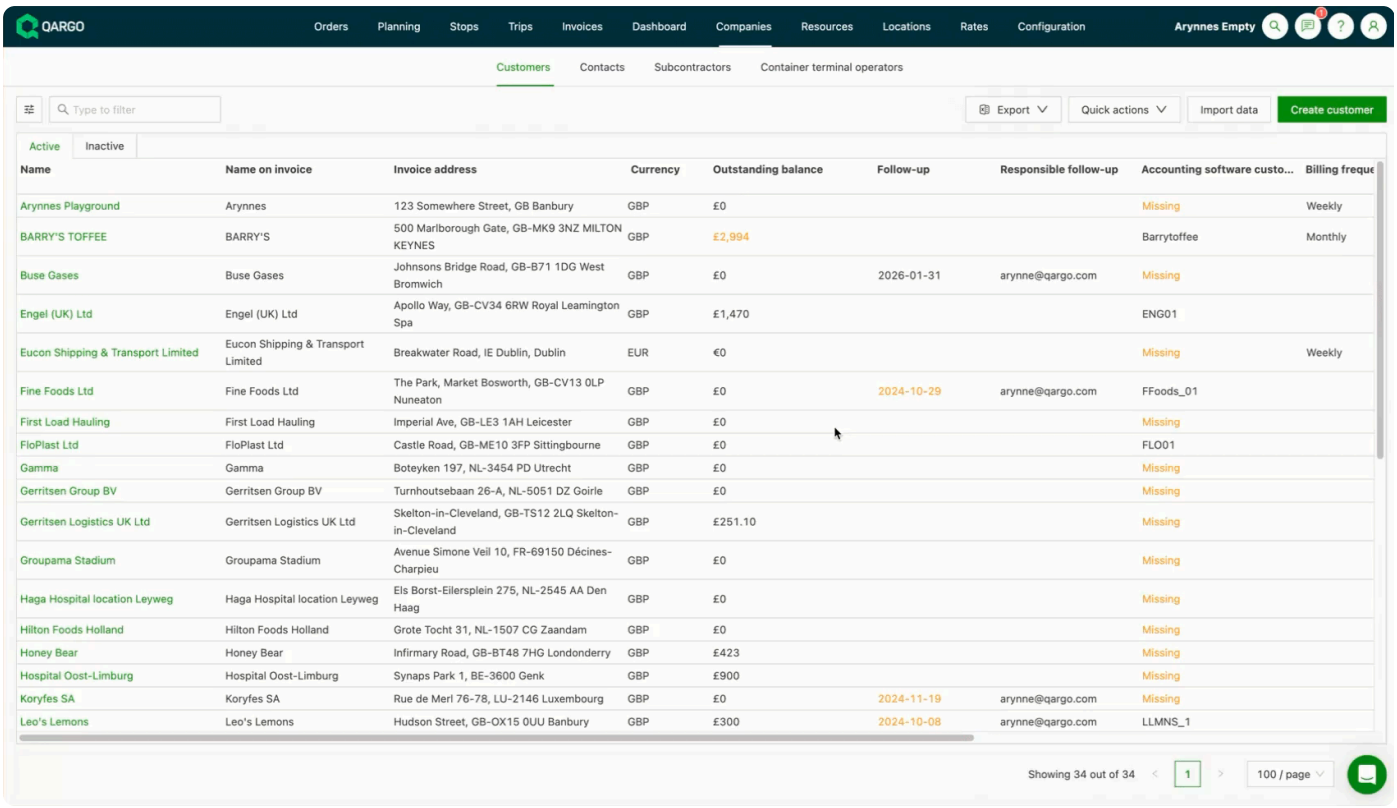
- Entering a follow-up date assigns the follow-up activity to the user who entered that date.



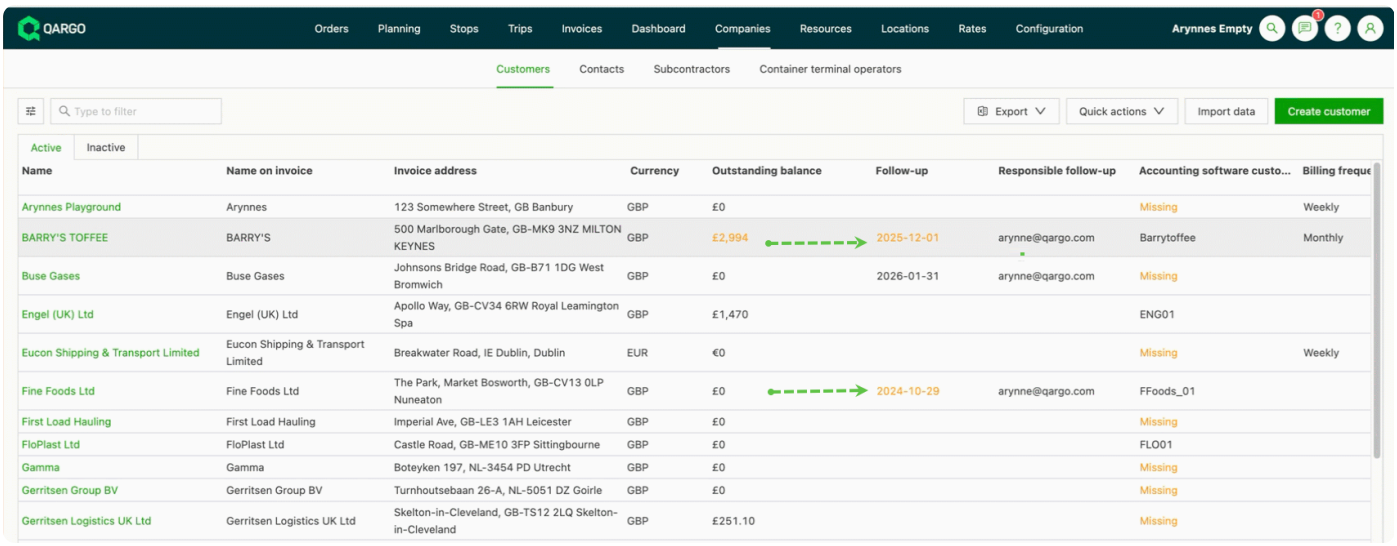
- With the columns enabled, the list view shows the date entered in the **Next follow-up** field and the assigned user.



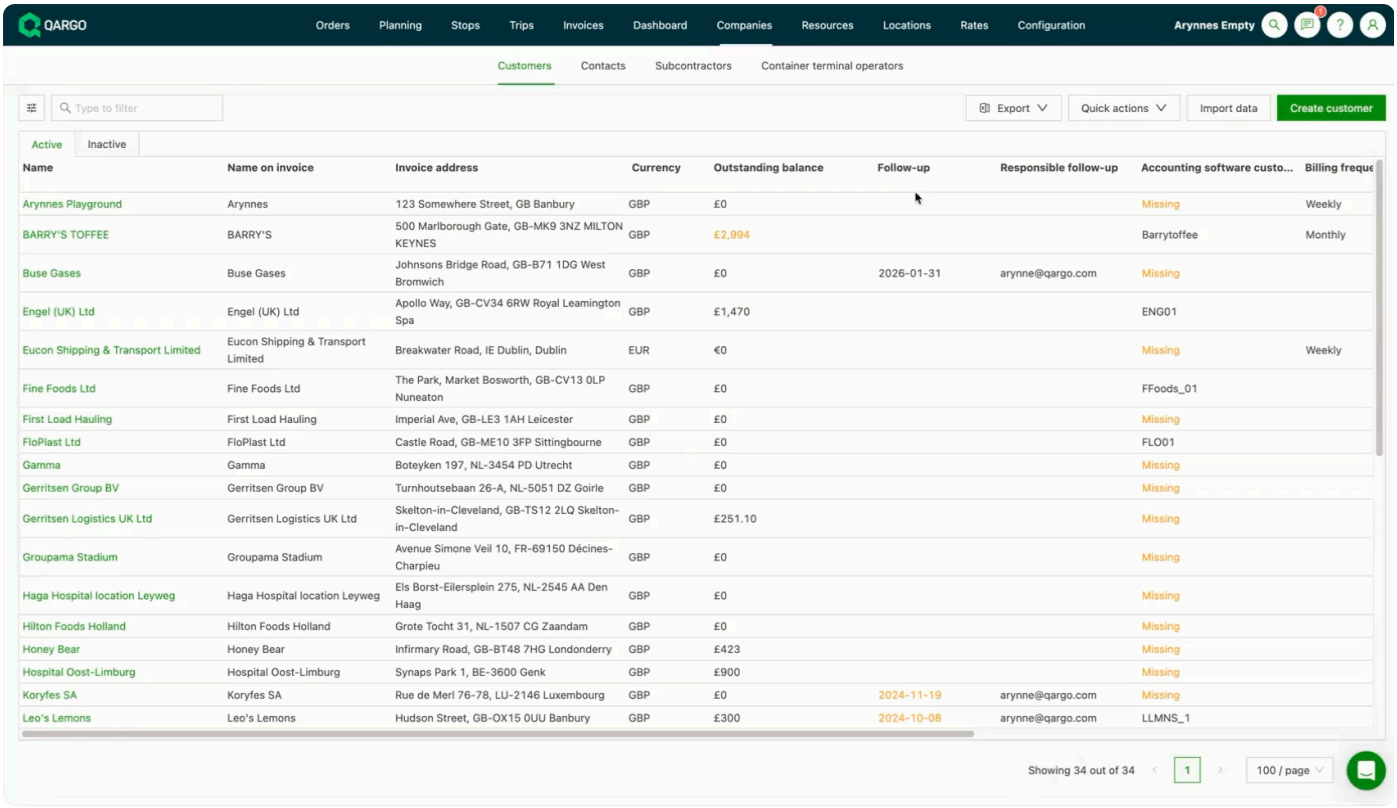
- The follow-up date can be updated or cleared by clicking the line in the company list or through the dedicated field on the customer detail page. When the follow-up date is cleared, the user responsible for the follow-up is also cleared automatically.



- Follow-up dates in the customer list automatically turn orange when they are overdue.



- Users can rely on this visual indicator, or on the dedicated filters for this column, to get a quick overview of overdue or upcoming follow-ups.


QARGO
Orders
Planning
Stops
Trips
Invoices
Dashboard
Companies
Resources
Locations
Rates
Configuration
Arynnes Empty
Customers
Contacts
Subcontractors
Container terminal operators
Type to filter
Export
Quick actions
Import data
Create customer
Active
Inactive
Name
Name on invoice
Invoice address
Currency
Outstanding balance
Follow-up
Responsible follow-up
Accounting software custo...
Billing freque
Arynnes Playground
Arynnes
123 Somewhere Street, GB Banbury
GBP
£0
Missing
Weekly
BARRY'S TOFFEE
BARRY'S
500 Marlborough Gate, GB-MK9 3NZ MILTON KEYNES
GBP
£2,994
Barrytoffee
Monthly
Buse Gases
Buse Gases
Johnsons Bridge Road, GB-B71 1DG West Bromwich
GBP
£0
2026-01-31
arynne@qargo.com
Missing
Engel (UK) Ltd
Engel (UK) Ltd
Apollo Way, GB-CV34 6RW Royal Leamington Spa
GBP
£1,470
ENG01
Eucon Shipping & Transport Limited
Eucon Shipping & Transport Limited
Breakwater Road, IE Dublin, Dublin
EUR
€0
Missing
Weekly
Fine Foods Ltd
Fine Foods Ltd
The Park, Market Bosworth, GB-CV13 0LP Nuneaton
GBP
£0
FFoods_01
First Load Hauling
First Load Hauling
Imperial Ave, GB-LE3 1AH Leicester
GBP
£0
Missing
FloPlast Ltd
FloPlast Ltd
Castle Road, GB-ME10 3FP Sittingbourne
GBP
£0
FLO01
Gamma
Gamma
Boteyken 197, NL-3454 PD Utrecht
GBP
£0
Missing
Gerritsen Group BV
Gerritsen Group BV
Turnhoutsebaan 26-A, NL-5051 DZ Goirle
GBP
£0
Missing
Gerritsen Logistics UK Ltd
Gerritsen Logistics UK Ltd
Skelton-in-Cleveland, GB-TS12 2LQ Skelton-in-Cleveland
GBP
£251.10
Missing
Groupama Stadium
Groupama Stadium
Avenue Simone Veil 10, FR-69150 Décines-Charpieu
GBP
£0
Missing
Haga Hospital location Leyweg
Haga Hospital location Leyweg
Els Borst-Eilersplein 275, NL-2545 AA Den Haag
GBP
£0
Missing
Hilton Foods Holland
Hilton Foods Holland
Grote Tocht 31, NL-1507 CG Zaandam
GBP
£0
Missing
Honey Bear
Honey Bear
Infirmary Road, GB-BT48 7HG Londonderry
GBP
£423
Missing
Hospital Oost-Limburg
Hospital Oost-Limburg
Synaps Park 1, BE-3600 Genk
GBP
£900
Missing
Koryfes SA
Koryfes SA
Rue de Merl 76-78, LU-2146 Luxembourg
GBP
£0
2024-11-19
arynne@qargo.com
Missing
Leo's Lemons
Leo's Lemons
Hudson Street, GB-OX15 0UU Banbury
GBP
£300
2024-10-08
arynne@qargo.com
LLMNS_1
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