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Hot new products for lawyers and law office administrators.

A Central Repository for Client-Related Documents and Email

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If someone asks you which type of document your law firm creates most often, you'd probably say "word processing" out of habit. However, it's probably email. Though we often forget that email messages are documents, they contain some of the most important information about a matter. And of course they often contain attached documents.

DocMoto 3 ... in One Sentence
Launched this month, CHL Software's DocMoto 3 is a Mac-based document management system.

The Killer Feature
Previously, DocMoto handled all document types except email. The new version now stores client-related email as well. You can add existing email messages and their attachments using drag and drop, so that you can quickly get email into DocMoto. You can also initiate a new email message from within DocMoto, which enables you to attach documents in DocMoto as well as documents on your Mac.

DocMoto integrates with Apple Mail, Microsoft Outlook (Mac version), and PostBox. Any email messages you send from DocMoto will also appear in your email account's Sent folder if you use one of the above applications.

"The single biggest reason Mac-based law firms contact us is because they can't find email and other documents quickly and easily using the Finder on Apple's file server or cloud storage services," CHL Software's
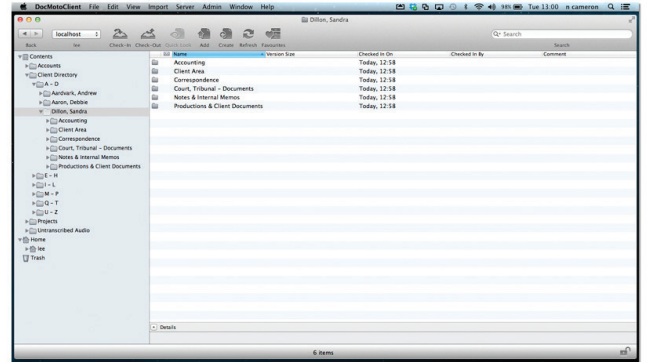
Marketing Manager Neil Cameron told us. "With DocMoto 3.0 we have made this simple to achieve.

Other Notable Features
DocMoto offers all the features you'd expect of a document management as well as a few unique twists. Regarding the former, each time you or a colleague work on a document, DocMoto can save it as a new version and also create an audit log. Other such features include full-text search, document and folder tags (e.g., client, matter, document type, etc.), enforced document profiles that ensure correct filing of new documents, and document- and folder-level security so that you can restrict access (e.g., read only or no access at all).

One of DocMoto's unique twists is that you can use it as a secure client portal, enabling your clients and others to access designated folders and documents via a web browser (no Mac required). Also, in a nod to the iPad's popularity among lawyers, you can access your DocMoto account using the GoodReader iPad app.

DocMoto offers a number of automation technologies. You can receive an email alert when someone changes a document or folder you're watching. To ensure consistent document creation across your firm, you can create a library of "document masters" (e.g.,

templates for letters, pleadings, wills, etc.). Similarly, "folder templates" ensure that each new matter has the correct set of folders. DocMoto can also automatically enter deadlines into your calendar (such as Apple's built-in Calendar application or Outlook 2011), reminding you of court or internal deadlines for document creation.

What Else Should You Know?
Your firm can host DocMoto onsite or use it on a hosted basis. In either case, it works the same, the only difference being the location of the Mac on which your firm's documents reside.

docmoto

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