



CaseLink²

Trustee Assistant uses 2 Different Cloud-based Software Platforms *Discovers Faster Workflows in CaseLink² and Knowledgeable BMS Support*

A trustee assistant who works for two different trustees—each using a different case administration software platform—is discovering much more productive workflows and saved time with CaseLink², plus in-depth support from specialized staff with bankruptcy knowledge at BMS.

This Chapter 7 professional has enjoyed the following benefits since starting to use BMS software:

- **Easier usability & access** with a more intuitive interface – allowing the user 1-click access to cases, documents, and reports from the Sidekick panel, and easier finding of case information and documents altogether on one screen.
- **Enhanced productivity** with faster report generation and the ability to take actions with less clicks.
- **Saved time** with the Alerts Panel, which notifies the user about actionable items that would otherwise require manual review.
- **Increased flexibility** with lightning-fast accessibility to the software from anywhere, plus the ability to use the latest in browser technology (such as Chrome).
- **Better banking** with direct support from the BMS Banking Center – specialized in both bankruptcy knowledge and BMS software.
- **Dedicated support** from experienced Account Managers and the industry's most-renowned support center, all who are specialized in the processes involved with administering bankruptcy cases.

Having experienced these advantages with BMS firsthand, this trustee assistant is strongly considering recommending the other trustee switch to CaseLink² for their case administration needs as well. With inconsistent, slow support that only covers the technical aspects of their software, the other provider's experience no longer measures up.

[Read the full testimonial:](#)

“ During the day, I assist a trustee who uses an older cloud-based software platform, and in the evenings, I work for a different trustee who uses CaseLink². With both trustees, I take on the case administration tasks after the 341(a) meeting.

My workflow is much faster in CaseLink². One of the tasks I do most often is generating NDR and final reports. In the other software, I have to manually save all of my documents, which slows me down; however, in CaseLink², my reports are automatically saved into my Case Documents folder, which saves me a ton of time.

I am much more productive in CaseLink². I love the Sidekick [the left panel which offers one-click access to cases, documents and reports anywhere in the software] – particularly, the Favorites feature. With this feature, I can mark my most-used cases as “favorites” which are added into the Sidekick—that is so much easier than having to search for cases!

I have saved a lot of time with the Alerts Panel in CaseLink², as it notifies me about all actionable items as soon as I log into the software. It really takes the guesswork out of my tasks.

The CaseLink² platform is also more flexible for me, since I can choose which browser I want to use – including Google Chrome. The other software requires Internet Explorer, which is a pain since everyone in our office uses and prefers Chrome.

One of my main issues with the other provider has to do with banking. We used to have someone at the bank working directly with us, but that person is gone. Now we have to call someone else at the bank, and the support is slow and inefficient. I often feel as if they have other priorities. With BMS, we call the BMS Banking Center for support, and it is always direct and prompt—that is so much better.

Overall, I find what I need much easier in CaseLink² than in the other platform. CaseLink² is always very simple and fast to get in and out of the software. Whereas, in the other software, it's not always apparent where to find what I need, plus I often have to take two actions to get to where I want. In CaseLink², everything is right where I need it – whether in the Sidekick or in the Case Information screen, where all of the information is laid out intuitively so I can find everything quickly.”