

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 #350250 / \$740,000 [VIEW FULL PROFILE →](#)

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

"This lead is a made to order manufacturer of retail signage that also does litho and screen printing that is looking for a full ERP solution to handle the entire entity including: AP, AR, GL, CRM, estimates, EDI, inventory, job costing, MRP, order management, purchase orders, supply chain management, and WMS. The lead contact is in IT management..." [\(MORE\)](#)

Lead #350143 / \$428,000 [VIEW FULL PROFILE →](#)

A non-profit in Massachusetts who needs ERP including: payroll, project management, HR management, donor management, GL, AP, and AR components.

*"**Please be aware that because of the possible scale/scope of this project, the contact is in the very early stages of reviews and not in a rush to make any decisions without a thorough process. He ultimately may be turned off by aggressive sales individuals** This lead is for a non profit that specializes in healthcare delivery working with the..."* [\(MORE\)](#)

Lead #350079 / \$179,200 [VIEW FULL PROFILE →](#)

A non-durable goods distributor in Ontario who needs ERP including: supply chain management, warehouse management, GL, and AP components.

“This lead is a Canadian-based distributor of non-durable items looking for a new ERP solution that can assist with AP, AR, GL, inventory control, order management, PO, and warehouse management. The lead contact is the controller who needs to find a new solution because she was informed their current system, Macola 10, will no longer be supported...” [\(MORE\)](#)

Lead #350292 / \$147,000 [VIEW FULL PROFILE →](#)

A medical device manufacturing company in Colorado who needs ERP including: inventory control, order management, CRM, manufacturing management, and four other modules.

“This lead is a medical device manufacturer that is in need of an ERP solution geared towards medical device manufacturers and includes: AP, AR, GL, CRM, inventory, MES, MRP, order management, purchase orders, and the option to add payroll in the future. The lead contact is the purchasing and inventory manager for the company. He said they were on...” [\(MORE\)](#)

Lead #350261 / \$90,400 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in California who needs inventory control, CRM, and EDI capabilities.

“This lead is for a ~\$1M MTS and MTO woodworking and welding organization looking for ERP software that can do CRM, Inventory Control and EDI. The lead contact is the Assistant Business Manager who has been tasked with reviewing these capabilities as this is mostly a manual process today. The contact mentioned they are using Quickbooks Enterprise...” [\(MORE\)](#)

Lead #350099 / \$74,800 [VIEW FULL PROFILE →](#)

A service company in Tennessee who needs inventory control, purchase order, job cost, and CRM functionalities.

“This lead is for a multi location HVAC residential and commercial services organization looking for a field service/ERP type solution that can handle CRM, Estimating, Inventory, Job Cost and Purchase Orders. The lead contact is the Owner of the company who is looking for alternatives to her current solution due to cost and functionality. The lead...” [\(MORE\)](#)

Lead #350264 / \$49,000 [VIEW FULL PROFILE →](#)

A sub-contractor in Florida who needs accounting capability.

“This lead is a general contractor that mainly does sub-contractor work on residential apartment projects. They are looking for a solution that can handle AP, AR, GL, fixed asset management, and job costing. The solution might need to accommodate bank reconciliation as well. They employ about 40 people, and their annual revenues exceed \$25 million...” [\(MORE\)](#)

Lead #350231 / \$48,000 [VIEW FULL PROFILE →](#)

A professional services or consulting company in Arizona who needs accounting and project management functionalities.

“This lead is a professional consulting organization looking for a solution that can handle AP, AR, GL, project management, and time and billing. The lead contact is the controller. They currently track accounting, project management, and time and billing through a combination of Excel spreadsheets and Sage 50, but the solution fails to meet their...” [\(MORE\)](#)

Lead #350106 / \$45,200 [VIEW FULL PROFILE →](#)

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

“This lead is for a MTO furniture manufacturing organization looking for a global capable Inventory and Barcode solution. The lead contact is the Associate Director of Supply Chain who is looking for this type of solution today as there is no solution other than what Netsuite can provide. First and foremost Netsuite is the system of record which...” [\(MORE\)](#)

Lead #348110 / \$42,000 [VIEW FULL PROFILE →](#)

A durable goods distributor in New York who needs ERP including: order management, payroll, job cost, commissions management, GL, AP, and AR functionalities.

“This lead is a distributor of durable goods looking for a solution that can handle AP, AR, GL, commissions management, job costing, order management, PO, and payroll. The lead contact is a partner. They currently

use QuickBooks, and feel like they have outgrown it as a solution. They handle projects that sell and install anything from desks..." [\(MORE\)](#)

Lead #349921 / \$42,000 [VIEW FULL PROFILE →](#)

A non-profit in Arizona who needs fixed asset management capability.

*"**This lead is a redistribution of 350097** This lead is a non profit organization that conducts scientific research and is in need of a fixed asset management solution to track all of their IT assets. The lead contact is the help desk manager who said they had been using Quest Case K1000. He indicated they want to do a better job of..."* [\(MORE\)](#)

Lead #350097 / \$42,000 [VIEW FULL PROFILE →](#)

A non-profit in Arizona who needs asset management capability.

"This lead is a non profit organization that conducts scientific research and is in need of an asset management solution to track all of their IT assets. The lead contact is the help desk manager who said they had been using Quest Case K1000. He indicated they want to do a better job of tracking their assets from inception and when they are..." [\(MORE\)](#)

Lead #350139 / \$42,000 [VIEW FULL PROFILE →](#)

A professional services company in Indiana who needs project management/PSA functionality.

"This lead is a professional services company that operates as a project management/ PSA and PMO company in the energy industry that is looking for a project management solution. The lead contact is the Project Control Specialist and Technology Lead for the company. He indicated that their company is contracted by large companies to assist in all..." [\(MORE\)](#)

Lead #350324 / \$42,000 [VIEW FULL PROFILE →](#)

A healthcare organization in Massachusetts who needs inventory control capability.

“This lead is a government run hospital that is looking for an inventory solution for one of their research labs. The lead contact is the Research Health Specialist who is tasked with sourcing vendors and collecting information to bring back to her bosses. She is not the final decision maker, but will be involved in the process. She said they have...” [\(MORE\)](#)

Lead #350166 / **\$40,400** [VIEW FULL PROFILE →](#)

A food distributor in North Carolina who needs ERP including: inventory control, e-commerce, dispatching, GL, AP, and AR components.

“This lead is for a ~\$1M wholesale food service distributor looking for an ERP solution that can provide accounting (AR, AP, GL), e-commerce, inventory control, and routing management. The organization buys and sells local produce to institutions, grocery stores, chefs and local non profits to name a few. The lead contact is the Operations...” [\(MORE\)](#)

Lead #350102 / **\$39,200** [VIEW FULL PROFILE →](#)

A process operations manufacturer in Texas who needs manufacturing management functionality.

“This lead is a large process operations manufacturer looking for a solution that can handle BOM. The lead contact is the materials management lead. They already have SAP as their ERP solution, but he is in need of something to handle BOM, and he does not want to pay SAP for any of their potential add-ons. He envisions it being a standalone...” [\(MORE\)](#)

Lead #350321 / **\$38,000** [VIEW FULL PROFILE →](#)

An educational organization in Pennsylvania who needs fixed asset management functionality.

“This lead is an educational institution that operates at a collegiate college that is in need of a fixed asset management for tracking their capital assets and depreciation including: buildings, IT assets, furniture, and fixtures. The lead contact is the Controller of the college who indicated they have been using Excel to manage their assets. He...” [\(MORE\)](#)

Lead #350148 / **\$36,000** [VIEW FULL PROFILE →](#)

A restaurant or food service company in West Virginia who needs accounting capability.

“This lead is for a pizza chain with 9 stores in need of an inventory management and accounting (AR, AP, GL) solution. The lead contact is the VP of Operations who indicated they are looking for this type of solution as there is no systematic inventory management solution in place today other than Excel, as well as a very old accounting solution...” [\(MORE\)](#)

Lead #350173 / **\$36,000** [VIEW FULL PROFILE →](#)

A financial company in Illinois who needs inventory control capability.

“This lead is for a financial market services organization looking for inventory management solutions. The lead contact is the Event Manager who is reviewing this capability as there is no solution in place today other than Excel and the reason for this search. The contact is new to the organization and one of her first projects is this evaluation...” [\(MORE\)](#)

Lead #350329 / **\$35,000** [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in California who needs fixed asset management functionality.

“This lead is a large electronics manufacturer with total global company revenue over a billion dollars annually that is looking for an RFID asset management solution. The lead contact works in operations and he said this would be deployed in his facility. He is looking to track IT assets with an RFID tag and said he has roughly 1,000 items to...” [\(MORE\)](#)

Lead #350170 / **\$32,700** [VIEW FULL PROFILE →](#)

A hospitality or hotel management company in Ontario who needs accounting capability.

“This lead is a Canadian-based hospitality company looking for a solution that can handle AP, AR, GL, PO, and inventory control. The lead contact is the CFO of the organization. They had been using QuickBooks Premium and QuickBooks Enterprise, and she felt like the solution felt short of their needs in other areas such as handling POs and inventory...” [\(MORE\)](#)

Lead #350169 / **\$30,300** [VIEW FULL PROFILE →](#)

A general contractor in Texas who needs ERP including: estimating, GL, AP, and AR capabilities.

“This lead is a general contractor who primarily handles commercial projects, but on occasion, will take on residential projects. He is looking for a solution that can handle AP, AR, GL, estimates, quotes & proposals, job costing, and project management. The lead contact is the owner of the company. He typically handles about 4-5 projects per year...” [\(MORE\)](#)

Lead #350149 / **\$28,800** [VIEW FULL PROFILE →](#)

A rental company in Louisiana who needs inventory control capability.

“This lead is an equipment rental company looking for a solution that can help them with inventory control. This is a smaller organization with 10-15 employees. Online estimates place their annual revenues at around \$1 million, but the lead contact was unsure of the exact amount. The lead contact is a manager for the company, and he is looking for...” [\(MORE\)](#)

Lead #349968 / **\$23,300** [VIEW FULL PROFILE →](#)

An accounting firm in Texas who needs CRM capability.

“This lead is a CPA firm that is looking for a CRM solution for their business. The lead contact is the owner of the firm who indicated currently he is working with 10-15 clients and growing. Due to some unexpected health issues, he is outsourcing the actual book keeping of his clients to another firm. He wants a CRM system that will let them track...” [\(MORE\)](#)

Lead #350224 / **\$23,000** [VIEW FULL PROFILE →](#)

A soft goods distributor in California who needs inventory control and warehouse management functionalities.

“This lead is a 3PL company that does clothing distribution and order fulfillment for customers that is looking for an inventory and WMS solution. The lead contact owns the business and she said they are trying to grow their business and win new customers. As part of this, she indicated she wants to have a better inventory and WMS solution in place...” [\(MORE\)](#)

Lead #349904 / \$22,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in New York who needs inventory control capability.

*“This lead is a made to order manufacturer looking for an inventory control solution that can handle barcoding capabilities. **The solution needs to be able to integrate with Oracle Netsuite.** While he did not have exact numbers, he estimates they do around \$100 million in annual revenue. The lead contact is the lead systems engineer/manufacturing...”* [\(MORE\)](#)

Lead #350364 / \$21,700 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Texas who needs inventory control capability.

“This lead is a made to order machine shop that builds components for the oil field that is looking for an inventory solution for their raw piping materials. The lead contact is the Office Administrator who indicated they have no solution in place to handle their inventory. She said all of their accounting is done by their parent company as well...” [\(MORE\)](#)

Lead #350323 / \$21,500 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Florida who needs accounting and order management capabilities.

“This lead is for a soon to be 6 employee start up manufacturing MTO organization looking for a very basic accounting and order management solution. They will be in the business of making remembrance pillows. The lead contact is the Owner of the company who is looking for this solution as there is no solution in place today and he needs this...” [\(MORE\)](#)

Lead #350214 / \$19,100 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Tennessee who needs inventory control and purchase order components.

“This lead is for a MTO fire resistant corrugated box manufacturing company looking for a Purchasing and Inventory (secondary) Management solution. The lead contact is the VP of Operations who indicated these capabilities are

within Excel and Quickbooks Enterprise at best and this is creating many challenges thus this search. ****The main requirement...** [\(MORE\)](#)

Lead #350164 / \$19,000 [VIEW FULL PROFILE →](#)

A heating, A/C and ventilation services company in Florida who needs supply chain management capability.

“This lead is an HVAC company that is looking for a supply chain management system to manage their warehouse. The lead contact is the Warehouse Supervisor who said the primary goal is to find a solution that would assist with item receiving, allow them to then check in the box and add a sticker with a job name or code on it. He would also want to...” [\(MORE\)](#)

Lead #350031 / \$18,000 [VIEW FULL PROFILE →](#)

A wealth management company in Minnesota who needs investment portfolio management functionality.

*“**This lead is a redistribution of lead 350061 as he is now open to alternatives** This lead is a wealth management company that is looking for a tool to assist with their investment portfolio management. The lead contact is a financial planner for the company who indicated he is working with 120 clients and is looking for a tool that can assist...”* [\(MORE\)](#)

Lead #350216 / \$17,600 [VIEW FULL PROFILE →](#)

A professional services company in Ontario who needs accounting and bank reconciliation modules.

*“This lead is a Canadian professional services company that provides management services to 20 non profit organizations that is looking for an accounting system to handle: AP, AR, GL, and bank reconciliation. The lead contact is the CFO of the organization who said they are using AccPac V6 which isn't supported. As part of this evaluation, ****they...**”* [\(MORE\)](#)

Lead #350336 / \$17,600 [VIEW FULL PROFILE →](#)

A sub-contractor in Texas who needs accounting and project tracking components.

“This lead is a start up commercial subcontractor that will be focusing on demolition projects that is looking for a construction ERP solution to handle: AP, AR, GL, job costing, project management, with CRM as a wishlist item. The lead contact is one of the owners of the company who said they started the business last week. He said he is actively...” [\(MORE\)](#)

Lead #350045 / \$15,800 [VIEW FULL PROFILE →](#)

A made-for-stock manufacturer in California who needs ERP including: inventory control, payroll, manufacturing management, invoicing, sales tax, GL, AP, and AR components.

*“This lead is a made-for-stock manufacturer looking for a **Mac-based solution** that can handle AP, AR, GL, BOM, inventory control, invoicing, payroll and sales tax. **This lead has previously been submitted as lead number 348692, but the lead contact has expanded the search parameters to include an increase in setup fees. She had previously...”* [\(MORE\)](#)

Lead #350089 / \$14,800 [VIEW FULL PROFILE →](#)

A professional services company in Texas who needs bid management - government and contract management capabilities.

“This lead is for a full-service engineering firm with expertise in mechanical, electrical, plumbing and fire protection design and build looking for government contract and bidding management solutions. The lead contact is the Business Development Executive who says they are interested in pursuing/procuring government opportunities and is looking...” [\(MORE\)](#)

Lead #350128 / \$14,800 [VIEW FULL PROFILE →](#)

A professional services or consulting company in Alabama who needs inventory control functionality.

“This lead is for an engineering firm (mostly government) in need of a inventory management solution. The lead contact is in Procurement and indicated they are looking for this type of solution as there is no solution in place today other than an excel based process which is creating challenges. The contact mentioned they are building "things" for...” [\(MORE\)](#)

Lead #350252 / \$14,600 [VIEW FULL PROFILE →](#)

A non-profit in Florida who needs ERP including: payroll, fund accounting, donor management, GL, AP, and AR capabilities.

“This lead is a baptist church looking for a solution that can handle AP, AR, GL, donor management, fund accounting, and payroll. The lead contact is the administrator who will discuss the project with others, but will ultimately be the final decision maker on the solution. They had been using ACS software as their church accounting solution, but...” [\(MORE\)](#)

Lead #350338 / \$14,400 [VIEW FULL PROFILE →](#)

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

“This lead is a consultant calling on behalf of their made-to-order manufacturing client looking for a solution that can work with their current ERP and handle BI. They are looking to be connected with providers of Oracle Hyperion Planning as well as another 2 options to compare features and pricing. Her client employs over 60 people, and online...” [\(MORE\)](#)

Lead #350059 / \$14,100 [VIEW FULL PROFILE →](#)

A general contractor in Florida who needs ERP including: estimating, GL, AP, and AR components.

“This lead is a general contractor looking for construction software that can handle AP, AR, GL, estimating, job costing, and project management. They are set up to handle residential and commercial projects, but most of their business has been in residential projects to this point. The lead contact is the accounting manager. They are currently...” [\(MORE\)](#)

Lead #350028 / \$12,800 [VIEW FULL PROFILE →](#)

A medical distributor in Jamaica who needs inventory control capability.

*“**This lead is for a medical dispensary based in Jamaica** This lead is for a medical dispensary and retail with 2 locations looking for an inventory management solution. They have a 3rd location which is their farm. The lead*

contact is the Executive Assistant & Group Compliance Manager who is looking for this solution as their existing solution..." [\(MORE\)](#)

Lead #350318 / \$12,600 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in California who needs inventory control functionality.

"This lead is for a made to order manufacturer of electrical components that does work for the government and aerospace that is in need of an RFID inventory solution. The lead contact is a manufacturing engineer with the company who said they have a client that is requiring RFID technology to be used on the electrical components the company creates..." [\(MORE\)](#)

Lead #350284 / \$12,000 [VIEW FULL PROFILE →](#)

A general contractor in Pennsylvania who needs estimating capability.

"This lead is a residential general contractor looking for a solution that can handle estimating, quotes and proposals. They are looking for a demo of XactRemodel, and are interested in hearing from 2 additional solutions to compare features and pricing. They typically handle about 20 projects per year. The lead contact is the business manager of..." [\(MORE\)](#)

Lead #350255 / \$11,900 [VIEW FULL PROFILE →](#)

A sub-contractor in Arizona who needs estimating capability.

"This lead is for a residential roofing company looking for a modern estimating software. The lead contact is the assistant who is looking for an estimating solution to replace their current unsupported solution that is no longer available. The contact indicated they are using ConTracker EZ and because it is no longer available and not supported..." [\(MORE\)](#)

Lead #350332 / \$11,600 [VIEW FULL PROFILE →](#)

A service company in Kansas who needs estimating functionality.

"This lead is for a commercial and residential (75%) HVAC, electrical and plumbing organization seeking an Estimating and Quoting solution. The lead

contact is the Co-Owner is at a point where they have become very busy and need to move from paper based quoting to a more systemic way of electronically estimating and quoting. They have so much work..." [\(MORE\)](#)

Lead #350083 / \$9,750 [VIEW FULL PROFILE →](#)

A general contractor in British Columbia who needs accounting and project management components.

"This lead is a Canadian based start up general contractor that is a branch of an existing contracting company that is in need of a solution to handle: AP, AR, GL, job costing, and project management. The lead contact is the pre-construction manager who said this will be a completely new company to the one of they currently have. She said this..." [\(MORE\)](#)

Lead #350253 / \$8,700 [VIEW FULL PROFILE →](#)

A general contractor in Florida who needs estimating capability.

"This lead is a commercial general contractor that is looking for an estimating solution. The lead contact is the Vice President of the company who indicated they currently do not have an invoicing solution in place and use spreadsheets and manually do their estimates. She said they use Gemini accounting for their financial needs and are not open..." [\(MORE\)](#)

Lead #350266 / \$8,700 [VIEW FULL PROFILE →](#)

A non-profit in Georgia who needs donor management capability.

"This lead is for a small non profit organization that mainly helps underserved people by doing things such as helping them pay bills, etc. They are looking for a donor management (primary) and fundraising (out of scope/longer term) solution. The lead contact is the Director who is currently managing their donor/contributions in excel today and..." [\(MORE\)](#)

Lead #350171 / \$8,300 [VIEW FULL PROFILE →](#)

An educational organization in Colorado who needs inventory control and asset management functionalities.

“This lead is for a community college looking for a simple asset and inventory management solution. The lead contact is a Buyer who has been tasked with reviewing solutions as their current "solution" is Excel and very time consuming. The lead contact said they are looking for a better way to track their assets then how they are doing it today...” [\(MORE\)](#)

Lead #350040 / \$8,000 [VIEW FULL PROFILE →](#)

A made-to-order manufacturer in Mexico who needs inventory control, CMMS, and manufacturing management functionalities.

*“This lead is a made-to-order manufacturer looking for a solution that can help with CMMS, inventory control, and MRP. While the company itself has locations in US, Canada, Latin America, Europe, and Asia, **this particular lead is located in Mexico.** He did not mention if the solution would be specific to his location or if it would be used at...”* [\(MORE\)](#)

Lead #350086 / \$7,500 [VIEW FULL PROFILE →](#)

A non-profit in Louisiana who needs accounting and donor management functionalities.

“This lead is a non profit church looking for a system to handle: AP, AR, GL, and donor management. The lead contact is the administrative assistant who indicated their existing Praishsoft solution is changing its deployment from local to web based for accounting and their donor management would no longer be linked. She is looking preferably for an...” [\(MORE\)](#)



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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