Release Notes – Centerbase 10.5.3.1

Hello Centerbase Family!

Happy Thanksgiving to everyone—we hope that you'll find much to be thankful for in this release!

First up, we are releasing an update to our PDF Bill Generation process. Not only will this change increase the speed of PDF generation, it will also increase performance across the system, particularly during the beginning of the month when most customers are generating bills.

Additionally, we have added some customer-requested features to Centerbase Document Management. These include default folder creation, the ability to manually create a SharePoint matter site, and the ability to link an existing SharePoint site to a matter.

See below for more details and have a Happy Thanksgiving!

Billing

- Until now, when generating PDF bills in bulk, the user would select the bills to be generated and wait until the PDFs were finished generating before moving on to the next group of bills or next task. With this new functionality, the PDFs will be generated on their own special server, allowing the user to batch groups of bills, then "fire and forget". For more information, please see this article: New Bill Generation Method.

Document Management

- A set of default folders can now be created in Document Management when a new matter is created. To enable this, a user with administrative rights must navigate to System Settings > Document Manager > Centerbase Document Management and enter the list of folders that should be created.

- When no SharePoint site is connected to a matter, users can now initiate the site creation with the click of a button or link a matter to an existing SharePoint site by entering the site URL.
- When sorting documents in Doc Management, Centerbase will sort across all pages and sort by date for date fields.