Centerbase

Native or Integrated Document Management Solutions

Accelerate your firm's productivity through **Centerbase**'s native document management that enables **seamless matter management, automation, & time capture**. Or choose to use your existing **NetDocuments** or **iManage** subscription integrated within Centerbase.

Enhance firm productivity and efficiency with document creation and organization automation.

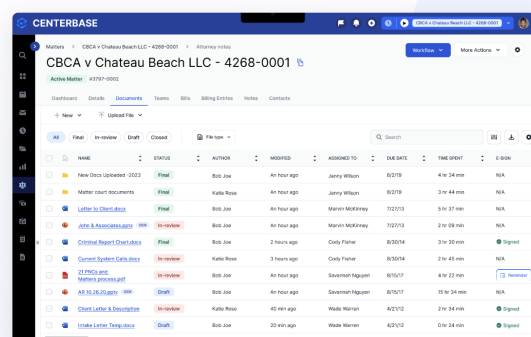**Turn document management activities into billable hours.**

Accelerate productivity with native, comprehensive document processes.
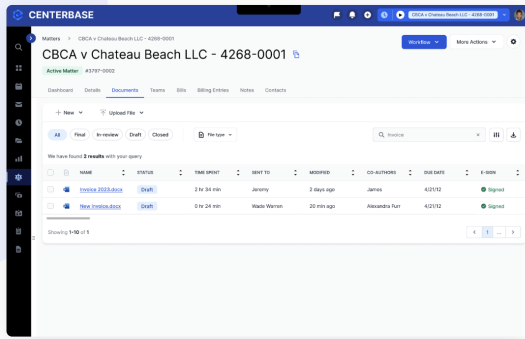
Centerbase DMS Functionality

✓ Documents, folders, & metrics integrated into Centerbase Dashboard

✓ Optical Character Recognition (OCR) & full text search

✓ Attach eSignatures to documents from the matter via DocuSign

✓ Subscribe to document & eSignature notifications

✓ Create standard folder structures to be populated upon matter creation

✓ Manage document workspaces without leaving Centerbase

✓ Share documents with clients via the Client Portal

✓ Save documents to non-matter workspaces such as activities and contacts

✓ File version control

✓ Assign emails to the appropriate matter from the email itself

Timekeeping

➤ Automatically record your time when using Word and Outlook via Automated Time Capture (premium feature)
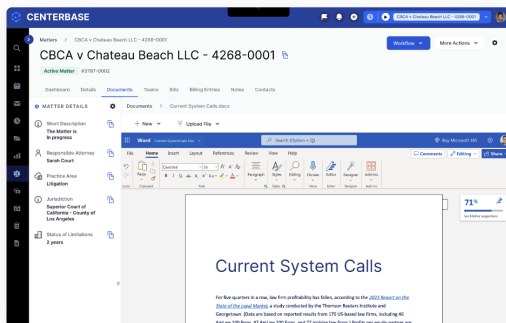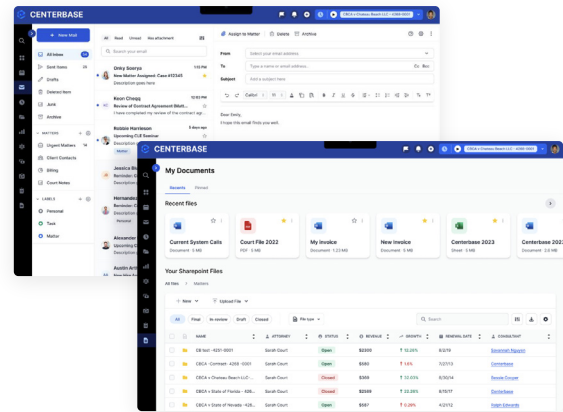
Document & File Automation

- Automatically save & generate documents with Automated Workflows

- Auto-fill document templates with matter and client data

- Automatically save emails to workspaces

File Handling

- Create / Print / Email files from the workspace
- Open / Delete files from the workspace
- Easily convert Word documents to PDFs
- Easily share documents
- Add a file or folder to a favorites list
- Automatic page numbering and configuration

Storage & Upload Sizes

- File upload size: **15 GB**
- Batch upload size: **250 GB**
- Storage availability: **1TB +10G** per user
- File path character limit: **400**

Compatibility

- Windows
- Mac
- iPhone & iPad
- Android

iManage Integration

- Compare matter details and documents side-by-side with the tab view.

- iManage integration automatically populates practice-area specific folder structures once you open a matter within Centerbase.

- Choose up to 30 custom fields that are automatically inherited as metadata by your documents from the associated matter record.

netdocuments® Integration

- NetDocuments integration allows you to manage your documents without leaving Centerbase.

- Opening a matter in Centerbase automatically opens a workspace in NetDocuments right inside the matter.