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## M-Files Viewpoint

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### Minimizing Change:



### A Key to Document Management Success

What is meant by minimizing change in relation to the implementation of a document management system?

Isn't adopting document management all about

changing the way people work, improving the processes for organizing and managing company documents to reduce time wasted looking for documents, improve information reuse and minimize or eliminate conflicts and loss of data? Yes, it is, but to gain those benefits it's necessary to ensure consistent usage and adoption across the company or organization. We've all probably heard the old adage, "you can lead a horse to water but you can't make him drink." So what does this have to do with document management?

[Click here to read more...](#)

Sincerely,  
*The M-Files Team*

## Announcements

### M-Files CRM



#### **M-Files CRM**

*A powerful and easy to use document management solution with an integrated CRM.*

M-Files is well known as a document management system, but did you know that documents are only one type of object that can be managed with M-Files? M-Files has the ability to manage other data in addition to documents.

The standard, pre-defined object type in M-Files is a "Document," but other object types such as Customer, Contact Person, Employee, Task, Device, etc. can be defined and managed. Based on demand from many M-Files customers using this capability to manage their customers, contacts, email lists, follow-up tasks, and so on, Motive created M-Files CRM, a new Add-on for M-Files.

M-Files CRM is an easy-to-use and versatile application for managing customer and contact information, and sales processes and related data.

Some key features of M-Files CRM include:

- Creating, managing and tracking customers and other contacts.
- Fast searches for customers based on properties such as name, company, geographic region, and so on.
- Creating follow-up tasks and reminders.
- Generating email lists and address labels for communicating to contacts by email or traditional mail.
- Seamless integration with M-Files document management capabilities allowing documents to be linked and managed with CRM contacts.

Now you can have your cake and eat it too, a powerful document management solution and an integrated CRM that is both easy to use and affordable.

[To learn more click here...](#)



*"In contrast to Autodesk Vault, M-Files is a comprehensive company-wide solution, as applicable for accounting or clerical documents as it is for AutoCAD's DWG files."*

*"That was the selling point - the minimal user interface," says Bonenberger. "It kept it simple for the employees. It didn't change their workflow much at all."*

## M-Files Customers

### BSA LifeStructures: Replacement Windows?

*BSA LifeStructures finds a way to manage all its documents better than traditional Windows network folders -- without changing how architects and designers work*

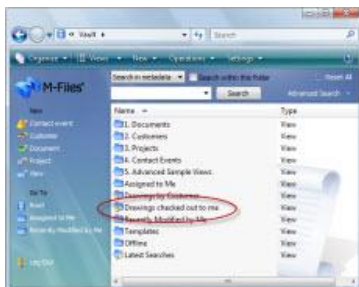
In any kind of design firm, documents are not only the final deliverable but also the currency of a project's workflow. Keeping track of changes can be a challenging prospect even among a few designers, but as a company grows, a laissez-faire method of managing files very soon proves problematic.

That was the case with BSA LifeStructures. The Indianapolis AEC (Architecture Engineering & Construction) group is not just any kind of design firm, but more like an every-kind-of-design firm.

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## Tech Tip

### Defining "Dynamic" Views



With traditional Windows folders the explicit hierarchy of the folders define where a document or file is located. To find a file you open the folder in which it resides. Further, a file can only reside in one folder, unless the document is copied, or a shortcut is created, and placed in multiple folders, creating duplicates files and clutter that waste time when searching, and worse, potentially lead to using out of date files or data loss.

In M-Files there is only one master document or object, but they can be grouped and displayed in different views according to the objects' properties or metadata. This is a very powerful and unique capability of M-Files.

[Click here to read the rest of the Tech Tip...](#)

## Get M-Files Now!

It's amazing how many companies are not taking advantage of one of the most straightforward ways to improve their bottom line, that being better organization and efficiency in managing their documents and information.

And M-Files provides one of the easiest and most accessible, yet powerful solutions on the market. Since you are receiving this newsletter you are already a customer and have begun to accrue the benefits of M-Files, or you are considering it and as such you are well on your way be realizing that there is a problem for which there is a very straightforward and proven solution.

Don't put it off any longer; gain an edge over your competition. The cost of delaying the decision by a month can be thousands or tens of thousands of dollars. Contact us at [sales@m-files.com](mailto:sales@m-files.com) with any questions about the articles or information in this newsletter, or to get started with M-Files today!

Thanks for reading!

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