



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	✓		
Device compatibility	Tablet, PC & Mac	PC	PC

NeosAI	Neos	Needles 5	Needles 4
AI Document Generation	✓		
AI Document Summarization	✓		
AI Document Extraction	✓		
AI Dynamic Forms	✓		
AI Chat	✓		

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

Document Management	Neos	Needles 5	Needles 4
Document assembly	✓	✓	✓
Document template generation	✓	✓	✓
Rich text notes	✓	✓	
Sort & filter documents by type	✓	✓	

Document Management (cont.)	Neos	Needles 5	Needles 4
Search by documents title & content	✓	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	✓		
Multi-user document collaboration	✓		
In-app document preview	✓		
Electronic Signature	✓		

Productivity	Neos	Needles 5	Needles 4
Provider management	✓	✓	✓
Organize & search providers	✓	✓	✓
Provider notes	✓	✓	✓
Time management	✓	✓	✓
Expense tracking	✓	✓	✓

Calendar & Task Management	Neos	Needles 5	Needles 4
Assign tasks	✓	✓	✓
Configurable by case type	✓	✓	✓
Schedule recurring appointments	✓	✓	✓
On-screen reminders	✓	✓	✓
View multiple staff or group calendars	✓	✓	✓
Outlook® calendar integration	✓	✓	✓
Schedule private appointments	✓	✓	

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

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

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

Available Integrations	Neos	Needles 5	Needles 4
QuickBooks® Desktop	✓	✓	✓
Microsoft 365® cloud integration	✓		
Microsoft OneDrive® integration	✓		
DocuSign®	✓		
Medical records	✓		
Open API	✓		

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

Intake (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	✓		