Centerbase

The single platform to
manage & grow your firm.

What is Centerbase?

Cloud-based practice management software that powers your firm from a client's first website visit to their final bill.

Solutionsfor Firm Operations, Client Operations, Firm Management, and Growth & Marketing through a single platform

THE CENTERBASE DIFFERENCE

What makes Centerbase different?

- Single platform
- Configurable to your needs
- Role-based
- Full general ledger & trust/retainer accounting
- Automated workflows
- ePre-Billing
- Automatic Time Capture
- Intelligent reporting
- Modern client experience solutions
- Websites & marketing services
- External & internal data security permissions
- Proprietary implementations process for easy switching
- Family Law Software for fast family law case resolution

TESTIMONIAL

"Our attorneys can review their pre-bills electronically, and we can send them out with a click of a button. Most certainly that has definitely changed and helped our most valuable asset which are our attorneys since they are of course the highest billers of the firm. And it's really given them back time."

AIMEE GANNON Operations Manager at Gonser & Gonser, PA

Firm Operations

Stay Focused on the High-Value Work That Keeps Your Firm Profitable

Family Law Software
A Centerbase Company

Complete family law calculations to reach settlements faster.

ePre-bill

PREMIUM

Review, edit, and track pre-bills electronically through the approval chain. **Save 4 days per billing cycle with ePre-bill.**

Calendaring

Filter and compare everyone's schedule in one calendar.

Mobile App

Keep up with your firm's activities and track time from your cell phone.

Billing

Bill clients the way they want across one or multiple matters. **Bill up to 20x faster**

Matter Management

Empower everyone to easily find matter information in one place.

TESTIMONIAL

"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

Client Operations

Enhance Client Engagement & Maximize Billable Hours

Client Portal

Easily update clients and provide them with the information they need.

Client Intake

Quickly intake new clients before they search for other counsel.

CRM

Keep tabs on every client in one place.

Timekeeping

Empower your attorneys to hit every billable target.

Automated Time Capture

PREMIUM

Our automatic timer starts and stops when you do.
Potentially capture up to **200 extra billable hours per month**

Payments

Get client payments within minutes of sending out a bill.
Increase cash flow up to **100%**

Firm Management

Manage Your Firm With More Efficiency - And Without Uncertainty

- **Automated Workflows** – Save hours per week by automating your manual work to get more of your to-do list done.
- **Trust & Retainer Accounting** - Feel confident that you're complying with trust regulations.
- **Firm Accounting** - Easily prove your firm is a fiscally responsible business unit.
- **Online Banking** - Easily reconcile your credit cards with a live online banking feed.
- **Document Management** - Support your firm's comprehensive document processes and harness the power of a robust DMS.
- **Project Management** - Track and execute every project your firm undertakes.
- **Advanced Reporting** - Run holistic and insightful reports that support strategic decisions.
- **Security** - Protect your data from outside and inside threats.

TESTIMONIAL

Rather than looking for data on servers, everything is in one place with added ease of use.

J. Matthew Little Partner at Teague, Campbell, Dennis, & Gorham

Growth & Marketing

Confidently Support Your Firm's Brand & Profitability Strategies

- **Websites** - Increase your firm's visibility with a high-converting website, powered by Legalfit.
- **Marketing Services** - Execute personalized marketing strategies and track their ROI, powered by Legalfit.
- **Profitability Reporting** NEW - Allocate indirect expenses or costs associated to employees - then calculate overhead into the net results. So you can go beyond showing only billed vs collected to your shareholders.
- **Production & Origination** - Easily credit and compensate originators for their work.

INTEGRATIONS

Use the Tools You Already Know & Love

Office 365

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

PLAID

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

LawToolBox.com

Automatic deadlining with **LawToolBox.**

intuit QuickBooks Online

Upload accounting data from **QuickBooks Online** into Centerbase accounting.

netdocuments

Stay organized and on task with **NetDocuments** access through Centerbase.

iManage

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

TESTIMONIAL

Centerbase delivers on continuously developing their product. Not many SaaS products can say that.

CLAYTON ROMERO Founding Partner at CodexTen

WE MAKE SWITCHING EASY

Effortlessly Transition to Centerbase With Our Dedicated Support

Implementations

With our proprietary implementations processes, we focus on understanding your unique goals so we can make the process seamless, with little down-time, while delivering a superior solution.

Customer Success & Tech Support

Your dedicated Customer Success Manager and Tech Support team are ready to ensure your firm rollout is seamless and you continue to reap the benefits of a Centerbasepartnership.

TESTIMONIAL

Thanks to our investment in cutting-edge technology and nimble workflow processes, we were able to transition to primarily remote work within one business day and with no interruptions to client service."

Brian Winterfeldt Founder & Principal at Winterfeldt IP Group

SECURITY

Safeguard Your Data With State-of-the-Art Security Features

Secure data from external threats & disasters

Securing data in the Cloud is the modern expectation for well-run businesses. With industry-standard 265-bit AES encryption 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.

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