Free Yourself From Browser Tyranny — Manage Your Documents Natively Instead

By Neil J. Squillante
October 5, 2020

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DocMoto

Award Winner 2021
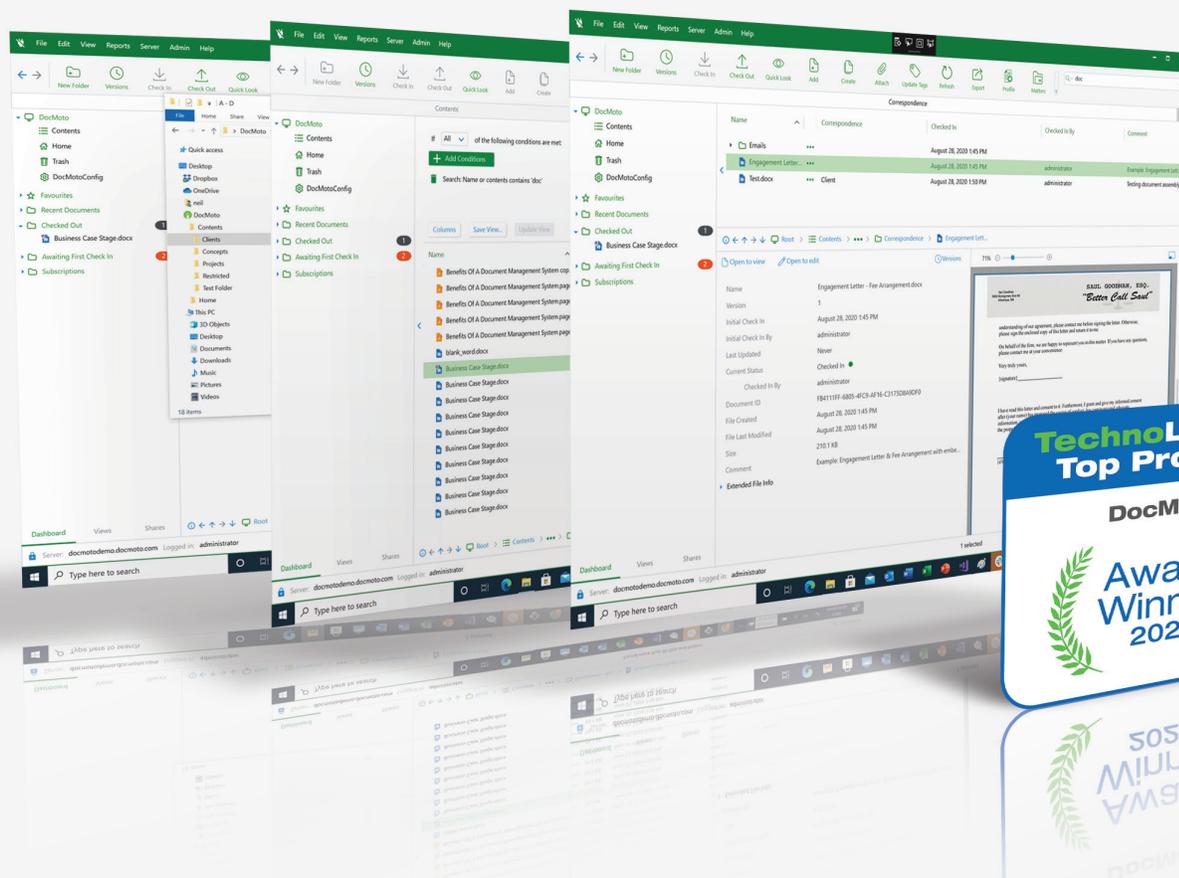
E very law firm uses document management software, making it the most popular software category in the legal industry. Many use macOS Finder or Windows Explorer to manage documents. Others use specialized software that typically falls into two camps — browser-based or Windows-based. A new product offers a more flexible alternative.

DocMoto v5 in One Sentence

CHL Software's new DocMoto v5 is a document management system (DMS) that now offers a Windows client with the same functionality as the Mac client that put the company on the map.

The Killer Feature

"With DocMoto version 5 we have become truly cross platform providing an app based DMS solution for law firms running Windows and Mac devices," says CHL Software founder and director Neil Cameron. "DocMoto is now a credible alternative to the status quo and an opportunity to break away from the limitations of pure browser-based solutions."

Cameron is referring to the clunky nature in which web browsers interact with operating systems. For example, many courts now require e-filing. With a browser-based DMS, you must first download the brief from the DMS, upload it to the court, and then delete the downloaded document lest you confuse it with the original in the DMS.

By contrast, the new DocMoto Windows client integrates with Windows Explorer and offers a feature called DocMoto Drive that creates a DocMoto mapped drive. Regardless of whether you opt for cloud or local hosting, documents in the DMS are accessible from Windows Explorer via this mapped drive. This means you can upload the original brief to the court as if it were on your local drive already. The DocMoto Mac client similarly integrates with macOS Finder.

Other Notable Features

Each DocMoto client resembles its parent operating system. From one screen, you can
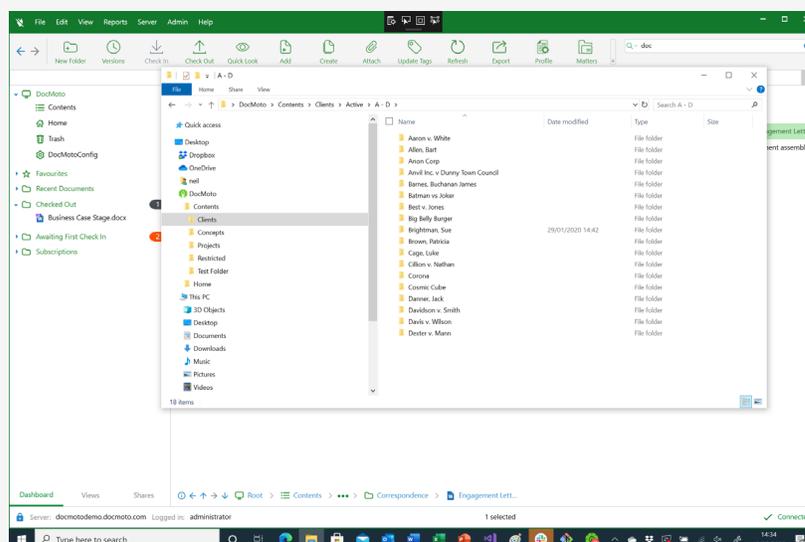
The new Windows client in DocMoto v5 offers the same functionality as the Mac client as well as a tight integration with Windows Explorer.

access every document and tool — favorited documents and folders, global search, documents you have checked out, etc. Using the Tabs feature, you can create unlimited custom views of folders and documents, and with Tags you can organize documents beyond nested folders.

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DocMoto offers a number of enhancements to traditional DMS features that provide safeguards and save time. For example, Folder Templates create a set of folders and subfolders when setting up a new client or matter. You can even retroactively update these folders when you modify a template. Another timesaver is Bundles for creating closing books and other collections. Point DocMoto to the documents you want to collate, and it creates a PDF file with a hyperlinked table of contents.

Perhaps nothing better exemplifies DocMoto's polish than how it ties together document check-out and sharing with versioning. When you check a document back in, DocMoto automatically creates a new version. Similarly, if you add a document received from a client or opposing counsel such as a markup, DocMoto will create a new version if a prior version exists. DocMoto also includes a

document comparison tool for creating redlines of different versions.

While you can share documents via email, DocMoto offers a secure sharing portal that supports expiration dates and document passwords. Dashboards for checked out documents and shared documents as well as a searchable Activity Timeline listing every interaction helps solve problems ranging from forgetfulness to fraud.

What Else Should You Know?

Version 5 includes three key integrations requested by customers — Outlook, Gmail, and Slack. From Outlook or Gmail, you can file email and attachments into DocMoto. You can also attach any document in DocMoto to a message you're sending. With the Slack integration, you can save conversations in DocMoto and also share links to documents in DocMoto. "With DocMoto version 5, law firms can look forward to a bright new era of document management," adds Cameron.

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Meet Neil J. Squillante

Neil J. Squillante is the founder and publisher of TechnoLawyer, an award-winning network of free email newsletters for lawyers and law office administrators. Many consider TechnoLawyer newsletters the only ones they need. A Fastcase 50 award winner, Neil has a long track record of inventing successful advertising and publishing technologies and related best practices. Previously, Neil practiced commercial litigation at Am Law 100 firm Willkie Farr & Gallagher. He received his J.D. from UCLA School of Law and his B.A. from Duke University. At UCLA, Neil served as a Managing Editor of UCLA Law Review.

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