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Review of Centerbase (Next-Generation Practice Management)

By Seth G. Rowland, Esq.

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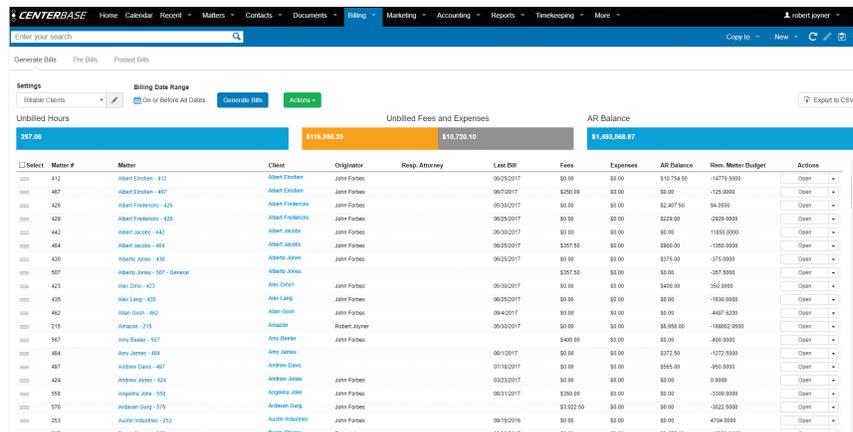


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We have witnessed *The Innovator's Dilemma* over the past 10 years as startups wooed tens of thousands of lawyers to cloud practice management software without much of a fight from the companies behind legacy products. Now, the disrupters face disruption themselves as a new wave of startups seek to offer "next-generation" cloud practice management software with the extensive customization and deep feature set of the legacy products. One such product is Centerbase. Does it deliver? Find out in this review by lawyer and legal technology consultant Seth Rowland.

Who hasn't dreamed of going into space? Whether your preference tends toward quirky Dr. Who or idealistic Star Trek, the motivation is the same — to escape the bonds of your earthbound existence. Well, until Richard Branson starts discount flights to the moon, the closest you might be able to get to an untethered existence is cloud computing — more specifically, cloud practice management software. So, come with me in this issue of *SmallLaw* and let me introduce you to *Practice Management: The Next Generation*.

Lawyers have long used desktop practice management software to manage their billing, calendar, client relations, and documents to bring order and profits to their law firms. These systems, while



Unbilled Hours	Unbilled Fees and Expenses	AR Balance
397.06	\$116,598.25	\$10,720.10
		\$1,493,668.67

Select	Matter #	Matter	Client	Originator	Resp. Attorney	Last Bill	Fees	Expenses	AR Balance	Sum Matter Budget	Action
...	412	Albert Einstein - 412	Albert Einstein	John Faros		06/20/2017	\$0.00	\$0.00	\$12,754.50	14779.3000	Clear
...	487	Albert Einstein - 487	Albert Einstein	John Faros		06/10/2017	\$200.00	\$0.00	\$0.00	-125.0000	Clear
...	426	Albert Einstein - 426	Albert Einstein	John Faros		05/10/2017	\$0.00	\$0.00	\$2,407.50	64.0000	Clear
...	429	Albert Einstein - 429	Albert Einstein	John Faros		06/25/2017	\$0.00	\$0.00	\$228.00	-2628.0000	Clear
...	442	Albert Einstein - 442	Albert Einstein	John Faros		05/30/2017	\$0.00	\$0.00	\$0.00	11850.0000	Clear
...	484	Albert Einstein - 484	Albert Einstein	John Faros		06/25/2017	\$207.50	\$0.00	\$0.00	-1260.0000	Clear
...	430	Albert Einstein - 430	Albert Einstein	John Faros		06/25/2017	\$0.00	\$0.00	\$275.00	-375.0000	Clear
...	507	Albert Einstein - 507 - General	Albert Einstein	John Faros		06/25/2017	\$307.50	\$0.00	\$0.00	-367.0000	Clear
...	423	Alan Turing - 423	Alan Turing	John Faros		05/30/2017	\$0.00	\$0.00	\$405.00	550.0000	Clear
...	435	Alan Turing - 435	Alan Turing	John Faros		06/25/2017	\$0.00	\$0.00	\$0.00	-1530.0000	Clear
...	492	Alan Turing - 492	Alan Turing	John Faros		06/40/2017	\$0.00	\$0.00	\$0.00	4487.5200	Clear
...	215	Amos - 215	Amos	Robert Joyce		05/30/2017	\$0.00	\$0.00	\$8,900.00	-18802.0000	Clear
...	487	Andy Jones - 487	Andy Jones	John Faros		06/25/2017	\$400.00	\$0.00	\$0.00	-400.0000	Clear
...	464	Andy Jones - 464	Andy Jones	John Faros		06/10/2017	\$0.00	\$0.00	\$272.50	-1275.0000	Clear
...	497	Andrew Davis - 497	Andrew Davis	John Faros		07/18/2017	\$0.00	\$0.00	\$585.00	-650.0000	Clear
...	424	Andrew Davis - 424	Andrew Davis	John Faros		03/23/2017	\$0.00	\$0.00	\$0.00	0.0000	Clear
...	558	Angela Lee - 558	Angela Lee	John Faros		06/23/2017	\$300.00	\$0.00	\$0.00	-3300.0000	Clear
...	576	Andrew Gung - 576	Andrew Gung	John Faros		06/23/2017	\$3,022.50	\$0.00	\$0.00	-3622.0000	Clear
...	253	Arthur H. Hays - 253	Arthur H. Hays	John Faros		06/15/2016	\$0.00	\$0.00	\$0.00	4794.0000	Clear

Centerbase's Billing System

mature and powerful, have a major drawback — they are tethered to physical computer hardware that must reside in the office or datacenter. They also require expensive maintenance and regular updates of both the hardware and the software.

With client expectations of 24/7 service, lawyers now need round-the-clock access to the information in their matters. A paradigm shift has occurred in recent years as lawyers have looked up to "the Cloud" for a solution. The first step was to outsource the hardware and maintenance to "virtual desktops" hosted in the cloud ("DAAS"). This solution enables law firms to use the same powerful desktop applications, but it's not well suited for use on tablets and smartphones.

The Next Generation

Centerbase represents the "The Next Generation" of practice management software designed from the ground up as a cloud app that runs in your web browser. Whether you use a desktop, laptop, tablet or phone, they all access the same live data.

As a result, changes on any platform appear immediately, including design and layout changes.

There are both iPhone and Android apps that give you access to all your data. It took one minute to download the mobile app and enter login credentials after which I was ready to go. An admin module lets you customize the mobile options, including choosing which record types can be viewed in the app. For each record type (e.g., contacts, matters, and custom items) you can set how the list will be displayed and what form fields will appear.

The first generation of cloud software was designed for the solo attorney. These apps were limited in their functionality to the core features of calendaring, time and billing, and contact management. They were cookie-cutter systems that anyone could learn and sold like hotcakes. The hard stuff — specialized workflows, advanced billing, form customization, reporting, and global search — standard features of the desktop systems — were largely absent.

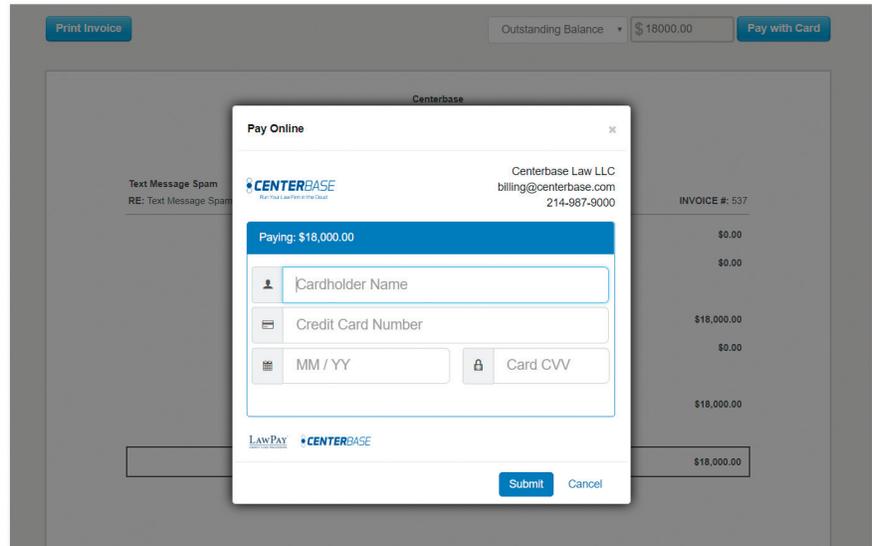
Centerbase is “next generation” because it tackles this hard stuff that users of desktop practice management have come to expect. With Centerbase, you can go to the cloud without compromising your data integrity, reporting requirements, or complex partner profile allocation formulas. Surprisingly, Centerbase costs \$52 per user per month — about the same as the first-generation apps.

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Practice Area Customization and Workflows

Lawyers consider themselves specialists with special needs, and practice management requirements vary from firm to firm. The organizing theory behind Centerbase starts from this premise. Centerbase enables you to create unlimited custom items (or record types) and link them to other custom items, matters and contacts. You can create unlimited custom fields, which offer the full range of data types. You can create unlimited custom page layouts (dashboards), change the layout depending on the type of case, the specific situation, or even the stage of the case in the workflow. The flexibility is infinite in my experience.

Centerbase then lets you use your data to trigger complex workflows. Rules-based workflows called “triggers” can monitor changes in fields, and send email, assign tasks, or create documents. When



Centerbase includes credit card processing.

the assigned tasks are completed, the workflow can update fields back on the matter record. You can create user-activated workflows in which the user can choose among branching options that launch particular items. Both triggers and workflows are managed through a web-based workflow designer. Workflows can include email and Word templates, facilitating the creation of custom email and documents on the fly from the actual matter.

Be prepared to spend some time planning out your workflow before you start building it or work with a Centerbase certified consultant. The editor is as complex, as it is powerful. Centerbase needs to implement a better User Interface (UI) to make it more intuitive. For example, to set the value of a variable, you need to inspect the code on the HTML page to get the name of the field. And while you can create any new item on the fly and set its values, you cannot automatically set the page layout — it must be applied.

All the CRM Basics Included

In the best legal practice managements systems, the data

radiates from two spindles — contacts and matters. The business generation side revolves around networks of contacts, their relations to each other, and their involvement with principals of the law firm. This is the classic CRM, short for Client Relationship Management. Centerbase is both a CRM and a matter management system.

On the CRM side, cases enter the law firm via the CRM. With Centerbase you can place a potential client intake form on your website and coordinate it with marketing and advertising campaigns. As forms are completed, the data automatically enters the CRM, and notifies the appropriate person to follow up, schedule an appointment, gather prospect information, and then engage with the contact contractually.

You can track email, create phone logs (there’s a VoIP connection that will auto-dial calls from web), send out engagement agreements, and collect retainer payments via credit card. Because all record types in Centerbase are customizable, you can collect case-specific data via a web intake form. With automated

triggers, you can even assign the intake to different people depending on how the questions are answered.

Centerbase takes a different approach than most programs in navigation, searching and list management. It uses a dynamic sidebar, similar to popular websites, that shows the results of search or customizable queries. The sidebar is a power navigational tool that is surprisingly efficient. For example, you can selectively tag the results of a search and perform a range of system-wide actions. As an advanced CRM, Centerbase enables you to save your searches (Queries), and assign them to a customizable menu hierarchy.

Other practice management systems use a more traditional grid format for search results. Recently, Centerbase added grids for some items. The Client grid includes billing related fields, summary data and action items. The Matter grid includes the ability to group data by field. I would like to see the ability to customize the columns displayed, including support for saved queries, and then assign that configuration to a menu item and matter layout dropdown, similar to the page layout dropdown selector on the forms.

Matter Management Fundamentals

Centerbase covers the fundamentals — calendar, tasks, notes and documents. The calendar is fully functional, including the ability to assign an event to multiple users, provide advance email notifications of upcoming events, and create repeating events and all-day events. On completion of any activity, you have the option to add a follow-up task and record time. The time slip inherits the duration of the activities and the link to the matter. At the moment, though, neither the subject nor the description of the activity is transferred to the

time slip. Centerbase also handles expenses.

Centerbase has a Related Items tab that houses all the related lists. The tab loads quickly. Each list includes the ability to add new items, link unassociated items, make bulk changes, and filter the list. It would be nice if the filter would include a search limited to the related items in the list as well as some more bulk process options comparable to the bulk process options on the sidebar lists.

Centerbase is the first cloud product that matches the capability of the legacy desktop practice management systems. It deserves a high grade on comprehensive feature set and implementation.

Billing and Accounting

To do justice to Centerbase's financial management tools, I have consulted colleagues who are billing experts. They were impressed both by what has been built and released, and the early peek we got at the forthcoming accounting module. Centerbase tracks a wealth of data on partner originations and fee allocation. It allows for setting a hierarchy of billing rates on the staff, client, and matter level. Bills can be generated at the matter level, client level, and key indicators. Partial payments on invoices are allocated on the basis of configurable preferences.

Reports cover billing, productivity, cash flow, origination, trust balance, and balance, sheet, income, etc. The reports are comprehensive and dynamic, meaning you can drill down to the supporting data

records directly from the reports. The Report Manager enables you to create your own complex reports. You can duplicate an existing report as a starting point, and then customize the columns and the filters. For advanced report creation, you can register a SQL stored procedure with Centerbase and then use that procedure to build your report.

Fully integrated accounting is a key feature of the Next Generation of practice management systems. When the accounting module is released in January 2018, it will use the same database. This will provide comprehensive reporting that includes matter data as well as billing data, and workflows that blend billing actions with CRM actions.

Integrations

Centerbase runs monthly and quarterly software development sprints. If a feature is in demand (such as accounting), it will get prioritized. Additionally, Centerbase uses APIs (application programming interfaces) to integrate with other cloud products. Centerbase recently released bidirectional integration with Office365 calendars for example.

In addition, Centerbase has built an integration with the NetDocuments document management system. Once the credentials are established, Centerbase will send over client and matter data to NetDocuments and auto-create the workspace which is then displayed as a tab on the matter record. I hope that future integration with NetDocuments will allow you to manage creation and approval of its document via the workflow engine.

The integration with credit card processing services Stripe and LawPay.com means that invoices can get paid with a click of the button and automatically accounted for on the matter. The LawPay integration is particularly helpful for attorneys,

as it allows a single payment to pay for WIP and for retained, with Centerbase automatically splitting the payments to the appropriate operating and trust accounts.

TechnoScore

As a consultant, I judge a product on whether it meets the needs of the law firm that retains me and fits within their budget. Part of the evaluation matrix includes a close look at current features versus present needs. Another key element is to examine the company's commitment to customer support and continuing product development. I look at the

development team's capability to bring the product to the next level, surprising me with features I didn't know I needed and now find I can't live without.

Centerbase is the first cloud product that matches the capability of the legacy desktop practice management systems. It deserves a high grade on its comprehensive feature set and implementation. In my review, I have noted some features of the current system that I would like to see improved. I have raised a number of these items with the company's management, and believe that these issues will be

addressed in future releases. Centerbase represents the next generation of practice management software, and it will surely go places no software company has gone before.



Run Your Law Firm in the Cloud

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Document assembly specialist [Seth Rowland](#) has been building document workflow automation solutions since 1996 through [Basha Systems](#), the consultancy he founded. He also helps law firms implement practice management systems. Basha Systems is a member of the [3545 Consulting Group](#). Previously, Seth cut his teeth as a litigator at Cravath, Swaine & Moore and Kramer Levin. Seth won the TechnoLawyer Consultant of the Year @ Award for his achievements in the areas of legal practice management and document assembly.

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