

## Helpful Computer Programs for Organization and Efficiency

By Megan DeLaGarza, Executive Assistant

Staying organized and on top of a busy workload and boss can be time-consuming and overwhelming. Even if you have a plan of attack, it's not always easy to find where exactly to start or the best way to implement new ideas. Below are a few resources that might prove helpful not only for you, but perhaps for your entire firm, to execute efficient and effective daily work.

**Text Expander.** Save time and effort with TextExpander to avoid typing the same thing over and over, whether it's a simple email signature or several paragraphs of a standard response. According to TextExpander.com, these features include:

Insert standard greetings, text, and signatures, including formatted text and pictures

- Save keystrokes by typing short abbreviations to get long snippets
- Correct typos automatically (Add them to your snippet library and/or use one of the included AutoCorrect snippet groups for English, French or German)
- Reposition the cursor in the expanded snippet, or use new fill-in-the-blank snippets to enter variable data in multiple fields.
- Position the cursor wherever you want in your expanded snippet
- Automatically insert clipboard content in a snippet
- Use fill-ins for snippets with multiple options for variable content
- Sync snippets via Dropbox; use snippets on multiple devices (with TextExpander touch)
- Organize snippets into groups
- Search snippets from menu bar or via keyboard shortcut
- Get suggestions of matching abbreviations via keyboard shortcut
- Add snippet groups from external files and online sources
- HTML, CSS, AutoCorrect, Accented Words, Symbols snippet groups included
- Internet Productivity snippet group (shorten long URLs automatically)



- Insert the current date and time in any format you prefer
- Date/time math (add or subtract years, months, days, hours, minutes, seconds from current date and time)
- Print snippets by group
- For programmers, make editor-independent code templates; invoke AppleScripts and shell scripts

**MORE INFO AND SOURCE:** <http://smilesoftware.com/TextExpander/features.html>

**FileThis Pro.** FileThis was started by a group of people who believe in all the benefits of a paperless home or office. Start with your most important documents – bills, statements, insurance policies, health documents, and on and on. The kinds of documents you would want to file somewhere safe. Having them in digital form has so many benefits: eco-friendly, reduces paper clutter, easier to search and find, easier to store and manage, and easier to share when appropriate.

There's no need to spend extra time organizing and managing documents. The goal of FileThis is to create your own personal digital assistant. Someone (or thing) that can go out and get your documents, file them and manage them. Someone you can just turn to and say "File this". And all of this to help you keep your documents up-to-date, organized, and most importantly, extremely easy to find when you need something.

FileThis securely fetches all your online statements, bills and other documents from companies like American Express, Chase, Anthem, Amazon, and many more without you having to login to their sites individually. Save time and focus on the things that really matter. FileThis delivers all your documents and statements to our secure FileThis Cloud. Or if you like, you can send them to your PC or your preferred cloud storage provider, such as Evernote Business, Box, Personal, Dropbox or even Google Drive. And not to worry, you can switch any time.

**MORE INFO AND SOURCE:** <https://filethis.com/pro/>

**Evernote Business.** This is a closed source freemium suite of software and services, designed for note-taking and archiving. A "note" can be a piece of formatted text, a full webpage or webpage excerpt, a photograph, a voice memo, or a handwritten "ink" note. Notes can also have file attachments. Organize how you best see fit for your business and employees and utilize the search and find feature for all notes.

**MORE INFO AND SOURCE:** <https://evernote.com/business/>

**PaperKarma.** PaperKarma lets you take photos of the unwanted physical mail you want to stop. Snap a photo, and you're done. PaperKarma automatically contacts the Mailer and removes you from their distribution list. PaperKarma can stop most unwanted mail that is addressed directly to you.

**MORE INFO AND SOURCE:** <https://www.paperkarma.com/>

**Unroll.Me.** Unroll.Me is the easiest way to manage your email inbox. Unsubscribe from unwanted email subscriptions, discover new ones and organize them all in one place. Utilize "The Rollup" feature, which is a digest that gives you an overview of all the subscriptions you receive each day. The Rollup will keep your inbox clean by organizing the subscriptions you receive into a daily digestible email. The subscriptions you include in your Rollup will no longer be sent to your inbox. Rather, they are moved to the "Unroll.me" folder in your email and can be found there at any time.

**MORE INFO AND SOURCE:** <https://unroll.me/faq>

**SpamDrain.** Filter your email inbox and stop spam from reach-

ing your inbox. Only messages with real email qualities get through. Your spamster filters out the unwanted stuff including viruses and phishing attacks. Learn daily what emails have stopped, and if it's made a mistake you can return the email to your inbox.

**MORE INFO AND SOURCE:** <https://spamdrain.com/en/index.html>

Be sure not to miss any important e-mails from The Ultimate Estate Planner! Once you've cleaned up your inbox and implemented some of these items, be sure to add us to your safe sender list and/or daily digest. You can also update your e-mail settings by clicking here.

#### ABOUT THE AUTHOR:

**Megan DeLaGarza** has been with The Ultimate Estate Planner, Inc. since May 2011, after being promoted from Phil's law firm, Kavesh, Minor & Otis, Inc. as Phil's Executive Assistant. Her primary responsibility now includes the management of the day-to-day operations of The Ultimate Estate Planner, Inc. She also continues to coordinate, manage, and facilitate our educational teleconferences, and serves as a backup to Melissa for assistance to Phil. She also works closely with the Executive Director and the Event Coordinator on business planning and development. You can reach Megan at (424) 247-9337 or by e-mail at [megan@ultimateestateplanner.com](mailto:megan@ultimateestateplanner.com).



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