



DocLink

DocLink for Trustee Offices

341(a) Document Management Portal

Request, Remind, and Receive—Seamlessly

- Secure Document Uploading for All Parties
- Eliminates Manual Document Retrieval Processes
- A Single Location for 341(a) Debtor Documents
- Automate 341(a) Reminders and Communications
- Cloud-Based for Anytime Access
- Available to CaseLink Users at No Cost





DocLink

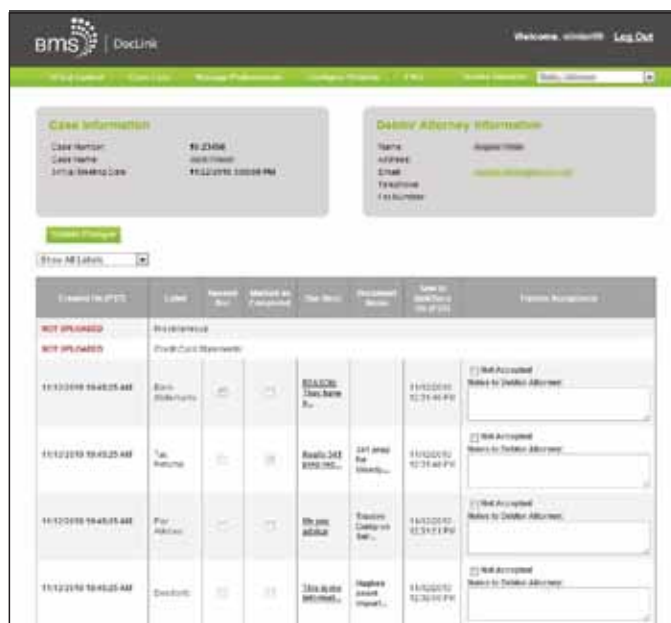
Transform the Way You Work For the Better

DocLink revolutionizes the entire 341(a) meeting preparation process, enabling easy access to information and enhanced communication with debtor attorneys and their staff—dramatically improving the collaborative process. Once you're set up, all your repetitive 341(a) document tasks and follow-up are completely eliminated.

DocLink allows you to do more in less time, significantly increasing your productivity while reducing operational costs—because it's all automated. *No more manually sending requests and reminders. No more searching for needed documents.* And best of all, *no more worrying if you have all the documents you need in time for your 341(a) meeting*—all documents uploaded into DocLink are automatically put into your BMS case administration software so you can find the documents you need quickly. DocLink does everything for you, so you can focus on the more important aspects of each case. And all at absolutely no cost to you.

That's why more trustees use DocLink in place of any other system to manage all their document requests—it's free to use, and it's a terrific time-saver. And in your business, isn't time the most precious commodity of all?

Request a demo today to see how we can dramatically reduce the time and effort it takes to collect documents and collaborate with other parties in your cases.



Intuitive, screens let you know exactly which requested documents have been submitted and which ones are still outstanding.



341(a) Meetings are presented in an easy-to-understand Calendar view listing total cases as well as DocLink-enabled cases for quick review

Key Product Features

Centralized Document Storage, Access & Retrieval

DocLink lets you request and receive all your 341(a) meeting documents online—so you never have to search for a document again. DocLink's collaborative web portal allows all involved debtor attorney offices to upload their files to a specific, secure location, and it automatically retrieves and downloads each file to your cases inside *CaseLink Office* or *CaseLink Web* upon upload. Each party is immediately notified that the document is available, eliminating entirely the need to print, distribute, process and store hard copies.



Customizable, Fully Automated Notifications and Reminders

- Streamlines your communications through fully-automated and customizable notifications, reminders and emails.
- Debtor Attorneys are quickly and efficiently notified of document requests, and document upload/format guidelines and deadlines.
- Schedule automatic notifications and reminders to multiple parties at the same time.



Time-Saving, Effective Collaboration

- Save time and more-effectively collaborate with debtor attorneys with automated requests for documents, automated confirmation of uploaded documents and automated reminders of missing documents.
- Quickly and easily track the documents received, see what documents are still outstanding, and notify debtor attorney offices of their current submission status.



Fully Integrated with BMS Case Administration Software

- All documents received are automatically saved to the corresponding case folders in our case administration software platforms—*CaseLink Office* or *CaseLink Web*.
- With its auto-sync feature, DocLink ensures that you always retrieve the most current documents.



Completely Secure, Cloud-Based Access

- Utilizes industry-standard encryption to ensure that the connection between your computer and the BMS servers are secure.
- All BMS servers are in an enterprise-grade, SAS70 Type II-compliant facility, similar to those used by major financial institutions.
- DocLink is scanned daily by McAfee-Secure to guard against known vulnerabilities.
- Your documents are always safe, secure and available anytime and from anywhere through the Cloud.

What BMS Clients are Saying

“ DocLink has streamlined my job and cut my workload in half! Before I would get huge emails with 100 plus-page PDF files—that I would have to download several times—now they're all right there in DocLink for me to access when I need them.”

- Wanda Toepper, Trustee Assistant
Pueblo, CO

“ DocLink is a life saver! Before DocLink, we would get thousands of pages of documents each month. Now, with DocLink, everything is delivered electronically and I no longer have to spend hours shredding sensitive documents after hearings. Being able to have titles for each requested document is wonderful. It allows me to ensure each requested document is properly received and which ones are still outstanding. And the attorneys and legals assistants love DocLink too. They tell me they love not having to stand at the copier making copies and the expense of mailing the voluminous documents.”

- Pamela Bellina, Bankruptcy Trustee Paralegal
Millburn, NJ

Getting started with DocLink is easy!

- Step 1:** Update settings within your BMS Case Administration Software.
- Step 2:** Connect to DocLink through your BMS Case Administration Software and create a DocLink Account.
- Step 3:** Select the “Manage Professionals” tab in DocLink to send out registration keys to debtor attorneys associated with your cases.

Let DocLink do the rest!

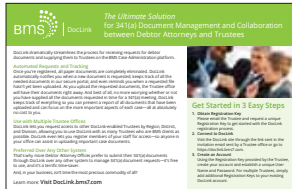
Get Debtor Attorneys to use DocLink

With these BMS Support Materials



Redesigned DocLink website

The DocLink website was recently changed to provide more detailed information about the value of using DocLink. The new site also informs Debtor Attorneys how easy it is to start using DocLink—with step-by-step instructions. We've even included a Frequently Asked Questions section and the email address for DocLink Support so BMS can answer the questions Debtor Attorney offices may have - removing that burden from you.



Flyers for 341(a) Meetings

341(a) meetings are the ideal place to let Debtor Attorneys know about using DocLink. We've made it even easier for you by developing a simple flyer that lets Debtor Attorneys know of the benefits of using DocLink and how easy it is to get started.



Email Template

Since DocLink is integrated with CaseLink Office and CaseLink Web, it's easy to let all the Debtor Attorneys know that you will be accepting documents for 341(a) meetings through DocLink. In fact, you can send out this type of communication through DocLink with their registration key - all they Debtor Attorneys have to do is click on the link and sign up!

To learn more or to set up a demo, please contact:



8 Corporate Park, Ste. 230, Irvine, CA 92606
T: 800-634-7734 | www.BMSadvantage.com