

*Client: North Coast Refrigeration & Electric
Industry: General Business and Paperless Office*

Making the Building Trades Digital

California licensed contractor goes paperless with easy-to-use electronic document management software



“You feel funny shredding all your documents,” admits Daniel Maas, owner of North Coast Refrigeration & Electric, Inc., “but then, that was the whole point.”

North Coast RE is a shop of ten employees, typically sized for a building trades contractor serving the needs of local commercial and resident customers. North Coast RE serves the seaside community of Fort Bragg, just up the California coast from San Francisco.

Putting all the paperwork of the business into a web-accessible document management system was something Maas wanted to do for a long time. “Because paperwork accumulates at such a rapid rate, you keep having to put it in more and more file cabinets and storage boxes,” he says.

“Since the electronic file system makes backups regularly and I store them offsite, I feel pretty confident about doing away with paper files. Plus, in the two years I’ve had the electronic document manager, I have never had any issues with the software.”

Maas scanned his old paper files and stored them into the Windows-integrated file management software M-Files, by Motive Systems.

Keyword indexing for intuitive document management

“We store all of our documents in M-Files,” he says. “This includes our accounting documents, like accounts receivable, invoices, payables as well as our job information, such as orders, estimates and contracts. All project information, even photos of the work site, go into M-Files.”

A simple software to install on either a single PC or on a network, the comprehensive document management system is easy to use for the everyday saving and retrieving documents through any Windows application. Maas is like many licensed contractors nationwide who have switched from traditional paper methods to a digital system to more efficiently manage their information and workflow.

“Before, everything was on paper. If you wanted to look at a job file, you had to go to the filing cabinet,” explains Maas. Office staff or employees in the field could pull a company file, but “if someone else had it, you were out of luck. If the person who had it was in phone range, you could try to call and find out what you were looking for. With M-Files on the other hand, everybody has access to everything they need no matter where they are.”

Because the M-Files document manager places all company files into a single repository accessible from any workstation in or out of the office, Maas can bring up any file, even if another employee is using it.

“M-Files has helped me as well as the other manager here who does a lot of the estimating, as we both have access to the same files at the same time,” says Maas. “The clerical and accounting staff can get to all of that too. When it comes time to bill, especially on a contract project, they can immediately get to the contract and the previous billing. All of that information is available all the time.”

The M-Files file management system operates through a simple indexing method that attaches keywords to each document. The keywords easily identify a particular file for quick and precise searches of a single, companywide repository.

Working without paperwork

“We print everything on a printer -- such as accounts receivable invoices that have to go out – and we also print a copy as a PDF to be stored in M-files. We’ll mail the paper copy and store the digital version as a permanent record,” says Maas. “We also have about four or five desktop scanners at the main office location. Any mail that comes in, like accounts payable billings and such -- we just drop them in the scanner and they go into M-Files that way.”

North Coast capitalizes on M-Files keyword indexing to keep all files exactly categorized by customer, author, date, and operational function. “We include the project name and customer name and other details as metadata along with the normal file name,” Maas explains. “Over time this generates a master record for that client. All of the files for that job throughout our company are indexed and can be located with those key terms. The M-Files Search feature retrieves anything we want instantly.”

Maas selected the file management system carefully, after downloading and trying out many alternatives. “A lot of programs have features that I would have found hard to use in the actual work process,” he says. He selected M-Files because it integrates with Windows Explorer, making the application as easy to use as standard Windows.

“With M-Files you can perform multiple searches and keep them open as long as you need them. When somebody calls with a request, you have immediate access to those documents without closing anything else you are working on. The difference between other document management programs and M-Files is the usability.”

About North Coast Refrigeration & Electric

North Coast Refrigeration & Electric, Inc offers quality commercial and residential service to HVAC, generator, or refrigeration customers in Fort Bragg, California.