



Arctrieval Legal  
Arctrieval <> Neos Integration Setup Guide

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Document Version 1.3

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## 1. Introduction

Arctrieval is a unique software-based approach to obtaining and managing medical records, billing information, and imaging studies for legal professionals. Neos is a leading case management system that law firms use to manage their business.

Arctrieval's integration with Neos is our commitment to our mutual customers. The integration provides additional functionality and features that improve the overall workflow and enhance the user experience, making your work more efficient and effective.

## 2. Functionality Overview

Arctrieval's integration provides the following functionality between the two systems.

1. Client Information
  - a. Import Neos Client information from the Neos Address Book into an Arctrieval Client record through the Arctrieval Add Client process. One client is added from Neos to Arctrieval at a time.
  - b. Pull updated Neos Client information from the Neos Address Book into the Arctrieval Client record through the Arctrieval Client Activity Update From Neos process. Client information is updated in Arctrieval one Client at a time.
  - c. Push updated Arctrieval Client information from Arctrieval Client records to a Neos Contact in the Neos Address Book via the Arctrieval Edit Client process. When Client information is updated in Arctrieval, the Arctrieval User is prompted whether or not to update the information in the Neos Address Book.
  - d. Link an existing Arctrieval Client record with an existing Neos Client in the Neos Address Book.
  - e. Remove the link between Neos Client information from the Neos Address Book and the Arctrieval Client record. Only an Arctrieval Attorney Firm Administrator or Arctrieval Attorney Firm User (with the appropriate permission) may break the connection.
2. Medical Provider Information (Arctrieval Contact)
  - a. Import Neos Provider information from the Neos Address Book into an Arctrieval Contact record through the Arctrieval Add Contact process. Each Neos provider is added from Neos to an Arctrieval Contact one at a time.
  - b. Pull updated Provider information from the Neos Address Book into the Arctrieval Contact record through the Arctrieval Contact Activity Update From Neos process. Each contact is updated in Arctrieval one at a time.
  - c. Push updated Arctrieval Contact information from the Arctrieval Contact record to a provider in the Neos Address Book through the Arctrieval Edit Contact process. When Contact information is updated in Arctrieval, the Arctrieval User is prompted whether or not to update the information in the Neos Address Book.
  - d. Link an existing Arctrieval Contact record with an existing Neos Provider in the Neos Address Book.
  - e. Remove the link between a Neos Provider and the Arctrieval Contact record. Only an Arctrieval Attorney Firm Administrator or Arctrieval Attorney Firm User (with the appropriate permission) may break the connection.
3. Link Arctrieval Requests to an existing Neos Case
  - a. When the request is sent through Arctrieval, the User selects a Neos Case, and Arctrieval automatically links it to the Neos Case.
  - b. If a request was started, created, and sent through Arctrieval, the request can be linked after the fact to an existing Neos Case.

4. Data synchronization between Arctrieval and Neos
  - a. Arctrieval creates an Arctrieval tab on the Case Docs page when a request is issued or linked.
  - b. All documents related to the request are stored in the Arctrieval tab.
  - c. Arctrieval creates and maintains a single Note for each request.

### 3. Document Change History

Date	Document Revision	Description of Changes
9/16/2025	1.0	Initial Document.
9/18/2025	1.1	Added information to create an integration user in Neos.
9/22/2025	1.2	Clarified the values to use when creating an integration user in Neos.
02/26/2026	1.3	Clarified user permissions needed for Arctrieval to work correctly.

## 4. Setting Up Neos

### 4.1. Integration Activation Prerequisite—Important!

Before you can configure the Arctrieval integration with Neos, you must contact Neos to activate the Arctrieval integration in your Neos account. It is not an available default integration and must be activated by the Neos team.

### 4.2. Requesting Arctrieval Activation

All integration activation requests should be submitted via the Neos Integration Request form. You can request that Arctrieval be activated in your account by completing the form, and the Neos team will handle all the necessary details.

Here is a link to the Neos Integration Request form:

[https://forms.office.com/pages/responsepage.aspx?id=yQOGwWTDX02kP-4gJNXuvRNZ5\\_tANI9JzRGFTviQ6RUOERTU0xvUUFU4UzJIUIMzQzhaN1ISWjVWViQIQCN0PWcu&route=shorturl](https://forms.office.com/pages/responsepage.aspx?id=yQOGwWTDX02kP-4gJNXuvRNZ5_tANI9JzRGFTviQ6RUOERTU0xvUUFU4UzJIUIMzQzhaN1ISWjVWViQIQCN0PWcu&route=shorturl)

### 4.3. Neos Integration Request Form

The first page of the form collects information about who is making the Arctrieval activation request, as shown in the image.

**Assembly**  
Expert Practice Management. Simplified.

### Neos Integration Request

Welcome to our Integration Request Form. Please detail your integration needs with Neos, including technical specifics, data flow, and contact information. Your accurate responses are key for a seamless integration process.

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

\* Required

#### Requestor Details

Contact Name \*

Contact Email \*

Contact Phone Number

Contact Company Name \*

Legal Firm Name  
If you are submitting on behalf of an existing firm on the Neos platform, please include their name.

Assembly Software Contact  
If you have spoken with someone at Assembly Software already, please include their information.

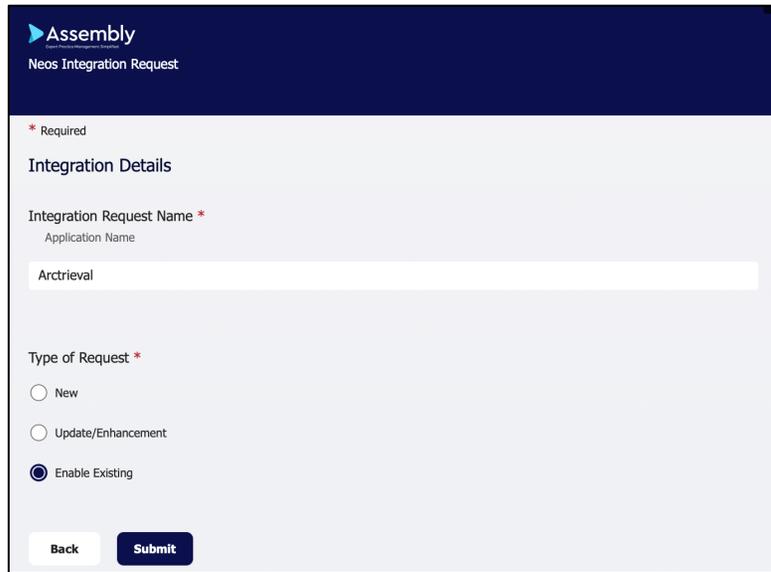
**Next**

On the second page of the form, please provide the following information:

1. Integration Request Name: Arctrieval
2. Type of Request: Enable Existing

After entering the information, click on the Submit button.

The Neos team will handle all the necessary details.



The screenshot shows the 'Assembly Neos Integration Request' form. The 'Integration Details' section includes a required field for 'Integration Request Name' with the value 'Arctrieval'. Below this, the 'Type of Request' section has three radio button options: 'New', 'Update/Enhancement', and 'Enable Existing', with 'Enable Existing' selected. At the bottom of the form are 'Back' and 'Submit' buttons.



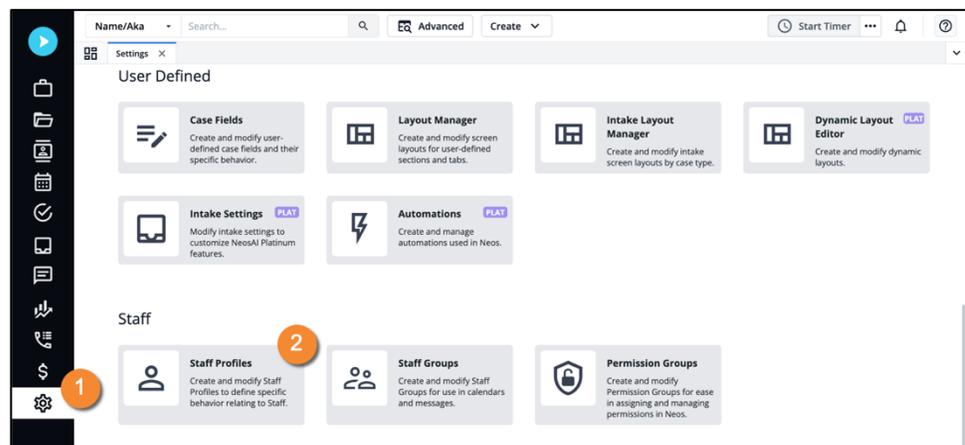
You must complete the prerequisite step described above before you can continue setting up the integration. The Neos team must enable the Arctrieval integration.

There may also be an additional cost from Neos to activate the Arctrieval integration. You may need to discuss this with your Neos account manager.

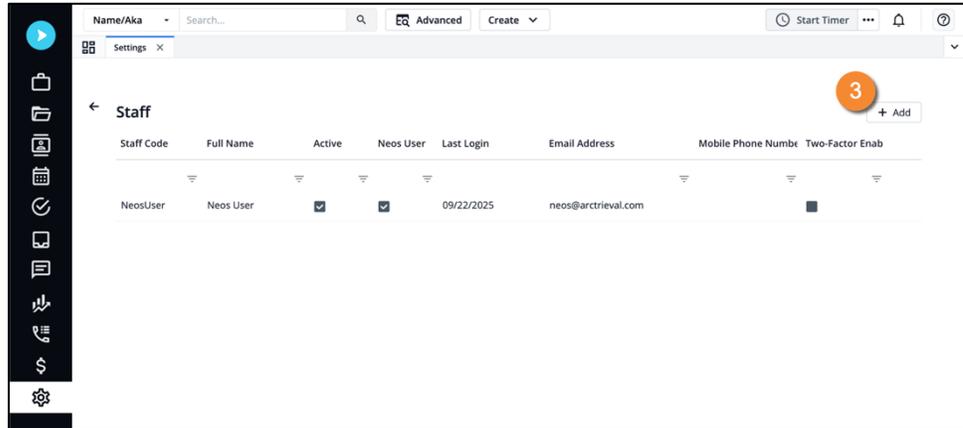
#### 4.4. Creating an Integration User

The steps below outline how to create a new user for the Arctrieval integration with Neos. This user is not a licensed Neos user and can be created at no cost to your firm.

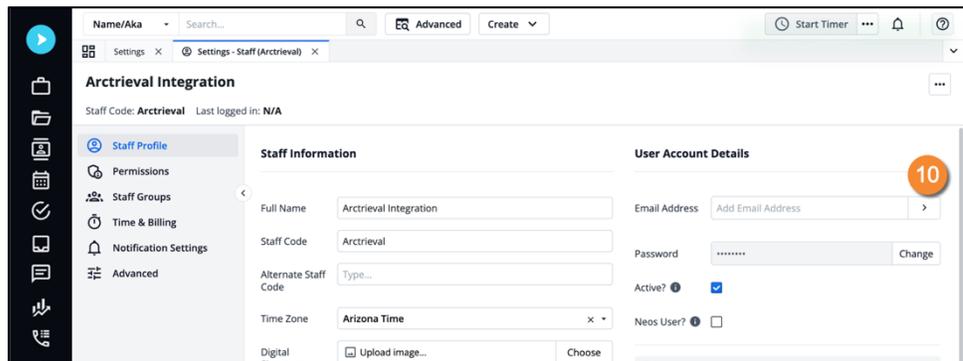
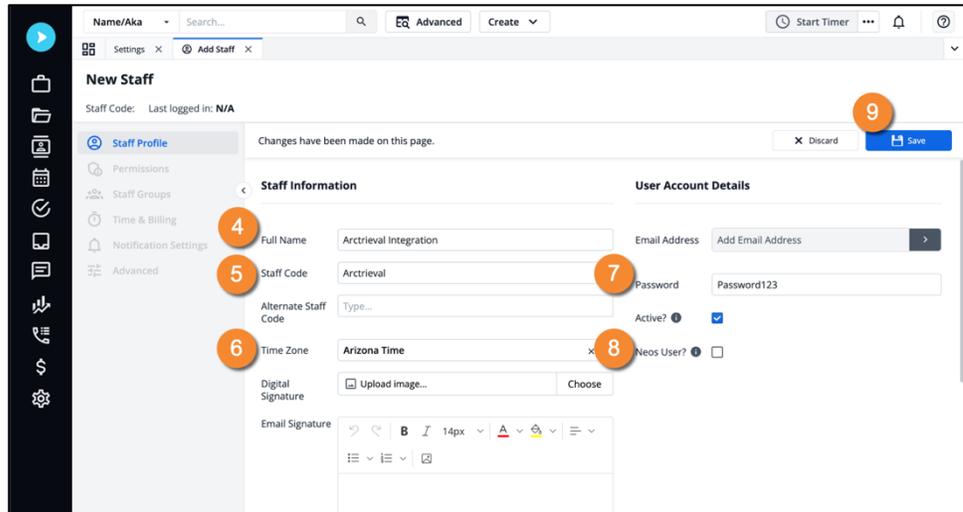
1. Click on the Gear Icon in the left menu to access the Settings page.
2. Click on the "Staff Profiles" option under "Staff" in the middle of the page



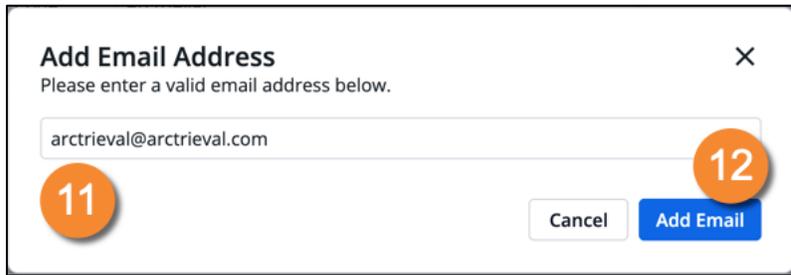
3. Click “Add” in the top-right corner of the window.



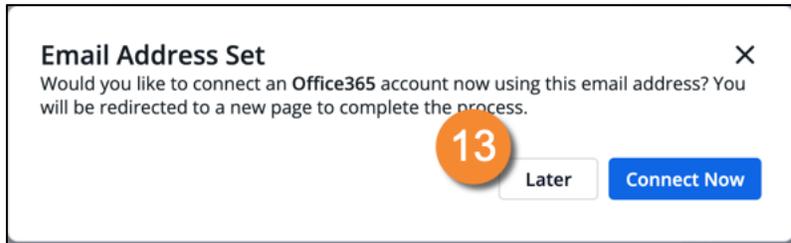
4. On the New Staff page, enter “Arctrievall Integration” as the Full Name.
5. Enter “Arctrievall” as the Staff Code.
6. Set your Time Zone to your local time zone.
7. Enter any password you want in the Password field.
8. Ensure that the ‘Neos User’ checkbox is left unchecked (or set to ‘False’). This way you are not charged for an additional license.
9. Press “Save” to proceed.
10. Click on the “>” next to the Email Address field as indicated in the image.



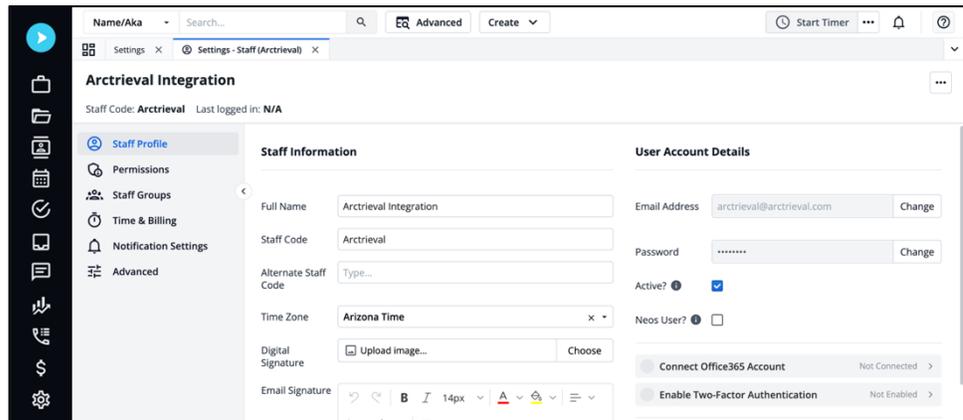
- 11. In the Add Email Address dialog box, enter arctrieval@arctrieval.com.
- 12. Click the Add Email button.



- 13. A pop-up may appear asking to connect an Office 365 account to this user. Click "Later" to skip this step.



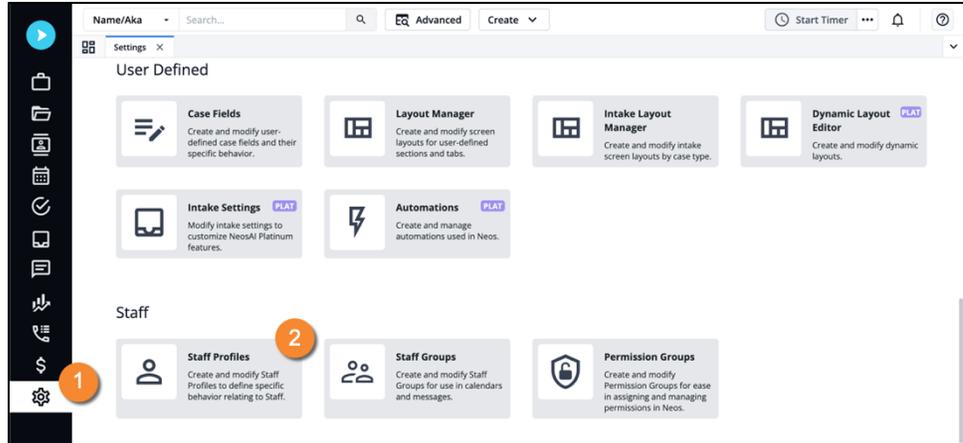
- 14. You should now see the following window with all the completed information.



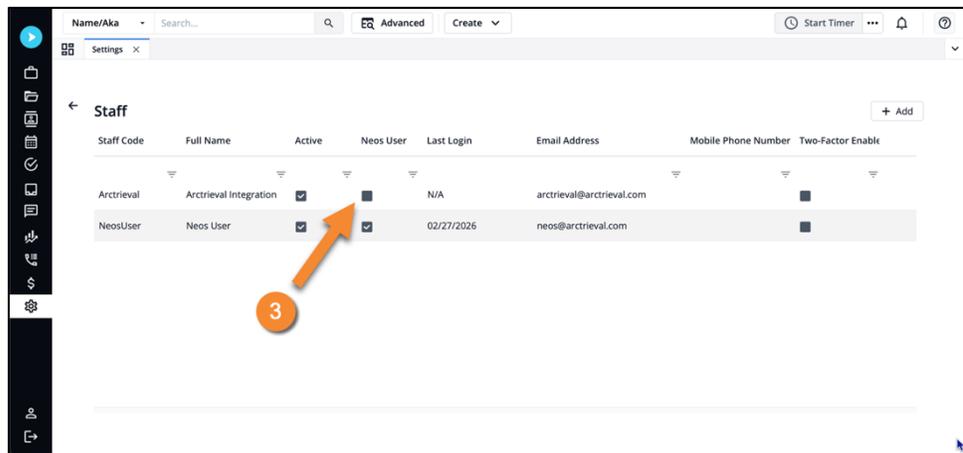
### 4.5. Configure Integration User Permissions

The integration-specific staff profile must be granted explicit permissions in Neos. If these permissions are not enabled, certain synchronization functions — such as Case Notes and Request History — will not appear in Neos.

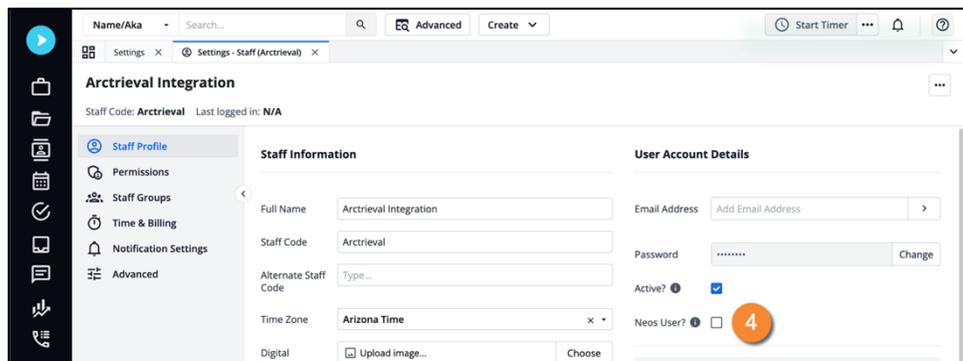
1. Click on the Gear Icon in the left menu to access the Settings page.
2. Click on the "Staff Profiles" option under "Staff" in the middle of the page.



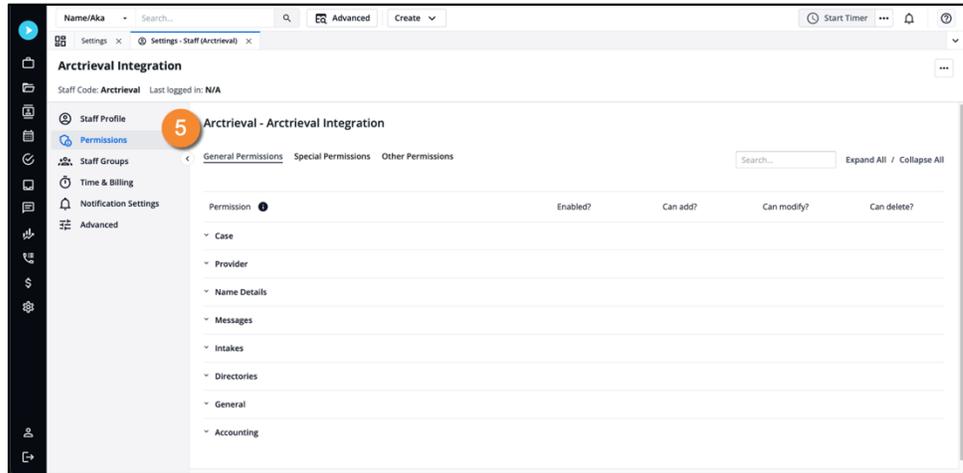
3. Ensure that the Neos User box is unchecked for the user linked to the Arctrievial integration.



4. Ensure that the Neos User box is unchecked for the user linked to the Arctrievial integration.



5. Click “Permissions” in the Staff Profile to display the available permissions.

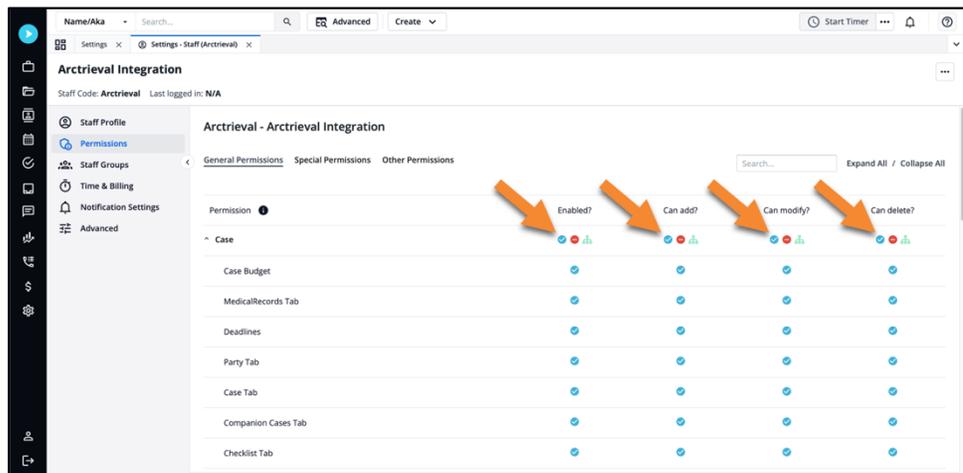


#### 4.5.1. General Permissions

Under General Permissions, all required access types must be set to: Explicit Allow. Do not leave these as Inherit or Deny.

All permissions within the following categories must be set to Explicit Allow for the integration user.

1. Case
2. Provider
3. Name Details
4. Messages
5. Intakes
6. Directories
7. General
8. Accounting



#### 4.5.2. Special Permissions

In addition to the General Permissions above, the following Special Permissions must be enabled:

1. Modify Date of Incident
2. Generate Documents and Forms
3. Access to Other Staff’s Cases
4. Modify Staff Assigned
5. Activity Feed Tile
6. Modify Case Dates
7. View All Parties in Cases
8. Modify Other’s Notes

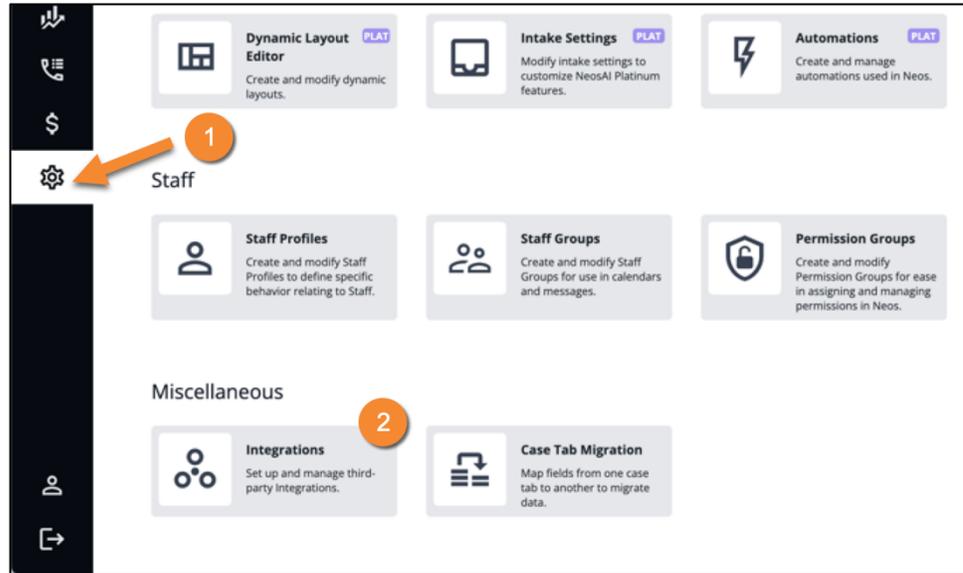
These Special Permissions are required for full synchronization between Arctrievial and Neos. If the integration user does not have permission to create or update Case Notes (including the required Note Topic), request history notes generated by Arctrievial will not appear in Neos.

Make sure to click Save to apply the updated permissions.

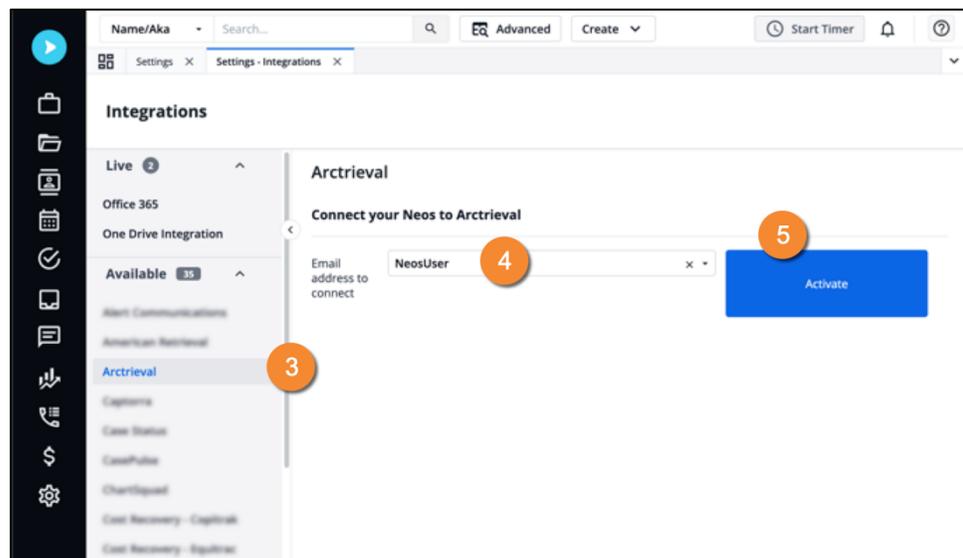
### 4.6. Activating the Integration

After the Neos team enables the Arctrieval integration in your account, you will connect Arctrieval to your Neos account by following these steps, as shown in the image.

1. Click on the Gear Icon in the left menu to access the Settings page.
2. Click on the "Integrations" option under "Miscellaneous" at the bottom of the page.



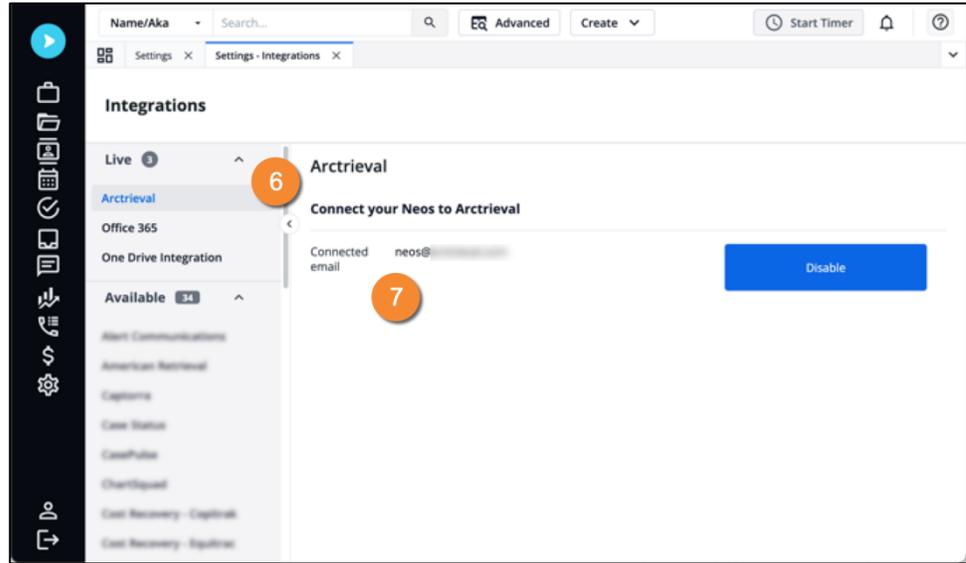
3. Click on Arctrieval in the list of available integrations.
4. Enter the Email address you want to use to connect to Arctrieval.
5. Click the Activate button.



For security purposes, Neos recommends using integration-specific staff profile for each integration (e.g., "Arctrieval Integration") and given the proper permissions.

Once the integration-specific staff profile is added, you must refresh Neos to see that staff in the "Email address to connect to" dropdown dialog box.

15. You should then see Arctrieval listed in the Live Integrations section as shown in the image.
16. The email for the Connect staff member is displayed in the Connected email field.



## 5. Setting Up Arctrieval

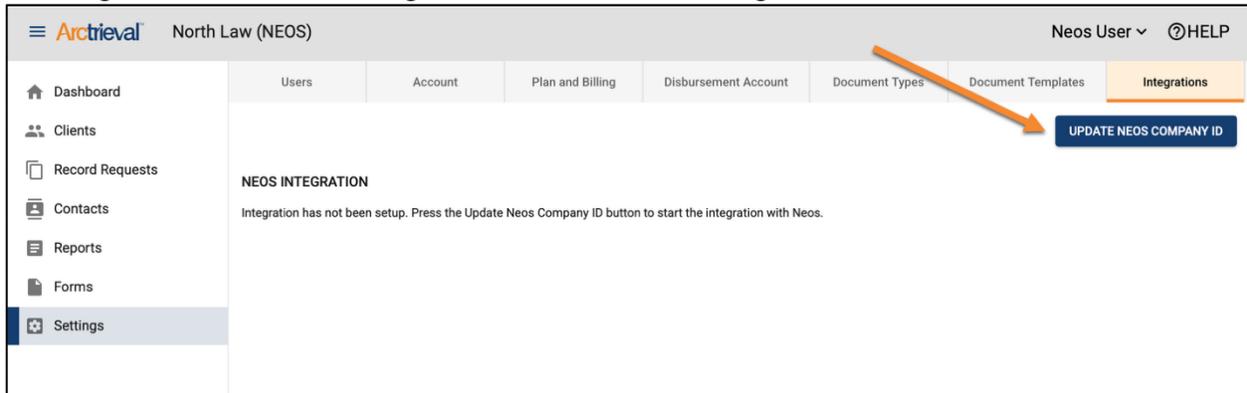
### 5.1. Overview

To enable Neos and Arctrieval to communicate and exchange data, the following must occur:

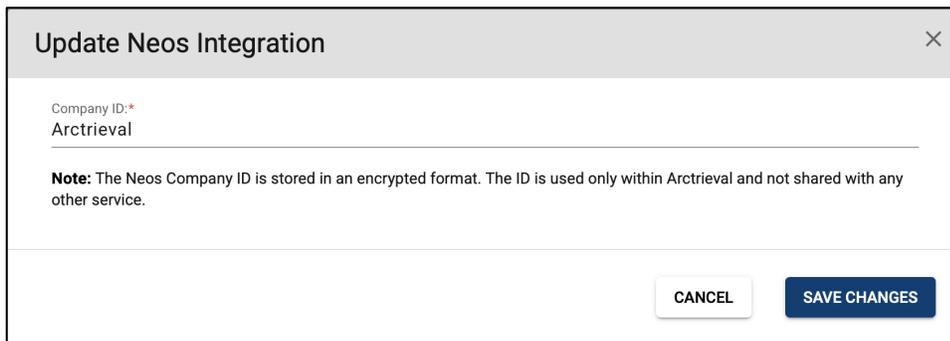
1. Arctrieval activates the Integrations tab in the Arctrieval Settings for firms with a multiple-user subscription. The Neos integration feature is only available to firms with a subscription for multiple users. Please contact Arctrieval to activate the feature.
2. On the Arctrieval Integration page, in the Settings menu, you must grant Arctrieval access to your Neos Account to establish the link between Neos and Arctrieval.

### 5.2. Establishing the Link

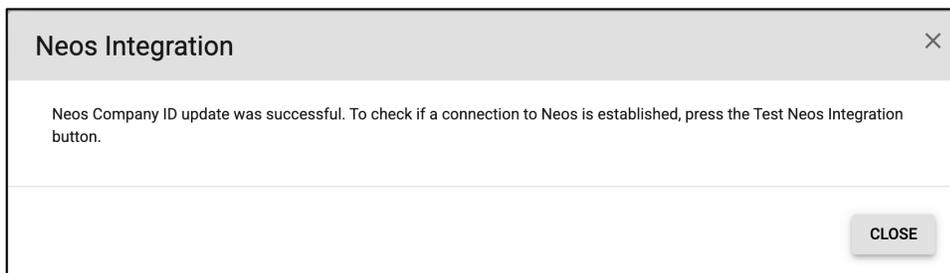
Once the Neos and Arctrieval integration is enabled, the Arctrieval Attorney Firm Administrator will see the Integrations Tab on the Settings menu, as shown in the image.



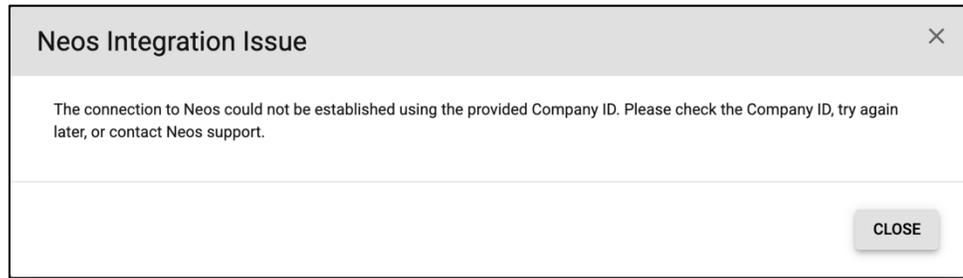
Clicking the Update Neos Company ID, will display the following dialog box where you will enter your Neos Company ID. This is the same ID that you use to log into your Neos account.



After entering your Company ID and clicking the Save Changes button, the information is saved, and Arctrieval attempts to connect to Neos. If the connection is successfully established, the following message is displayed.

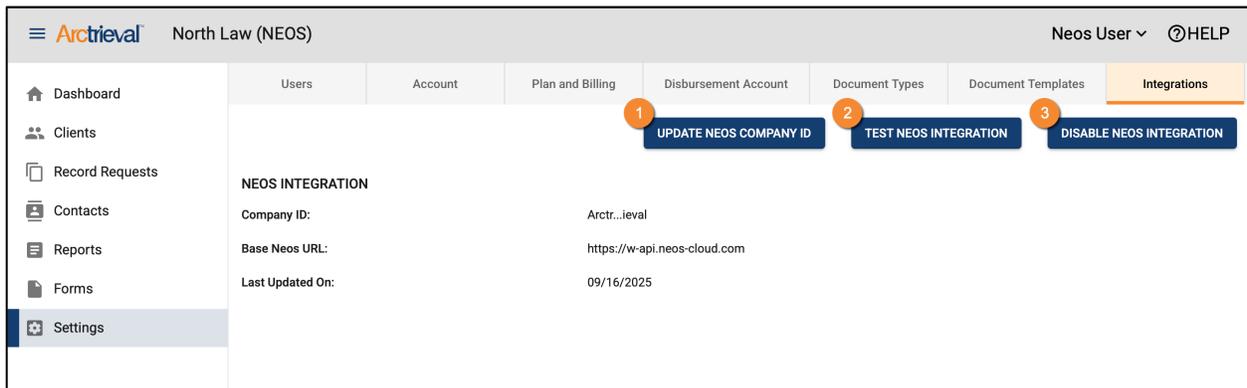


If the connection with Neos could not be established, the following message is shown.



### 5.3. Arctrieval Integration Page Options

After the connection is established, the Arctrieval integration page will now display the following options as shown in the image.



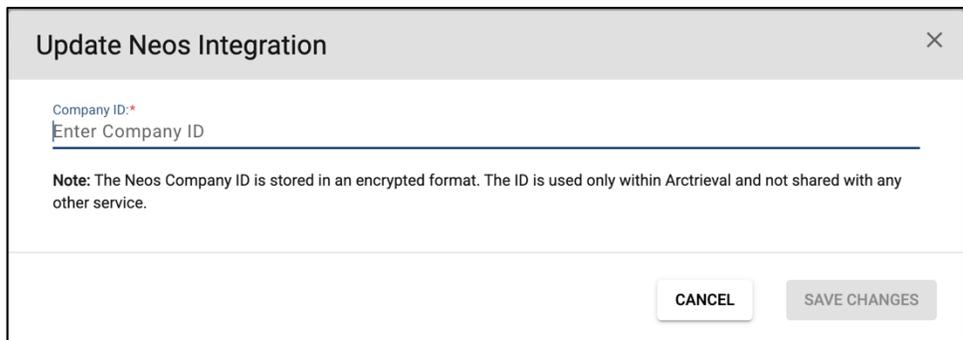
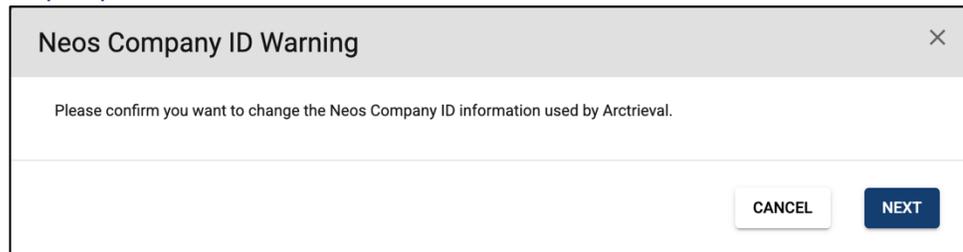
1. Update Neos Company ID. If the Company ID for your Neos account should change for some reason, you can update the value by clicking on the Update Neos Company ID button and entering the new value.
2. Test Neos Integration. Clicking the Test Neos Integration button will verify the connection between Neos and Arctrieval.
3. Disable Neos Integration. Clicking the Disable Neos Integration will remove the connection between Neos and Arctrieval.

### 5.4. Update Neos Company ID

Clicking the Update Neos Company ID button displays the following dialog box.

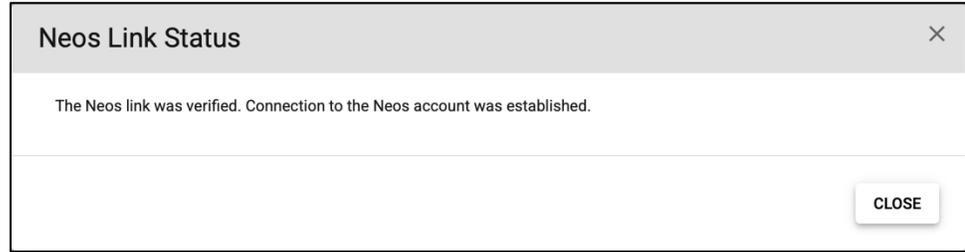
Click the Next button to confirm you want to change the Company ID value.

Enter the new Company ID value and click on Save Changes.

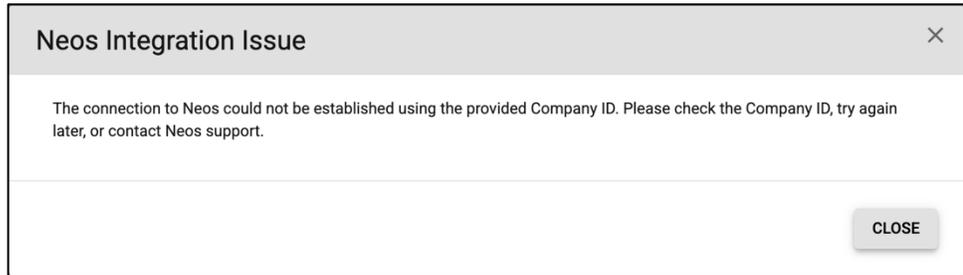


### 5.5. Testing the Connection

Clicking the Update Neos Company ID button will verify the integration settings. If everything is correctly configured, the following message is displayed.

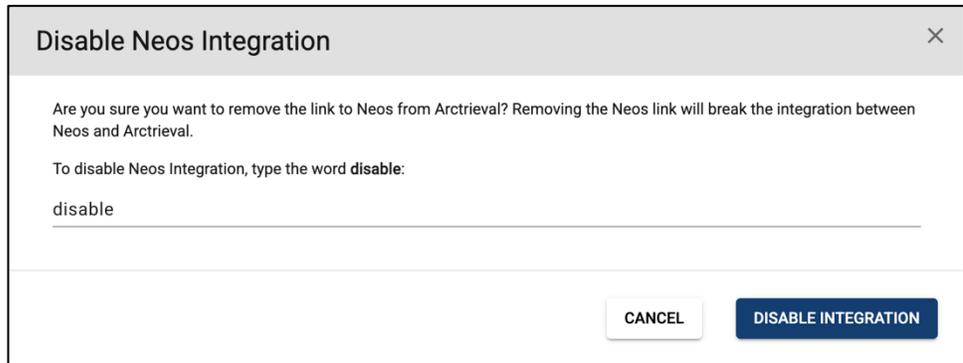


If there is an error with the integration, the following message is displayed.



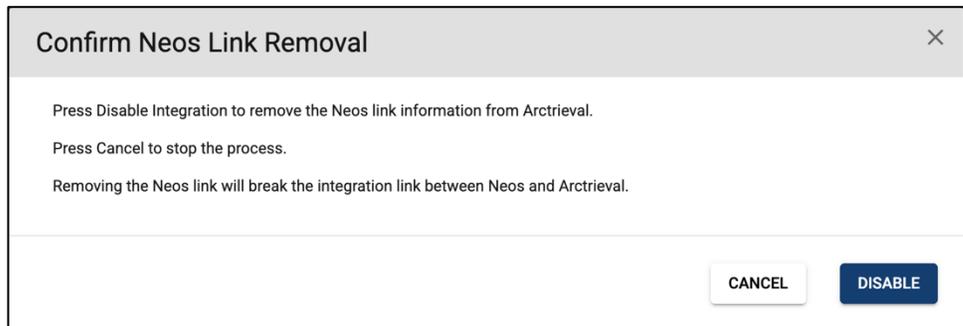
### 5.6. Disable Neos Integration

To disable the integration and remove the connection between Arctrievial and Neos, click on the Disable Neos Integration button to display the following dialogue box.



Type the word "disable" and click on Disable Integration to proceed.

In the Confirm Neos Link Removal dialogue box, click Disable to confirm your decision and proceed.



After the connection is disabled, a confirmation message is displayed.



## 6. Integration Notes

### 6.1. Social Security Numbers

When syncing data from Neos to Arctrieval, the system extracts the last four digits of the SSN from the Neos SSN field and stores only those four digits in Arctrieval.

When syncing data from Arctrieval to Neos, the system does not synchronize the last 4 digits of SSN back to Neos from Arctrieval.