

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 #326483 / \$480,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Ontario who needs ERP including: order management, payroll, budgeting, manufacturing execution system, GL, AP, and AR modules.

"This is for a Canadian made to order manufacturer of heat exchanger tubing that is used in auto, military, after market, locomotives that is looking for an ERP solution for their business. The lead contact is the VP of Operations and their primary motivation for change is that they are currently using an old software called Monitor. Their main..." [\(MORE\)](#)

Lead #326455 / \$75,000 [VIEW FULL PROFILE →](#)

A durable goods distributor in New Jersey who needs ERP including: supply chain management, payroll, supply chain management, warehouse management, budgeting, GL, AP, and AR functionalities.

*"This lead is a distributor/wholesaler of plumbing and electrical parts and components that is in the **exploratory stages** of evaluating replacements to their current ERP solution. They need a solution that can do AP, AR, budgeting, GL, inventory, order management, payroll, purchase order, supply chain, and warehouse management. **To be clear..."* [\(MORE\)](#)

Lead #325604 / \$72,000 [VIEW FULL PROFILE →](#)

A service company in California who needs budgeting functionality.

"This lead is a service provider that specializes in videography and graphic design. They have a location in CA and in NY with a total of 90 employees and \$25 million in revenue. They use QB Enterprise and a BI software called Looker. The contact is the

Finance Manager who stated they are interested in a budgeting/forecasting/planning software...” [\(MORE\)](#)

Lead #326475 / \$72,000 [VIEW FULL PROFILE →](#)

A finance, banking & insurance company in Maryland who needs general ledger and bank reconciliation capabilities.

“This is for a finance company that provides funding solutions to the agricultural industry. This contact is a business analyst for the company who desires a solution to their month end reconciliations. Their main motivation to change is that they have a difficult time performing their month end reconciliations and would like a tool that will...” [\(MORE\)](#)

Lead #326374 / \$70,000 [VIEW FULL PROFILE →](#)

A pharmaceutical/food manufacturing company in New Mexico who needs inventory control and manufacturing execution system capabilities.

“This is for an agricultural operation that is also the packager and distributor of their goods. This contact is the senior accountant/corporate secretary for the company who desires a solution to their inventory and MES. Their main motivation to change is that their tracking process currently involves heavy manual input into their accounting...” [\(MORE\)](#)

Lead #326409 / \$69,000 [VIEW FULL PROFILE →](#)

A professional consulting company in District of Columbia who needs accounting and project management capabilities.

“This lead is a commercial consulting firm specializing in public relations and communications. There are 65 employees and they use Intacct. The contact is the Director of Finance who is looking for a replacement to Intacct for AP, AR, GL, and project management. She believes Intacct may be a little too much for their needs and wants to review...” [\(MORE\)](#)

Lead #326571 / \$56,800 [VIEW FULL PROFILE →](#)

A non-profit in South Carolina who needs ERP including: fund accounting, HR management, bank reconciliation, GL, AP, and AR components.

“This is for a non-profit organization who's operations benefit the homeless and foster children. This contact is the HR Director for the organization who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, fund accounting and HR. Their main motivation to change is that they currently do not have a formal HR solution and...” [\(MORE\)](#)

Lead #326381 / \$50,000 [VIEW FULL PROFILE →](#)

An ambulance service provider in Oklahoma who needs RFID inventory control.

“This lead is an independent and privately owned ambulance service provider with 120 employees and 20 ambulance vehicles. The contact, who is the Logistics Director, is not sure of what accounting or ERP system they are using. He desires an RFID solution that can manage his inventory. He prefers it to be a standalone solution. They do not have a...” [\(MORE\)](#)

Lead #325176 / \$42,600 [VIEW FULL PROFILE →](#)

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

*“This is for a fast growing real estate development and property management company that works mainly in the commercial and multi-family residential space. This contact is an owner/partner in the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation and property management. **As a courtesy this contact asked not to...”* [\(MORE\)](#)

Lead #326394 / Open [VIEW FULL PROFILE →](#)

A durable goods distributor in Alabama who needs accounting, CRM, and bank reconciliation modules.

“This lead is a commercial wholesaler of janitorial and sanitation products (jan-san provider). There are roughly 20 employees and the company uses an unnamed proprietary legacy software solution. The contact is the Owner who desires an ERP system for general accounting (AP, AR, GL), bank reconciliation, CRM, inventory control, and payroll. They...” [\(MORE\)](#)

Lead #326395 / \$36,000 [VIEW FULL PROFILE →](#)

A government entity in Michigan who needs ERP including: payroll, CRM, fund accounting, bank reconciliation, utility billing, GL, AP, and AR components.

“This is for a government entity that operates as a utility company. This contact is an administrator for the entity who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, payroll, utility billing, fund accounting and CRM. Their main motivation to change is that they have used the same accounting program for many years and...” [\(MORE\)](#)

Lead #326252 / \$33,500 [VIEW FULL PROFILE →](#)

An accounting or legal services firm in Ohio who needs document management and client write-up capabilities.

“This is for a commercial and service company who provides a specific service to high net worth individuals and corporations. This contact is the accounting supervisor who desires a solution to their auditing/trial balance and document management. Their main motivation to change is that they have a very manual process now to their monthly...” [\(MORE\)](#)

Lead #326489 / \$30,000 [VIEW FULL PROFILE →](#)

A property management company in Pennsylvania who needs property management functionality.

“This is for a government agency who owns and manages 400-500 commercial property units. This contact is a consultant for the agency who desires a solution to their property management. While the consultant is technically not under contract at the moment, they have a previous relationship and have performed other services for them. Their main...” [\(MORE\)](#)

Lead #326449 / \$29,600 [VIEW FULL PROFILE →](#)

A sub-contractor in Arizona who needs ERP including: purchase order, payroll, job cost, bank reconciliation, GL, AP, and AR components.

“This is for a construction company that operates mainly on a sub-contractor level for residential and commercial projects. This contact is the owner of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation,

payroll, job costing and purchasing. Their main motivation to change is that while they do not feel that... [\(MORE\)](#)

Lead #326511 / \$29,400 [VIEW FULL PROFILE →](#)

A finance, banking & insurance company in Puerto Rico who needs cash management, treasury management, and bank reconciliation functionalities.

“This is for a finance company located in Puerto Rico, that specializes in asset management as a service for financial institutions. This contact is a research intern for the company who desires a solution to their cash management/treasury management. Their main motivation to change is that they have roughly \$60M in assets now under management and...” [\(MORE\)](#)

Lead #326567 / \$25,500 [VIEW FULL PROFILE →](#)

A government entity in Florida who needs fund accounting and contract management capabilities.

“This is for a government entity that operates on a local city government level. This contact is the purchasing specialist for the city who desires a solution to their contract management with some fund accounting capability. Their main motivation to change is that they manage their roster of contracts and vendors via a manual spreadsheet method...” [\(MORE\)](#)

Lead #326351 / \$23,800 [VIEW FULL PROFILE →](#)

A sub-contractor in California who needs ERP including: inventory control, invoicing, estimating, GL, AP, and AR components.

“This is for a construction sub contractor that offers scaffolding services including, scaffolds, labor, set up, and trucking to residential and commercial projects that is in need of a construction accounting and management system for their company. Their primary motivation for change is they are launching this company and want to have the right...” [\(MORE\)](#)

Lead #326174 / \$21,000 [VIEW FULL PROFILE →](#)

A professional services or consulting company in United States Of America who needs accounts receivable and collection management functionalities.

“This is for a professional services firm located in Sint Maarten that provides outsourced collection services. This contact is the owner of the company who desires a solution their accounts receivable/collection management. Their main motivation to change is that the solution they currently use is no longer supported and long overdue to be...” [\(MORE\)](#)

Lead #326008 / \$20,900 [VIEW FULL PROFILE →](#)

A healthcare or social services organization in New Jersey who needs inventory control functionality.

“This lead is for a medical facility that does patient evaluation, dispenses prescription drugs, and provides medical equipment to patients that is in need of an inventory solution for their company. Their primary motivation for change is their inventory is currently done as a manual process where they have to count each item in their stock. This...” [\(MORE\)](#)

Lead #326435 / \$18,000 [VIEW FULL PROFILE →](#)

A towing service in Georgia who needs accounting and payroll capability.

“This lead is a towing service and has under 10 employees. They use a software called Bookkeeper by AvanQuest. The contact is the Owner who desires an accounting (AP, AR, GL), bank reconciliation, and payroll program. Their current software does not allow for concurrent users which the owner desires. She is also switching over her workers from 1099...” [\(MORE\)](#)

Lead #326510 / \$17,400 [VIEW FULL PROFILE →](#)

A retailer of hard goods in Jamaica who needs ERP including: inventory control, purchase order, job cost, bank reconciliation, GL, AP, and AR components.

“This is for a hard goods retail company that operates as a pre-owned auto dealership located in Kingston, Jamaica. This contact is the administration director for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, inventory, job costing and purchasing. Their main motivation to change is that as a car dealer...” [\(MORE\)](#)

Lead #326508 / \$11,500 [VIEW FULL PROFILE →](#)

A general contractor in Florida who needs ERP including: purchase order, job cost, estimating, bank reconciliation, GL, AP, and AR components.

“This is for a construction company that operates as a general contractor for residential new home builds. This contact is the assistant to the VP and purchaser for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, estimating, job costing and purchasing. Their main motivation to change is that they use a...” [\(MORE\)](#)

Lead #326452 / \$10,000 [VIEW FULL PROFILE →](#)

An educational organization in Texas who needs accounting and bank reconciliation components.

“This is for an educational facility that operates as an afterschool care and pre-school center for infants and toddlers. This contact is the owner of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation and payroll. Their main motivation to change is that this is a brand new business that was recently awarded...” [\(MORE\)](#)

Lead #326534 / Open [VIEW FULL PROFILE →](#)

A consultant on behalf of a non-profit in New Hampshire who needs fund accounting capability.

“This lead is a consultant requesting on behalf of a small nonprofit client of his. He cannot disclose their name but stated they have about 26 employees, \$5 million in annual revenue, and provide intricate medical online training programs. They use Quickbooks (unknown edition but the consultant guessed QB Pro?) and they use Zoho for CRM and...” [\(MORE\)](#)

Lead #326559 / \$8,700 [VIEW FULL PROFILE →](#)

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

“This is for an accounting services firm who solely focuses on tax preparation as a service. This contact is the owner of the company who desires a solution to their tax preparation. Their main motivation to change is that they are starting their own tax

preparation firm and therefore need a solution to provide top quality tax preparation services..." [\(MORE\)](#)

Lead #326519 / \$7,700 [VIEW FULL PROFILE →](#)

A property management company in New Jersey who needs accounting and property management components.

"This is for a property management company that also owns the units that they rent that is in need of an accounting and property management solution for their business that can do: AP, AR, GL, property management, and potentially payroll. They act as 3 separate family run companies and have all residential properties. Their properties can range..." [\(MORE\)](#)

Lead #326413 / \$7,500 [VIEW FULL PROFILE →](#)

An accounting or legal services firm in Washington who needs time billing functionality.

"This is for an accounting firm that provides bookkeeping, payroll, tax preparation and consulting services. This contact is a CPA for the firm who desires a solution to their time and billing. Their main motivation to change is that their current solution recently was merged/acquired by another company and pricing terms have changed significantly..." [\(MORE\)](#)

Lead #326371 / \$7,100 [VIEW FULL PROFILE →](#)

A non-profit in Virginia who needs fundraising capability.

"This is for a newly forming non profit organization (they have applied for 501C-3) that is looking for a fund raising and donor management solution for their non-profit with the option to potentially add more accounting features like AP, AR, and GL. Their primary motivation for change is they are expecting to launch and be up and running in the..." [\(MORE\)](#)

Lead #326460 / \$7,000 [VIEW FULL PROFILE →](#)

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

“This lead is for an accounting service that provides outsourced payroll services for 120-140 different companies that is looking to review new payroll solutions. Primary motivation for change is that they currently use an old AMS software solution (said they paid \$300 for the solution) and want to evaluate better solutions that can increase their...” [\(MORE\)](#)

Lead #326450 / \$5,760 [VIEW FULL PROFILE →](#)

A bank in Maryland who needs accounts payable functionality.

*“*This is the same lead as Lead 326453 but for two different modules. If you are able to handle both the AP and Fixed Assets needs within one program, feel free to request either lead.* This lead is a bank that has 13 employees and manages \$125 million in assets. They use a software called FMS which is being sold to Banktel (with regards to the AP...”* [\(MORE\)](#)

Lead #326433 / \$5,400 [VIEW FULL PROFILE →](#)

A general contractor in Ontario who needs accounting and work order modules.

“This lead is a small general contractor that does residential renovations and framing. This is a husband-wife owned company and they are not using any software. The contact is the wife who desires a construction management software with AP, AR, GL, work order, and job cost. Currently she manually calculates and reports their finances and taxes...” [\(MORE\)](#)

Lead #326480 / \$5,300 [VIEW FULL PROFILE →](#)

A general contractor in North Carolina who needs estimating functionality.

“This is for a construction company that operates on a general contract level for commercial and government projects. This contact is the owner of the company who desires a solution to their estimating. Their main motivation to change is that they do all of their estimating process currently by hand. They feel they have outgrown this process and...” [\(MORE\)](#)

Lead #326545 / \$4,176 [VIEW FULL PROFILE →](#)

A non-profit in Colorado who needs general ledger and payroll components.

“This lead is a nonprofit organization that gives grants for individuals and organizations. There are roughly 5 employees and the organization is using Sage 50, however, that same program is used to manage the finances of another business ran by one of the Directors. The contact is the Controller and she desires a simple general accounting program...” [\(MORE\)](#)

Lead #326389 / \$3,950 [VIEW FULL PROFILE →](#)

A property management company in California who needs accounting, bank reconciliation, and property management components.

“This is for a real estate company who in addition to sales provides property management services. This contact is the owner of the company who desires a solution to their property management. Their main motivation to change is that this is a fairly new company who has grown their management portfolio to 35 units and climbing. They would like to...” [\(MORE\)](#)

Lead #326453 / \$3,600 [VIEW FULL PROFILE →](#)

A finance, banking & insurance company in Maryland who needs fixed asset management capability.

*“*This is the same lead as Lead 326450 but for two different modules. If you are able to handle both the AP and Fixed Assets needs within one program, feel free to request either lead.* This lead is a bank that has 13 employees and manages \$125 million in assets. They use a software called FMS which is being sold to Banktel (with regards to the AP...”* [\(MORE\)](#)

Lead #326410 / \$2,520 [VIEW FULL PROFILE →](#)

A sub-contractor in British Columbia who needs job cost capability.

“THIS is a subcontractor that does both residential and commercial excavation services that needs a job costing module for their business. Primary motivation for change is that their current Quickbooks solution does not offer a job costing module. They do NOT want to move away from Quickbooks for their accounting needs. They work roughly 50 jobs...” [\(MORE\)](#)

Lead #326297 / \$2,500 [VIEW FULL PROFILE →](#)

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

“This is for an accounting company that primarily focuses on tax preparation 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 were involved with a firm and had a falling out with their partner and have decided to go out on their own and need a solution...” [\(MORE\)](#)

Lead #326370 / \$2,200 [VIEW FULL PROFILE →](#)

A professional services or consulting company in Ontario who needs payroll functionality.

“This is for a professional services firm located in Canada who provides outsourced staffing services. This contact is the office manager for the company who desires a solution to their Canadian payroll. Their main motivation to change is that their existing solution doesn't really work for them as a staffing company and therefore would like to...” [\(MORE\)](#)

Lead #326406 / \$1,800 [VIEW FULL PROFILE →](#)

A property management company in Texas who needs property management functionality.

“This lead is a small property management business operated by the contact and her fiance. They have 4 residential properties. They do not use any software to manage their business finances. The contact is interested in a simple property management software to track rent payments, maintenance orders and expenses, property rental history, and run...” [\(MORE\)](#)

Lead #326458 / \$1,800 [VIEW FULL PROFILE →](#)

A property management company in Texas who needs accounting capability.

“This lead is for a property management owner with 3 single family homes. She is not using any software and has been manually keeping her records for the past 5 years. She is interested in a general accounting program for AP, AR, GL, and payroll. She does not property management specific software as she wants to expand into real estate as well. She...” [\(MORE\)](#)

Lead #326504 / \$1,800 [VIEW FULL PROFILE →](#)

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

*“This is for a residential home flipping and remodeling company that needs a basic accounting system to handle their AP, AR, and GL. Their primary motivation for change is they were going to use Quickbooks and now can't get it to work and want to review alternative options to Quickbooks **Please do not request using a Quickbooks solution** They...”* [\(MORE\)](#)

Lead #326634 / \$1,800 [VIEW FULL PROFILE →](#)

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

“This is for a faith based non-profit organization that operates as a church. This contact is a trustee within the congregation who desires a solution to their accounting (AR,AP,GL) with bank reconciliation. Their main motivation to change is that they have recently appointed a new treasurer, the previous treasurer kept the books via paper and pen...” [\(MORE\)](#)

Lead #326402 / \$1,000 [VIEW FULL PROFILE →](#)

A retailer of hard goods in Indiana who needs inventory control and point-of-sale components.

“This is a start-up retail store that will be handling consignment sales. They will not have any paid employees when they begin and will just be managed by family. This contact is the owner of the operation who desires a POS and consignment inventory tracking solution to better help organize their sales and associate the appropriate items with the...” [\(MORE\)](#)

Lead #326459 / \$1,000 [VIEW FULL PROFILE →](#)

A real estate sales & development company in Virginia who needs takeoff and planning functionality.

“This lead is for an investor that buys, flips, and sells residential homes. He is not using any software at the moment and is highly interested in a digital takeoff / planning software. He wants to know what the profitability and cost of fixing the

homes would be as well as creating visual floor plans with digital remodeling capabilities. He would... [\(MORE\)](#)

Lead #326356 / **Open** [VIEW FULL PROFILE →](#)

An accounting or legal services firm in Nevada who needs accounting research and auditing modules.

“This is for an accounting services firm who provides auditing, payroll, tax prep and bookkeeping services. This contact is the CPA for the firm who desire a solution to their auditing/accounting research. Their main motivation to change is that they do not have a solution in place to perform this functionality and whenever an issue arises with a...” [\(MORE\)](#)



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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