



CaseLink²

Wisconsin Chapter 7 Trustee Discovers Functionality of *Office* with Web Flexibility in CaseLink²

Wisconsin Trustee Michael Dubis and his assistant, Tiffany Obermeyer – located near Milwaukee, WI – were comfortable with their desktop software, but wanted web-based flexibility. With *CaseLink²*, they have found perfect harmony.

From *Office* to *Web*

Trustee Dubis had only ever used desktop-based software (including *CaseLink Office* by BMS) since his 1973 panel appointment. But he wanted to try Cloud-based case administration, so in 2015 he switched to *CaseLink Web*.

While Trustee Dubis, Ms. Obermeyer and other staff members in their office enjoyed the flexibility of *CaseLink Web*, they struggled with its differences at first.

“We liked a lot of features in *Web*, but, back then, there were capabilities in *Office* we missed,” Ms. Obermeyer said.

When Ms. Obermeyer voiced her concerns to her Account Manager, Melanie Patton, she discovered a world of support. Ms. Patton immediately began to train them on many of the processes that were streamlined and improved in the web-based software, which soon helped them acclimate.

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“When Melanie began helping us, we were much more satisfied,” Ms. Obermeyer said. “She definitely made sure our needs were met.”

Once on her feet, Ms. Obermeyer began to enjoy the benefits of working on the web. So, when she heard about *CaseLink²*, she was interested.

“We are very satisfied since switching to CaseLink². The program is so easy-to-use and navigate, and it all works together so well.”

“I wasn’t sure about it at first,” Ms. Obermeyer said. “But when we decided to upgrade, it was a smooth and effortless transition.”

Expectations Met & Exceeded

With *CaseLink²*, Trustee Dubis, Ms. Obermeyer and the other staff members in their office have found the best of both worlds – the familiarity of *CaseLink Office* with the flexibility of the web.

“We are very satisfied since switching to *CaseLink²*,” Ms. Obermeyer said. “The program is so easy-to-use and navigate, and it all works together so well.”

With its similarities to *CaseLink Office*, Ms. Obermeyer is in her element. Yet, she still loves the platform’s new productivity-enhancing features.



“The updated Claims screen has made our job so much easier,” Ms. Obermeyer said. “I love that we can access all our assets and claims right in the same screen.”

“Distributions are also much easier with the ability to run sample distributions,” Ms. Obermeyer added.

Along with all of these benefits, Ms. Obermeyer loves the time-saving features in *CaseLink*².

“The software streamlines so many of our regular tasks,” Ms. Obermeyer said. “We save so much time on tasks like preparing and filing documents after 341(a) hearings.”

Personalized Support with Bankruptcy Expertise

In addition to total software satisfaction, Ms. Obermeyer is appreciative of the support she has received from both her Account Manager, Melanie Patton, and the BMS Support Center.

“With Melanie’s help, our office automated printing our file cover sheets and labels, saving us a lot of effort,” Ms. Obermeyer said. “We didn’t even know that was possible until I mentioned to Melanie how tedious the manual process was and she said, ‘We can help with that!’ She really showed us how our processes can be made more efficient by adopting the productivity-enhancing features in the software.”

“The support has been fantastic,” Ms. Obermeyer added. “I can’t say enough good things about Melanie. She is on top of everything, and if she can’t answer our question, she always finds someone who can. That makes for a phenomenal rep, let me tell you.”

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