



## **AppFinity Software Designs a Winning Web Order/CRM Solution for Varsity Painting**

*Affordable, custom-designed solution and rapid-response technical support yield very satisfied client.*

As one of the largest and most successful painting companies in California (over 6000 jobs completed to date), Walnut Creek-based Varsity Painting ([www.varsitypainting.com](http://www.varsitypainting.com)) places great emphasis on getting the best possible results from three key areas of its operations – marketing, sales and production. Until recently, the company had to endure the inefficiencies of manual or inadequate computerized systems that made it very challenging to track labor resources, maintain optimal scheduling efficiency and gauge ongoing profitability.

According to Varsity Painting president Roland Thoms, “It was extremely difficult to track the source of our leads and the actual conversion rate into sales, because no mechanism was in place to enable input of that information from the sales force. While we were able to rely on a loose paper trail to determine perhaps 50% of the sources of leads, we had no data from which to assess the percentage of leads that eventually turned into painting jobs.”

“Tracking sales was an equally shaky proposition,” claimed Thoms. “Before installing a computerized system, our salespeople communicated their sales verbally. Once we installed a basic computerized system, they input their own sales data, which led to a scenario in which 10% of our reported sales were actually “exaggerated bookings” that never resulted in jobs. This resulted in a significant discrepancy between our reported sales and the actual income we derived from completed jobs.”

### **AppFinity Software resolves a host of tracking issues with a truly affordable solution.**

Thoms knew it was time to invest in a cost-effective solution that would resolve the company’s widespread tracking issues. He had already implemented a custom solution from a Canadian consultant, but the software didn’t possess the flexibility or functionality to fit the needs of a fast-growing painting company.

In the summer of 2004, the company’s CPA highly recommended a San Francisco-based software developer, AppFinity Software Corp., to design and implement a custom-designed solution. Dennis Lo, AppFinity’s co-founder, visited Varsity Painting to gain an in-depth understanding of the company’s day-to-day business processes. Together, Lo and Thoms reviewed Varsity Painting’s internal systems and CRM needs so that they could design a solution that would enable management to track all the key components of a job from initial prospecting through completion.

More specifically, Thoms wanted a Web Order/CRM system that could efficiently and accurately accomplish the following tasks:

1. Track overall profitability of work.

2. Track profitability by salesperson and/or paint crew.
3. Check volume of sales/production on a weekly basis.
4. Generate timely marketing reports such as Lead Tracking Conversion Rate (by month or year-to-date) and Completed Job Profit Report, Weekly Analysis (amount of work booked/estimates completed).
5. Create a "Newsletter Board" where Thoms could communicate with his entire staff

AppFinity first customized a series of screen layouts for Thoms to review and approve before commencing actual coding of the software. After approval, AppFinity proceeded to develop a Web Order System Manager module, in which they added business logic to make it function like a mini-CRM solution. With this system in place, management now has an invaluable tool to track the entire process from initial prospect all the way through to post-job satisfaction level. The system also offers sophisticated drill-down capabilities so that staff can look up the history of any payment, client or region in which Varsity Painting operates.

CRM (Sales) System  
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### All Orders Listing

Back To Listing | Print | Show All (except Dead and Cancell)

Status	SM	PM	WO #	Estimate Date	Preferred Start Date	Preferred Finish Date	Estimated Hours	Estimated Amount
Booked	Emanuel Sammartino (5510161)		62551	06/04/2005	08/01/2005	08/05/2005	0.00	4450.00
Booked	Isaac Puglia (5510219)		60810	08/01/2005	08/01/2005	08/01/2005	0.00	6866.00
Booked	Sal Sammartino (5510160)		60505	07/15/2005	07/15/2005	07/15/2005	0.00	3500.00
Booked	Chris Gross (5510178)		62282	06/18/2005	07/09/2005	07/13/2005	0.00	7724.00
Booked	Jim Fuller (5510204)		62663	07/05/2005	07/05/2005	07/05/2005	0.00	5433.00
Booked	Chris Gross (5510178)		62278	06/15/2005	07/01/2005	07/08/2005	0.00	5169.00
Booked	Chris Gross (5510178)		62294	06/30/2005	06/30/2005	06/30/2005	0.00	10127.00
In-Progress	Brian Teal (850)	Miguel Birrute (5101107)	60760	11/07/2005	11/10/2005	11/16/2005	0.00	4580.00
In-Progress	Emanuel Sammartino (5510161)	William Pree (5101180)	60972	10/24/2005	11/07/2005	11/11/2005	0.00	5800.00
In-Progress	Shawn Wright (5510227)	Corey Byars (5101164)	61314	10/26/2005	11/07/2005	11/11/2005	0.00	4160.00
In-Progress	Brian Teal (850)	Corey Byars (5101164)	61301	10/25/2005	11/02/2005	11/07/2005	0.00	6640.00
In-Progress	Brian Teal (850)	Angel Gomez (5101105)	61305	10/15/2005	10/31/2005	11/04/2005	0.00	13800.00
In-Progress	Emanuel Sammartino (5510161)	Steve Stiles (p101)	60962	10/14/2005	10/31/2005	11/04/2005	0.00	4750.00
In-Progress	Shawn Wright (5510227)	Steve Stiles (p101)	61310	10/19/2005	10/31/2005	11/04/2005	0.00	4050.00
In-Progress	Brian Teal (850)	Ernesto Moreno (5101160)	60744	09/13/2005	10/24/2005	10/28/2005	0.00	8080.00

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### Calendar View

Week #1	Nov 12	Nov 13	Nov 14	Nov 15	Nov 16	Nov 17	Nov 18
	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
			Sobin Basu / # 60760 / Miguel Birrute				
			Chris Thomas / # 60972 / William Pree		Mr. Francis Xavier Stuart / # 60898 / Vincent Venem		
			Sandy Alex Mackie / # 61305 / Angel Gomez				
			Katherine Osborn / # 61310 / Steve Stiles				
			Chris Kinsel / # 61314 / Corey Byars				
Week #2	Nov 19	Nov 20	Nov 21	Nov 22	Nov 23	Nov 24	Nov 25
	Saturday	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday

  

WO #	SM	PM	Customer	Crew #	Estimated Hours	WO Amount
60760	Brian Teal (850)	Miguel Birrute (5101107)	Sobin Basu	Miguel Birrute	0.00	4580.00
60898	Shawn Wright (5510227)	Vincent Venem (5101147)	Mr. Francis Xavier Stuart	Vincent Venem	0.00	10910.00
60972	Emanuel Sammartino (5510161)	William Pree (5101180)	Chris Thomas	William Pree	0.00	5800.00
61305	Brian Teal (850)	Angel Gomez (5101105)	Sandy Alex Mackie	Angel Gomez	0.00	13800.00

To keep IT costs to a minimum, AppFinity hosts the solution on its secure server and performs modifications to the software when needed, in addition to providing rapid-response technical support should any issues arise. The hosted solution is low-maintenance and low-cost – the best of both worlds.

### **AppFinity Web Order/CRM Solution Offers Tremendous Benefits**

Roland Thoms is thrilled with the benefits Varsity Painting has reaped with AppFinity's custom solution. "Since we implemented the new system, we have enjoyed tremendous time-savings and now we can effectively track all of our marketing, sales and production activities," claimed Thoms. "I can manage my business from any remote location and the system gives us the flexibility to roll with any changes that may occur such as cancellations or price changes. Most important, AppFinity has created a system that we can depend on every day. This solution can serve as a great template for any business in the home improvement industry."

When it comes to AppFinity's support, Thoms is no less enthusiastic. "AppFinity has been extremely responsive to our needs. If any issues arise, we know that they will be on the case and resolve them right away. Once, Dennis Lo even interrupted his vacation to come back to help with a problem when the power went out. That's dedication!"

### **About AppFinity Software**

AppFinity Software Corporation (located in San Francisco, California) and its sister company AppFinity Asia (headquartered in Beijing, China) are the developers of a comprehensive suite of business solutions that complement existing accounting software to achieve a total, real-time information solution for the desktop and Web-enabled systems. AppFinity's product offerings are focused on today's most in-demand applications such as Shopping Cart Ordering systems, CRM and Web-enabled Financial Reporting, so that businesses can benefit from total solutions that integrate their accounting data with the applicable add-on modules that complete their business systems. For more information, please visit AppFinity Software at [www.appfinity.com](http://www.appfinity.com).

### **About Varsity Painting**

Varsity Painting is one of the largest painting companies in California, specializing in the painting of interiors and exteriors of residential and commercial properties. Varsity Painting is an environmentally focused painting company, recycling its dirty paint water and masking paper, and using low VOC, low-odor paints on all interior painting jobs. Working with the Salvation Army, Habitat for Humanity and Shelter Inc, Varsity Painting has painted over 100 homes for needy families. For more information, please visit Varsity Painting at [www.varsitypainting.com](http://www.varsitypainting.com).