Cloud-based case management software powered by customer innovation
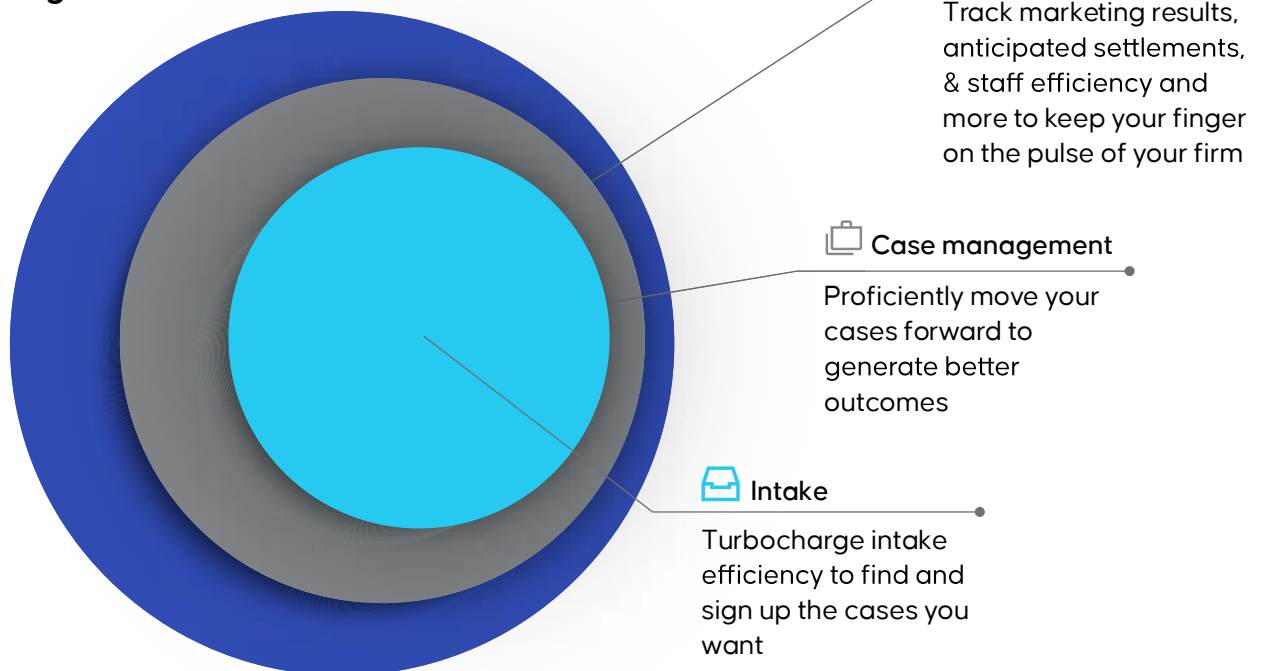
Customization, automation, and streamlined workflows all work together to supercharge your firm's productivity throughout the client lifecycle.

Neos accommodates your needs, not the the other way around

Customize everything from your intake questionnaire to your dashboard reports. Access everything you need in an integrated platform from anywhere, any device. Experience the only case management system built by lawyers, for lawyers.

From the micro to the macro operations of running a firm

Firm management

Track marketing results, anticipated settlements, & staff efficiency and more to keep your finger on the pulse of your firm

Case management

Proficiently move your cases forward to generate better outcomes

Intake

Turbocharge intake efficiency to find and sign up the cases you want

Assembly
Neos

Increased efficiency

Spend less time on busywork, more time on winning cases

- Workflow automation and daily task lists for boosted productivity
- Search for anything, anywhere, in any document or case file
- Seamlessly transition all intake related documents and notes to a case

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

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
- HIPAA compliance via Microsoft® Azure

Full-scale document management

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

- Rich case library and powerful template options
- Digital letterhead and image insertion
- Bulk document generation and sending capabilities with merge tags

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

- Scorpion
- Zapier®
- Lexitas
- 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 with 650+ articles for immediate answers