



CaseLink²

Northern California Chapter 7 Practice Discovers Most Up-To-Date & Efficient Practices with *CaseLink²*

Switching from a previous software vendor's stagnant platform to BMS was like night and day for Trustee John Roberts and his assistant, Fran Rothwell. With *CaseLink²*, their practice is more up-to-date and flexible than ever before.

Switching from Stagnant Software with Other Vendor

Trustee Assistant Fran Rothwell felt like she was stuck in the past. Although she has seen many changes in the bankruptcy industry since she began assisting Trustee John Roberts, who went on panel in 1986, Ms. Rothwell felt that her case administration software – originally provided through another vendor – was stagnant.

At the time, Ms. Rothwell knew several BMS clients and employees, including Account Manager Melanie Patton – then, a Trustee Assistant. When Melanie Patton went to work for BMS, Ms. Rothwell became curious.

"It seemed to me that BMS was staying more cutting-edge with their platform than my then software vendor," Ms. Rothwell said. "Melanie told us how great the product was, so we began to look into it. Plus, knowing how great the people were at BMS made it easier for us to switch."

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With features such as extensive document management and robust reporting, Mr. Roberts and Ms. Rothwell were blown away by the enhanced capabilities of *CaseLink Office* in comparison to their previous software. Plus, the excellent service provided by the BMS Support Center made all the difference.

Although Ms. Rothwell was very satisfied with the *CaseLink Office* software, Mr. Roberts began working toward retirement in 2014, so Ms. Rothwell needed a more flexible software option. That's when *CaseLink Web* caught her eye with its ease of accessibility so she could monitor Mr. Roberts' remaining cases from home.

In September 2016, Mr. Roberts and Ms. Rothwell were introduced to *CaseLink²*, the new and improved cloud-based platform from BMS. With that drive to stay up-to-date with new modes of technology, Mr. Roberts and Ms. Rothwell decided to move forward with the simple upgrade.

Leading the Way with the New Standard of Case Administration

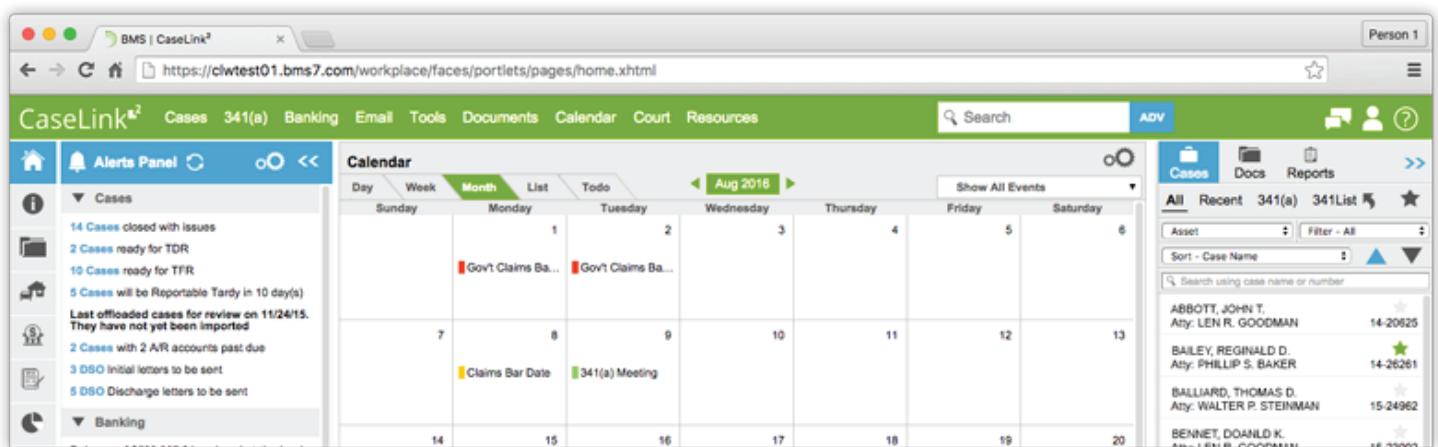
Since switching to *CaseLink²*, Ms. Rothwell is no longer in the past with her case administration duties. "Everything in *CaseLink²* is so well-thought out," Ms. Rothwell says. "I love that it mimics *CaseLink Office* in the layout. It's very easy to use and easy to work with. I'm liking it quite a bit."

Now that Ms. Rothwell primarily works from home, the improved accessibility of *CaseLink*² is most welcome. "I love the web-based software," Ms. Rothwell said. "The flexibility to work from home is really a great addition to our practice."

Plus, new features have made her monitoring duties a cinch while working remotely. "I love the Alerts Panel – working from home, I like that I can see the most important items that I need to see as soon as I sign in," Ms. Rothwell said. "I also like the Calendar and Tasks list quite a bit because – even though I don't get to all the tasks I need to every day – I like seeing everything that is on my plate and prioritizing my day around it."

"Having those reminders from the Tasks list is a must because even if I think I'm going to remember everything, I won't," Ms. Rothwell added.

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While *CaseLink*² is very similar in functionality to *CaseLink Office*, it has refined and improved those processes, which Ms. Rothwell greatly appreciates. "Features like cloud-based document editing are such a time saver while the receipts log is vastly improved, with much more robust and easy-to-access Reports," Ms. Rothwell said. "Plus, new features like the Sidekick—offering the ability to Favorite Cases and access cases, documents and reports on-the-fly—are excellent."

Industry-Renowned Support an Added Benefit

With fully-realized accessibility and enhanced productivity, Ms. Rothwell could not be happier with *CaseLink*², with the added benefit of receiving the industry-renowned support from the BMS Support Center and her Account Manager, Melanie Patton.

"My experience with BMS has been over-the-top wonderful," Ms. Rothwell said. "I've always had excellent service from the Support Center and Melanie. Plus, everybody's so friendly and they make you feel like family. I just love working with BMS."

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