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Sent: Wednesday, May 4, 2016 15:02
To: Louis Botes
Subject: This Morning's Fresh Leads (14)

THIS MORNING'S FRESH LEADS

Hello, Louis! We have 14 leads for your review this morning. They will be matched at 1pm ET. Click the links below to read the full profile, including detailed interview notes.

Lead #301507 [VIEW FULL PROFILE →](#)

Yesterday afternoon, Amanda Matusin spoke with an international retailer of hard goods in Minnesota who needs ERP including: order management, foreign currency conversion, supply chain management, sales tax, help desk, and accounting functionality.

“This is a hard goods retailer that channels customers through ecommerce, catalog sales, mailers, and inbound/outbound sales calls in their call center. Both internationally and abroad, the company has 5 locations total, and 2 legal entities. There will soon be a 3rd legal entity located in Asia. They’re doing about 300M in annual revenues and have...” [\(MORE\)](#)

Lead #301786 [VIEW FULL PROFILE →](#)

Yesterday afternoon, Brent Laskowski spoke with an association in Ontario who needs accounting, budgeting, fund accounting, and invoicing capability.

“This is a non-profit association that provides services for members and members are part of a specific industry, due to the fact that they have Epicor systems in place for managing only backend finances, they are searching for a new software solution. They have reviewed Sage systems and Epicor systems, therefore these systems have been removed...” [\(MORE\)](#)

Lead #301787  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Adam Bluemner spoke with an IT systems integrator in West Virginia who needs an accounting, time-tracking, and job-costing program capable of helping them establish DCAA compliance in order to pursue targeted government contracts.

“This company is a systems integrator of IT solutions who is starting to pursue government contractors. They currently have 38 employees and are using QuickBooks and Connectwise for their accounting and time tracking. The goal of this search is to find a software system that will help them establish the DCAA compliance they require to pursue...” [\(MORE\)](#)

Lead #301791  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Russ Davidson spoke with a finance pension plan company in Ontario who needs ERP including: cash management, HR management, budgeting, GL, AP, and AR modules.

“This is a retirement pension plan administration. They will be collecting pension contributions from employees and employers across their area and paying out pension benefits and investing money that comes in on investment plans they coordinate. They will have a main two sides to their operations, which is investments vs. pension operation. This...” [\(MORE\)](#)

Lead #301777  [VIEW FULL PROFILE →](#)

Yesterday morning, Brent Laskowski spoke with a large multi-company operation in Pennsylvania who needs multi-entity accounting functionality.

“This is a search for the headquarters (management) entity of a multi-company operation that has an industry specific software solution in place for managing finances, and due to the fact that the software company has just recently went out of business, there is no longer support, and they are now identifying alternative software options. They are...” [\(MORE\)](#)

Lead #301794  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Brent Laskowski spoke with a new non-durable goods distributor in Louisiana who needs ERP including: supply chain

management, cash management, payroll, invoicing, sales analysis, GL, AP, and AR components.

“This is a new distribution business that will selling product on behalf of a large manufacturing company that uses a network of distributors, they do not have any software in place to manage daily operations and they would like to have new system in place by the time they open for business in a few months, so this could be a quick sale. They also...” [\(MORE\)](#)

Lead #301479  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Russ Davidson spoke with a real estate development company in Virginia who needs work order management functionality.

“This is a general contractor of real estate developments. They create generally 50-100 homes each year. They handle a lot of residential homes as well as duplexes and multi-family condos. This contact is the VP of Construction Design who desires a work order management solution to handle scheduling and tracking service on a lot of these homes...” [\(MORE\)](#)

Lead #301781  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Amanda Matusin spoke with a made-for-stock manufacturer in California who needs inventory management functionality.

“This is a b2b and made for stock manufacturer that is looking for inventory management software. They’d like the solution to integrate with their Netsuite accounting program that they currently have in place. They have a very large inventory of parts used to make the finished units, which are housed in 2 warehouse locations. They currently do not...” [\(MORE\)](#)

Lead #301801  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Russ Davidson spoke with an insurance company in North Carolina who needs accounting capability.

“This is an insurance agency that sells commercial and personal insurance. They mainly deal with property and liability insurance. This contact is the President of the company who desires an accounting solution to meet their

that they do not do invoicing. They have contracts..." (MORE)

Lead #301170  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Russ Davidson spoke with a non-profit in California who needs accounting capability.

"This is a nonprofit trade organization with a large member base that helps them find opportunities and resources for their industries for employment or completing certain tasks. This contact is the Associate Director of Finance and Operations for the company who desires an accounting solution to meet their AP, AR, and GL needs. They also believe..." (MORE)

Lead #301720  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Brent Laskowski spoke with a systems integration company in Utah who needs fixed assets functionality.

"This is a systems integration company in the biotechnology field, and they have recently parted ways with their outsourced CPA firm that tracked depreciation for them, so they are searching for a fixed asset management system, and they project that they will be purchasing a system ASAP, and they want to speak with providers ASAP. It will be..." (MORE)

Lead #301792  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Adam Bluemner spoke with a bakery and coffee shop in Quebec who needs accounting functionality.

"This company is a new bakery and coffee shop. At this point, they do not yet own any accounting software. The purpose of this search is to find a basic back-end accounting program. While the majority of the revenues will come through cash transaction conducted through register sales (POS is not required), they will have some receivables for..." (MORE)

Lead #301707  [VIEW FULL PROFILE →](#)

Yesterday morning, Amanda Matusin spoke with a non-profit in District of Columbia who needs GASB compliant accounting and fund accounting

software.

“This is a nonprofit organization in search of a GASB compliant accounting and fund accounting solution. The organization currently utilizes QuickBooks Premier to manage their financials, but they are looking for a replacement program that is affordable, but able to meet their non-profit specific needs more completely. Note: the solution must be...” [\(MORE\)](#)

Lead #301800  [VIEW FULL PROFILE →](#)

Yesterday afternoon, Russ Davidson spoke with an accounting firm in Wisconsin who needs payroll capability.

“This is a tax accounting business that helps provide individual, corporate, and partnership tax preparation to area clients. They also offer a small level of small business accounting and payroll processing. This contact is an accountant for the business who desires a payroll solution for their clients. This payroll solution should be able 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.

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