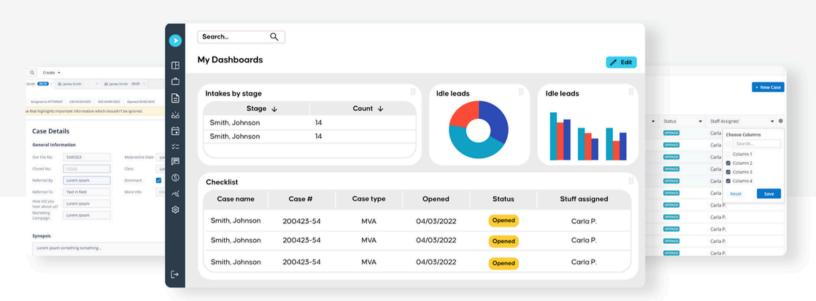
Assembly Neos



Product Comparison Matrix

General System Setup	Neos	Needles 5	Needles 4
Infrastructure requirements	None	Servers & PCs	Servers & PCs
Database architecture	SQL	SQL & Sybase	Sybase
Web browser compatibility	Multiple		
Anytime, anywhere accessibility	~		
Open API	 Image: A second s		
Device compatibility	Tablet, PC & Mac	PC	PC



NeosAl	Neos	Needles 5	Needles 4
Al Document Generation	\checkmark		
Al Document Summarization	\checkmark		
Al Document Extraction	~		
Al Dynamic Forms	 		
Al Chat	~		

Usability & Automation	Neos	Needles 5	Needles 4
User-defined tabs	~	\checkmark	~
Unlimited case dates, staff assignments, rename staff labels	~	~	
Unlimited contacts associated to case	~	~	
Workflow automation	\checkmark		
Global search	\checkmark		

Document Management	Neos	Needles 5	Needles 4
Document assembly	\checkmark	 Image: A second s	\checkmark
Document template generation	~	~	~
Rich text notes	 Image: A second s	 Image: A set of the set of the	
Sort & filter documents by type	~	 Image: A second s	



Document Management (cont.)	Neos	Needles 5	Needles 4
Search by documents title & content	\checkmark	Title only	
Access & edit documents via Microsoft Office Suite (online & desktop)	~	Desktop only	Desktop only
Microsoft OneDrive®/ Sharepoint® document storage	~		
OCR (optical character recognition)	~		
Email Templates	\checkmark		
Multi-user document collaboration	~		
In-app document preview	\checkmark		
Electronic Signature	\checkmark		

Productivity	Neos	Needles 5	Needles 4
Provider management	\checkmark	 Image: A second s	\checkmark
Organize & search providers	~	 Image: A second s	~
Provider notes	~	 Image: A second s	\checkmark
Time management	~	 Image: A second s	\checkmark
Expense tracking	\checkmark	\checkmark	\checkmark

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Calendar & Task Management	Neos	Needles 5	Needles 4
Assign tasks	\checkmark	\checkmark	
Configurable by case type	\checkmark	\checkmark	~
Schedule recurring appointments	~	\checkmark	~
On-screen reminders	~	~	\checkmark
View multiple staff or group calendars	~	~	~
Outlook [®] calendar integration	\checkmark	 Image: A set of the set of the	\checkmark
Schedule private appointments	\checkmark	\checkmark	

Communication	Neos	Needles 5	Needles 4
Email	\checkmark	~	\checkmark
Texting	\checkmark	~	
SMS templates	\checkmark	~	
Initiate emails within application & file messages	~		

Analytics & Intelligence	Neos	Needles 5	Needles 4
Configurable dashboards	\checkmark		
Unlimited dashboards	\checkmark		
Real-time dashboards	\checkmark		
Subscribe & schedule reports	\checkmark		

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Encryption	Neos	Needles 5	Needles 4
Security	SSL/TLS	Cryptographic keys	ODBC & SQL support
Advanced permissions by role, user, case type & case	\checkmark	\checkmark	~
Two-factor authentication	~		
Availability/uptime 99%	~		
Full redundancy for backups	~		
Built-in virus/threat intelligence	\checkmark		

Available Integrations	Neos	Needles 5	Needles 4
QuickBooks [®] Desktop	\checkmark	~	\checkmark
Microsoft 365 [®] cloud integration	\checkmark		
Microsoft OneDrive® integration	\checkmark		
DocuSign®	\checkmark		
Medical records	\checkmark		
Open API	\checkmark		

Intake	Neos	Needles 5	Needles 4
Intake Documents, Notes, Checklist, & Activity Feed	\checkmark		



ntake (cont.)	Neos	Needles 5	Needles 4
Neos Pro	~		
Dynamic Intake forms with custom questionnaires	~		
Lead manager with Zapier®	~		
Intake stages and statuses	~		
Communication tools includes email and SMS templates	~		
Checklist and triggers	~		
Track marketing campaigns for leads	~		
Notification manager	~		