

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 #333271 / \$61,000,000 [VIEW FULL PROFILE →](#)

A professional services or consulting company in Minnesota who needs business intelligence functionality.

*"This lead is for one of the largest global auditing and professional services company in the world that is in need of a BI solution for their business. **Please note they ONLY want to review true BI solutions and do NOT want to review an ERP solution. Please do NOT request with an ERP solution** The lead contact is the Global Talent Director for..."* [\(MORE\)](#)

Lead #333548 / \$263,000 [VIEW FULL PROFILE →](#)

An insurance company in Arizona who needs ERP including: purchase order, CRM, budgeting, bank reconciliation, GL, AP, and AR components.

"This is for an insurance company that is primarily in the health care field. This contact is the IT project manager for the company who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, budgeting/forecasting, purchase orders and CRM as a wishlist item. Their main motivation to change is that their existing deployment..." [\(MORE\)](#)

Lead #333534 / \$250,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Quebec who needs ERP including: inventory control, order management, job cost, CRM, and five other modules.

"This lead is a vertically integrated job shop manufacturer of custom packaging machinery. There are approximately 110 employees. They use Accpac for accounting along with a SQL based locally-developed proprietary business management software. That software has barcode capability and a basic CRM. The contact is the Director of Continuous..." [\(MORE\)](#)

Lead #333449 / \$166,000 [VIEW FULL PROFILE →](#)

A healthcare or social services organization in Colorado who needs ERP including: inventory control, purchase order, fund accounting, budgeting, bank reconciliation, GL, AP, and AR capabilities.

“This is for a non-profit company who provides health care and social services. This contact is a high ranking officer for the organization who desires a solution to their accounting (AR,AP,GL) with bank reconciliation, budgeting/forecasting, fund accounting, inventory and purchasing. Their main motivation to change is that they are outgrowing...” [\(MORE\)](#)

Lead #333225 / \$151,200 [VIEW FULL PROFILE →](#)

A heating, A/C and ventilation services company in Pennsylvania who needs ERP including: inventory control, job cost, CRM, work order, invoicing, dispatching, GL, AP, and AR capabilities.

“This lead is an HVAC company that does install, maintenance, and repair for both residential and commercial customers who is in need of a full ERP solution to handle: AP, AR, GL, CRM, inventory, invoicing, job costing, route and dispatch, and work orders. The company currently does 5.5 million in annual revenue The lead contact is the Controller...” [\(MORE\)](#)

Lead #333536 / \$145,000 [VIEW FULL PROFILE →](#)

A durable goods distributor in Michigan who needs supply chain management capability.

“This lead is for a distributor of durable goods used by HR departments for employee recognition that is in need of a solution to handle: order management, purchase orders, and inventory control. The lead contact is the purchasing manager who indicated they currently process their orders and PO's by hand. They use Dynamics Solomon for their back...” [\(MORE\)](#)

Lead #333268 / \$108,000 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in Michigan who needs supply chain management and asset management modules.

“This lead is a consultant for a large autonomous vehicle manufacture. They are in need of a fleet management solution with asset management, order management, and inventory management. They have multiple locations around the US and have fleets in different states. The lead is the Consultant and the motivation for this search is that they currently...” [\(MORE\)](#)

Lead #333292 / \$74,000 [VIEW FULL PROFILE →](#)

A service company in Iowa who needs ERP including: inventory control, job cost, CRM, work order, GL, AP, and AR modules.

“This lead is a commercial and service provider that specializes in vehicle modifications and remodels. This is a family owned business with less than 10 employees. They use QB Enterprise as their accounting program. The contact is one of the Owner's son who is in charge of operations. He is interested in an ERP program that has AP, AR, GL, CRM...” [\(MORE\)](#)

Lead #330787 / \$69,000 [VIEW FULL PROFILE →](#)

A general contractor in Colorado who needs project management functionality.

“This lead is a consultant on behalf of a construction company that focuses on energy engineering and design builds that is in need of a project management solution for the business. The lead contact is a consultant and advisor to the company. His company is a venture capital company who is investing in the company. The company currently uses...” [\(MORE\)](#)

Lead #331380 / \$69,000 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in Colorado who needs ERP including: supply chain management, payroll, e-commerce, commissions management, GL, AP, and AR components.

“This is for a made for stock manufacturer who is also the wholesale distributor with some retail sales as well. This contact is the owner of the company who desires a solution to their accounting (AR,AP,GL) with payroll, inventory, order management, purchase orders, commissions management and e-commerce. Their main motivation to change is that...” [\(MORE\)](#)

Lead #333087 / \$69,000 [VIEW FULL PROFILE →](#)

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

*“**This is a redistribution of lead 330787 which was distributed under the wrong industry vertical** This lead is a consultant on behalf of a professional engineering company that focuses on energy engineering and design builds that is in need of a project management solution for the business. The lead contact is a consultant and advisor to the...”* [\(MORE\)](#)

Lead #333347 / \$63,800 [VIEW FULL PROFILE →](#)

A non-profit in Missouri who needs budgeting functionality.

“This is for a non-profit organization who's mission is to help provide access to basic essentials around the globe. This contact is a financial analyst for the company who desires a solution to their budgeting/planning/forecasting. Their main motivation to change is that they solution they have isn't quite robust enough for their budgeting needs...” [\(MORE\)](#)

Lead #333460 / \$59,000 [VIEW FULL PROFILE →](#)

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

“This is for a wholesale distribution company who sells janitorial and office supplies. This contact was recently hired to handle the purchasing and sales for the company and has been tasked with finding a solution to their accounting (AR,AP,GL) with bank reconciliation, e-commerce, inventory, order management and purchase orders. Their main...” [\(MORE\)](#)

Lead #333455 / \$51,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Alberta who needs ERP including: supply chain management, payroll, job cost, estimating, GL, AP, and AR modules.

“This is for a Canadian hybrid job shop custom and made for stock manufacturer of items specific to oil and gas producers. This contact is the office manager for the company who desires a solution to their accounting (AR,AP,GL) with payroll, estimating, job costing, inventory, order management and purchase orders. Their main motivation to change is...” [\(MORE\)](#)

Lead #333549 / \$51,000 [VIEW FULL PROFILE →](#)

A bank card financing company in Massachusetts who needs accounting capability.

“This lead is a bankcard financing company that provides card programs to financial institutions. They fluctuate around 100 employees. They use Sage 50 as their accounting program. The contact is the CFO who is interested in a replacement accounting program that has AP, AR, GL, and strong invoicing. Multiple invoicing options will be the biggest...” [\(MORE\)](#)

Lead #333448 / \$50,000 [VIEW FULL PROFILE →](#)

A property management company in Wisconsin who needs reservations management and property management components.

“This lead is a residential property management company that is part of an association/larger management firm. This association hires companies such as this one to maintain both company owned and non-company owned properties. This firm has 4 full time employees and 2 seasonal. They outsource all their accounting to a 3rd party company. The contact...” [\(MORE\)](#)

Lead #333580 / \$50,000 [VIEW FULL PROFILE →](#)

A heating, A/C and ventilation services company in Utah who needs ERP including: inventory control, purchase order, job cost, GL, AP, and AR capabilities.

“This lead is an HVAC mechanical contractor that fabricates and installs heating and ventilation systems. There are 100 employees and they use A-Systems for accounting along with a Viewpoint estimating software. The contact is the Operations Manager who is interested first and foremost in a construction accounting program with AP, AR, GL, job cost...” [\(MORE\)](#)

Lead #333341 / \$42,600 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Massachusetts who needs business intelligence functionality.

“This lead is a made to order manufacturer of saw blades that is in need of a business intelligence solution for their company. The lead contact is the systems admin for the company who will be reviewing matched solutions with the company's CIO. He

indicated that they were previously using GPS developed by Vanguard. That solution merged with Exact..." [\(MORE\)](#)

Lead #332071 / \$41,600 [VIEW FULL PROFILE →](#)

A food distributor in Pennsylvania who needs manufacturing execution system functionality.

"This lead is a well known wholesaler/distributor of food. They are in search of a MES solution. The company is a publicly traded company. The lead is the Director of Operations and the motivation for this search is that then need an automated way to procure data at the floor level. The lead noted they have 11 packaging lines and need to be able to..." [\(MORE\)](#)

Lead #333320 / Open [VIEW FULL PROFILE →](#)

A process operations manufacturer in South Carolina who needs inventory control, order management, manufacturing management, and bank reconciliation capabilities.

*"*Please read before requesting* This lead is a process manufacturer of chemicals. There are between 10 to 20 employees with annual revenue between \$1 million to \$5 million. The contact is the CEO/CFO. Here are his needs per his email (expressed method of communication): Our manufacturing processes are batch in nature. Currently we are using..."* [\(MORE\)](#)

Lead #333355 / \$38,000 [VIEW FULL PROFILE →](#)

A service company in Pennsylvania who needs inventory control, fleet maintenance, work order, fixed asset management, and three other modules.

"This is for a equipment rental and service company that works primarily with the transportation industry. This contact is the owner of the company who desires a solution to their rental management and service including fleet maintenance, invoicing, asset fixed asset management, contract management, POS, inventory and work orders. Their main..." [\(MORE\)](#)

Lead #333302 / \$37,000 [VIEW FULL PROFILE →](#)

A durable goods distributor in Minnesota who needs CRM functionality.

“This is for a wholesale distributor who provides added value to the goods they sell. This contact is the purchasing manager for the company who desires a solution to their CRM. Their main motivation to change is that they recently did a software analysis internally and decided to stay with their ERP solution, however they found that it was lacking...” [\(MORE\)](#)

Lead #333411 / \$35,000 [VIEW FULL PROFILE →](#)

A sub-contractor in Arizona who needs ERP including: payroll, GL, AP, and AR capabilities.

“This lead is for a construction sub contractor that focuses on commercial electrician projects that is in need of a solution to handle: AP, AR, GL, job costing, payroll, and project management. The lead contact is the President of the company who indicated they have been using Sage 50 which no longer meets their needs. Her CPA recommended...” [\(MORE\)](#)

Lead #333432 / \$35,000 [VIEW FULL PROFILE →](#)

A non-profit in Nevada who needs fundraising and donor management components.

“This lead is a non profit organization focusing on youth services surrounding foster care, and other youth support that is in need of a fund raising and donor management for their company. There are 2 lead contacts for this project. I spoke with the Community Relations Manager of the company who is collecting the results of this search and then...” [\(MORE\)](#)

Lead #333538 / \$34,000 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in Georgia who needs ERP including: order management, inventory control, CRM, payroll, and six other modules.

“This lead is a made for stock manufacturer of mold disease care products that is looking for a full ERP solution to handle: AP, AR, BOM, BI, CRM, e-commerce, GL, inventory, MES< order management, payroll, and purchase orders. The lead contact is the COO of the company who indicated they are currently using Quickbooks Enterprise Manufacturing on...” [\(MORE\)](#)

Lead #333024 / \$30,000 [VIEW FULL PROFILE →](#)

A non-profit in Tennessee who needs asset management functionality.

*“**This lead has been retracted and redistributed under 333095**”* [\(MORE\)](#)

Lead #333095 / \$30,000 [VIEW FULL PROFILE →](#)

A non-profit in Tennessee who needs document management capability.

“This lead is a non profit organization that acts as an association that focuses on history that is in need of a document management solution for their company. The lead contact is the marketing coordinator for the company who indicated they do not have a good solution in place to manage the resources they offer to their 5,600 members. They provide...” [\(MORE\)](#)

Lead #333033 / \$28,000 [VIEW FULL PROFILE →](#)

Restaurant management group in California who needs accounts payable and general ledger functionalities.

“This lead is a restaurant management firm that owns and manages 12 fast food restaurants. They annual revenue is around \$25 million. There are 450 employees between corporate and the franchises. They outsource their payroll but use Great Plains as their accounting program along with E-restaurant POS. The contact is the Controller who is interested...” [\(MORE\)](#)

Lead #332607 / \$27,300 [VIEW FULL PROFILE →](#)

A retailer of soft goods in New Jersey who needs applicant tracking functionality.

*“*This lead is redistributed and is the same as Lead 333346.* This lead is a soon to operate retail shop. There will be 8 stores with 1 corporate location. The company plans to hire 150 employees to start. She is looking at accounting software and might consider a QB program along with ADP for payroll. That is not for certain yet. The contact is...”* [\(MORE\)](#)

Lead #333346 / \$27,300 [VIEW FULL PROFILE →](#)

A retailer of soft goods in New Jersey who needs HR management functionality.

*“*This lead is redistributed under 332607* This lead is a soon to operate retail shop. There will be 8 stores with 1 corporate location. The company plans to hire 150 employees to start. She is looking at accounting software and might consider a QB program along with ADP for payroll. That is not for certain yet. The contact is the Owner who is only...”* [\(MORE\)](#)

Lead #333272 / \$24,400 [VIEW FULL PROFILE →](#)

A non-profit in Michigan who needs accounting capability.

“This lead is a nonprofit organization that provides informational resources to different universities regarding strategic planning. There are 22 employees and their annual revenue is between \$4 million to \$5 million. They use QB Online along with a proprietary donor management program called Oneness. They use an outsourced payroll provider. The...” [\(MORE\)](#)

Lead #333266 / \$23,000 [VIEW FULL PROFILE →](#)

A non-profit in Florida who needs donor management functionality.

“This lead is a nonprofit organization that specializes in low income childcare education services. There are 6 early learning centers with over 100 employees in total. The contact, who is the Director of Business Development, does not know what the name of their accounting or ERP program is. She said she would have to check with the CFO. She...” [\(MORE\)](#)

Lead #324334 / \$21,600 [VIEW FULL PROFILE →](#)

A durable goods distributor in Hawaii who needs ERP including: supply chain management, CRM, GL, and AP modules.

“This lead is a wholesale/distributor of building materials for construction companies. They are in search of a full ERP system that offers AP, AR, GL, CRM, inventory control, and purchase order. The lead is the President and their motivation for there search is that they currently use the solution Atrex for order entry, inventory, purchase order...” [\(MORE\)](#)

Lead #332278 / \$21,600 [VIEW FULL PROFILE →](#)

A service company in Ohio who needs ERP including: work order, invoicing, dispatching, GL, AP, and AR modules.

“This lead is a commercial services company that provides installation and service to garage doors that is in need of a solution that can handle: AP, AR, GL, invoicing, route and dispatch, and work orders. The lead contact is the owner of the company who indicated that they currently use multiple systems and as they grow, they are looking to...” [\(MORE\)](#)

Lead #333540 / \$19,000 [VIEW FULL PROFILE →](#)

A government entity in Ohio who needs purchase order functionality.

“This is for a finance company that operates in support of state government employees. This contact is the systems administrator for the organization who desires a solution to their purchasing/procurement. Their main motivation to change is that they recently updated their 2013 system to the 2016 version and they updated process for procurement...” [\(MORE\)](#)

Lead #333146 / \$18,000 [VIEW FULL PROFILE →](#)

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

“This lead is a property manager doing property management for a client. They are in need of a solution that offer AP, AR, GL, and property management. The client they will be working for has an association of 14 different owners, each that owns their own individual buildings, and 1 owner that has 3 buildings with 9 tenants overall. The lead is the...” [\(MORE\)](#)

Lead #333287 / \$18,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Minnesota who needs ERP including: inventory control, purchase order, manufacturing management, invoicing, GL, AP, and AR functionalities.

“This lead is a Manufacturing made to order company that specializes in packaging. They are in need of a ERP solution that offers AP, AR, GL, invoicing, BOM, purchase order, and inventory control. The lead is the Customer Service Manager and the

motivation for this search is that they currently use the system SVT for inventory which is from the..." [\(MORE\)](#)

Lead #333472 / \$18,000 [VIEW FULL PROFILE →](#)

A retailer of hard goods in Pennsylvania who needs ERP including: supply chain management, e-commerce, GL, and AP modules.

"This is for a retail company that sells durable goods to the construction industry. This contact is the owner of the company who desires a solution to their accounting (AR,AP,GL) with inventory, order management, purchase orders and e-commerce integration. Their main motivation to change is that they are a fairly new company that is in the process..." [\(MORE\)](#)

Lead #333350 / \$16,200 [VIEW FULL PROFILE →](#)

A restaurant or food service company in Illinois who needs inventory control and point-of-sale modules.

"This is for a retail store that operates as a convenience store and primarily sells food and liquor. This contact is the owner of the company who desires a solution to their POS and inventory. Their main motivation to change is that they feel they have outgrown their existing solution and would like to review alternatives that will have some..." [\(MORE\)](#)

Lead #333550 / \$14,400 [VIEW FULL PROFILE →](#)

A government entity in Louisiana who needs fixed asset management capability.

"This lead is a government entity that focuses on housing services that is in need of a fixed asset management for the company. The lead contact is the internal auditor who indicated they have no fixed asset solution in place. She indicated that she is collecting options and reviewing them to present to the executive director. Currently they use..." [\(MORE\)](#)

Lead #333402 / \$14,000 [VIEW FULL PROFILE →](#)

A service company in Alberta who needs supply chain management capability.

“This is for a Canadian based commercial and service company who sells, rents and services various machines and vehicles. This contact is a retained consultant working on behalf of the company who desires a solution to their inventory, order management, purchase orders and work orders. Their main motivation to change is that they are using a basic...” [\(MORE\)](#)

Lead #333406 / \$13,300 [VIEW FULL PROFILE →](#)

A non-profit in Newfoundland and Labrador who needs fundraising and donor management functionalities.

*“This lead is the consultant on behalf of their client. They are in search of solution that offers donor management and fundraising. *Please note this lead is in Canada.* The lead is the consultant and the motivation for this search is the client currently does not have a donor management or fundraising solution in place. They currently use excel...”* [\(MORE\)](#)

Lead #333351 / \$12,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Utah who needs ERP including: order management, inventory control, manufacturing management, GL, AP, and AR modules.

“This lead is a made to order manufacturer of fire trucks and supporting equipment that is in need of a solution to handle: AP, AR, GL, inventory, order management, purchase orders, work orders, and CRM as a wish list item. The lead is the President of the company who indicated their existing Quickbooks Enterprise solution no longer fits their...” [\(MORE\)](#)

Lead #333444 / \$11,500 [VIEW FULL PROFILE →](#)

An accounting firm in Manitoba who needs time billing functionality.

“This lead is an accounting firm that has around 10 employees. They use Sage 50 for accounting and payroll. The contact is the Owner who is interested in a time & billing software. He stated that if it had a strong GL feature that would be nice but he does not intend to replace Sage 50 so it is not required. He is open to modular solutions where he...” [\(MORE\)](#)

Lead #333148 / \$10,480 [VIEW FULL PROFILE →](#)

A printing or publishing company in California who needs accounting, order management, and project management capabilities.

“This lead is a printing and design company. They are in search of a ERP solution that offers AP, AR, GL, order management, and project management with CRM and E-Commerce as wish list items. The business does custom printing and design from business cards to large formats like banners and decals. The lead is the Owner and the motivation for this...” [\(MORE\)](#)

Lead #333277 / \$10,400 [VIEW FULL PROFILE →](#)

An educational organization in Florida who needs accounting and CRM functionalities.

*“This lead is a Non-Profit school that hosts preschool, and K-8 ages. They are in need of an *education specific* system that offers AP, AR, GL, time & attendance, and CRM. The lead is the Financial Administrator and the motivation for this search is that they are currently using CCM (Child Care Management) and CCM is updating and making changes to...”* [\(MORE\)](#)

Lead #333558 / \$10,000 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in California who needs inventory control and order management modules.

“This lead is a made for stock manufacturer of laser machines. There are 25 employees. They use an unknown edition of QB for their general accounting. The contact is the Quality Manager who is interested in an inventory and order management solution. Integration with QB is desired. They are NOT replacing QB so will not need any accounting modules...” [\(MORE\)](#)

Lead #332876 / \$9,700 [VIEW FULL PROFILE →](#)

A sub-contractor in North Carolina who needs estimating functionality.

“This is for a construction company that operates equally on a either a sub or general contractor level for asphalt projects. This contact is a co-owner of the company who desires a solution to their estimating. Their main motivation to change is that they do not have a automated system to their bidding at the moment and it hasn't affected their...” [\(MORE\)](#)

Lead #333031 / \$9,100 [VIEW FULL PROFILE →](#)

A healthcare organization in Maryland who needs accounting capability.

“This lead is a healthcare organization that specializes in dentistry. The lead is in search of a solution that offers AP, AR, GL, and payroll. The lead noted this is a single practice. The lead is the Owner and the motivation for this search is that they are currently using Quicken and it does not offer the robust reporting they are looking for...” [\(MORE\)](#)

Lead #333211 / \$9,000 [VIEW FULL PROFILE →](#)

A sub-contractor in New Mexico who needs estimating functionality.

“This lead is a subcontractor that does residential kitchen and bath remodeling. He has 10 employees between direct and 1099 workers. They want to expand into a general contractor for residential homebuilding. They are using QB (unknown edition) and Xactimate. The contact is the Owner who is interested in an estimating program. He does not want to...” [\(MORE\)](#)



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.

MONICA@SOFTWARECONNECT.COM • (414) 456-0500 EXT. 11

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