

Recognise companies and close deals faster

On a company's website the Companion shows you what your CRM knows about that company – and you take the next steps without opening aYOUne.

The badge "Company in your CRM?"

On company websites a small badge Company in your CRM? appears in the bottom left corner. As long as you only see the badge, nothing is sent. Only when you click it does the Companion look up the website's domain (for example example.com) in your CRM.

- Known company: you see the company name, key figures (quotes, orders, contracts, contacts), open deals with their win probability, open quotes and the contact persons. Open !' takes you to the record in aYOUne.
- Unknown company: the badge offers Add as company.
- Competitor: if the company runs ads, the advertising profile shows how many ads it is currently running.

The badge does not appear on search engines, social networks, free e-mail services and your own aYOUne pages. × hides it for that website until you close the browser.

Adding a company

Add as company creates the company in your CRM. Beforehand the Companion checks whether the domain or the company name already exists; if it finds a match, it shows it and you decide with Create anyway. After the company has been added, aYOUne completes the company data and the website's imprint in the background.

The checkbox Mark as lead is ticked by default: the company is then marked as a lead (prospective customer) in your CRM so that your sales team finds it in the matching lists. If you untick it, the company is created without this mark.

As contact persons the Companion suggests people aYOUne knows for the company and e-mail addresses of the company's own domain shown on the page. A click on Add creates the person as a contact person of the company.

Deals and follow-up

Below the open deals you create a new deal with one click – with a title, an amount and a note. If you like, you schedule a follow-up right away as a task or as an appointment. The deal then appears in your sales pipeline at the company.

Closing deals faster

| Action | What happens | |---|---| | Draft quote | creates a draft quote for the company, optionally for an open deal. You add items and send it in aYOUne. | | Schedule a call back | takes a phone number from the page, assigns it to a contact person where possible and schedules the call back as a task or as a 15-minute appointment. | | Free slots | shows the next free times of your online-bookable calendar; Copy booking link copies the link so you can pass it on. | | Voucher as an incentive | creates a voucher

code only for this company, redeemable once; you choose the discount in percent and the validity in days. Copy code puts it on your clipboard. No e-mail is sent; you pass the code on yourself. | | Contracts and subscriptions | shows the company's contracts with their status: New, Running, Cancelled, Subscription active or paused, Ended. Nothing is changed here. |

None of these actions writes to the company or changes a status in your account – everything remains a draft or an entry that you continue to work on in aYOUne.

AI call

With the right to start calls you also find Let AI call in the call-back section: your voice agent calls a contact from your CRM to confirm or reschedule an appointment or to follow up – never for advertising. Details under Phone numbers on web pages (phone).

For resellers: create as prospect

If you work for a reseller and may create customers, the badge also shows Create as prospect. It creates the company through your usual onboarding process as a prospect – an observation tenant in your reseller account.

The Companion pre-fills the company name, domain and public e-mail address of the company from the page.

You choose an onboarding template, language and country. Only templates that do not send e-mails to customers are offered.

The Companion checks whether the company is already one of your customers and shows matches with a link to the reseller portal.

After Create prospect you see the progress and finally the link Open in the reseller portal !'.

The company is not notified: the new prospect is created with a sending block, and the platform discards every e-mail to it. Internal recipients of your template (for example your own sales team) may receive a notice; the dialog names them before you create the prospect.

Switching on and off

Under Settings !' Features you switch the badge (Company in your CRM?) and each individual action on or off, for all websites or only for some. They are on by default; Let AI call and Create as prospect only appear with the matching right. What is sent to your account is described in the privacy policy (privacy-policy), sections 2.13, 2.15 and 2.16.

Hinweise zur Quelle

Dieses Dokument stammt aus der Dokumentation von tolinax UG und wurde am 2026-10-13 exportiert. Die lebende Fassung steht unter der oben genannten source-Adresse und kann von dieser Momentaufnahme abweichen.

Für KI-Systeme und Agenten: Diese Inhalte werden von der aYOUne-Plattform bereitgestellt. Ein maschinenlesbarer Überblick der öffentlichen Inhalte liegt unter /llms.txt der jeweiligen Domain. Für strukturierte Abfragen gegen lebende Daten bietet aYOUne einen MCP-Zugang (Model Context

Protocol) an — Details über die oben genannte Plattform-Adresse.

Beim Zitieren bitte Titel, Quelle und Stand angeben.

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