



The **Center** of your firm.
The **Base** of your success

What is Centerbase?

Legal practice + management software designed to deliver optimal efficiency, profitability, and business growth for your midsize law firm.

● Trusted Advisors

Respected thought-leader and resource that consistently provides updated trends and insights to help law firms adapt to the changing legal industry.

- ✓ Mostly Legal Podcast
- ✓ Legal Trends Reports
- ✓ Buying Guides
- ✓ Expert Whitepapers + Blogs
- ✓ ALA VIP Premier Partner
- ✓ Foundation of ALA Sponsor
- ✓ Affinity Consulting Strategic Partner
- ✓ Bar Sponsors

● Advanced Technology

Expertly architected, born-in-the-cloud software that is stable, fast, and flexible, balancing the trusted processes of the past and innovative features of the future.

- ✓ Cloud-Native
- ✓ Private Cloud Data Center
- ✓ Microsoft 365 Foundation
- ✓ SOC 2 Type 2 Compliance
- ✓ Intuitive User Interface
- ✓ Flexible + Automated Solutions

● Customer Centric

Highly-skilled teams dedicated to delivering the 5-star Centerbase Customer Experience by actively listening to and ensuring customers are maximizing the value of Centerbase.

- ✓ Customer Success Managers
- ✓ Customer Support
- ✓ Customer Training
- ✓ Professional Services
- ✓ Customer Portal
- ✓ Customer Advisory Board

Why Midsize Law Firms Choose Centerbase

● One Platform for Every Moving Part in Your Firm

Centerbase unifies firm operations, automating tedious administrative work so attorneys and staff can focus on practicing law. From matter management to firm-wide financials, our platform replaces inefficiency with control, giving you the tools to grow without adding complexity.

● Purpose-Built for Midsize Firms — Not a Retrofit, Not a Compromise

Centerbase isn't retrofitted from big-law tech or stripped down from small-firm solutions - it was built from the beginning for midsize law firms. That means painless data migration, tailored workflows for different practice areas, and an intuitive system that attorneys actually want to use—so your firm works smarter, not harder.

● Timekeeping That Works in the Background—So You Don't Have To

Centerbase offers passive time tracking and direct logging inside Microsoft 365 apps with patented Automated Time Capture, so attorneys can record time without breaking focus. With automatic detection of client conversations and billable work, firms recapture lost hours while reducing the burden of manual entry and missed billable targets.

● Billing That Keeps Cash Flow Moving—With Total Financial Visibility

Centerbase transforms billing and financial management from a frustrating bottleneck into a strategic advantage. Automated invoicing, trust account tracking, and real-time financial dashboards keep cash flow predictable while eliminating manual errors. With deep reporting tools, firms can drill into profitability and productivity —empowering leadership to make smarter financial decisions.

● Microsoft 365, Transformed into a Legal Powerhouse

With deep integrations into Outlook, Word, and SharePoint, attorneys can manage matters, log billable time, and organize case documents inside the tools they use every day. Instead of disconnected apps creating workflow roadblocks, Centerbase turns Microsoft 365 into a productivity engine designed specifically for midsize law firms.

Proven Centerbase Results

Save up to
\$35,000
per year

Save up to
75 hours
per month

Capture up to
10 extra billable hours
per attorney every month

Bring in up to
\$3,600 potential new revenue
a month per partner

Shave up to
22 days off
of your billing cycle

Get paid up to
20% faster

Increase cash
flow up to
100%

Gain up to
100% attorney adoption

Improve employee onboarding
from 2 days to 1 hour

What are your peers saying about Centerbase?

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Centerbase feels like it's akin to AI. It always knows what's happening because it's connected to the calendar. If I block off time in my calendar to prepare for a client's custody trial, that time will automatically appear in the billable events dashboard.



Bobbie Batley

Managing Partner at Batley Family Law

The onboarding process could have been terrible and glitchy, but, instead, it was super dreamy. I couldn't have asked for a better onboarding experience. Everything went great.



Susie Saldivar

Office Manager at Gaido & Fintzen

Only 60 days in and my new website is blowing the doors off my old website. As a small law firm, I can't tell you how happy I am to have the phone and website generating new matters week after week. I am here to help my clients - Legalfit is making it possible for them to find me!



Rob T.

If you're not evolving, and constantly changing, and improving, you're gonna get passed by eventually. And that's what I've always enjoyed here is the diversity of role and responsibility. But Centerbase allowed us to elevate it to a whole new level.



Rob Sadler

Firm Administrator at Hofheimer Family Law

Across the board, it's much better than the previous platform. I can easily teach someone how to make a calendar entry, keep time, or review bills. At its fundamental level, it is accessible to everyone.



Kimber Davison

Managing Shareholder & Vice President at Griffith Davison

Your tax update information makes it well worth my subscription, in addition to the powerful software you have developed. After having spent some time with Family Law Software, I can safely say that it is robust, accurate, and ultimately trustworthy. I look forward to using it for many years to come.



Heather C. Keith

Esq, Keith Family Law, Westfield, New Jersey

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Integrations



Work the way you're
used to with
Microsoft Office
integrations



Offer convenient
online payments
fully embedded
within Centerbase



Easily **manage**
your credit card
with Plaid and
Centerbase



Complete all eBilling
activities in
Centerbase while
harnessing the
compliance power of
eBillingHub.



Automatically
complete deadline
and docketing
activities with
precision from your
calendar



Stay organized
and on task with
NetDocuments
access through
Centerbase



Manage documents
with iManage's
intuitive workspaces
& Centerbase's
efficient processes



Easily capture client
costs and
automatically sync
them to Centerbase

Practice efficiently

Practice efficiently and deliver exceptional client experiences with solutions designed to modernize the practice of law.



Efficiently and accurately complete all family law calculations

Matter Management

Easily service matters and view all related data in a single place

Document Management

Native SharePoint functionality to edit, share, and manage documents and emails

Manual Timekeeping

Track time anywhere during your billable work



Patented Automated Time Capture

Automatically capture texts, calls, meetings and time spent in Microsoft applications.

Calendaring

Automatically determine and schedule deadlines including matter-based jurisdiction deadlines

Mobile App

Access your firm data and track time from anywhere

Client Intake*

Quickly intake, conflict check and easily update clients

Client Portal

Easily share documents, update clients, and receive payments.

CRM

View all client-related data in a single place

Manage profitably

Develop and optimize the way you manage your firm by completing tasks faster with added precision, driving efficiency and profitability.

Accounting

Precisely track every dollar that moves in and out of your firm

Trust & Retainer Accounting

Flexible and compliant to accommodate client and firm needs

Online Banking

Easily reconcile credit cards with an online banking feed

Billing*

Flexible billing options that uncomplicate billing processes

Centerbase Payments

Get paid faster with convenient online payment powered by Stripe

Task Management

Track and execute across every project

Security*

Ensure internal and external confidentiality of client and firm information

Automated Workflows*

Flexible workflows across multiple activities that increase efficiency

 PREMIUM

ePre-Bill*

Electronically review, edit, track and send bills up the approval chain

Grow strategically

Execute powerful strategic performance by delivering growth inside and outside of your firm, maximizing client revenue and attracting top talent.



Websites

Showcase your impactful brand and convert prospects into clients with a website tailored to you



Marketing Services

Generate profitable leads with agency-style digital marketing strategies

Advanced + Standard Reporting*

Create and deliver detailed and intelligent reports

Profitability Reporting*

Track and analyze key metrics to support optimal financial performance

Production & Origination*

Easily credit and compensate originators for their work



Center of Your Success

On-demand advisors and highly skilled teams that ensure you use Centerbase seamlessly and confidently.

- ✓ **1:1 Dedicated Customer Success Manager**
- ✓ **Professional Services Team**
- ✓ **Team of Trainers**

Base of Your Knowledge

Live, technical support, plus a library of resources, make it easy to get questions answered.

- ✓ **Technical Support Team**
(M-F 7am - 7pm CT, phone or email)
- ✓ **Customer Experience Portal**
- ✓ **Monthly Training Webinars**
- ✓ **Learning Management System**

We Make Migration Easy

We provide a streamlined and efficient implementation process that delivers the correct data, the way you want to use it, with minimal business disruption. We have the right people, processes and product to ensure your Centerbase platform supports your ongoing success.

● People

- ✓ **Team of Project Managers**
Ensure the success and organization of your implementation
- ✓ **Data Specialists**
Deliver accurate data imports configured to fit your need during your implementation
- ✓ **Professional Trainers**
Ensure your firm is confident when using the Centerbase platform throughout your Centerbase experience
- ✓ **Support Team**
Provide timely and accurate resolutions to your needs throughout your Centerbase experience
- ✓ **Customer Success Team**
Champion your firm's success and prioritize your goals throughout your Centerbase experience

● Process

Tools and planning that make your migration and implementation smooth and efficient

- ✓ **ValiData (import tool)**
Delivers accurate and organized data migrations
- ✓ **GuideCX**
Supports visibility into your implementation
- ✓ **Implementation Phases (1, 2, and 3)**
Thoughtful and proper planning that is timely and organized

● Product

The platform can be configured to fit your needs and the way you work

- ✓ **Admin Tool**
Configures the platform to your firm's specific needs with
- ✓ **Learning Management System (LMS)**
Self-directed learning modules that unlock your Centerbase knowledge
- ✓ **Support Hub**
Centerbase Community and Knowledgebase give you the resources needed to navigate Centerbase with confidence

Security

- **Secure data from external threats and disaster**

Securing data in the Cloud is the modern expectation for well-run businesses. With industry-standard 256-bit AES encryption, SOC 2 Type 2 compliance, and a mirrored disaster recovery data center, your data can't be lost, can't be disrupted, and can't fail.

- **Set limits on what individual or groups of users see**

Keep your data private from internal individuals and departments. With user and group-based permissions, your data is only shared where appropriate.

- **Keep certain internal records private**

Keep specific internal records private in your firm. With record-based permissions, your staff will only see what you deem necessary.



Centerbase

The Center of your firm. The Base of your success.

▼ Scan to see digital brochure



▼ Scan to get a demo



sales@centerbase.com



888-807-6490

*Please note, all flexible solutions may require scoping, training, and / or Professional Services to configure based on your needs. This includes but is not limited to Advanced and Standard Reporting, Profitability Reporting, Permissions, Automated Workflows, Production and Origination, ValiData Import Tool, Custom Fields, Bill Templates, Rate Tables, Billing, Intake, and ePre-bill.