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## APPS WE LOVE

# Apps We Love: Email Management

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**Gail Perry, CPA** • Apr. 24, 2017



You've just spent your busy season juggling projects and are probably already thinking about how you could make your life easier going forward and in particular next spring. We've done some investigation and have requested input from members of the *CPA Practice Advisor* community and we think we can provide you with some tools to handle at least one of life's little irritations – email overload.

Our first recommendation is for **SaneBox** which bills itself as “Email management for any inbox.” **Doug Sleeter**, member of the Accounting Technology Hall of Fame and founder of The Sleeter Group (now Accountex), said, “Sanebox automatically sorts your email into separate inboxes so you can easily prioritize the process of reading and responding to email. It learns from you as you move items between inboxes so future emails from the same sender will be automatically categorized for you. Sanebox reduced the clutter of my inbox, and increased the relevancy of the main inbox. It's rare that an app like Sanebox comes along that I consider a ‘requirement’ for my setup.”

**Scott Hoppe**, CPA, of San Francisco-based Hoppe Tax says, “I run everything on **Gmail** at the firm. We use **Mixmax** for advance management (share templates for email, send emails at a later time, snooze emails, add youtube/fancy links/etc) and **Virtru** for encryption (control emails with sensitive information from being opened by the wrong people).

We received three recommendations from **Randy Johnston**, executive vice president at K2 Enterprises, CEO & Founder of Network Management Group, Inc., and member of the Accounting Technology Hall of Fame:

1. **Mimecast** – The key benefits of this solution include: reliability, advanced filtering with URL protection, attachment protection, and impersonation protection. Further, with the mail bagging facility, email continues to be available when your hosted or premise-based system has stopped working.
2. **Reflexion** – This spam filtering and email encryption tool is highly accurate and configurable. The accuracy of the filtering is good and it learns more about your preferences over time.
3. **Office 365 email filtering** – Clutter and pure spam filtering have improved notably in the Office 365 email hosted offering. Microsoft is working to make this as seamless as possible to users.

**Caleb Jenkins**, CQP, leader of cloud accounting at RLJ Financial Services recommends two apps: “For work I use **Karbon HQ** for email management. It is extremely helpful to turn my emails into to-do items and link emails with work projects and then get to inbox zero every day by clearing out triage. For personal – I use **Inbox by Google** to snooze emails that I need to deal with at a later date. This is helpful because it helps me get to inbox zero every day by working with the items that need dealt with that day.”

**Kristin Ingram**, CPA, MSAT director at University of Hartford, also uses Inbox by Google. “It allows me to have emails resent to me based on a date or location. I use it when I need information from a client at our meeting or when I want to deal with an email later in the week. It decreases the amount of clutter in my inbox and allows me to see emails when I need them.”

And finally, we have several recommendations for **Boomerang**. **Mathew Heggem**, CEO of SUM Innovation and managing partner of Neuland Alliance, uses Boomerang, a plugin for Office 365. “It is a god-send! The ability to push an email into the future and clear your inbox gives you the space you need to keep a digital desk tidy and stay super-focused on what’s most important.

**Brett Mills**, CPA, partner at McCarthy, Rose & Mills in the Dallas/Fort Worth area, agrees. “Boomerang does several cool things, but my favorite functionality is that it allows me to write emails really late at night and then schedule them to be sent at normal business times the next morning. This way I am maximizing my productivity during the day by not responding to emails every 10 minutes throughout the day, as well as not coming across as a maniac sending emails at one o’clock in the morning.”

**Stacy Kildal**, owner of Kildal Services, creator of StacyKAcademy, and co-creator of the QBOShow, gives her vote to Boomerang as well. “Boomerang for Gmail is my favorite email tool. I can have client related emails returned to me for follow up, I can schedule classes with members of the StacyKAcademy, and it reminds me of travel reservations. Added bonus: Using the *responsible* feature to write better emails!”

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