

THIS WEEK'S FRESH LEADS

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 #326152 / \$15,000,000 [VIEW FULL PROFILE →](#)

A consultant on behalf of a public entity in British Columbia who needs ERP including: purchase order, business intelligence, fixed asset management, GL, AP, and AR modules.

“This lead is a consultant requesting on behalf a public organization with 7,000 employees. There is 1 parent company with 5 subsidiaries. The company is using Infor SmartStream and HRPay. The consultant was contracted to perform a feasibility study for the client in regards to their ERP system upgrade. They are contemplating replacing their ERP...” [\(MORE\)](#)

Lead #326326 / \$618,000 [VIEW FULL PROFILE →](#)

A pharmaceutical/food manufacturing company in Ohio who needs ERP including: inventory control, order management, CRM, manufacturing management, and six other modules.

“This is for a wholesale distributor/manufacturer of a food/beverage product who also has a handful of retail storefronts as well. This contact is the business manager/CFO for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, CRM, MES, MRP, inventory, order management, purchase orders and e-commerce. Their...” [\(MORE\)](#)

Lead #326132 / \$500,000 [VIEW FULL PROFILE →](#)

A consultant on behalf of a made-for-stock manufacturer in Michigan who needs inventory control and warehouse management capabilities.

*“*Please read as this is NOT a typical inventory/WMS request.* This lead is a consultant requesting on behalf of a made for stock manufacturer of lawn mowers*

and landscaping equipment. The company has over 10,000 global employees with this location having over 4,000 workers. When asked if the client is already using a software (specifically for...) [\(MORE\)](#)

Lead #326267 / \$150,000 [VIEW FULL PROFILE →](#)

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

“This is for a job shop custom manufacturer of electronic equipment designed for the wildlife industry. This contact is a co-owner/manager for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, CRM, inventory, MES, MRP, purchase orders and job costing as a wishlist item. Their main motivation to change is...” [\(MORE\)](#)

Lead #326330 / \$131,000 [VIEW FULL PROFILE →](#)

A service company in Oregon who needs ERP including: supply chain management, project tracking, CRM, estimating, bank reconciliation, GL, AP, and AR functionalities.

“This is for a commercial and service company that is a wholesale distributor of residential and commercial grade garage doors. This contact is the office manager for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, CRM, estimating, job costing, inventory, order management, work orders, purchase orders and...” [\(MORE\)](#)

Lead #325746 / \$100,000 [VIEW FULL PROFILE →](#)

A process operations manufacturer in Minnesota who needs inventory control and warehouse management capabilities.

*“This lead is a process manufacturer of animal feed supplements. There are 20 employees and they do not have a business management solution in place. They have an external accounting firm and utilize Excel sheets for tracking some internal processes. The contact is the Logistics Coordinator who expressed that *her boss is interested in an...” [\(MORE\)](#)*

Lead #326089 / \$100,000 [VIEW FULL PROFILE →](#)

A real estate sales & development company in North Carolina who needs accounting capability.

*“This lead is a real estate and land development company that is privately owned by a software development entity. The contact who is the Finance Director at the software company indicated that the owners have a separate real estate business with 20 entities. *The owners outsource the development and legal services to contractors and do not have...”* [\(MORE\)](#)

Lead #326321 / \$70,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Illinois who needs ERP including: inventory control, purchase order, manufacturing management, time billing, budgeting, estimating, GL, AP, and AR functionalities.

*“*This lead is a job shop manufacturer that designs, installs, and services air pollution machines. Keep in mind they contract out the manufacturing.* There are roughly 26 employees and they use Navision 2009. The contact is the Controller who is looking for a new ERP system for accounting (AP, AR, GL), budgeting, quotes, invoicing, inventory...”* [\(MORE\)](#)

Lead #326068 / \$69,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Florida who budgeting components with foreign currency capability.

“This lead is a job shop manufacturer of bedding. The company recently acquired another company which brings their total employee count to over 1,000 workers. Previous to the acquisition they were at \$450 million in annual sales and with the acquisition they are at \$600 million. They are Oracle based while the other company is SAP based. The...” [\(MORE\)](#)

Lead #326295 / \$59,200 [VIEW FULL PROFILE →](#)

An accounting or legal services firm in New York who needs accounting capability.

“This lead is a CPA firm that provides outsourced accounting services to over 400 clients that is in need of a software solution that can do client write up, GL, and payroll. Their primary motivation for change is their current Creative Solutions and

Ultra Tax solutions are out dated and since they are evaluating an update to that software, they..." [\(MORE\)](#)

Lead #326255 / \$56,800 [VIEW FULL PROFILE →](#)

A general contractor in Puerto Rico who needs HR management functionality.

*"This is a general contracting company **based in San Juan Puerto Rico** that is looking for a HRMS system for their company. The work primarily 4-5 projects both small and large that are heavy industrial and commercial based. Their primary motivation for change is they use ProContractor by Viewpoint for accounting and construction and do NOT have..."* [\(MORE\)](#)

Lead #325544 / \$56,000 [VIEW FULL PROFILE →](#)

A non-profit in Maryland who needs accounting and business intelligence components.

"This is for a non profit organization that provides training and certifications for regulatory practices for the health, medical, and pharmaceutical field that is looking for accounting solutions that can do: AR, budgeting, BI, cash management, and GL. Their organization has an annual operating budget of \$11 million and currently has 15,000..." [\(MORE\)](#)

Lead #326198 / \$51,700 [VIEW FULL PROFILE →](#)

A government entity in North Carolina who needs accounting functionality.

*"This is a government facility that acts as a convention and visitor center that is looking for a new accounting system that can do AP, AR, budgeting, GL, and purchase order. Their primary motivation for change is that they are currently evaluating replacing their existing Dynamics GP solution. **The lead contact has requested that all Dynamics..."* [\(MORE\)](#)

Lead #326202 / \$49,000 [VIEW FULL PROFILE →](#)

A retailer of hard goods in Florida who needs ERP including: supply chain management, bank reconciliation, GL, and AP modules.

“This is for a hard goods retailer/dealer of office furniture. This contact is the Vice President and co-owner of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, inventory, order management, purchase orders and work orders. Their main motivation to change is that they use an accounting system that doesn't...” [\(MORE\)](#)

Lead #326155 / \$46,000 [VIEW FULL PROFILE →](#)

A property management company in Florida who needs accounting and property management modules.

*“This lead is a property management firm that is part of a larger portfolio management company. There are 7 employees. The contact is located in Florida but the HQ is located in Virginia. They are not using any software at the moment. The contact is the Regional Manager who desires a property management solution with accounting capabilities. *His...”* [\(MORE\)](#)

Lead #325576 / \$40,600 [VIEW FULL PROFILE →](#)

An accounting or legal services firm in California who needs trust accounting, time billing, and document management modules.

“This is a law office. They have 15 employees currently and plan on growing that number upwards of 25 employees in due time. This contact is the office manager of the company who desires a solution to handle their time & expense tracking, document management, and some form of trust accounting. Currently the company uses Quickbooks Enterprise for...” [\(MORE\)](#)

Lead #326205 / \$27,000 [VIEW FULL PROFILE →](#)

A general contractor in North Dakota who needs project tracking capability.

“This is for a general contractor that is in need of a job costing and project management solution for their company. Their primary motivation for change is they just bought out 50 lots in a residential neighborhood and will be building custom homes on all 50 lots. They need a solution that can track job costing by categories as well as manage the...” [\(MORE\)](#)

Lead #326078 / \$26,300 [VIEW FULL PROFILE →](#)

A general contractor in Alabama who needs accounting capability.

“This is a high end residential contractor that has 15-20 employees and does around \$15M in annual sales. This contact is their Chief Estimator. He desires a software solution to handle their full construction management. This includes AP, AR, GL, job costing, and estimating with bid management. The contact said they do a lot of bidding, and most...” [\(MORE\)](#)

Lead #326218 / \$26,200 [VIEW FULL PROFILE →](#)

A non-profit in Nevada who needs accounting functionality.

“This is for a non profit organization that is responsible for facilitating tissue and cornea donation statewide and has been doing so for the last 30 years that is in need of an accounting solution to handle their AP, AR, budgeting, and GL. Their primary motivation for change is that they feel they have outgrown their current Quickbooks Enterprise...” [\(MORE\)](#)

Lead #326325 / \$25,500 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Illinois who needs accounting capability.

“This lead is a job shop manufacturer that builds CNC machines. There are 5 employees and they do not use any business management software right now. The contact is an Engineer who desires an accounting software with AP, AR, GL, and inventory. Inventory is their biggest pain point and priority. Order management would be nice to have but not...” [\(MORE\)](#)

Lead #326217 / \$24,500 [VIEW FULL PROFILE →](#)

A service company in Puerto Rico who needs inventory control functionality.

“This lead is a consultant requesting on behalf of a commercial and service provider of security alarms for residential, commercial, and public/government customers. There are 20 employees and they use Sage Peachtree. The contact stated he was hired by the company directly and has been with them for 3 weeks but does not have an official title...” [\(MORE\)](#)

Lead #326071 / \$21,000 [VIEW FULL PROFILE →](#)

A non-profit in Colorado who needs accounting functionality.

“This leads is a non profit organization that provides early childhood education to lower income families that are ages 0 to 5. They currently serve 600 children and have an annual operating budget of 10 million dollars. They are looking for a new accounting solution to replace their existing Sage 300 ERP solution. They require a solution that can...” [\(MORE\)](#)

Lead #326246 / \$19,400 [VIEW FULL PROFILE →](#)

A food manufacturing company in California who needs ERP including: inventory control, order management, GL, and AP functionalities.

“This is for a food manufacturer that produces olive oil from raw olives and other products that is looking for an ERP solution for their business that can do: AP, AR, GL, inventory, invoicing, order management, and the ability to add purchase order and warehouse management as a future add on. Their primary motivation for change is they are...” [\(MORE\)](#)

Lead #326123 / \$18,000 [VIEW FULL PROFILE →](#)

A sub-contractor in New York who needs budgeting functionality.

“This is a construction subcontractor that does 10 commercial and industrial projects per year that is looking for a budgeting and long term forecasting solution for their business. The lead contact is the Controller of the company, and is looking for a solution that can do budgeting and forecasting, per job budgeting, forecast cash flow and...” [\(MORE\)](#)

Lead #326076 / \$16,200 [VIEW FULL PROFILE →](#)

An accounting firm in Jamaica who needs accounting functionality.

“This lead is located in Jamaica but provides accounting and marketing services for small businesses in both Jamiaca and . There are 3 employees and they are not using any software at the moment. The contact is the Managing Director who desires an accounting program for AP, AR, GL and payroll that she can use for her organization as well as for her...” [\(MORE\)](#)

Lead #326341 / \$15,600 [VIEW FULL PROFILE →](#)

A service company in Texas who needs inventory control, invoicing, and asset management modules.

“This is for a commercial and service company that provides industrial tools available for rent. This contact is the manager of the company who desires a solution to their invoicing, inventory/asset management. Their main motivation to change is that they have a solution now that is good for invoicing but the other functionality they need for their...” [\(MORE\)](#)

Lead #326363 / \$15,400 [VIEW FULL PROFILE →](#)

A service company in New York who needs accounting functionality.

“This lead is for an owner of a dojo that also does personal and private training that is looking for a software solution that can do AP, AR, GL, inventory, and invoicing. His primary motivation for change is he currently uses Quickbooks Online and indicated that he is looking for a solution that can better increase his processes and overall...” [\(MORE\)](#)

Lead #326199 / \$15,000 [VIEW FULL PROFILE →](#)

A transportation company in Texas who needs accounting, fleet management, and dispatching capabilities.

“This lead is a transportation company that offers short and long haul trucking services. There are 55 total employees but 20 are drivers. They do not have a software in place. The contact is the Transportation Manager who desires a transportation specific software with AP, AR, GL, fleet management, and route/dispatch modules. He stated that they...” [\(MORE\)](#)

Lead #326003 / \$14,300 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in Ohio who needs document management capability.

“This lead is a made for stock manufacturer of door frames and other plastic-based products. This business is part of a larger entity but operates and likes to consider itself separate. It has 29 employees. The contact is the Quality Manager who is not sure what accounting or ERP system they use as they as her department does not use the business...” [\(MORE\)](#)

Lead #326193 / \$14,100 [VIEW FULL PROFILE →](#)

A restaurant or food service company in Georgia who needs property management capability.

“This is for a multi-location retail restaurant operation. This contact is a consultant working on behalf of the company who desires a solution to their property tax management. Although the consultant on this project is located in India, the company is US based and solutions should reflect that. The consultant has an existing relationship with the...” [\(MORE\)](#)

Lead #326299 / \$12,800 [VIEW FULL PROFILE →](#)

A finance, banking & insurance company in Virginia who needs ERP including: loan origination software, bank reconciliation, commissions management, GL, AP, and AR capabilities.

“This is for a finance company that specializes in mortgage lending. This contact is the owner of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, commissions management and loan origination. Their main motivation to change is that they have a difficult time linking their current data from loan origination...” [\(MORE\)](#)

Lead #326107 / \$12,600 [VIEW FULL PROFILE →](#)

A restaurant or food service company in New Jersey who needs inventory control and point-of-sale components.

“This is a grocery store that sells a number of products along with a deli area. They have 15 employees. This contact is a manager for the company who has been tasked by ownership to search for a new POS system. The solutions should be able to handle day to day transactions and keep records of daily sales. It will also need to be able to scan...” [\(MORE\)](#)

Lead #326222 / \$12,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in California who needs sales tax capability.

“This is for a custom job shop manufacturer of signs and lighting on a commercial level. This contact is a high ranking officer for the company who desires a solution to their sales tax management. Their main motivation to change is that their current

sales tax solution offers little to no clarity about how they operate, have poor service standards... [\(MORE\)](#)

Lead #326179 / \$11,900 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Ontario who needs business intelligence capability.

“This is for a custom job shop manufacturer of custom cabinetry. This contact is a consultant who has been contracted by the company who desires a solution to their business intelligence. Their main motivation to change is that this consultant is working on an implementation project for an Oracle system and they would like a BI solutions that can...” [\(MORE\)](#)

Lead #326204 / \$11,200 [VIEW FULL PROFILE →](#)

A non-profit in Ontario who needs accounting and bank reconciliation modules.

“This is for a non-profit organization located in Canada who raises money for equipment and other hospitals essentials. This contact is the business manager for the organization who desires a solution to their accounting (AR,AP,GL) with bank reconciliation and fund accounting. Their main motivation to change is that their existing solution that...” [\(MORE\)](#)

Lead #326206 / \$10,200 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Michigan who needs time & attendance functionality.

“This is a made to order manufacturer of conveyor systems that is looking for a time and attendance tracking system for their business. Their primary motivation for change is that they are currently using Time Force and were told that the package they are on is going to out of support soon and they will need to do an upgrade. Since they will need...” [\(MORE\)](#)

Lead #326263 / \$9,000 [VIEW FULL PROFILE →](#)

A service company in North Carolina who needs accounting and bank reconciliation components.

“This is for a service company that provides daycare and transportation services. This contact is the owner of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation. Their main motivation to change is that they do not have a solution in place that manages their general income and expense of the business, they...” [\(MORE\)](#)

Lead #326329 / \$9,000 [VIEW FULL PROFILE →](#)

A heating, A/C and ventilation services company in Florida who needs inventory control, work order, invoicing, and dispatching functionalities.

“This lead is a commercial HVAC company. There are 6 total employees, 2 in the office and 4 in the field. They use QB Pro for accounting. The contact is the Office Manager who desires a field service management software for mobile invoicing, inventory, route/dispatch management, and work order management. She is NOT looking to replace QB for the...” [\(MORE\)](#)

Lead #326039 / \$7,700 [VIEW FULL PROFILE →](#)

A general contractor in New Hampshire who needs accounting and bank reconciliation functionalities.

“This is for a construction company that operates on a general contractor level for mainly residential interior/exterior remodels. This contact is the owner of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, estimating and job costing. Their main motivation to change is that this contact, who has been in...” [\(MORE\)](#)

Lead #326080 / \$7,500 [VIEW FULL PROFILE →](#)

A general contractor in Louisiana who needs job cost, invoicing, and estimating functionalities.

“This is for a general contractor that is getting back into the business that is looking for a system to manage his estimates, invoicing, and job costing. They primarily work residential construction and some light commercial projects and anticipate working 6-12 projects per year and can do anything from new home construction ore residential...” [\(MORE\)](#)

Lead #326368 / \$6,200 [VIEW FULL PROFILE →](#)

A general contractor in North Carolina who needs accounting capability.

“This is a consultant on behalf of a residential custom home builder that does 6 projects annually and is looking to grow to doing 12 projects per year that is in need of a construction accounting and management system for their business. The consultant confirmed that he has been hired and is under contract by this company. He indicated that the...” [\(MORE\)](#)

Lead #326103 / \$6,000 [VIEW FULL PROFILE →](#)

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

“This is an owner/operated tax preparation service company. This is a new company that is just starting out. This contact desires to get his business underway ASAP and needs a tax preparation software solution. This will be for handling about 25 corporate/business accounts and upwards of 100 individual returns. He will need e-filing, and the...” [\(MORE\)](#)

Lead #326012 / \$5,400 [VIEW FULL PROFILE →](#)

A real estate sales & development company in Texas who needs accounting capability.

“This lead is a new residential house flipping business that is looking for a basic accounting solution for their company. Primary motivation for change is that this a new business entity and they need to keep track of their financial information for reporting and tax purposes and to be able to manage the checks they are writing. They currently are...” [\(MORE\)](#)

Lead #325927 / \$4,500 [VIEW FULL PROFILE →](#)

A durable goods distributor in Tennessee who needs accounting capability.

“This is a small vehicle distributor/dealership. They sell customized vehicles for all needs. These are ordered from manufacturers and they do handle customization at their location (light manufacturing/assembly involved). They have 15 employees and do around \$3M in annual sales. This contact is their accounting manager who desires a solution to...” [\(MORE\)](#)

Lead #326073 / \$4,500 [VIEW FULL PROFILE →](#)

A general contractor in Nevada who needs inventory control and project management capabilities.

“This is a landscaping company with 11 employees and a number of subcontracting crews. They average just under \$1M in annual sales. This contact is the office administrator who desires a solution to handle their overall job planning (project management) and inventory. Once a contract has been agreed upon, they need to plan it. This includes...” [\(MORE\)](#)

Lead #326143 / \$4,500 [VIEW FULL PROFILE →](#)

A non-profit in California who needs time billing functionality.

*“This is for a non-profit organization that provides nursing services that is looking for a time and billing solution for their company. Their primary motivation for change is their previous system Meditech crashed on them and they were having issues with it. **They need a system that allows the time and billing to have a hard close at month end so...”* [\(MORE\)](#)

Lead #326097 / \$3,600 [VIEW FULL PROFILE →](#)

A durable goods distributor in California who needs accounting capability.

“This is a furniture resale business. They purchase items directly from manufacturers and help sell them to commercial businesses. They do not deal with individual sales and only work B2B. They have 2 employees and do just over \$1M in annual sales. This contact is a Partner with the organization who desires an accounting solution to handle AP, AR...” [\(MORE\)](#)

Lead #326114 / \$3,600 [VIEW FULL PROFILE →](#)

A pharmaceutical manufacturing company in Massachusetts who needs purchase order capability.

“This is for a medical device manufacturing company that is looking for a purchase order system for their business. Their primary motivation for change is they are currently coming out of the R&D process and will be going live shortly. They currently use Quickbooks Online for their accounting and Fishbowl for their inventory and manufacturing...” [\(MORE\)](#)

Lead #326148 / \$3,600 [VIEW FULL PROFILE →](#)

An accounting or legal services firm in Oklahoma who needs tax preparation functionality.

“This is for an accounting services firm who provides bookkeeping, payroll and tax prep services. This contact is the owner/sole proprietor of the company who desires a solution to their tax preparation. Their main motivation to change is that they are not completely satisfied with the solution that they currently have and would like to review...” [\(MORE\)](#)

Lead #326284 / \$3,600 [VIEW FULL PROFILE →](#)

A water utility firm in Utah who needs accounting and utility billing components.

“This lead is a privately owned water company that offers public culinary water system services. There are only 2 employees and they use a proprietary software designed by an internal employee years ago. The contact is the Accounting Specialist who desires a utility billing / accounting software mainly for invoicing, AR, and GL/reporting. She...” [\(MORE\)](#)



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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