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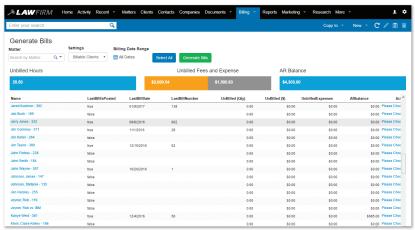Hot new products for lawyers and law office administrators.

Centerbase Offers a Cloud Practice Management Path for Firms With Complex Billing Requirements

By Neil J. Squillante
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Many law firms find cloud practice management products alluring but lacking in functionality compared to legacy on-premises products. The market seems ripe for cloud practice management software that bridges this gap.

Centerbase ... in One Sentence
Centerbase is cloud practice management software with billing and workflow features for law firms with complex business processes such as revenue allocation rules.

The Killer Feature
Before giving me a demo, Founder and CEO John Forbes tells me, "Our sophisticated billing functionality makes Centerbase a great option for law firms looking to move to the cloud from older, server based software such as Time Matters, Timeslips, and Juris."

Forbes is referring to features like the Matters Dashboard, which has functionality similar to Time Matters' Power Views. You can configure the Matters Dashboard to display just about anything related to a matter, including billing information.

> "Our sophisticated billing functionality makes Centerbase a great option for law firms looking to move to the cloud from older, server based software such as Time Matters, Timeslips, and Juris," says CEO John Forbes.

New Billable Clients

You can also configure settings such as trust account thresholds, timekeeper rates, and compensation rules on a firm-wide basis or at the client or matter level. These rules can encompass factors like partner commissions and origination credit. You can also create rules specific to your practice area. For example, your state may require allocating overpayments by clients to a trust account.

Centerbase supports financial controls such as closing dates that lock posted transactions, prebill approvals, write-offs, and adding trust replenishments to the amount due on invoices. Customizable Invoice Templates enable you to create different invoice designs for certain clients or matter types. Invoice delivery options include email, PDF, and ebilling protocols such as LEDES, the latter of which you can configure to accommodate any system. Centerbase also supports credit card payments from a payment button in email invoices.

Centerbase includes a number of reports such as accounts receivable, fee receipts,

and timekeeper analysis. The company routinely adds reports based on customer requests. Certified consultants can create custom reports for you.

"Centerbase increased the productivity and efficiency of our entire firm," says Kenneth Sheets, partner at Payne & Blanchard, which switched from Juris. "The team over at Centerbase has been there with us throughout the transition process, making it easier on everyone."

Other Notable Features

If Centerbase doesn't support a process in your firm, you can create a Workflow using the company's free Database Designer. These Workflows can automatically generate and assign tasks to lawyers and staff, send automated email, generate documents from templates, fill in form fields, and create new records. Potential uses include client intake, project management, and referral tracking. You access Workflows from the Custom Actions menu in the Matters Dashboard and other dashboards.

Centerbase takes a unique approach to email and document management. An Outlook add-in can file email messages and attachments in the corresponding matter. Time slips can be created in Outlook when you view or send an email. For documents, Centerbase can appear as a mapped drive in Windows such as on your file server. Any documents

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Native Mobile Timekeeping App

placed there become available in Centerbase and vice versa. Centerbase includes 5 TB of space.

What Else Should You Know?

Other key integrations include on-premise Microsoft products, Office 365, and Quick-Books Online. The Centerbase Mobile app provides access to everything on your iPhone. Most importantly, you can enter time on the go. Centerbase costs $52 per user per month.

CENTERBASE

Run Your Law Firm in the Cloud

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