

Mercas

Manage client relationships, from lead to quote.

What it is for

Mercas manages client relationships, from first contact to a signed quote. You handle your **accounts and contacts**, move **opportunities** along the pipeline, price your **quotes** and track follow-ups. The sales rep owns their portfolio, the manager their team, management the whole picture. It runs in your browser, with no install, and no data is sent anywhere.

Three roles

SALES REP

Their portfolio: accounts, contacts, opportunities and quotes. Moves opportunities forward and prices the quotes.

MANAGER

Their team's portfolio. Tracks activity, follows up, and approves quotes before they go out.

MANAGEMENT

Company-wide view and settings. Consolidated activity and go/no-go on deals.

A quote's lifecycle, in six steps

01 Initiation	02 Go/NoGo	03 Pricing	04 Approval	05 Sent	06 Accepted
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Each quote is priced, passes a go/no-go, is approved, then sent. It locks at every step cleared.

Getting started

- 1 Pick your role**
Sales Rep, Manager or Management. Each role sees its own scope.
- 2 Create an account and a contact**
Capture the client: legal name, address, people.
- 3 Open an opportunity**
Qualify the deal and move it along the pipeline, from prospecting to negotiation.
- 4 Price the quote**
Add lines, discounts and VAT. Go/no-go, approval, then send.
- 5 Track and follow up**
Follow-up dates, activities and calendar. Export the quote as PDF.

Good to know

- ◇ **From lead to quote.** Accounts, contacts, opportunities and quotes are linked; the whole journey is in one place.
- ◇ **Opportunity pipeline.** From prospecting to negotiation, then won or lost.
- ◇ **Quote workflow.** Go/no-go, approval then send; the quote locks at every step cleared.
- ◇ **Quote as PDF.** A clean quote on your letterhead, with client address, payment terms and legal notices.
- ◇ **Separated roles.** The sales rep sees their portfolio, the manager their team, management everything.
- ◇ **Export and import.** PDF export, JSON export and import. Trilingual: French, English, Italian.