

Support Resources

Available resources designed to help your firm be successful, and provide the answers and responses you are looking for.

Support

If you have how-to questions, see error messages, or something isn't working how you expect it to, open a ticket at support.centerbase.com at any time.


Invoices

All of your invoices and subscription billing questions are handled by the Accounting team, including upcoming renewals. You should direct any questions to billing@centerbase.com.

+ Additional Resources & Information


Support site:

Starting point for answers or to trouble shoot. From this site you can request licenses, access our library of articles and system walkthroughs, download add-ins, access the standard report library, access your support portal, and open a support ticket. Navigate to support.centerbase.com to access these features.

 *When submitting a support request, please include as much detail as possible including screenshots, links to specific records, and the steps you took to produce the issue you are asking about.*

Live Support:

Live support team is available Mon-Fri, from 7am – 7pm Central time via email at support@centerbase.com, or directly at 214-987-9000.

 *When interacting with live support, please include as much detail as possible including screenshots, links to specific records, and the steps you took to produce the issue you are asking about. We may reference support emails and calls as tickets to keep track of your communications and reach a resolution!*

Weekly training webinars:

Product training webinars are on Thursdays at 2pm Central on a variety of topics. You can also access the recordings at any time on our community page community@centerbase.com, and can post requests for new topics there as well.

Enhancement request page:

The yellow lightbulb button down at the bottom of your navigation bar in Centerbase will take you to our enhancement request portal. This is where you should direct all changes and suggestions that you would like to see to our product. This portal is managed and reviewed by our product team and influences our product roadmap. You can also see other suggested product enhancements and upvote them.

The Centerbase Community:

Use the chat feature at community.centerbase.com to request an invitation to join this page if you do not already have an account. This site is where our customers can engage with each other, and where you can post questions in an open forum. This is where we post our release notes when we develop new features, and where we post our training webinar recordings.

Continued Training options:

Four 1-hour long modules for Centerbase Essentials training, accessible for 12 months, are available to purchase. As well as web-based or live custom training options. Submit a support ticket at support.centerbase.com to request more information on these resources.

Professional Services:

Professional services are available for creating reports, bill templates, and workflows. Submit a support ticket at support.centerbase.com to request pricing for a project.