

## THIS WEEK'S FRESH LEADS

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Hello, Louis! Here's a list of leads our team has spoken with and qualified in the past week. Please let me know as soon as possible if you have any interest.

Lead #326025 / \$431,000 [VIEW FULL PROFILE →](#)

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A professional services or consulting company in Washington who needs ERP including: CRM, fixed asset management, project management, time billing, budgeting, GL, AP, and AR functionalities.

*"This is a professional engineering firm that is in the exploratory and information gathering stages of potentially replacing their existing ERP solution that needs: AP, AR, budgeting, CRM, fixed asset management, GL, project management, and time and billing capabilities. Their primary motivation for change is that they are currently using Deltek..."* [\(MORE\)](#)

Lead #325800 / \$300,000 [VIEW FULL PROFILE →](#)

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A durable goods distributor & ecommerce retailer in New Jersey who needs accounting, inventory, and order management capabilities with a wishlist for EDI and eCommerce.

*"This lead is a wholesale/distributor as well as an ecommerce retailer of office supplies. They generate \$20 million in annual revenue. There are 40 employees and they use a software called DDI Systems. They do have unnamed EDI and an eCommerce provider. The contact is a Business Development Manager who is tasked with finding ERP solutions to..."* [\(MORE\)](#)

Lead #322282 / \$250,000 [VIEW FULL PROFILE →](#)

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A made-to-order manufacturer in Alberta who needs ERP including: inventory control, purchase order, CRM, HR management, and five other modules.

*"This lead is a job shop steel manufacturing company that also does steel frame installation. They have over \$150 million in revenue and employee count between 200-500 depending on demand. They use a custom developed accounting and*

*manufacturing software. The contact is the Director of Business Solutions who desires an ERP system with accounting...* [\(MORE\)](#)

Lead #325860 / \$210,000 [VIEW FULL PROFILE →](#)

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A service company in Oregon who needs ERP including: inventory control, order management, budgeting, GL, AP, and AR capabilities.

*“This is a commercial services company that provides lumber and rocks to customers that is in need of an ERP solution that can handle: AP, AR, budgeting, GL, inventory, and order management. The lead contact is the Vice President of Operations who is conducting the search. The primary motivation for change is they currently run 5 different systems...”* [\(MORE\)](#)

Lead #325734 / \$122,000 [VIEW FULL PROFILE →](#)

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A pharmaceutical manufacturing company in California who needs manufacturing execution system capability.

*“This is a consultant on behalf of a pharmaceutical manufacturer that manufactures components that are used to repair spinal chord injuries that is looking for an MES system for their company. The consultant is an outsourced firm that was hired to revamp business processes in order to get the components to be more sustainable and repeatable from a...”* [\(MORE\)](#)

Lead #325579 / \$114,400 [VIEW FULL PROFILE →](#)

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A food or medical distributor in California who needs ERP including: supply chain management, bank reconciliation, commissions management, GL, AP, and AR modules.

*“This is for a wholesale distribution company that sells food and convenience level products. This contact is a high ranking officer within the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, inventory, order management, purchase orders and commissions management. Their main motivation to change is that they...”* [\(MORE\)](#)

Lead #325957 / \$97,000 [VIEW FULL PROFILE →](#)

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A senior living organization in Texas who needs CRM functionality.

*“This lead is a senior living organization with over 1,000 employees and multiple locations in 4 states. They use an accounting program called CYMA. The contact is the Executive VP who initially stated they are shopping for a CRM software. He expressed interest in Focus CRM as he believed his previous organization used that. He then mentioned that...”* [\(MORE\)](#)

Lead #325818 / \$92,400 [VIEW FULL PROFILE →](#)

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A finance, banking & insurance company in Michigan who needs accounting and bank reconciliation components.

*“This is for an insurance company that operates and a healthcare plan with up to 90,000 members. This contact is a contract project manager who is under contract with the company through 2019, who desires a solution to their accounting (AR,AP,GL) with bank reconciliation and budgeting. Their main motivation to change is that they feel they have...”* [\(MORE\)](#)

Lead #325811 / \$92,000 [VIEW FULL PROFILE →](#)

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A jewelry distributor in Illinois who needs inventory control capability.

*“This lead is a ecommerce retailer and wholesale distributor of jewelry. There are roughly 30 employees and they use NetSuite ERP. The contact is the Intern who is tasked with finding inventory management solutions with barcode scanning that integrates with NetSuite. They are NOT looking to replace NetSuite so please do not request with full ERP...”* [\(MORE\)](#)

Lead #325750 / \$88,000 [VIEW FULL PROFILE →](#)

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A non-profit in Missouri who needs ERP including: time billing, fund accounting, foreign currency conversion, budgeting, bank reconciliation, GL, AP, and AR modules.

*“This is for a non-profit organization that is a division of a larger agricultural government backed company. This contact is the project director for the organization who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, budgeting/planning/forecasting, foreign currency, fund accounting and time/billing. Their main...”* [\(MORE\)](#)

Lead #325747 / \$81,000 [VIEW FULL PROFILE →](#)

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A marketing company in New Jersey who needs ERP including: media insertion orders, project management, time billing, bank reconciliation, GL, AP, and AR components.

*“This is for a marketing company that provides outsourced marketing and advertising on a client to client basis. This contact is the finance director of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, time/billing, project management and media insertion orders. Their main motivation to change is that they...”* [\(MORE\)](#)

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Lead #325537 / \$58,200 [VIEW FULL PROFILE →](#)

A professional services or consulting company in Virginia who needs ERP including: payroll, time billing, time & attendance, GL, AP, and AR components.

*“This is for a professional services company that provides independent IT assessments and security services for the US federal government that is looking for a software solution that can do: AP, AR, GL, payroll, time and attendance tracking, and time and billing with the option to add budgeting and CRM down the road. Their primary motivation for...”* [\(MORE\)](#)

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Lead #325898 / \$51,000 [VIEW FULL PROFILE →](#)

A service company in Hawaii who needs ERP including: payroll, job cost, work order, GL, AP, and AR modules.

*“This company is a mechanical contractor with upwards of 45 employees. They do around \$20M in annual revenue. \*\*This company is located in the state of Hawaii. Please take this into consideration based on time-zones and being able to reach the contact at a reasonable time.\*\* This contact is the controller for the company. They desires a fully...”* [\(MORE\)](#)

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Lead #325889 / \$50,600 [VIEW FULL PROFILE →](#)

A printing or publishing company in Ontario who needs ERP including: supply chain management, bank reconciliation, GL, and AP capabilities.

*“This is for a printing company that operates on a project basis for custom printing of artwork and corporate displays. This contact is the finance director for the company who desires a solution to their accounting (AR,AP,GL) with bank*

*reconciliation, inventory, order management and fixed assets as a wishlist item. Their main motivation to change...* [\(MORE\)](#)

Lead #325923 / \$47,600 [VIEW FULL PROFILE →](#)

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A professional services or consulting company in Utah who needs ERP including: job cost, time billing, bank reconciliation, GL, AP, and AR capabilities.

*“This is for a business services consulting firm that provides e-commerce consulting services. This contact is the finance director for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, time/billing and job costing with project management as a wishlist item. Their main motivation to change is that they are...”* [\(MORE\)](#)

Lead #325682 / \$45,000 [VIEW FULL PROFILE →](#)

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A insurance company in Maryland who needs ERP including: CRM, invoicing, commissions management, GL, AP, and AR components.

*“This is for an insurance agency that has 2 different insurance groups that is looking for an accounting solution that can do: AP, AR, commissions management, CRM, GL, and invoicing. Their primary motivation for change is their current outdated Peachtree solution and Sagitta don't do a good job of managing the commissions paid out on premiums and...”* [\(MORE\)](#)

Lead #325880 / \$38,100 [VIEW FULL PROFILE →](#)

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A general contractor in Missouri who needs project management functionality.

*“This is for a construction company that operates on a general contractor level for both residential new builds and light commercial projects. This contact is a consultant working on behalf of the client who is under contract to find an appropriate project management solution. Their main motivation to change is that they do not have a formalized...”* [\(MORE\)](#)

Lead #325792 / \$38,000 [VIEW FULL PROFILE →](#)

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A non-durable goods distributor in Florida who needs ERP including: supply chain management, CRM, bank reconciliation, GL, AP, and AR modules.

*“This is for a wholesale distributor of non durable goods who also has a service and custom manufacturing element to their operation as well. This contact is the owner of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, inventory, order management, purchase orders, CRM and e-commerce as a wishlist item...”* [\(MORE\)](#)

Lead #325641 / \$35,800 [VIEW FULL PROFILE →](#)

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A real estate sales & development company in Colorado who needs accounting and bank reconciliation functionalities.

*“This is for a real estate company that is acting as the primary investor for a multi-million dollar multi-use project. This contact is a consultant for the project, who will be a W2 employee post project completion, who desires a solution to their accounting (AR,AP,GL) with bank reconciliation and payroll. Their main motivation to change is that...”* [\(MORE\)](#)

Lead #325762 / \$34,200 [VIEW FULL PROFILE →](#)

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A non-profit in Colorado who needs ERP including: fund accounting, budgeting, bank reconciliation, GL, AP, and AR capabilities.

*“This is for a non-profit company that operates in the the real estate sector for finance, government backed programs and property management. This contact is a consultant working on behalf of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, fund accounting and budgeting/planning/forecasting. This...”* [\(MORE\)](#)

Lead #325745 / \$33,400 [VIEW FULL PROFILE →](#)

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A consulting company in Ontario who needs business intelligence capability.

*“This lead is a consulting firm for the auto industry with 110 employees and annual revenue of \$40 million. They use Dynamics NAV. The contact is the Corporate Controller who desires a BI tool with financial analysis and reporting capabilities that integrates with Dynamics NAV. \*She is NOT looking to replace Dynamics NAV so please DO NOT request...”* [\(MORE\)](#)

Lead #325739 / \$28,800 [VIEW FULL PROFILE →](#)

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A financial institution in Jamaica who needs accounting capability.

*“This lead is a financial institution with over 100 employees and 14 locations in Jamaica. They use a proprietary custom developed software. They outsource their payroll. The contact is a Senior Accounts Payable Specialist who is in the early stages of looking for accounting solutions for AP, some AR, and GL to present to his team for...”* [\(MORE\)](#)

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Lead #325934 / \$28,000 [VIEW FULL PROFILE →](#)

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An agriculture company in Oregon who needs payroll functionality.

*“This is for an agricultural company that has multiple business entities that is looking for a payroll solution for their business. Their primary motivation for change is that they currently have payroll outsourced to a 3rd party servicer and they are looking to bring payroll in house. The lead contact is the director of HR. They need a payroll...”* [\(MORE\)](#)

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Lead #326018 / \$25,000 [VIEW FULL PROFILE →](#)

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A consultant requesting on behalf of a government entity in Virginia who needs document management capability.

*“\*This lead is the same as Lead 326023 but this request is for Document Management.\* This lead is a consultant requesting on behalf of a government entity with over 1,000 employees. The consultant cannot disclose the client name due to contractual agreements. The organization is using Quickbooks Pro 2015 for general accounting. They have 50...”* [\(MORE\)](#)

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Lead #326023 / \$25,000 [VIEW FULL PROFILE →](#)

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A consultant requesting on behalf of a government entity in Virginia who needs digital currency management and foreign currency conversion functionalities.

*“\*This lead is the same as Lead 326018 but this request is for Foreign/Digital Currency Management.\* This lead is a consultant requesting on behalf of a government entity with over 1,000 employees. The consultant cannot disclose the client name due to contractual agreements. The organization is using Quickbooks Pro 2015 for general accounting. They...”* [\(MORE\)](#)

Lead #325574 / \$23,000 [VIEW FULL PROFILE →](#)

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A non-profit in North Carolina who needs ERP including: fund accounting, foreign currency conversion, fundraising, bank reconciliation, GL, AP, and AR modules.

*“This is for 2 non-profit organization who both operate as air travel providers to people in need of medical services in remote locations. This contact is a consultant working on behalf of the companies who desire a solution to their accounting (AR,AP,GL) with bank reconciliation, fund accounting, fundraising/donor management and multi-currency...”* [\(MORE\)](#)

Lead #326015 / \$20,000 [VIEW FULL PROFILE →](#)

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A general contractor in California who needs accounting functionality.

*“This is a masonry general contractor. They generally handle 2-5 jobs ongoing at once at any given point. The size of their business will fluctuate greatly depending on the number of jobs they handle. They will have as low as 20 employees during slow periods and as many as 100 employees during peak times. They average around \$5M in annual revenue...”* [\(MORE\)](#)

Lead #325781 / \$19,000 [VIEW FULL PROFILE →](#)

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An accounting or legal services firm in Missouri who needs sales tax functionality.

*“This is for an accounting firm who provides bookkeeping, tax consulting and payroll services. This contact is a consultant for the firm who is the contracted CIO for a period of time who desires a solution to their sales tax management as a service. Their main motivation to change is that their process now to do an analysis for a clients sales tax...”* [\(MORE\)](#)

Lead #325870 / \$17,200 [VIEW FULL PROFILE →](#)

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An educational organization in Texas who needs fund accounting and budgeting modules.

*“This is for an educational university specifically for the population health and health affairs office that needs a budgeting and fund accounting software solution for their company. Their primary motivation for change is that they currently manage what has been spent from funds via Excel spreadsheets. They do user People Soft for accounting...”* [\(MORE\)](#)

Lead #325778 / \$17,100 [VIEW FULL PROFILE →](#)

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A chartered airline company in Bahamas who needs accounting capability.

*“This lead is a soon to operate chartered airline company located in the Bahamas with 30 employees. They have another location in Guyana. They may be going with SITA Aviation software for their airline specific needs. The contact is the VP of Operations who desires a general accounting program for AP, AR, and GL. He stated it does not need to be...”* [\(MORE\)](#)

Lead #325835 / \$16,600 [VIEW FULL PROFILE →](#)

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An accounting or legal services firm in Georgia who needs payroll capability.

*“This is for an accounting services firm that provides tax preparation, bookkeeping and live payroll services. This contact is the owner of the firm who desires a solution to their live payroll. Their main motivation to change is that they have used their current solution for quite some time and would like to review alternatives that could be a...”* [\(MORE\)](#)

Lead #325884 / \$14,300 [VIEW FULL PROFILE →](#)

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An accounting or legal services firm in Tennessee who needs tax preparation capability.

*“This is for an accounting firm that provides full service bookkeeping, tax preparation and payroll services. This contact is the owner of the company who desires a solution to their tax preparation. Their main motivation to change is that they have been using the same tax prep solution for years and would like to review possible alternatives to...”* [\(MORE\)](#)

Lead #325917 / \$14,000 [VIEW FULL PROFILE →](#)

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A service company in Texas who needs work order and asset management functionalities.

*“This is for a commercial and service company that provides equipment and field support to the oil industry. This contact is a partner in the company who desires a solution to their asset management and work orders. Their main motivation to change is that they are managing their equipment inventory and work orders through their accounting system...”* [\(MORE\)](#)

Lead #325841 / \$13,300 [VIEW FULL PROFILE →](#)

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A retailer of hard goods in California who needs accounting capability.

*“This is for a retail pharmacy that has over 2,000 customers and process 1,000 prescriptions per week that is in need of a basic accounting package to do AP, AR, and GL. \*\*They have an existing POS system that they will continue to use and will need integration with. The lead contact could not think of the POS solution (thought merchant services...”* [\(MORE\)](#)

Lead #325849 / \$11,871 [VIEW FULL PROFILE →](#)

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A finance, banking & insurance company in Quebec who needs accounting and investment tracking modules.

*“This is for a Canadian based private investment and business management consulting firm that accompanies and invests in entrepreneurial companies with strong growth potential and leadership in their sectors that is looking for a basic accounting solution that can manage AP, AR, budgeting, GL and Investment tracking. Their motivation for change is...”* [\(MORE\)](#)

Lead #325784 / \$10,800 [VIEW FULL PROFILE →](#)

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A general contractor in Massachusetts who needs CRM and project management functionalities.

*“This is for a general contractor that focuses on luxury outdoor structures like terraces etc in residential homes that is looking for a CRM and project management solution for their company. Their primary motivation for change is they are looking for a solution that can better handle their full sales cycle from the prospecting and quoting phase...”* [\(MORE\)](#)

Lead #325920 / \$10,000 [VIEW FULL PROFILE →](#)

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A transportation company in Alberta who needs dispatching functionality.

*“This is a car dealership with upwards of 100 employees. This particular department is their support/maintenance department which has around 10 employees. This particular contact is a shuttle driver for the company. They strongly desire a routing and dispatch management solution to handle their fleet of shuttle drivers. This company operates a...”* [\(MORE\)](#)

Lead #325796 / \$9,000 [VIEW FULL PROFILE →](#)

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An accounting firm in Kentucky who needs business intelligence capability.

*“This lead is an accounting firm with 16 employees. They use QB Premier Accountant's edition and QB online (for 2 clients) along with ProfitCents for financial analysis. The contact is an Intern who is tasked with finding and reviewing replacements for ProfitCents that has Business Intelligence capability to perform financial analysis and...”* [\(MORE\)](#)

Lead #325801 / \$9,000 [VIEW FULL PROFILE →](#)

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A finance, banking & insurance company in Indiana who needs budgeting functionality.

*“This is for a finance company that operates as a real estate investment trust. This contact is an IT/Financial analyst for the company who desires a solution to their budgeting/planning/forecasting. Their main motivation to change is that they are handling a large budgeting process currently via spreadsheet method which is not only time consuming...”* [\(MORE\)](#)

Lead #326029 / \$8,000 [VIEW FULL PROFILE →](#)

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A made-to-order manufacturer in Florida who needs accounting functionality.

*“This is a manufacturer/wholesaler of medical supplies. They have 6 employees and do over \$1M in annual sales. This contact is the CEO of the company who desires a solution to handle their primary accounting (AP, AR, GL). It should be able to handle their full accounting, and also have some minor additional functionality such as a basic order and...”* [\(MORE\)](#)

Lead #325977 / \$7,500 [VIEW FULL PROFILE →](#)

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An accounting or legal services firm in Alabama who needs tax preparation capability.

*“This is an owner/operated tax preparation business. The contact handles on average about 50/60 returns each year with a maximum of no more than 100. This contact is looking for a tax preparation solution to handle doing both individual and business returns for up to 60 clients. This contact has been using TaxWise since 2009 but is now looking...”* [\(MORE\)](#)

Lead #325982 / \$7,400 [VIEW FULL PROFILE →](#)

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A mechanical shop in Yukon who needs time billing and time & attendance components.

*“This lead is a car repair shop with 3-5 employees in Canada. They use Sage 50. The contact is the Owner who desires a time management software for both time & attendance and workorder/project time and billing. \*He is NOT looking to replace Sage 50 as his accounting program so please do not request with a full accounting solution.\* Integration...”* [\(MORE\)](#)

Lead #325803 / \$7,000 [VIEW FULL PROFILE →](#)

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A sports, arts, travel & entertainment company in Georgia who needs purchase order capability.

*“This is for a movie studio that is in need of a purchase order solution that can routing and manager approvals. Their primary motivation for change is they currently do not have a solution in place. This search is being conducted by an intern and the matches will be reviewed by him in conjunction with the executive VP of their Atlanta office. They...”* [\(MORE\)](#)

Lead #325839 / \$7,000 [VIEW FULL PROFILE →](#)

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A general contractor in Ohio who needs bid day software capability.

*“This lead is for a commercial general contractor that works roughly 20 projects per year with 2-4 larger projects that is looking specifically for a bid day software solution. Their primary motivation for change is that they are currently using Prime Bid which goes end of life at the end of this year. They have the ability to use the solution...”* [\(MORE\)](#)

Lead #325858 / \$6,900 [VIEW FULL PROFILE →](#)

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A general contractor in New York who needs estimating capability.

*“This is a residential construction company that handles both new builds and repairs (with more of a focus on repair/remodeling work). They have 25 employees and do about \$3M in annual sales. This contact is a project manager for the company who desires an estimating solution to better handles their overall estimating for labor costs, material...”* [\(MORE\)](#)

Lead #325761 / \$6,400 [VIEW FULL PROFILE →](#)

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A retailer of soft goods in Utah who needs accounting, point-of-sale, and bank reconciliation modules.

*“This is for a brick and mortar retail store that sells fabric. This contact is the owner of the store who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, POS and inventory. Their main motivation to change is that the system they have now is not set up properly for how they would like to be able to access it. They have 2...”* [\(MORE\)](#)

Lead #325919 / \$5,200 [VIEW FULL PROFILE →](#)

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A general contractor in Florida who needs invoicing, estimating, and project tracking capabilities.

*“This is for a general contractor that is also a roofing contractor that does both residential and commercial projects that is in need of a solution that can handle: estimates, invoicing, job costs, and project management. Their primary motivation for change is that they currently use Excel and Word docs for the above modules and are looking for a...”* [\(MORE\)](#)

Lead #325809 / \$4,100 [VIEW FULL PROFILE →](#)

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A property management company in Oklahoma who needs work order functionality.

*“This is for a real estate company that provides property management as a service and has a maintenance division as well. This contact is the owner of the company who desires a solution to their work order management. Their main motivation to change is that they have a solution in place for their property management however the work order function...”* [\(MORE\)](#)

Lead #325763 / \$3,850 [VIEW FULL PROFILE →](#)

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A service company in Arkansas who needs CRM capability.

*“This is for a commercial services company that sells and services water purification systems and accessories that is looking for a CRM solution for their company. Their primary motivation for change is they currently have no solution in place and are*

*doing a lot of their task management via pen and paper. They are looking to do a testing phase of..."* [\(MORE\)](#)

Lead #325932 / \$3,600 [VIEW FULL PROFILE →](#)

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A real estate sales & development company in California who needs general ledger, payroll, and commissions management modules.

*"This is a start-up real estate company that expects to be operational in 60 days. As of now it is owner/operated. He intends on finding some agents to work with him in the coming months. This contact desires a real-estate focused software solution that can handle general accounting handling sales, agent records, online listings, payroll..."* [\(MORE\)](#)



**I'm here to help!** My name is Monica Wilson, and I am your account representative. If you have any questions about a lead or service membership, just let me know. I'd be happy to provide assistance and help get you connected with new prospects.

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