



# 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.



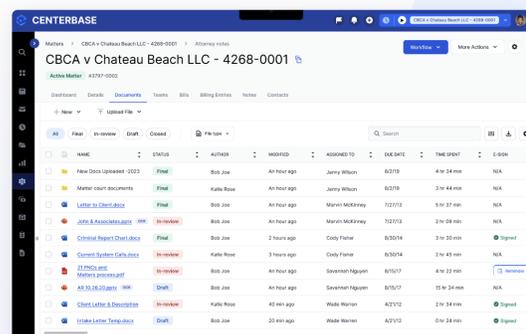
Accelerate productivity with native, comprehensive document processes.

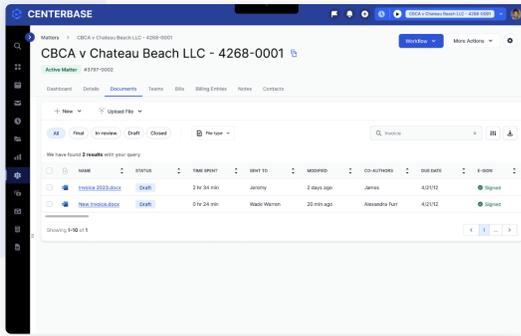
## Centerbase DMS Functionality

- ✓ Documents, folders, & metrics integrated into Centerbase Dashboard
- ✓ Documents appear in Global Search & Conflict Checks
- ✓ 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)



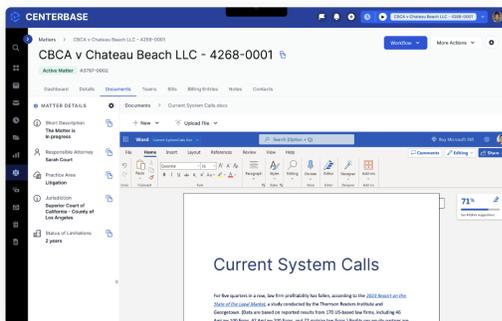
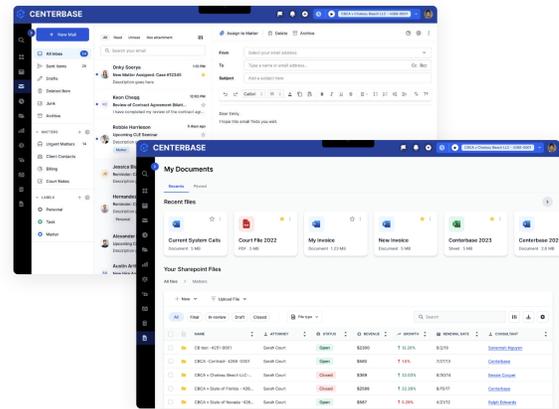


## Document & File Automation

- 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: **1+ TB**
- 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.