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PRACTICE MANAGEMENT

BUYER'S GUIDE: 2022 EDITION

Neos Can be Precisely Customized to Help Your Firm Improve Case Results While Increasing Efficiency and Profitability

“Documents are fully searchable with version control, and users can filter by type, category, and more. Firms can create templates for document assembly to generate documents automatically, ensuring consistency and saving time.”

Company Name Brand
Assembly Software

Product Name Brand
Neos

Latest Developments and Updates

- Intake Pro module is a fully native solution built only for Neos customers resulting in a seamless transition from intake to case. Intake Pro features a dynamic intake, required fields, stage and statuses, checklists, and triggers.
- Neos Automatic Timekeeper starts and stops automatically when a user opens a case, minimizing the time required to record billable time.
- Automations: Neos Intake Pro features dynamic intake forms that instantly adapt based on responses and predefined rules you control. Automated document generation lets you send documents via email and DocuSign, as well as generate referrals and rejections with the click of a button.

Collaboration and Workflow

Neos provides end-to-end case management and allows users to work anywhere, on any device. Built on Microsoft Azure cloud, Neos is 100% web-based and includes two-factor authentication (2FA) to ensure a secure environment, with live redundancy and 99% uptime. Legal teams can find all communications for a case and keep track of essential dates and task lists in one place. Neos has designed this intuitive platform to streamline workflows for law firms and legal teams.

Navigating the System

An action bar at the top provides quick access from commonly used functions including search, notifications, a timer, and the knowledge base. Icons along the left panel allow a user to move through the platform, including the **activity feed**, notifications, cases, documents, contacts, calendar, and task lists. As a user selects an icon, relevant options become available immediately to the right. The program

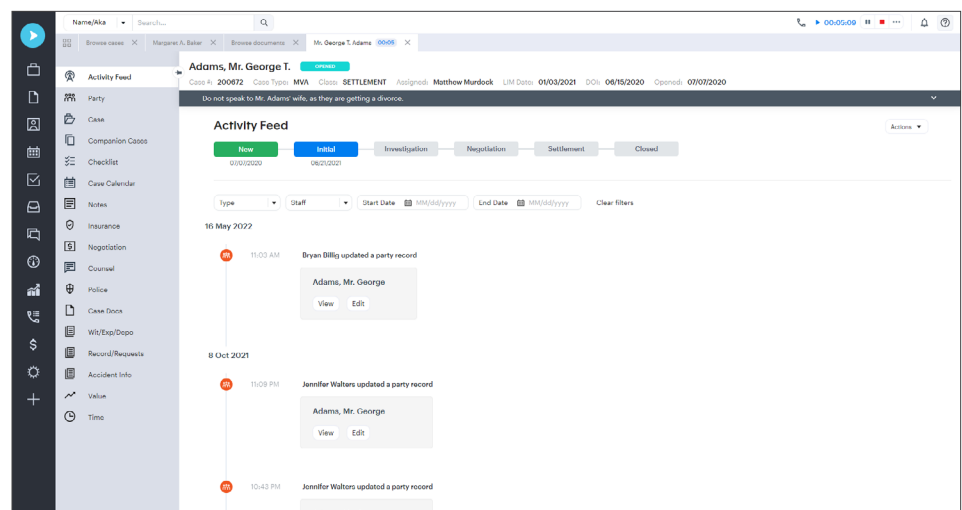


Figure 1: The Activity Feed is a chronological history of everything that has happened with a case. Whenever someone completes a checklist item, creates a note, or uploads a document, team members will see an entry on the feed, providing a full audit trail. Users can interact with items by clicking View and filter the feed by activity type, staff, or date.

“Neos is light years better than any other online platform that I’ve seen—and I did all my due diligence on everything else—and it is technically superior.”

Matt Schad
Schad & Schad

opens tabs as the user navigates through the system, remaining open until the user closes them. A user can have as many tabs open as they want, making it easy to move around the system. Each screen remembers how you left it and provides filter options relevant to that screen. Common throughout the program, Neos has a collapsible field chooser permitting users to select/deselect fields available in a view. *See Figure 1 on the previous page.*

The notification icon will provide a list of all notes that are sent directly to or mention a user. Each notification is clickable, and the user is taken to the note to respond. The search icon offers global search and displays results as the user types, which you can then filter. The briefcase icon displays a list of all matters in the system. If a user has filtered matters to a specific type, the next time they click on that screen, matters will show that filtered display. The contact icon displays a list of contacts in the platform, and firms can customize what information is shown. The system is highly interactive and allows users to click on a phone number for a contact and place a call directly or even send an [SMS/text message](#).

Neos has a fully contained [document management system](#), accessible from the document icon, with all necessary functionality for a law firm. Documents are fully searchable with version control, and users can filter by type, category, and more. Firms can create templates for document assembly to generate documents automatically, ensuring consistency and saving time. Neos supports multiple document generation, allowing users to

create the same letter for multiple parties. Neos integrates with DocuSign, giving firms a secure method for sending documents to clients and third parties for signatures.

Intake Pro

Intake is the starting point of every matter. [Intake Pro](#), brand new as of the fourth quarter of 2021, is a fully native and customizable system to manage leads and start new matters. When a user clicks on the intake icon, all current live intakes are displayed in the screen’s main body. The intake process starts with a customizable and [dynamic intake questionnaire](#), allowing users to collect information critical to specific types of cases. As the information is entered, a user will be asked related questions. Intakes can come from anywhere, so Neos integrates with Zapier to support connection between web forms, chat bots, emails, and more directly into the system. Neos has incorporated checklists with triggers and actions into Intake Pro. Checklists are developed by the firm for each case type, identifying tasks needed for each step of the case. When creating a matter, all required tasks are set up automatically, streamlining the intake process as well as how the case is handled.

Neos Today — Scheduling and To-Dos

The Neos Today screen is designed to give users a snapshot of their schedules and to-do lists. There are two sections to the screen: My Appointments and My Checklist. My Appointments lists appointments from a user’s Outlook account through integration that provides real-time synchronization with their calendar. Additionally, a user will see their

Status	Code	Task Name	Assigned	Due #	Due Date	S/R	Lim	Phase
✓	A76	Receivance Insurance Confirm	Sam Wilson		03/10/2020			Initial
✓	A05	File Agreement & Medico	Sam Wilson		06/15/2020			Initial
✓	A80	Client Released/MMI Enter D	Sam Wilson		07/15/2020			Initial
✓	A41	Request Medical Records & I	Hank McCoy		08/13/2020			Initial
✓	REV	Review Case/Enter Status Not	Matthew Murdock		08/14/2020			Unphased
✓	A20	Send Rep Letter to Plaintiff's I	Sam Wilson		08/16/2020			Initial
✓	A75	Send Rep Letter to Defendant	Sam Wilson		08/16/2020			Initial
✓	A70	Receivance Lost Wage Inform	Sam Wilson		09/14/2020			Initial
✓	A65	Request Lost Wage Inform	Sam Wilson		10/15/2020			Initial
✓	A75	Request Final Medical Re	Hank McCoy		10/15/2020			Initial
✓	B05	Prepare Draft Demand	Matthew Murdock		10/15/2020			Investigation
✓	B10	Confirm All Balances	Sam Wilson		11/22/2020			Investigation
✓	B25	Contact Adjuster to Nego	Matthew Murdock		10/23/2020			Negotiation
✓	B30	Follow Up Call to Adjuster	Matthew Murdock		10/30/2020			Negotiation

Figure 2: The Neos Today screen gives users a snapshot of their day. A user will see their checklists and their appointments synchronized with Outlook.

“I can’t say enough good things about Neos. We received great support and training and the data and document transfer went flawlessly.”

Sunny Vongtip

Ketterman Rowland & Westlund

My Checklist summary which shows all tasks specific to that case. My Checklist on the Neos Today page is similar but displays a list of tasks assigned to a user, showing the task name, matter, due date, and more. Neos supports task dependency and displays a hierarchy tree icon you can click to show sub-tasks. *See Figure 2 on the previous page.*

Dashboards and Reports

Dashboards are a simplified way to view data in Neos, presenting information and metrics that a firm wants to monitor. Dashboards are fully customizable, allowing each user to create and modify dashboards useful to them. Each visualization has clickable data points that allow a user to access the underlying data. *See Figure 3.*

Neos provides a powerful reporting tool, delivering hundreds of pre-designed reports, giving users access to the information needed to handle their matters. Reports are easily customizable through filtering, sorting, and rearranging. Reports offer a subscription option with regular delivery to the team or outside the firm, and you can export them to Excel or PDF. Advanced Search is an easy-to-use custom report writer with a query builder where you can save any of the reports you’ve built to use again.

Integrations

Neos has integrations with Zapier, DocuSign, QuickBooks, Lexitas (automated medical record collections), Scorpion, CasePulse, and O365, which relies on a firm’s O365 license and works with desktop or web applications.

Pricing

Neos has entry-point pricing as low as \$85 per user. Depending on the configurations and add-ons, like the Neos Intake Pro module, price per user goes up. Contact Neos to find out more.

Who is Assembly Software?

Over 40,000 professionals in the legal business rely on Assembly Software’s products to power their firms. Their flagship cloud-based platform, Neos, configures precisely to a firm’s needs with its case checklist, document management, and analytics features. Assembly’s brands include Needles, Neos, Trialworks, and Neos Intake Pro.

Why Buy Neos?

- Neos is powered by Microsoft Azure, providing legal teams the benefit of security and speed.
- Available anywhere you have an internet connection and on any device.
- Automated checklist customized for each staff member, providing an assembly line of tasks within cases.
- Simple conversion of data, templates, and files—whether coming from another Assembly software system or a competitive solution.
- 96% customer satisfaction rate and an award-winning self-service portal filled with answers to common support questions, videos, and webinars.

Schedule a Neos Demo Today!

For an expert-led [one-on-one demo of Neos](#), contact today.

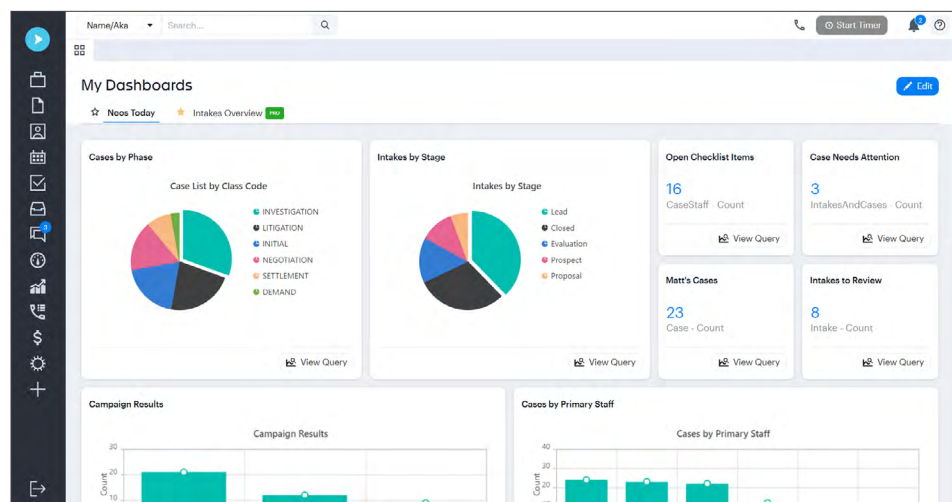


Figure 3: Dashboards can be modified easily by drag and drop or by resizing each tile. A user can access predefined dashboards or create new ones.

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