

Assembly Neos

The silent partner your firm is missing

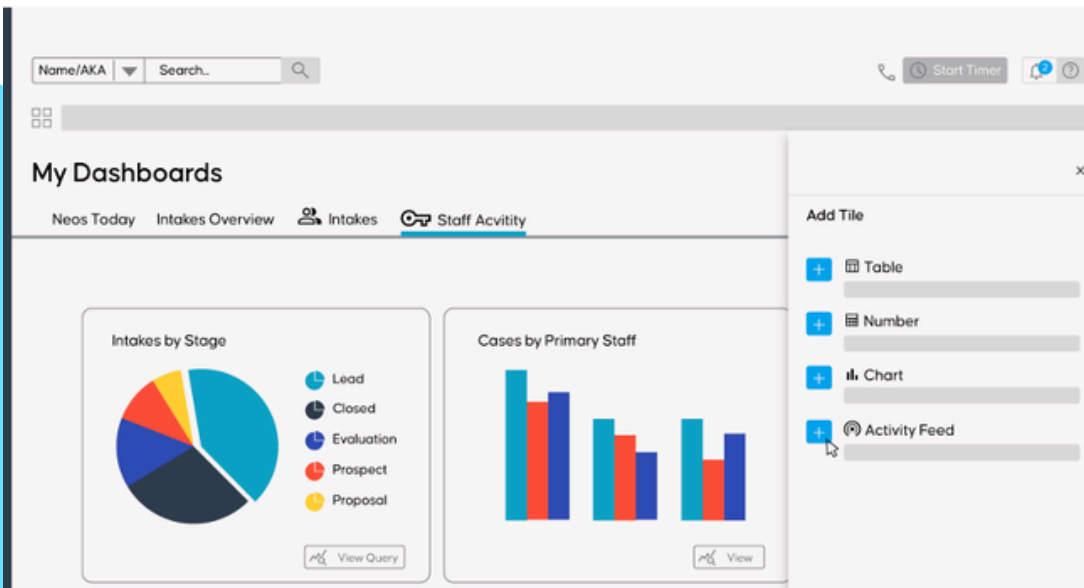
The Neos case management platform was built with **legal expertise** and **technological innovation**.



Award-winning case management platform built using the best features from the pioneering applications Trialworks and Needles.

Neos is a cloud-based case management platform tool that boosts a law firm's productivity throughout the entire client lifecycle. It's configurable to accommodate a firm's specific workflows and even uses embedded AI to take care of time-consuming manual tasks and minimize human errors.

Neos seamlessly integrates with a firm's existing tools and applications AND it offers robust analytics capabilities that unlock actionable insights for data-driven decision-making.



Neos accommodates your needs, not the the other way around

Boost efficiency with NeosAI

NeosAI is embedded in your existing workflows, seamlessly accelerating your productivity at every stage of the case lifecycle.

- AI-powered document and image summaries
- AI-powered document generation
- AI-powered document extraction
- AI-powered chat

Collaboration & communication

Enjoy effortless communication that results in fewer dropped balls and better outcomes

- In-application calling, emailing, and texting
- Track all communications with ease, even email send data that will hold up in court
- Rich text notes and @mentioning internal staff
- Comprehensive calendar management

Enriched intake capabilities

Conduct more intakes faster with fewer mistakes

- Customizable intake manager to get the unique information you need
- Dynamic intake questionnaire saves time during the intake
- Full visibility of intake status from call through case
- AI-enabled automatic data extraction into case fields
- Seamlessly transition all intake related documents and notes to a case

Secure anytime, anywhere access

Spend less money on IT and ensure the safety of your firm's data

- Individual and role-based permissions
- Two-factor authentication
- Data encryption and audit logs
- Data inputted into NeosAI is not stored outside Neos.
- Our AI services from Microsoft Azure ensure no data is retained for training purposes or available for third-party products or services.

Full-scale document management

Offload administrative busywork to automation so your team can focus on higher productivity.

- Bulk and AI-enabled document generation and sending capabilities with merge tags
- Rich case library and powerful template options
- Digital letterhead and image insertion
- Search for anything, anywhere, in any document or case file

Real-time insights

Learn how to lower your per case cost and improve your bottom line

- Build custom dashboards that reveal where your team could be more efficient
- Send reports automatically at a predefined cadence
- Track firm performance with audit reporting
- Learn what channels are generating the most and least ROI

Rich integrations

Eliminate time spent switching between different platforms

- RingCentral and Zoom Phone
- Zapier®
- Lexitas, YoCierge, American Retrieval
- LawToolBox
- QuickBooks®
- Microsoft Office 365® and OneDrive®
- DocuSign®
- LawPay

Training and support

Comprehensive onboarding and robust support ensure everyone can use Neos effectively

- Over 95% customer satisfaction rate
- 75% of tickets are closed within 24 hours
- Robust self-serve knowledge base, on-demand training videos, monthly live training webinars, and Neos certification