



CaseLink<sup>2</sup>

## Washington Chapter 7 Trustee Seeks Secure, Reliable and Easy-to-Use Software, Finds Perfect Solution with CaseLink<sup>2</sup>

Trustee Charlie Carlson of Washington wanted a secure and reliable platform after struggling with a former vendor's software. With *CaseLink<sup>2</sup>*, he has found true software satisfaction.

### Enough with Inconsistent Software & Service

Everything had been great for Mr. Carlson since his panel appointment in 2003. But when his software with a former vendor no longer met his practice's evolving needs, he found himself needing a change.

"There were instances where we'd submit our final reports to the U.S. Trustee, and when we went to do the notice, the data had changed. It was just bad," Mr. Carlson said.

To add insult to injury, customer service had been steadily declining in quality.

"[My previous vendor] used to be good on customer support, but through the years they got less and less accessible," Mr. Carlson said.

When Mr. Carlson took a demo of *CaseLink Web* by BMS, he liked the automated features and friendly, welcoming staff, and switched soon after.

"We saw many more features on the BMS platform than we had with our previous software vendor and decided it would be much better," Mr. Carlson said.

With data issues now a thing of the past since switching to BMS, Mr. Carlson had no second thoughts in deciding to upgrade to *CaseLink<sup>2</sup>* in September 2016.

### Secure, Reliable and More Productive

*"CaseLink<sup>2</sup> is very easy-to-use and self-explanatory... It's seamless and [the 341(a) View] works very well in hearings."*

With *CaseLink<sup>2</sup>*, Mr. Carlson is assured knowing his software is secure, reliable, and tailored to his needs.

"It's very easy-to-use and self-explanatory," Mr. Carlson said. "If I do run into any problems, I can use the in-software BMS tutorial videos, and I can figure it out from there. That is fantastic."

Since using the platform, Mr. Carlson has seen improvements in routine tasks such as 341(a) and TIR preparation.

*"[My previous vendor] used to be really good on customer support, and then through the years they got less and less accessible. They just weren't responsive."*



"I really, really like the 341(a) View," Mr. Carlson said. "I'm doing a docket tomorrow and it's very easy to review. It's seamless and it works very well in hearings."

"I just did my interim report in the software for the first time," Mr. Carlson added. "After watching a tutorial on it a couple of times, I followed through and did the report with no problems."

Plus, Mr. Carlson has stayed on track with his

caseload by utilizing features like the Alerts Panel.

"I like the Alerts Panel because I can quickly look at it and get constant reminders for what I need to do," Mr. Carlson said. "That and the To Do List feature really keeps me on top of things."

### Personalized Support with Bankruptcy Expertise

For Mr. Carlson, he cannot ask for more exceptional support than what is provided by both his Account Manager, Melanie Patton, and the BMS Support Center.

"Melanie is extremely helpful and responsive – she's fantastic," Mr. Carlson said. "I've also called into the Support Center a couple of times and they've been extremely helpful and fixed the problem immediately."

For trustees not yet using *CaseLink*<sup>2</sup>, Mr. Carlson makes it simple – just switch.

"I've spoken with several trustees, and to each person I have said, 'Go with BMS,'" Mr. Carlson said. "For customer service alone, you guys are great."

*"[My Account Manager, Melanie Patton] is extremely helpful and responsive – she's fantastic. I've also called into the Support Center a couple of times and they've been extremely helpful and fixed the problem immediately."*



5 Peters Canyon Rd, Ste 200  
Irvine, CA 92606

**Learn More:** [BMSAdvantage.com](http://BMSAdvantage.com)