

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 #332518 / \$324,800 [VIEW FULL PROFILE →](#)

A government entity in Idaho who needs ERP including: purchase order, payroll, fixed asset management, fund accounting, and seven other modules.

*“**This lead ended up being a duplicate of a consultant lead we have distributed previously. As this was a duplicate, the lead is being retracted**”* [\(MORE\)](#)

Lead #332790 / \$300,000 [VIEW FULL PROFILE →](#)

A consultant on behalf of a made-to-order manufacturer in Manitoba who needs ERP including: inventory control, order management, job cost, manufacturing management, and four other modules.

“This lead is a consultant requesting on behalf of a contract job shop manufacturer of packaging and bags. The company is in potential discussions of getting acquired. It generates around \$80 million in annual revenue and has roughly 200 employees. They use an antiquated legacy system which the consultant doesn't know the name of. He is consulting...” [\(MORE\)](#)

Lead #333008 / \$300,000 [VIEW FULL PROFILE →](#)

An investment company in California who needs ERP including: payroll, budgeting, investment tracking, GL, AP, and AR components.

“This lead is an investment company that manages a billion and a half dollar hedgefund. They are part of a parent company that manages 7 other underlying funds. This particular company has 12 employees and they let the parent company administer all their accounting and investment managements through their program called Hedgeware (for accounting...” [\(MORE\)](#)

Lead #333119 / \$281,000 [VIEW FULL PROFILE →](#)

A heating, A/C and ventilation services company in Pennsylvania who needs ERP including: order management, project tracking, payroll, CRM, and four other modules.

“This lead is a consultant on behalf of a large HVAC contracting and service company that considers themselves more of a environmental control contractor. They are in need of a full ERP solution that offers AP, AR, GL, invoicing, CRM, estimates, quotes& proposals, fixed asset management, job costing, order management, payroll, project management...” [\(MORE\)](#)

Lead #332921 / \$240,000 [VIEW FULL PROFILE →](#)

An ecommerce retailer in South Dakota who needs accounting and order management capabilities.

“This lead is an ecommerce retailer of bikes. They have a storefront, too, but the largest part of their operations is done through online sales. There are less than 50 employees and they use Sage 50 for posting their summaries with another system called MOM by Dydacomp. The contact is the Logistics Specialist who is interested in alternative ERP...” [\(MORE\)](#)

Lead #332946 / \$212,000 [VIEW FULL PROFILE →](#)

A professional services or consulting company in Virginia who needs ERP including: project tracking, inventory control, purchase order, business intelligence, and five other modules.

“This is for a multi-entity professional services firm who has a government contractor division. This contact is the senior accountant for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, budgeting, business intelligence, CRM, inventory, purchase orders, job costing project management and time/attendance...” [\(MORE\)](#)

Lead #333092 / \$116,400 [VIEW FULL PROFILE →](#)

A durable goods distributor in Ontario who needs ERP including: supply chain management, CRM, EDI, GL, AP, and AR components.

*“This lead is a wholesale/distributor that specializes in wheelchairs and rollators. They are interesting in a full ERP system that offers AP, AR, GL, purchase order, EDI, inventory management, and order management. The lead noted that the company is growing quickly. *This lead is based in Canada.* The lead is the Customer Service Manager and the...”* [\(MORE\)](#)

Lead #333035 / \$108,000 [VIEW FULL PROFILE →](#)

A medical device distributor in Nebraska who needs ERP including: supply chain management, warehouse management, GL, and AP modules.

*“This is a Distribution/Fulfillment Center. The distribution centers core operation/function is drop shipments on behalf of DME (Durable Medical Equipment) clients. **The contact has sent over very detailed requirements.** These requirements can be viewed here...”* [\(MORE\)](#)

Lead #332979 / \$100,000 [VIEW FULL PROFILE →](#)

A resort in Bahamas who needs reservations management capability.

“This lead is a luxury hotel and resort in the Bahamas. They have 3 separate hotels, one with 180 rooms, another with 290, and the last with 1,800. There are around 9,000 employees in total. GoConcierge is the main software used for hotel management. This particular request comes from the department of the resort which provides animal interaction...” [\(MORE\)](#)

Lead #332906 / \$94,000 [VIEW FULL PROFILE →](#)

A transportation company in Georgia who needs fleet maintenance functionality.

“This is for the maintenance division of a government entity who operates on the municipal level. This contact is a high ranking manager with the entity who desires a solution to their fleet maintenance. Their main motivation to change is that they have a solution in place that has been unsupported since 2007 and this contact has been charged with...” [\(MORE\)](#)

Lead #332845 / \$86,400 [VIEW FULL PROFILE →](#)

A process operations manufacturer in Florida who needs ERP including: supply chain management, e-commerce, GL, and AP components.

“This is for a process manufacturer who creates a line of cosmetics. This contact is a consultant working on behalf of the company who desires a solution to their accounting (AR,AP,GL) with e-commerce, purchase orders, inventory and order management. Their main motivation to change is that this is a quickly growing company that has investors poised...” [\(MORE\)](#)

Lead #332865 / \$81,000 [VIEW FULL PROFILE →](#)

A service company in Alberta who needs supply chain management and asset management functionalities.

“This is for a Canadian based commercial and service company that provides towing and repair services. This contact is the parts/purchasing manager who desires a solution to their inventory, order management, purchasing, and work orders and asset management with accounting and other financial modules as wish list functionality. Their main...” [\(MORE\)](#)

Lead #332911 / \$80,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Ontario who needs ERP including: inventory control, order management, job cost, rentals management, and four other modules.

“This lead is a job shop manufacturer of shipping containers but they also have a sales and rental operation. There are 22 employees and the company uses a software called EMDECS. The contact is the Quality Control Manager who is interested in single manufacturing ERP software that has general accounting (AP, AR, GL), inventory and order...” [\(MORE\)](#)

Lead #332768 / \$75,000 [VIEW FULL PROFILE →](#)

A medicinal cannabis manufacturer in Ontario who needs an RFID solution.

“This lead is a medicinal cannabis manufacturer that has 53 employees and generates between \$1 million to \$5 million. They are a start up company and hope to grow. They use an industry specific software called Ample Organics for tracking their plants. The contact is the Administrator who was tasked with finding an RFID program. Integration with...” [\(MORE\)](#)

Lead #332806 / \$75,000 [VIEW FULL PROFILE →](#)

A property management company in California who needs ERP including: job cost, bank reconciliation, property management, GL, AP, and AR capabilities.

“This is for a real estate company that primarily operates as a owner/manager of multi-family residential properties. This contact is the senior accountant for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, job costing and property management. Their main motivation to change is that while they have a...” [\(MORE\)](#)

Lead #332765 / \$70,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Ontario who needs ERP including: supply chain management, payroll, job cost, estimating, and four other modules.

“This lead is a Canadian based made to order manufacturer that specializes in custom metal fabrication and welding that is in need of a full ERP solution to handle: AP, AR, GL, estimates, inventory, job costing, MES, order management, payroll, purchase orders, and budgeting as a wish list item. The lead contact is the manager of the facility who...” [\(MORE\)](#)

Lead #332961 / \$69,000 [VIEW FULL PROFILE →](#)

A process operations manufacturer in Ontario who needs budgeting functionality.

“This lead is an agricultural fertilizer manufacturer and wholesaler. There are 4 entities that make up the company with roughly 350 employees in total. The different entities use different solutions such as Great Plains, Agvance, and Agri (a cloud based industry specific software). The contact is the Finance Operations Manager who is looking for a...” [\(MORE\)](#)

Lead #333018 / \$57,200 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in Illinois who needs ERP including: order management, inventory control, CRM, manufacturing management, and four other modules.

“This lead is a manufacturing made for stock operation that specializes in fire pump testing equipment. They are in need of a full ERP solution that can offer AP, AR, GL, CRM, inventory management, MES, MRP, order management, and PO. The lead is

the Office Manager and the motivation for this search is that their current solution QuickBooks...” [\(MORE\)](#)

Lead #332690 / \$56,000 [VIEW FULL PROFILE →](#)

A food distributor in Nova Scotia who needs ERP including: inventory control, order management, payroll, CRM, bank reconciliation, GL, AP, and AR capabilities.

*“This lead is a wholesale/distributor of food, specifically fish. They are looking for a full ERP system that offers AP, AR, GL, invoicing, payroll, bank reconciliation, CRM, inventory control, and order management. *Please note that this lead is in Canada.* The companies income is about 30% USD and 70% Canadian. They are a 4th generation fish...”* [\(MORE\)](#)

Lead #332868 / \$56,000 [VIEW FULL PROFILE →](#)

A government entity in Massachusetts who needs HR management functionality.

“This lead is a government municipality that is in need of a new HRIS system for the town. The lead contact is an Administrative Systems Analyst tasked with bringing back options for the team to review and demo. They were originally using a system called Tak-IT! that is no longer supported. They have been doing payroll through ADP for 30 years and...” [\(MORE\)](#)

Lead #333139 / \$54,600 [VIEW FULL PROFILE →](#)

A non-durable goods distributor in New York who needs ERP including: supply chain management, bank reconciliation, GL, and AP capabilities.

“This is for a wholesale distribution company who sells general merchandises as well as health/beauty. This contact is an owner of the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, inventory, order management and purchase orders. Their main motivation to change is that they feel they have outgrown their...” [\(MORE\)](#)

Lead #332635 / \$53,200 [VIEW FULL PROFILE →](#)

A finance, banking & insurance company in California who needs accounts payable, general ledger, and client portal components.

“This lead is a financial company that handles high net worth families accounts that is in need of a solution that can offer AP, GL, and a client portal. They are currently managing several billion dollars from their clients and do roughly 10 million in annual revenue. They are currently using Quickbooks online and bill.com and indicated that it...” [\(MORE\)](#)

Lead #332988 / \$53,200 [VIEW FULL PROFILE →](#)

A general contractor in Minnesota who needs project management capability.

“This is for a construction company that operates as a general contractor for commercial projects only. This contact is the general manager for the company who desires a solution to their project management. Their main motivation to change is that they have a very robust project management solution now and they are very happy with the functionality...” [\(MORE\)](#)

Lead #332855 / \$51,000 [VIEW FULL PROFILE →](#)

A professional services or consulting company in Delaware who needs budgeting functionality.

*“This lead is a professional service that specializes in accounting advisory. They are looking for a budgeting, planning, and forecasting solution. The lead has been tasked with bring back options for upper management (CFO, VP) to look over. *Please note that the lead is not the decision maker.* The lead is a Senior Associate and the motivation for...”* [\(MORE\)](#)

Lead #332937 / \$51,000 [VIEW FULL PROFILE →](#)

A durable goods distributor in Illinois who needs ERP including: supply chain management, payroll, CRM, invoicing, e-commerce, GL, AP, and AR modules.

“This lead is a wholesaler/distributor of lighting and refrigeration components. They are interested in a full ERP solution that offers AP, AR, GL, payroll, invoicing, purchase order, CRM, inventory control, e-commerce, and order management. The lead is the Marketing Manager and the motivation for this search is they would like to consolidate...” [\(MORE\)](#)

Lead #332777 / \$46,400 [VIEW FULL PROFILE →](#)

A restaurant or food service company in Florida who needs accounting capability and inventory management.

“This lead is a retail restaurant and food service that has 2 different well known franchises and 8 different locations. They are in search of a solution that offers AP, AR, GL, and inventory management. The lead is the Owner and the motivation for this search is that they would like to have better reporting and data on their current finances which...” [\(MORE\)](#)

Lead #332952 / \$42,000 [VIEW FULL PROFILE →](#)

An educational organization in Texas who needs ERP including: supply chain management, fixed asset management, GL, and AP capabilities.

“This is for an educational services company that provides specialized classes, tutoring and camps geared toward gifted children. This contact is the Executive VP of the company who desires a solution to their accounting (AR,AP,GL) with fixed assets, inventory, purchase orders, order management and CRM. Their main motivation to change is that their...” [\(MORE\)](#)

Lead #333030 / \$40,800 [VIEW FULL PROFILE →](#)

A heating, A/C and ventilation services company in Illinois who needs ERP including: inventory control, payroll, job cost, invoicing, dispatching, estimating, GL, AP, and AR capabilities.

“This lead is a residential and commercial HVAC subcontractor. There are 20 employees and they use Bluegrass Software. The contact is the Office Manager who is interested in an accounting and field management software with AP, AR, GL, invoicing, estimating, job cost, and payroll functionality. They've used Bluegrass for 11 to 12 years and are...” [\(MORE\)](#)

Lead #332869 / \$40,600 [VIEW FULL PROFILE →](#)

A transportation company in New Brunswick who needs accounting, dispatching, and bank reconciliation modules.

“This is for a Canadian based transportation company that provides long haul transportation services. This contact is the operations/fleet manager for the company who desires a solution to their accounting (AR,AP,GL) with bank

reconciliation and route and dispatch. Their main motivation to change is that they have a solution currently to track..." [\(MORE\)](#)

Lead #332994 / \$38,800 [VIEW FULL PROFILE →](#)

A transportation company in Colorado who needs accounting and dispatching functionalities.

"This is for a transportation company that operates as a shuttle service for larger corporations. This contact is a retained consultant working on behalf of the company who desires a solution to their accounting (AR,AP,GL) with budgeting, and route/dispatch. Their main motivation to change is that they are a growing company both in terms of clients..." [\(MORE\)](#)

Lead #332789 / \$36,800 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Oregon who needs inventory control and manufacturing management capabilities.

"This lead is a made to order manufacturer of lighting fixtures that is in need of a BOM and inventory solution for the business. The lead contact is the Administrative assistant who was tasked with collecting solutions and bringing them back to management and the owner for review. They currently use Quickbooks for accounting and Dropbox to manage..." [\(MORE\)](#)

Lead #332882 / \$36,000 [VIEW FULL PROFILE →](#)

A general contractor in California who needs estimating and project tracking components.

*"*This lead is a redistribution of lead 332391 due to an increase in budget.* This lead is a construction build firm that specializes in outdoor landscaping. They are in search of a solution that offers estimates, quotes & proposals, project management, and job costing. The lead is the Owner and the motivation for this search is that they would..."* [\(MORE\)](#)

Lead #333099 / \$33,200 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in Rhode Island who needs ERP including: supply chain management, bank reconciliation, manufacturing execution system, GL, AP, and AR components.

“This is for a made for stock manufacturer who's items are customizable in both size and finish. This contact is the marketing manager for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, inventory, order management, purchasing and MES. Their main motivation to change is that they have a solution currently...” [\(MORE\)](#)

Lead #333010 / **\$33,000** [VIEW FULL PROFILE →](#)

A real estate firm in California who needs ERP including: CRM, document management, commissions management, GL, AP, and AR functionalities.

“This lead is a real estate firm that is currently part of a larger brokerage firm. They are planning to break away to start their own firm. The new firm would have less than 5 employees. They currently use a proprietary real estate software through the parent company. They also use TopProducer as their CRM and Sky Slope as their document...” [\(MORE\)](#)

Lead #332835 / **\$31,000** [VIEW FULL PROFILE →](#)

A healthcare or social services organization in New Brunswick who needs accounting capability.

“This is for a multi-location Canadian healthcare company that provides medical massage services. This contact is an accountant/consultant working on behalf of the company who is their retired bookkeeper who desires a solution to their accounting (AR,AP,GL) with invoicing and payroll. Their main motivation to change is that they are using manual...” [\(MORE\)](#)

Lead #332958 / **\$30,000** [VIEW FULL PROFILE →](#)

An agriculture company in Ontario who needs inventory control and contract management capabilities.

“This is a grain elevator company. They handle storing grains for farmers during their harvest, where they will charge storage fees, and also take care of officially buying the grain at agreed upon prices. This company will then handle the sale of the

grains to the end user. They have 6 employees and do under \$1M in annual sales. This contact is... [\(MORE\)](#)

Lead #332544 / \$29,100 [VIEW FULL PROFILE →](#)

Business services company in British Columbia who needs accounting capability.

“This is for multi-location business services company that provides document management solutions in both the US and Canada. This contact is an accountant for the company who desires a solution to their accounting (AR,AP,GL) with foreign currency conversion. Their main motivation to change is that they have a US location and a Canadian location and...” [\(MORE\)](#)

Lead #333022 / \$29,100 [VIEW FULL PROFILE →](#)

A durable goods distributor in Utah who needs EDI capability.

“This is for a whole distributor of durable goods to the home furnishing industry. This contact is the online merchandising specialist who desires a solution to their EDI. Their main motivation to change is that they do not have an EDI solution in place currently and they have a manual process now for purchase order matching with their retailers...” [\(MORE\)](#)

Lead #333009 / \$28,400 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in Georgia who needs inventory control capability.

“This lead is a start up made for stock operation that specializes in iceboxes. They are in need of an inventory management system and warehouse management as a wish list item. The company currently had 4 of their iceboxes out on the market and plan to have 250 machines out this year. They are growing quickly and have 12 employees which the lead...” [\(MORE\)](#)

Lead #332877 / \$27,200 [VIEW FULL PROFILE →](#)

A real estate sales & development company in North Carolina who needs project management functionality.

“This lead is a real estate sales and developer. They are in need of a solution that offers project management. The lead is the Owner and the motivation for this search

is that they currently do not have any solutions in place. They keep track of all of their projects on paper and the lead would like to have more automation in the process for more..." [\(MORE\)](#)

Lead #332799 / \$26,800 [VIEW FULL PROFILE →](#)

A service company in California who needs inventory control, work order, invoicing, and dispatching capabilities.

"This lead is a commercial service that specializes in auto rim repairs. They are in need of a field management solution that can offer inventory management, invoicing, route & dispatch, and work order. They have 6 employees, 1 being full time and 5 being 1099 employees. The lead is the CEO and the motivation for this search is that they are..." [\(MORE\)](#)

Lead #332338 / \$25,400 [VIEW FULL PROFILE →](#)

A service company in Texas who needs ERP including: inventory control, CRM, work order, dispatching, GL, AP, and AR capabilities.

"This is for a commercial and service company that sells water softener systems on a residential and commercial basis. This contact is the service manager for the company who desires a solution to their accounting (AR,AP,GL) with CRM, inventory, route/dispatch and work orders. Their main motivation to change is that they are using a solution that..." [\(MORE\)](#)

Lead #332801 / \$25,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in New York who needs manufacturing management and document management functionalities.

"This is for a job shop custom manufacturer whose sole customer is the Department of Defense. This contact is the production manager for the company who desires as solution to there document management and BOM. Their main motivation to change is that they have built internal systems using MS Excel to manage their product life cycle and believe they..." [\(MORE\)](#)

Lead #333000 / \$25,000 [VIEW FULL PROFILE →](#)

A professional services or consulting company in British Columbia who needs project management functionality.

“This is for a Canadian professional services company that provides architectural services for both residential, institutional and commercial projects. This contact is the office manager for the company who desires a solution to their project management. Their main motivation to change is that they do not have a formalized project management...” [\(MORE\)](#)

Lead #333122 / \$25,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Michigan who needs ERP including: supply chain management, CRM, estimating, GL, AP, and AR functionalities.

“This is for a custom job shop manufacturer of ventilation systems to the process manufacturing industry. This contact is the owner of the company who desires a solution to their accounting (AR,AP,GL) with CRM, estimates, inventory, order management and purchase orders. Their main motivation to change is that they have many solution to their...” [\(MORE\)](#)

Lead #333105 / \$23,000 [VIEW FULL PROFILE →](#)

A durable goods distributor in North Carolina who needs ERP including: supply chain management, general ledger, accounts payable, and accounts receivable components.

“This is a steel service center. They sell steel aluminum to construction sites, to race car manufacturers, and everything in-between. They have a full fabrication job center as well do handle fabrication jobs like welding. They also allow a lot of walk-in business. This company has upwards of 25 employees and does almost \$10M in annual sales. This...” [\(MORE\)](#)

Lead #333108 / \$20,999.88 [VIEW FULL PROFILE →](#)

A retailer of hard goods in Maine who needs inventory control, order management, and e-commerce functionalities.

“This is a seasonal retail business that handles the creation, shipping, and sale of Christmas-themed products. They have upwards of 500 total employees when in full operation (counting seasonal employees). This contact is the Customer Service

Manager who desires to find a new solution to handle their inventory, order management, and ecommerce...” [\(MORE\)](#)

Lead #332760 / \$17,000 [VIEW FULL PROFILE →](#)

A service company in Tennessee who needs ERP including: supply chain management, sales tax, bank reconciliation, contract management, GL, AP, and AR components.

“This is for a commercial and service company who sell commercial grade equipment on a B2B level. This contact is the office manager for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, payroll, contract management, inventory, order management, work orders, purchase orders and sales tax management. Their...” [\(MORE\)](#)

Lead #332909 / \$16,200 [VIEW FULL PROFILE →](#)

A non-profit in North Dakota who needs accounting capability.

“This is a non profit church with 1,000 members and 200-250 households with an annual operating budget of \$250,000 that is in need of a solution that includes: AP, AR, GL, fund accounting, and payroll. The lead contact is the treasurer of the church who indicated they are currently using an outsourced 3rd party provider who uses Quickbooks. They...” [\(MORE\)](#)

Lead #333077 / \$15,900 [VIEW FULL PROFILE →](#)

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

“This is for a growing construction company that operates on a general contractor level for both residential and commercial projects. This contact is a partner in the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, estimating, job costing and purchase orders. Their main motivation to change is that they are...” [\(MORE\)](#)



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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