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Review of SimplyFile 4

By Edward J. Zohn

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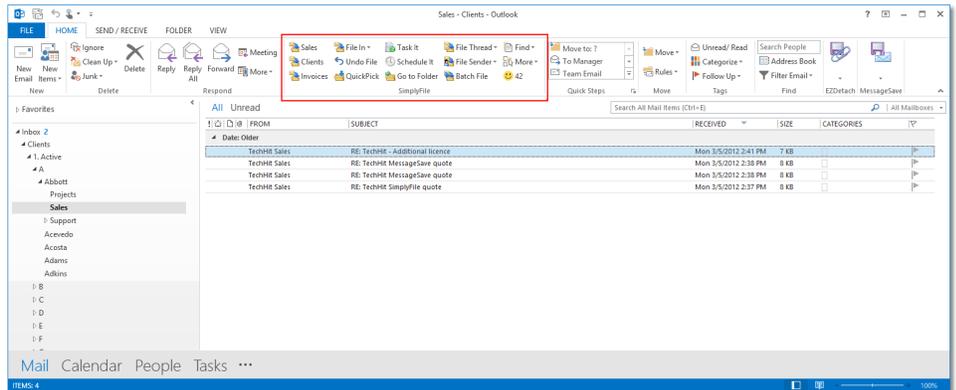
New Jersey lawyer Ed Zohn is an aficionado of both Outlook and document management so we asked him to write a review of SimplyFile 4. This Outlook add-on enables you to file incoming and outgoing email into the correct folder with one click. Ed covers setup, core functionality, and pricing. He also explores advanced features such as snoozing an email message to make it disappear until a later time. Don't miss Ed's verdict.

Many if not most lawyers in small law firms use Microsoft Outlook. While other good email systems exist, nothing else integrates as well with Exchange (including Office 365). However, Outlook lacks some features lawyers need, which has given rise to a vibrant market for third-party add-ons. I covered 44 of these in *TL Research Buyer's Guide to Outlook Add-Ons for Law Firms*.

One in particular stands out — Techhit's *SimplyFile 4* — because it addresses Outlook's inability to quickly and easily file and retrieve email. This issue of *SmallLaw* contains a review.

The Email Management Need

Leaving all inbound email in the Inbox is not an option for those of us in small law firms. Keeping outbound mail in the Sent Items folder is even worse. However, even if you have the discipline and time to create an Outlook folder tree, maintenance is tedious. On one hand, you need that folder structure; you can't revert to searching for everything. On the other hand, a more evolved folder structure



creates other problems. You want the benefits — without the costs.

SimplyFile aims to fix these problems by filing your incoming and outgoing email in a consistent and logical structure, most of the time with one keystroke. I evaluated SimplyFile in my production environment. I've been a licensed SimplyFile user since learning about it when writing the above report.

Getting Started

Installing SimplyFile on my three Windows computers (office, home office, and laptop) was uneventful. All of my computers have Windows 7 (64-bit), Office 365 with Outlook 2013, and hosted Exchange. I subscribe to a hosted Exchange service (I don't use the offering from Microsoft). I had no technical problems with SimplyFile in my environment. It added a customizable toolbar to the "Home" tab of my Outlook 2013 ribbon.

TechHit claims — correctly — that SimplyFile reduces your email filing time, increase filing accuracy, and allows for instant navigation to any folder. SimplyFile works on sent and received email and supports keyboard-only or mouse use.

The application algorithmically adapts to your filing habits, making the advertised one-click filing

possible. It also processes outgoing email just as easily.

SimplyFile also embodies the philosophy that fully-automated filing systems may misfile some email if you are not vigilant. Therefore, it presents you with a small list from which to choose the target folder. If your best option doesn't appear, it presents a pop up menu from which you can refine your search for the right folder. If you have hundreds of nested folders like I do, SimplyFile can save you enormous amounts of time and frustration.

An Example

The best way to describe how SimplyFile works is with a brief example.

Let's say I receive an email message from my client Patricia Reichardt. Patty's Outlook folder is third-level (i.e., under "Inbox" I have "Clients" and then "Reichardt, Patricia."). If I mouse over the message and click once to highlight, SimplyFile shows filing options, even though I haven't yet opened it. SimplyFile takes both the message content and sender into account in making these suggestions.

Since I have previously communicated with Patty, her folder is the first option. I then double-click the email, respond and click

“Send.” Again, because SimplyFile has adapted to my previous communications with Patty, it will ask me if I want to default to Patty’s folder or choose another. SimplyFile enables me to file Patty’s original message at the same time I file my response to her.

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If Patty and I had no previous email history, her folder would not be the first filing choice. I would then opt to search for a previously created subfolder or create a new folder on-the-fly, adding only a few seconds to the process. Upon receiving Patty’s next email, her folder would become the top choice.

It’s all very painless. There’s no need for Outlook’s tedious dialogs, no need to monitor the “Sent Items” folder, and no need to memorize your folder tree — a losing battle under the best of circumstances.

Notable Features

TechHit states that SimplyFile works with Outlook 2007, 2010 and 2013. SimplyFile is not as visually appealing as it could be, but using it is intuitive, fast, and accurate with some nice configuration options. You can choose the buttons to display on your toolbar, configure hotkeys, enable a troubleshooting log, and

modify the prediction heuristics. You can also enable or disable default filing options such as filing the original with the reply, leaving a copy in Sent Items, marking messages read upon filing, etc.

SimplyFile can save space by converting HTML email to plain text. Another nice SimplyFile feature for reducing clutter is the snooze-button. Choose an email, click on “Snooze It,” and decide how long you want this email hidden. You can also create a task or schedule a meeting directly from an email message.

Pricing and Value

SimplyFile’s single-user license costs \$49.95 with a 30-day money-back guarantee. Volume licenses exist as does a 30-day free trial. TechHit’s EULA states that you can use the software “on a number of computers up to, but not to exceed, the number of licenses shown on your purchase receipt.”

SimplyFile easily fulfills its promise. Even if you have a modest Outlook folder structure, you will immediately start saving time.

I wish SimplyFile had a plain English “single-user, multiple-computer” licensing option. Using multiple computers is the reality of 2015 legal life — especially *SmallLaw* subscribers. Software licensing is not always as flexible as it should be. This is a beef I have with many software licensing agreements, not just these.

TechnoScore

SimplyFile easily fulfills its promise. Even if you have a modest Outlook folder structure, you will immediately start saving time. I have more than 1,000 folders and subfolders, nested four levels deep. Because of this app, you would never know this from looking at my default Outlook screen. I save a lot of time.

Although competing add-ons exist, SimplyFile gets my nod because of its more minimalistic interface and no-choice purchasing decision. If you use Outlook you should definitely give it a try. Now. Right now.

TechHit’s Response

We invited TechHit to respond to this review. CEO Alex Kovalchuk responds as follows:

“I would like to thank Mr. Zohn for the detailed review. I would also like to thank many TechnoLawyer subscribers who gave us product feedback over the years. That feedback directly shapes future product development. For example, SimplyFile’s Filing History feature was specifically designed to address the needs of attorneys to easily find and bill for every single billable email.”



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