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Review of QuickFile 5

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 QuickFile 5. 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 — Standss' *QuickFile 5* — 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.

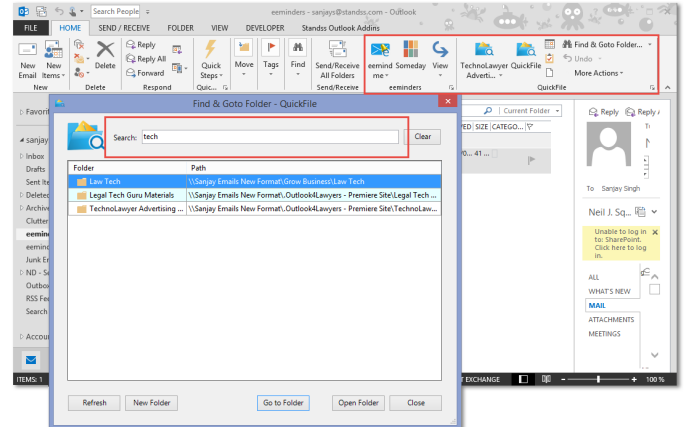
QuickFile aims to fix these problems by filing your incoming and outgoing email in a consistent and logical structure, most of the time with one keystroke. I evaluated QuickFile in my production environment. Standss gave me an evaluation license for QuickFile.

Getting Started

Installing QuickFile 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 QuickFile in my environment. It added a customizable toolbar to the "Home" tab of my Outlook 2013 ribbon.

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Standss claims — correctly — that QuickFile reduces your email filing time, increases filing accuracy, and allows for instant navigation to any folder. QuickFile 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.

QuickFile 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, QuickFile can save you enormous amounts of time and frustration.

An Example

The best way to describe how QuickFile 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, QuickFile shows filing options, even though I haven't yet opened it. QuickFile 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 QuickFile has adapted to my previous communications with Patty, it will ask me if I want to default to Patty’s folder or choose another. QuickFile enables me to file Patty’s original message at the same time I file my response to her.

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.

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Notable Features

QuickFile has some helpful options. You can configure and receive follow-up reminders for your sent email, configure the toolbar, and enable the troubleshooting log.

You can choose your default filing options and batch-file email from any folder.

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

Some of QuickFile’s more advanced functions require the “Pro” or “Ultimate” versions such as task and appointment creation, email export to Word, HTML, or PDF, and tagging email with case identifiers. Both the Pro and Ultimate versions add a license for [eeminders](#), another Standss add-on with advanced snooze-button options.

I evaluated all three QuickFile versions. I didn’t find all of the extra features important to me. You can carefully evaluate all the options thanks to the free trial. Standss also states that QuickFile works with Outlook 2007, 2010 and 2013.

Pricing and Value

QuickFile costs \$39.95 for the standard version, \$97 for the Pro version, and \$147 for the Ultimate version. Standss offers quantity discounts, a 30-day money-back guarantee, and a 30-day free trial. Standss’ license agreement states that you may “use QuickFile in a single workstation” and “[u]se of a registered copy in more than one workstation is against the terms of” the agreement.”

It turns out that Standss will allow installation on two computers upon request. Using multiple computers is the reality of 2015 legal life — especially SmallLaw subscribers. Standss should just build this into the license. Software licensing is not always as flexible as it should be. This is a beef I have with many software licensing agreements, not just this one.

TechnoScore

QuickFile 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.

If you use Outlook you should definitely give it a try. Now. Right now.

Standss’ Response

We invited Standss to respond to this review. CEO Sanjay Singh responds as follows:

“QuickFile Ultimate Edition is actually a major update to what was previously called QuickFile Lawyers Edition. Many of the updates in the new version are based on ideas from TechnoLawyer subscribers.”



Standss
73 Gordon Street
Suva, Fiji
sales@standss.com
www.standss.com

Edward J. Zohn practices law (matrimonial and general litigation) at [Zohn & Zohn](#) in Warren, New Jersey. Prior to attending law school, Ed was employed by IBM for eleven years, most of which he spent selling large systems, small systems, and networks of PCs to large, corporate customers.

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