



CaseLink²

North Carolina Trustee Says Mobility & Ease-of-Use Provided by *CaseLink²* is a “Necessity”

Chapter 7 Trustee James Lanik of North Carolina wanted a web-based software with all of the functionality he had enjoyed in his original platform, *CaseLink Office*. With *CaseLink²*, Mr. Lanik’s bar has been met resulting in a more productive practice.

From *Office* to Anywhere

Mr. Lanik had used *CaseLink Office* from BMS since his panel appointment in 2013. But, while he enjoyed the software’s robust features, he wanted more flexibility.

“*CaseLink Office* worked very well for us, but it tied us to a machine,” Mr. Lanik said. “If it was Saturday afternoon and the power went out, we were done for the day.”

When his assistant moved to Texas to work remotely, Mr. Lanik had much more need for a web-based solution. After looking into *CaseLink Web* by BMS, he switched over and soon found significant benefits to his practice.

“With [*CaseLink Web*], we could access our case information in power outages, fire, famine and floods,” Mr. Lanik said. “All we needed was an Internet connection, and we were up and running.”

“With [CaseLink Web], we could access our case information in power outages, fire, famine and floods. All we needed was an Internet connection, and we were up and running.”

“CaseLink² looks and acts more like CaseLink Office, which is perfect since we had been so used to Office. But CaseLink² is more intuitive than Office. You don’t have to click through as many screens to complete a task.”

Flying Free in the Cloud

While Mr. Lanik and his assistant enjoyed their newfound flexibility, they had trouble acclimating to the different user interface in *CaseLink Web* after being used to the screens in *Office*.

So, when they previewed *CaseLink²* in 2016 with its similar layout to *Office*, they enthusiastically asked for the quick upgrade.

With the familiar layout and full feature set in *CaseLink²*, Mr. Lanik now enjoys the best of both worlds in his practice.

“*CaseLink²* looks and acts more like *CaseLink Office*, which is perfect since [my assistant and I] had been so used to *Office*,” Mr. Lanik said. “But *CaseLink²* is more intuitive than *Office*. You don’t have to click through as many screens to complete a task.”

"I'm in two different divisions, so a lot of times I have 341(a) sessions on Friday and then another on Monday. CaseLink² makes it easy to see multiple 341(a) calendars at once."

Mr. Lanik's workflows are a breeze with features like the Sidekick – the left side panel which provides quick access to cases, documents and reports.

"I use the Sidekick all the time to get to documents quickly," Mr. Lanik said. "I also really like how you can see all of your 341(a) appointments at-a-glance, grouped by meeting time."

He added, "I'm in two different divisions, so a lot of times I have 341(a) sessions on Friday and then another on Monday. CaseLink² makes it easy to see multiple 341(a) calendars at once."

Above all, Mr. Lanik counts the added mobility of CaseLink² as a major plus – he knows he can always access his case information from wherever he is.

"It's so much easier," Mr. Lanik said. "My daughter was sick today, but I could stay home with her and still take care of everything I needed to do. If something goes on and I need to work elsewhere, I know that the platform is stable and will work anywhere."

Full Support of BA State Requirements

As a Trustee in a BA state, Mr. Lanik appreciates features in the platform which meet his special district needs.

"Trustees in BA states have unique reporting requirements," Mr. Lanik said. "My district's judge requires us to number our Interim Reports sequentially, and in CaseLink² we can automate that process. That is very helpful."

Grounded in Sterling Support

Along with the easy and accessible software, Mr. Lanik is a raving fan of the support he receives from his Account Manager, Renee Laws.

"As much as we like the product, the service and attention we get from Renee is beyond compare—it's just top-notch," Mr. Lanik said. "She's really been wonderful."

"As much as we like the product, the service and attention we get from [our Account Manager] is beyond compare—it's just top-notch."

Advice for Trustees Still Using Desktop Software?

For those not yet using CaseLink², Mr. Lanik says the software is a "necessity."

"I would definitely recommend CaseLink², and I have," Mr. Lanik said. "Being able to work from anywhere is of primary importance to us. Unless you want to go into the office every day, having a reliable web-based product is a necessity."



5 Peters Canyon Rd, Ste 200
Irvine, CA 92606

Learn More: BMSAdvantage.com