



CaseLink²

Idaho Chapter 7 Practice Switches Software Providers, Discovers True Browser-Based Freedom, Improved Workflows, & Unlimited Support with CaseLink²

Trustee Noah Hillen and his assistant, Debbie Rodriguez, switched to BMS from another vendor and have since found true software satisfaction with industry-renowned support from BMS, as well as a robust platform to meet their needs, *CaseLink²*.

More Accessibility & Enhanced Support a Major Plus

Mr. Hillen initially chose another software provider's web-based platform when he went on panel in January 2014 for increased flexibility in the Idaho-based Chapter 7 practice. However, Mr. Hillen and Ms. Rodriguez soon began to look for other options.

"Our other software platform was not exactly what we wanted at that time, so we considered other web-based platforms," Ms. Rodriguez said.

Having used BMS software when working with other Chapter 7 trustees in the past, Ms. Rodriguez recommended to Mr. Hillen that they switch to *CaseLink Web* due to her past experience using *CaseLink Office* with 2 other trustees whom she had previously assisted.

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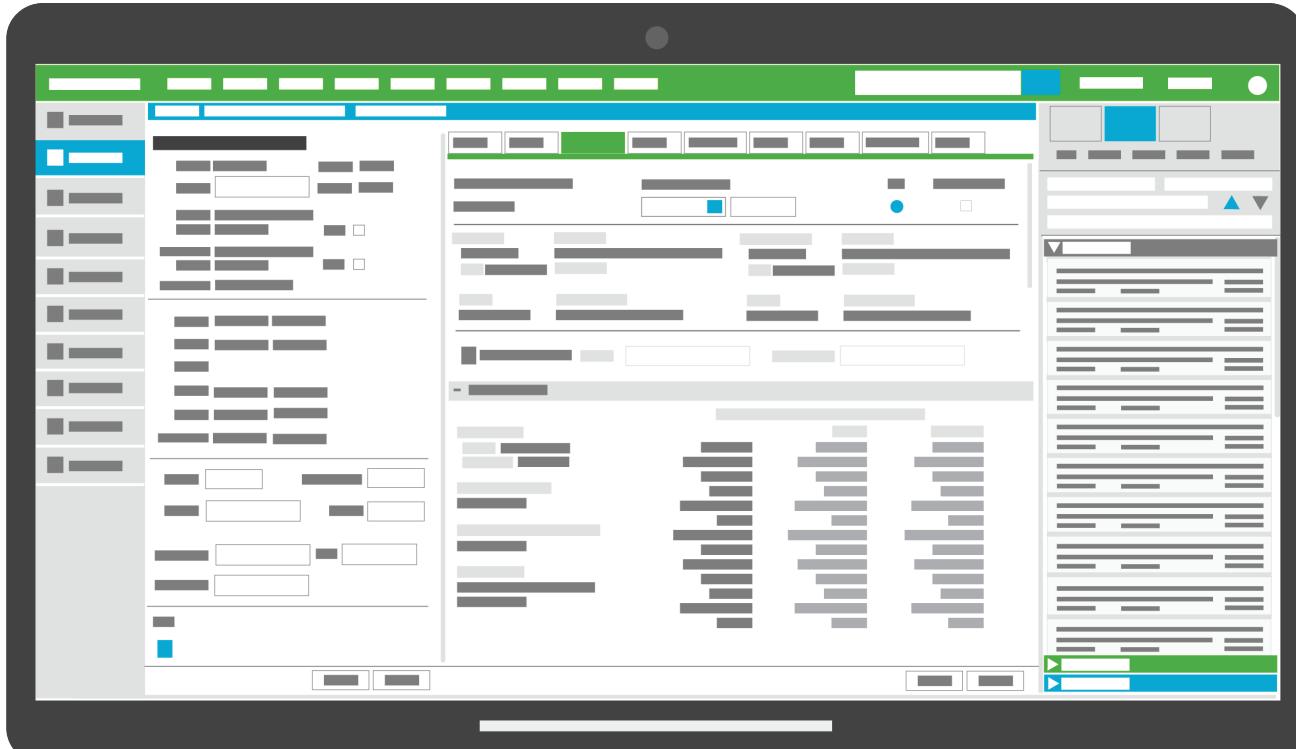
When *CaseLink²* was released in September 2016, Mr. Hillen and Ms. Rodriguez saw a demo of the product and were impressed. Not only was the accessibility and functionality enhanced on the web-based platform, but the software was more similar in format to *CaseLink Office*, with which Ms. Rodriguez was very familiar. So, Mr. Hillen and Ms. Rodriguez decided to do the quick upgrade to *CaseLink²*.

Fully Realized Web Flexibility and Efficiency + Unlimited Support

Since Mr. Hillen and Ms. Rodriguez have switched to *CaseLink²*, that accessibility that they originally sought after has been fully realized, making their practice much more flexible and efficient.

"It's so nice not having to rely on one specific computer or application in a particular place to access our cases," Ms. Rodriguez said. "It's so easy to jump in and manage our cases whether we're in the office or anywhere else, with no hassle."

In addition to that improved accessibility, Ms. Rodriguez has noticed broad workflow improvements in tasks such as 341(a) prep and TFR generation.



"My workload has gotten a lot easier," Ms. Rodriguez said. "I can go in and out of different cases very easily, so it saves a lot of time. It is much easier to go from case to case and get the information we need for 341(a) prep and TFRs."

"We haven't had to rely a lot on the Support that much since we made the switch – the software just made sense so we went with it."

switch – the software just made sense so we went with it," Ms. Rodriguez said. "I love that if we have an issue we can still use the Live Chat feature – that is pretty cool!"

She notes, however, that if she ever has a problem, she knows that her Account Manager, Melanie Patton and BMS Support Center team members are never far. "It all comes down to really great customer service."

"My workload has gotten a lot easier. I can go in and out of different cases with fewer screens to click through...it saves a lot of time."

The customizability of the platform has also made a huge difference in Ms. Rodriguez's daily workflows. "The overall customizability of the software is fantastic," Ms. Rodriguez said. "I work from the Alerts Panel on the homepage all day long, and having the ability to customize that to my needs has been great."

Since upgrading to CaseLink², Ms. Rodriguez hasn't had a lot to comment on about BMS Support – she hasn't needed it! "We haven't had to rely a lot on BMS Support that much since we made the



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