

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.



Highlighted integrations

Zapier®

Add and configure actions and integrations (Zaps) without leaving Neos. Enable users to 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.

Scorpion

Push your client data from Neos into Scorpion's digital marketing platform, enabling visibility into marketing and client insights.

American Retrieval Company

Initiate your digital medical record retrieval straight from Neos using American Retrieval Company (ARC). Access a full suite of text search and editing tools using OCR technology. Fully HIPAA-compliant running on secure servers.

Additional integrations

Microsoft 365®

Gain the flexibility to work from anywhere in a secure, reliable environment – while having access to generate, save, share, and collaborate within documents. Outlook email and calendar integrations enable you to easily manage appointments and file emails.

Microsoft OneDrive®

Allow multiple users to edit the same file, save changes, and work online, then sync files once you're back online.

Microsoft SharePoint®

Access the SharePoint document management and storage system features directly within the Neos application.

RingCentral

Communicate with your clients from anywhere in Neos. RingCentral integration matches your contacts' phone numbers with the associated case when they call you.

Lexitas - Automated Records Collection

Automate the request and receipt of medical records, eliminating time-consuming data entry and enabling you to prepare more demands faster.

QuickBooks® Desktop

Reduce duplication of efforts and data entry for billing and invoicing, leveraging the comprehensive functionality of QuickBooks®.

DocuSign®

Send, sign, and approve paperless documents, improving collaboration among staff members and clients.

Copitrak, Equitrac

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

API environment

Neos is highly flexible, enabling quick and easy integrations with a broad spectrum of providers. Scale your firm's integration network and automate more processes working with one fully secure, web-based platform.