

# Integration Overview

Embedded integrations allow you to work with clients, partners, providers, and staff within one seamless system. Less wasted time spent jumping between tools leads to greater productivity.



## Integration Categories

<b>Communications</b>	
<b>Access all the communication channels you need at your fingertips.</b>	
<b>Neos Premium Texting</b>	SMS texting right from Neos with all conversation threads saved to relevant cases and stored in Communications Center for easy access.
<b>RingCentral</b>	Communicate with your clients from anywhere in Neos. RingCentral integration matches your contacts' phone numbers with the associated case when they call you.
<b>Zoom Phone</b>	A reliable, cloud-based VoIP system that enhances your legal communication by integrating seamlessly with Neos. With features like instant call log sync, automatic call note creation during calls, and caller ID with case details display, every interaction is streamlined.
<b>DocuSign</b>	Send, sign, and approve paperless documents, improving collaboration among staff members and clients.
<b>MailChimp</b>	Mass email marketing at its finest.
<b>Kenect</b>	A communication and customer engagement platform that helps businesses connect with their customers through various channels, including text messaging, chat, and phone calls.

## Payments & Accounting

Get paid, distribute funds to your clients without skipping a beat, and keep your bookkeeping tight.

<b>LawPay</b>	Get paid faster with zero hassle. Accept payments online, send links to a secure payment portal via email, and more.
<b>Digital Disbursements</b>	Electronic disbursements will save your firm both time and money on processing checks, automate record keeping, and improve client experience. Send funds to clients using PayPal, ACH, eDebit cards, and more.
<b>QuickBooks</b>	Reduce duplication of efforts and data entry for billing and invoicing.

## Medical Records Retrieval

Streamline medical record acquisition at a low cost to your firm.

<b>YoCierge</b>	Superior medical records retrieval services with records delivered through a secure, HIPAA-compliant online portal for easy download.
<b>American Records Retrieval</b>	Fully integrated medical records retrieval - ordering, tracking, records right in the matter. No need to duplicate work and data entry - one system for all your needs and transparency
<b>Lexitas</b>	Comprehensive solutions for records retrieval, document management, and e-discovery.

## Cost Recovery

Interface with your existing cost-recovery solution to track and recover all costs associated with the document lifecycle.

<b>Copitrak</b>	A single, integrated solution that seamlessly tracks and recovers costs, automates the document lifecycle, and breaks down scanning workflow bottlenecks.
<b>Equitrac</b>	Intelligent print management software prints simply, securely and with maximum savings.

## Microsoft Office365

Gain the flexibility to work from anywhere in a secure, reliable environment – while having access to generate, save, share, and collaborate within documents.

<b>Outlook</b>	Tag emails from Outlook into Neos with one click
<b>Calendar</b>	Calendaring and appointment setting from Neos
<b>SharePoint</b>	Access the SharePoint document management and storage system features directly within Neos
<b>Word</b>	Merge templates and generate documents inside of Neos

## Client Portals

Automatically update your clients on what matters to them.

<b>Case Status</b>	Industry-leading mobile app client portal integrated into Neos. Enjoy 50% fewer calls & emails, 2X client satisfaction, and growth in 5-star reviews and referrals.
<b>CasePulse</b>	Reduce phone calls and increase client satisfaction. Automate case updates, send messages, share files, collect form data, get 5-star reviews, and more– directly from Neos.
<b>Hona</b>	Reduce phone calls and increase client satisfaction. Automate case updates, send messages, share files, collect form data, get 5-star reviews, and more– directly from Neos.

## Client Intake

Onboard clients smoothly and keep them engaged throughout the intake process.

<b>Alert Communications</b>	Streamline your client intake process from screening potential clients to managing retainer services, ensuring smooth lead-to-contract transitions. It also offers live chat, text services, and expert solutions for mass tort and class action campaigns, all while seamlessly integrating intake data into Neos.
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## Miscellaneous

Explore a variety of specialized applications designed to complement your legal practice.

<b>LawToolBox</b>	A cloud-based calendaring solution that provides real-time deadlines across the US and Canada for law firms and legal departments of any size.
<b>Infotrack</b>	Enjoy eFiling in 10 different states and Service of Process nationwide. Documents and data flow to and from Neos for speedier, more reliable processes.
<b>LegalSoft</b>	Virtual legal staffing and legal consulting for law firms.
<b>Dragon Legal Anywhere</b>	A cutting-edge cloud-hosted speech recognition solution that empowers legal professionals to create high-quality documentation effortlessly and efficiently by harnessing the power of their voice, enhancing productivity and accuracy within legal workflows.
<b>Zapier</b>	Add and configure actions and integrations without leaving Neos. Map source and marketing fields to track where the case intakes are coming from and how leads are generated. Integrate intakes with 3,000+ apps – no code required.