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Hot new products for lawyers and law office administrators.

Cloud Document Management That Won't Change the Way You Work

By Neil J. Squillante

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Cloud practice management has many virtues but concerns about document management prevent some law firms from taking the leap. These firms understandably don't want to give up their network drives and folder hierarchies, manually upload documents, or change the way they work.

Centerbase ... in One Sentence

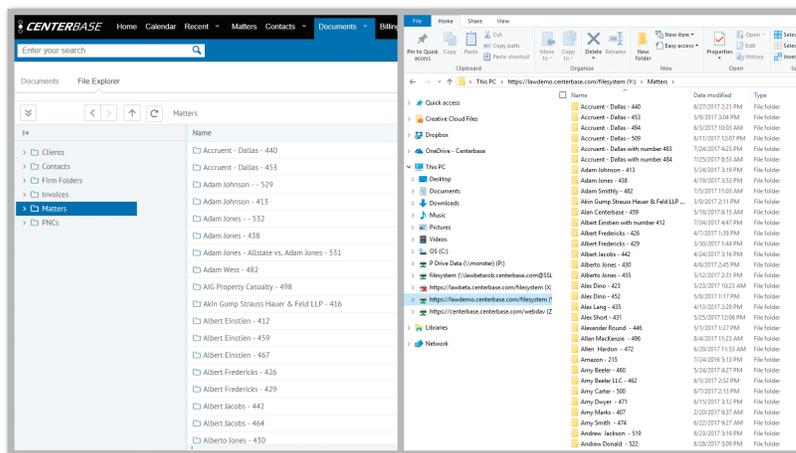
Centerbase is a cloud practice management system that now offers document management which functions like a local network drive.

The Killer Feature

CEO John Forbes tells me I'm the first person outside of the company and a few early adopters to see Centerbase's new document management technology. A product CEO who spent years as a reseller, Forbes has a Steve Jobs-like enthusiasm.

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Documents in Centerbase function on your PC or Mac like a network drive even though they actually reside on secure servers in the cloud. "After setup, you use your files and folders like you always have in Windows Explorer or Mac Finder," says Centerbase CEO John Forbes.



Access Documents From Centerbase or Windows Explorer

cloud. Centerbase uses WebDAV, a standard file protocol for Internet file sharing.

During initial setup, Centerbase's support team uploads your entire document library, and can help you map document folders to the correct clients and matters in Centerbase. Forbes tells me about a firm that imported 3.6 million files.

"After setup, you use your files and folders like you always have in Windows Explorer or Mac Finder," says Forbes. Any changes to documents are automatically reflected in Centerbase and vice versa. Forbes describes this as a "1:1 correlation." An optional add-on makes Centerbase files and folders available offline with changes automatically synced when you're back online. For new matters, Centerbase can automatically generate a set of folders.

"Centerbase has made transitioning to a cloud product for document management seamless," said Tait Johnson, paralegal at Sharpe & Associates, PLLC. "We no longer

have to maintain our own file server, and we can now access our documents from anywhere.”

Other Notable Features

You can view documents in Centerbase from multiple locations. The Documents File Explorer gives you access to all mapped documents. Navigate your folder hierarchies or run a search. Alternatively, you can access relevant documents in other areas of Centerbase such as in Matters, Contacts, and Billing. For example, each matter contains a Documents tab listing all related files.

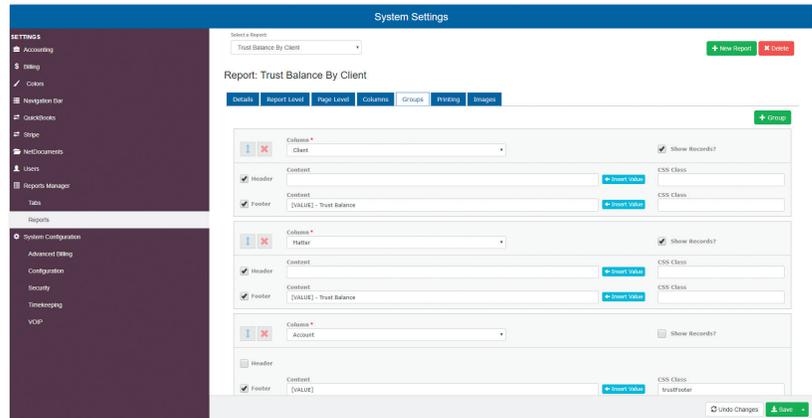
Centerbase's Microsoft Word integration and Workflows (document assembly combined with project management) bring further automation. Workflows take you from Centerbase to Word to automatically generate a document that gets saved to the correct matter when finished.

At your option, you can create document profiles to track type of document and other metadata to improve search results. Centerbase enables you to keep every version of a document in case you need to revert. You can restrict access to documents. Also, documents lock when



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Create Custom Reports With Centerbase's Report Builder

colleagues work in them. If you need more robust document management, Centerbase integrates with NetDocuments.

What Else Should You Know?

Centerbase launched several additional features since our [initial report](#). Matters Templates enable you to create customized layouts for each of your practice areas with all the requisite data fields. Thus, a bankruptcy matter can track creditors, while an accident matter can track medical records and police reports. The new Report Builder offers the ability to create custom reports. Forbes showed me a report that lists matters comprising 80% of a firm's business. Finally, Centerbase's iPhone app now includes mobile time entries for billing on the go. Centerbase costs \$52 per user per month.



Run Your Law Firm in the Cloud

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