

Transformed a Century-Old HVAC Company with Secure, Cloud-Based Document Management



Industry: HVAC

Services Used: Document Workflow Solutions
Backfile Scanning Services

“When we moved, we had seven years of stored records and banker’s boxes upon banker’s boxes. We used Applied, and they actually scanned and stored all those documents for us. It’s nice to have everything at my fingertips. I’m not digging in drawers anymore. I just put in my search criteria, and they pop up. Our Project Managers now have more control over their jobs day-to-day. It’s saved us a lot of time and a lot of space. And time is money.”

CINDY DRUBA
Tech Credit Union

Customer Challenge

CSE Morse is a Michigan-based HVAC and sheet metal fabrication company with roots dating back to 1896 and a customer base that includes several Fortune 500 organizations. However, like many businesses, the pandemic exposed the limits of their paperbased processes. Remote work was nearly impossible. Project Managers couldn’t access documents offsite. Records were scattered in filing cabinets and more than 100 banker’s boxes. As the company prepared to move into a new facility, they knew they couldn’t bring decades of physical clutter or outdated workflows with them.

Applied Solutions

Applied Innovation partnered with CSE Morse to modernize their operations by implementing DocuWare, a cloud-based document management and workflow automation platform. The team digitized seven years’ worth of records and over 100 banker’s boxes, organizing them into a secure, searchable system. Project Managers gained remote access to critical documents, and staff could instantly retrieve files using custom search criteria. Applied also established secure backup protocols and remained available for ongoing support and training.

The Benefits

Seamless transition to a cloudbased, paperless document system

No need for physical file cabinets or off-site storage

Instant access to job files, on or offsite, for faster project execution

Secure, backed-up data supporting audit readiness

Significant time and cost savings across departments

Responsive support from Applied’s knowledgeable team



At Applied Innovation, we have nearly four decades of technology expertise, 550+ team members, world-class brand partners, and a passion you’ll rarely find in a business like ours. Plus, as an independent dealer, we have the autonomy to always do what’s right for you. Whether your goal is adopting new technologies, making smarter use of the tools you already use, or maybe a mix of both, our people are always available. And always happy to help.



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