



CaseLink²

CaseLink Power User Delighted to Find Cloud-based CaseLink² Easier to Use with Large Firm's Strict IT Policies

CaseLink power user Michelle Montoya – paralegal for Utah-based Trustee Michael Thomson – wanted a software that was secure enough for her large firm's stringent IT guidelines but also easy to get into and work with. *CaseLink²* turned out to be just the solution.

Better Compliance with Firm's Security Policies

Ms. Montoya started using *CaseLink Office* by BMS in 2000, when she was assisting another trustee. After Mr. Thomson became a trustee in 2011, Ms. Montoya joined him as his assistant and, together, they moved to Dorsey & Whitney LLP in 2012 where they continued to use the *CaseLink Office* software. While Ms. Montoya liked the features in *CaseLink Office*, she found that her firm's stringent security policies made it harder for her to use the desktop software.

"On *Office*, we had to have a separate computer just for the software because it wasn't allowed on our firm's network," Ms. Montoya said.

In 2014, Mr. Thomson and Ms. Montoya started using *CaseLink Web*, which made things much easier for Ms. Montoya.

"By going to *CaseLink Web* [which is cloud-based, so it was accessible through a web browser], we no longer had to have two computers," Ms. Montoya said. "That was fabulous."

"I used to have 4 monitors, and 2 keyboards, so that significantly slowed down my work process," Ms. Montoya added. "It was much, much better going to one. Being on the web was also very helpful."

As a power user of *CaseLink*, Ms. Montoya often shares feedback with her Account Manager, Melanie Patton, on areas where she feels the software can be enhanced. So, when she saw a demo of *CaseLink²* in September 2016 with many of her suggestions incorporated, Ms. Montoya was excited and eager to upgrade to the latest cloud-based iteration.

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More Streamlined Workflows, Robust Features

With firm network issues a thing of the past, Ms. Montoya is rejoicing at the secure accessibility and ease of use of *CaseLink²*.

"By going to *CaseLink²*, we are no longer using a product that can't be used on our firm's network," Ms. Montoya said. "I now only have one computer and it makes my life so much

easier!"

Ms. Montoya appreciates that her suggestions have been listened to, such as the implementation of new features she had previously suggested, including a more flexible 341(a) module with filter, sort, and drag and drop functionality, as well as documents listed in groups by source such as PACER, DocLink, and Other. She also appreciates the familiar user interface (similar to *CaseLink Office*) in addition to these new features.

"I like that the Case screen is more similar to *CaseLink Office* a lot," Ms. Montoya said. "I also like the improved features provided in the web product with *CaseLink2*, such as the new banking screen with account summaries at the top and details below instead of having to go to a separate screen."

"It's just so easy to use, and the people really listen when you have suggestions," Ms. Montoya added. "Working with BMS has been fantastic."



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