

## THIS WEEK'S FRESH LEADS

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

**Lead #348550** / **\$770,000** [VIEW FULL PROFILE →](#)

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An agriculture, forestry, fishing or mining company in British Columbia who needs project management, dispatching, and asset management capabilities.

*“\*\*This lead is a Canadian-based forestry company looking for a solution that can handle project management, asset management, route and dispatch management, and potentially fleet management at some point in the future.\*\*  
The lead contact is the process analyst. Right now, they need a better solution to handle their resource planning and usage...” [\(MORE\)](#)*

**Lead #348673** / **\$90,000** [VIEW FULL PROFILE →](#)

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A general contractor in Manitoba who needs ERP including: payroll, estimating, GL, AP, AR, and project tracking modules.

*“This is an industrial contractor that also handles a small amount of fabrication work. They do a lot of on-site work. They have an average of 70 employees and do between \$4M to \$15M in annual sales depending on the type and volume of work. This contact is the Owner of the company. He desires a solution to handle their complete needs, such as time...” [\(MORE\)](#)*

**Lead #348498** / **\$69,000** [VIEW FULL PROFILE →](#)

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

*“This is a manufacturing company that manufactures specialty vehicles. They have two plants and close to 150 employees. This contact is the Head of*

*Accounting. She has been tasked by management to look into new solutions to handle both manufacturing processes and their accounting. \*\*It is imperative that the software is fully integrated and is not...* [\(MORE\)](#)

**Lead #348548** / **\$60,000.12** [VIEW FULL PROFILE →](#)

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

*“This is a consultant who was hired by this company to provide assistance in various aspects of their operations; one of which being to help implement a new software environment. This company is a manufacturer of various HVAC products and has 60-80 employees depending on the time of the year. They do around \$3M in annual sales in their service...”* [\(MORE\)](#)

**Lead #348528** / **\$54,000** [VIEW FULL PROFILE →](#)

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

*“This is a manufacturing company that produces various power supply items. They have 15 employees and hope to add an additional 6-8 employees in the next year. This contact is a materials manager with the company who has been tasked by the President to find a new MRP software solution for the company. This option should have a core accounting base...”* [\(MORE\)](#)

**Lead #348658** / **\$53,200** [VIEW FULL PROFILE →](#)

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A real estate sales & development, and restaurant franchisee company in Louisiana who needs ERP including: payroll, estimating, GL, AP, AR, and project tracking components.

*“This is a company that manages 5 businesses, which includes a real estate development arm, single asset LLCs for each development project operating as real estate holdings, a construction company that manages the construction of the retail developments across the company, and a retail restaurant management arm that handles the 15 franchisee...”* [\(MORE\)](#)

**Lead #348516 / \$43,200** [VIEW FULL PROFILE →](#)

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A property management company in Texas who needs accounting and property management components.

*“This lead is a property management company that owns and manages 17 buildings, and is looking to double that amount within 2 years. They currently manage about 350 tenants and operate in 17 states. They are looking for a solution that can handle property management, AP, AR, and GL. The lead contact is a property manager. They have an immediate...”* [\(MORE\)](#)

**Lead #347737 / \$41,400** [VIEW FULL PROFILE →](#)

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A non-profit in Louisiana who needs electronic health records functionality.

*“This lead is a non-profit organization looking for a solution that can handle electronic health records. The lead contact is the Healthy Lifestyle Coordinator who is leading this project. They have multiple branches and are using multiple EHR programs and databases, and are looking to consolidate into one EHR program. They are currently using...”* [\(MORE\)](#)

**Lead #348609 / \$40,000** [VIEW FULL PROFILE →](#)

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A made-to-order manufacturer in Quebec who needs manufacturing management functionality.

*“This is a manufacturer who creates specific holders for electronic devices. They have 15 employees and do around \$5M-\$10M in sales each year. This contact is the Supply Specialist for the company who desires an MRP solution. This solution will be handling sales orders and forecasts to drive raw part purchases. He wants it to tell him when things...”* [\(MORE\)](#)

**Lead #348669 / \$36,000** [VIEW FULL PROFILE →](#)

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An educational organization in Bahamas who needs HR management capability.

*“\*\*This lead is an education organization located in the Bahamas\*\* looking for software that can handle HR. \*\*She is mainly interested in receiving a demo and pricing information.\*\*”* *The lead contact is the chair of the English*

department. She is looking into solutions that will modernize how they handle some HR tasks. Specifically, she was looking..." [\(MORE\)](#)

**Lead #348635** / **\$32,400** [VIEW FULL PROFILE →](#)

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A general contractor in Texas who needs accounting functionality.

*"This is a pipeline construction company. They have a primary location in both the US and Canada, but have opened a new location in the US. This specific new US location has 25 employees and forecasts to do between \$5-\$10M in annual sales. \*\*This search is only for this new location and not for the company as a whole.\*\* This contact is a business..." [\(MORE\)](#)*

**Lead #347503** / **\$28,008** [VIEW FULL PROFILE →](#)

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A printing company in India who needs project tracking, inventory control, purchase order, MRP, and two other modules.

*"\*\*This lead is printing company based in India\*\* in need of a solution that can handle fixed asset management, inventory control, invoicing, project management, job costing, MRP, and purchase orders. In the future, they might have interest in expanding the solution to include point of sale functionality. Their accounting is currently handled by a..." [\(MORE\)](#)*

**Lead #348530** / **\$19,200** [VIEW FULL PROFILE →](#)

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A property management company in North Carolina who needs accounting and property management capabilities.

*"This lead is an accounting company looking for a solution to propose to her clients that can handle property management, AP, AR, and GL. The lead contact is an accountant who works with 2 property management companies. She is looking for a solution that can be used between their companies where her clients could use it for property management, and..." [\(MORE\)](#)*

**Lead #348705** / **\$17,900** [VIEW FULL PROFILE →](#)

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A transportation company in New Jersey who needs fleet management and dispatching capabilities.

*“This lead is a transportation company looking for a solution that can handle fleet management and route and dispatch management. \*\*They are interested in receiving a demo\*\* of Service Dispatch and History, and will review other options. The lead contact is a general staff member in charge of conducting research into software solutions, and she...” (MORE)*

**Lead #348524 / \$16,200** [VIEW FULL PROFILE →](#)

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A made-to-order manufacturer in Tennessee who needs ERP including: supply chain management, general ledger, accounts payable, and accounts receivable capabilities.

*“This is a manufacturing company that creates custom vehicle interiors. They have 33 employees and do around \$3M in annual sales. \*\*This lead said setting up a demo via email would be preferred.\*\* This contact is the bookkeeper for the company who desires to find a new accounting solution for the company. This solution should also handle sales...” (MORE)*

**Lead #348522 / \$15,300** [VIEW FULL PROFILE →](#)

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A professional services or consulting company in Texas who needs purchase order functionality.

*“This is an engineering firm with 16 employees and 12 engineers. They do around \$2-3M in annual sales. This contact is their Director of Operations. He desires a procurement software for their engineers to use. They need to control costs as far as watching what people procure and monitor their purchase orders. They charge everything they buy back...” (MORE)*

**Lead #348002 / \$14,400** [VIEW FULL PROFILE →](#)

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A general contractor in Washington who needs project management functionality.

*“This is a custom homebuilder that operates as a general contractor. They handle mostly residential resort type homes with an average home cost of \$600K to \$2M. They have 35 employees. This contact is a project coordinator for the company who desires a solution to better manage their scheduling. The scheduling itself will be to better manage their...” (MORE)*

**Lead #348582 / \$14,400** [VIEW FULL PROFILE →](#)

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A service company in North Dakota who needs dispatching functionality.

*“This lead is a service company based in the oil and gas industry looking for a solution that can handle route and dispatch management. The lead contact works in accounts receivable, and will be gathering information to present to a committee. Online records indicate that revenue exceeds \$1 million, and they currently employ 7 people. She is mainly...”* [\(MORE\)](#)

**Lead #348591 / \$14,400** [VIEW FULL PROFILE →](#)

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A service company in New Jersey who needs accounts receivable, CRM, invoicing, and dispatching components.

*“This lead is a services company looking for a solution that can handle route and dispatch management, CRM, invoicing, and AR. They are interested in reviewing AccountMate 10 for SQL and Express as well as up to 4 other solutions. The lead contact is the owner of the company looking to update from his current solution. The system they use has been...”* [\(MORE\)](#)

**Lead #348539 / \$12,600** [VIEW FULL PROFILE →](#)

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

*“This lead is a property management company looking for a solution that can handle property management functionality. Although not an immediate need, they could be interested in a product that also includes AP, AR, and GL. The lead contact is a property manager. They currently manage 10 multi-unit residential properties, but they are looking to...”* [\(MORE\)](#)

**Lead #348710 / \$9,800** [VIEW FULL PROFILE →](#)

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A food or medical distributor in Ontario who needs order management functionality.

*“This lead is a Canadian-based third-party food distributor looking for a solution that can handle order management. The lead contact is the owner of the company. They currently handle their order management manually, and*

are using QuickBooks for accounting. He is not looking for a new accounting solution at this time. He handles about 400 orders..." [\(MORE\)](#)

**Lead #348476 / \$9,000** [VIEW FULL PROFILE →](#)

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A municipality entity in New York who needs accounting functionality.

*"This is a government municipality organization with 20 employees. They have an annual operating budget of about \$3M each year. This contact is their Treasurer who desires a municipality focused financial solution to handle their core accounting (AP, AR, GL, and fund accounting). They receive around 5 grants/funds each year that they need to track..."* [\(MORE\)](#)

**Lead #348533 / \$7,200** [VIEW FULL PROFILE →](#)

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A service company in Iowa who needs inventory control functionality.

*"This lead is a services company looking for a solution that can handle inventory control. The lead contact is the office manager. She is looking for a solution that can handle barcoding and bin tracking. She feels that they have done a poor job handling inventory management, and a more streamlined solution could increase their revenue. They have..."* [\(MORE\)](#)

**Lead #348583 / \$7,200** [VIEW FULL PROFILE →](#)

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A finance, banking & insurance company in Florida who needs accounts payable functionality.

*"This is a company that provides auto loans and mortgages to new buyers. They have 10 employees and do over \$1M in annual sales. This contact is the Owner of the company who desires a solution that can track and manage the interest payments being paid out to his investors. \*\*This company does not need a traditional accounting software, but rather a..."* [\(MORE\)](#)

**Lead #348544 / \$4,000** [VIEW FULL PROFILE →](#)

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A restaurant company in New York who needs label generation functionality.

*“This is a small restaurant that also produces and sells it's food packages for customers to purchase. Most of these items are vegetable related and contain no protein so he only has to deal with FDA regulations rather than the USDA. They have 10 employees. This contact is the owner of the company who desires a nutritional label generating...”* [\(MORE\)](#)

**Lead #348514 / \$3,600** [VIEW FULL PROFILE →](#)

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A payday loan company in Mississippi who needs accounts receivable capability.

*“This is a start up cash advance loan company. They have 5 employees starting out. This contact is a Manager with the company who desires a \*\*loan management software solution. They do not need a traditional accounting system.\*\* This solution will help manage the core of their business, which is providing loans to people and collecting they money...”* [\(MORE\)](#)

**Lead #348721 / \$3,600** [VIEW FULL PROFILE →](#)

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A service company in British Columbia who needs work order, invoicing, and estimating modules.

*“This is a small plumbing company. They have 2 other companies they are involved with that provides them with their jobs. They also handle service calls. They have been in operation for around a year and would like to expand with better software. They have 4 employees. This contact is the office manager who desires a new solution to handle their...”* [\(MORE\)](#)

**Lead #348709 / \$3,500** [VIEW FULL PROFILE →](#)

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A restaurant or food service company in New York who needs general ledger and point-of-sale functionalities.

*“This is a restaurant that provides dine-in, takeout, and delivery services. They have 5 employees and do over \$1M in annual sales. This contact is the Owner who recently purchased the business, which was already preexisting. He'll be rebranding the business shortly, and he desires a new POS system to operate the business with. Currently, the...”* [\(MORE\)](#)

**Lead #348536** / **\$2,100** [VIEW FULL PROFILE →](#)

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A retailer of hard goods in Jamaica who needs inventory control functionality.

*“This lead is a **\*\*Jamaican-based retailer of hard goods with 15,000 employees\*\*** looking for a solution that can handle inventory management. The lead contact is the IT manager. They are looking for a simple inventory solution that can handle barcoding. He is interested in receiving a demo of CodeSoft, but will also review up to 4 additional...”* [\(MORE\)](#)

**Lead #348521** / **\$2,050** [VIEW FULL PROFILE →](#)

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

*“This lead is for a property management company looking for a solution that can handle property management. The lead contact is the former financial manager for a church currently acting in a consultant role. He is looking for property management software that can handle properties that he owns as well as properties owned by his church. The church...”* [\(MORE\)](#)

**Lead #348637** / **\$1,440** [VIEW FULL PROFILE →](#)

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A non-profit in Saskatchewan who needs fund accounting and donor management components.

*“This lead is for a Canadian non-profit organization looking for a solution that can handle donor management and fund accounting. He is looking specifically at Shepherd's Staff and would like one other option to compare. The lead contact is the financial secretary for the organization. He is looking for a solution that will allow him to track...”* [\(MORE\)](#)

**Lead #348415** / **Open** [VIEW FULL PROFILE →](#)

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A non-durable goods distributor in Alabama who needs sales tax capability.

*“This lead is a distributor of nondurable goods looking for a solution that can handle sales tax. The lead contact is the accounting assistant conducting a search on behalf of the owners who will be making the final decision. She is*

primarily looking at solutions that will be able to give them sales tax rate updates. They have already reviewed..." [\(MORE\)](#)

**Lead #348632** / **Open** [VIEW FULL PROFILE →](#)

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A general contractor in Indiana who needs aia billing form functionality.

*"This is an electrical contractor company with 35 employees and around \$12M in annual sales. This contact is an accountant with the company who desires a solution that can provide him with \*\*Microsoft Word templates for AIA billing forms.\*\* Such desired forms include the G702 and G703. This contact has had an incredibly tough time finding these..."* [\(MORE\)](#)



**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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