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## That's Not the Finder, That's DocMoto v4

By Neil J. Squillante

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Given that tens of millions of people use Macs, Apple does not focus on the needs of law firms when it creates new versions of macOS. As a result, law firms grow increasingly frustrated with the rudimentary document management tools in the Finder as they amass more documents and client-related email.

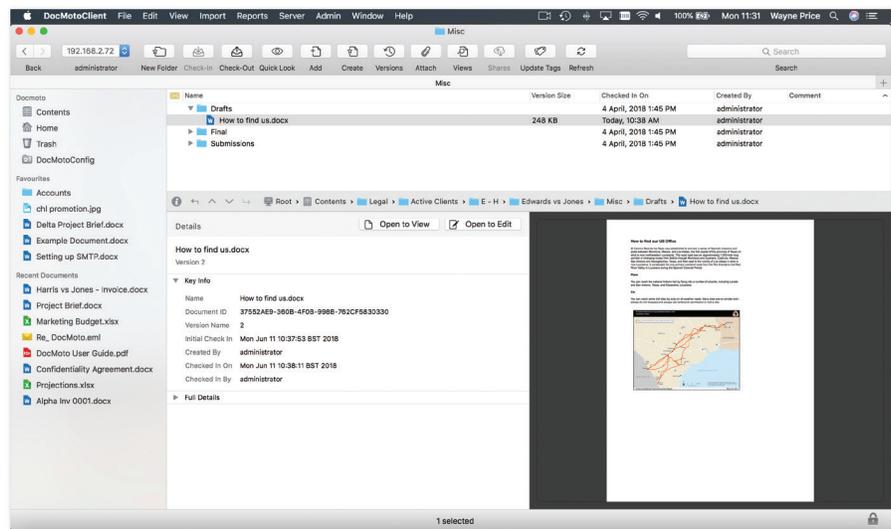
### DocMoto v4 ... in One Sentence

CHL Software's [DocMoto v4](#) is a Mac document management system with a new Finder-like interface that offers organizational and sharing tools for documents and email.

### The Killer Feature

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**DocMoto's New Finder-Like Interface**

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DocMoto looks like a Finder window. You'll immediately notice a side panel with three sections — DocMoto, Favorites, and Recent Documents. The DocMoto section gives you access to all documents via the nested folders your firm uses, your own private documents, and documents you've trashed. You can save frequently-used folders as Favorites for faster access, and open documents you're working on with one-click in the Recent Documents section.

You can open any folder in a new tab. "This tabs layout allows attorneys to keep multiple matters open simultaneously all in the one interface," says Cameron. Searches

also open in a new tab so that you won't lose your place. Save any search as a Shared View, which updates in realtime as new documents are created that match your search criteria. Rounding out the new interface, a customizable toolbar enables you check documents in/out, list all versions of document, and much more.

### Other Notable Features

Document management without email is incomplete so DocMoto now connects to email accounts such as Exchange, Office 365, and Gmail, and offers several tools to automate the capture of client-related email. One tool —Mailbox Rules — consists of customizable filters. For example, a rule could capture all email to or from a client. An administrator can maintain a set of standard rules for all users. Advanced users can create their own rules, including exclusionary rules to ignore personal email.

Mailbox Patterns give users more control of what email to store in DocMoto but still offer automation. Once created, Mailbox Patterns watch folders in connected email accounts, and copy messages and attachments that match to the correct location in DocMoto. Like the previous version, DocMoto also offers manual import of email via drag and drop.

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When you open a document or email message in DocMoto, a three-pane display shows you the document's location, metadata such as who last edited it, and a thumbnail. From here you can view or edit the document, the latter of which checks it out and creates a new version.

“When we moved our documents to DocMoto, it was great to have access to all documents without syncing to a computer and eating up hard drive space,” says Kelley McFarland, Lead Litigation Paralegal at Brown Law LLP. “Our colleagues quickly realized how easy it was to share documents with people inside and outside the firm by creating shared links to folders rather than putting documents on a USB drive.”

### What Else Should You Know?

The new version of DocMoto also features beefed up security, including a setting to throttle the number of documents users can download to prevent internal sabotage or theft.



**docmoto**

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