Getting Started with Neat

Neat's scanner, software, and cloud solutions create the ultimate Digital Filing System, making it easier for you to stay organized.

This Getting Started Guide will help you get the most out of Neat.

neat

Getting Started with Neat

Transforming Your Information

Every time you scan, Neat uses "Intelligent Text Recognition" to read and recognize the text in your documents. It even understands the type of document and fills in appropriate data fields.

BEFORE YOU SCAN

It's important to understand how Neat categorizes the items you add to the Digital Filing System. Neat recognizes every item as a Receipt, Contact, or Document, each with its own characteristics.

Receipts

Neat instantly captures information like Vendor, Date, Amount, and Payment Type. You can choose a tax category for each receipt, add comments, and run reports.

Contacts

Neat transforms business cards into digital contacts, recognizing and recording Name, Address, Company, Email Address, Phone Number, and more.

Documents

Neat runs Intelligent Text Recognition on every word of every document, making everything you scan keyword searchable, so it's easy to find exactly what you're looking for.

e-Receipts and Digital Documents

You can use the Send to Neat feature to add any digital document (web page, MS Word document, PDF, etc) or image to your Digital Filing System. Learn more about Send to Neat.

MAKING YOUR FIRST SCAN

Your Neat scanner is the easiest way to transform paper information into organized digital files. **Here's how to get your paper into Neat!**

Select your settings

Before scanning an item, it's important to check your scan settings in Neat. You can specify your item type, set color options, and more. *Note that scan settings will be different depending on whether you are using NeatDesk or NeatReceipts.*

1   **SCANNER SELECTION**

If you have multiple Neat scanners, you can choose which one to use here.

2   **ITEM TYPE**

Neat can detect item types automatically, or you can select a specific item type here.

3   **BLACK & WHITE/COLOR**

Select black & white for speed, or make full-color scans.
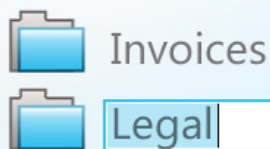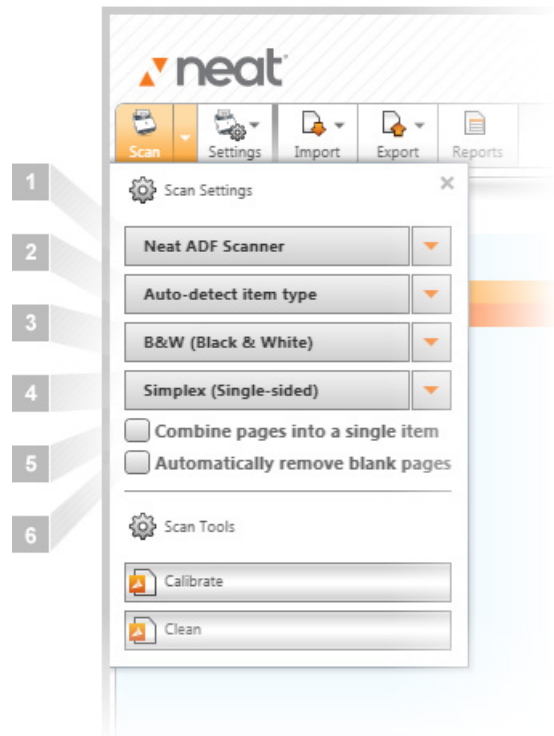
4   **SIMPLEX/DUPLEX (NeatDesk only)**

Select single- or double-sided scanning for NeatDesk.

5   **COMBINE PAGES**

This setting lets you save multi-page documents as a single item in Neat.

6   **REMOVE BLANK PAGES**

This setting will automatically delete blank pages – useful when scanning many pages at once.

Organize your information

You'll need to create a folder to keep your scanned items.

Click here to learn about creating and organizing folders.

SCANNING FROM YOUR HARDWARE

Scan button
Use the Scan button on your scanner to quickly scan an item. Items will appear in whatever folder you have open.
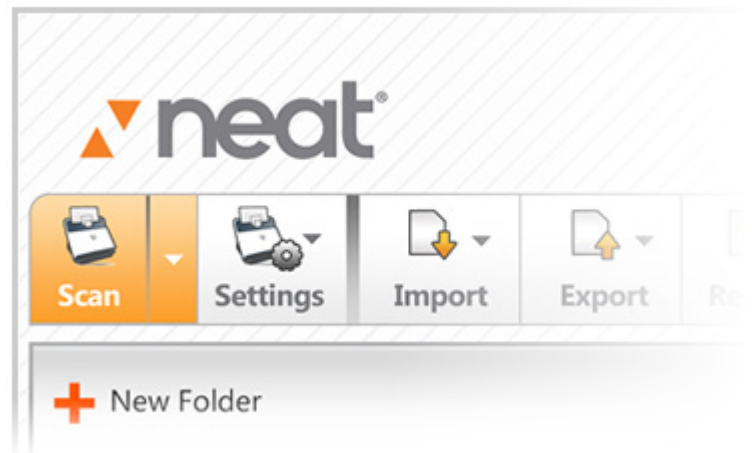
PDF button
Use the PDF button on your scanner to make a PDF file for easy sharing.

SCANNING FROM YOUR SOFTWARE

You can also scan items using the Scan button in Neat's software.

Select PDF from the dropdown menu if you want to scan directly to PDF.

NeatDesk scans items **face-up**

NeatReceipts scans items **face-down**

AFTER YOU SCAN

Whenever you add an item to Neat, you'll notice it goes through a processing queue before appearing in your Inbox. This is where our intelligent software automatically crops, rotates, and enhances your images, and where we perform Intelligent Text Recognition to bring your data to life. All of this only takes a moment or two, and your item will appear on your screen as soon as it is ready.
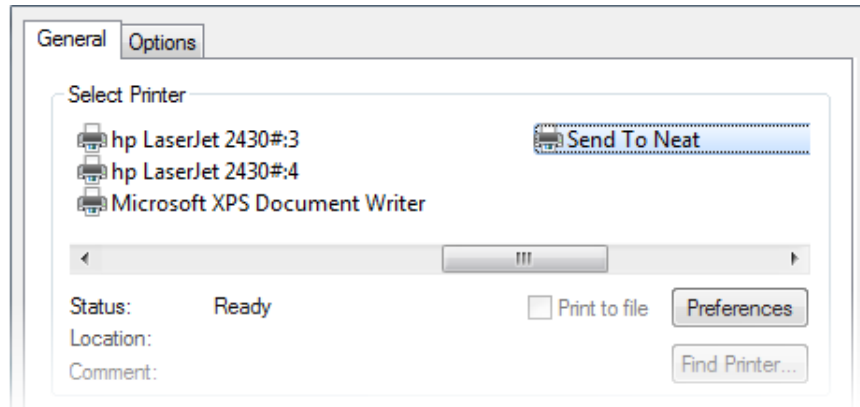
MORE WAYS TO GET THINGS INTO NEAT

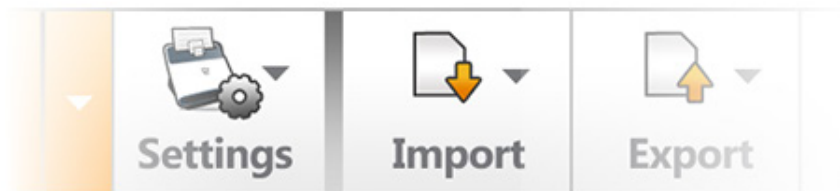Scanning isn't the only way to get things into Neat.

Send to Neat

Select "Send to Neat" as your printer to send documents from other applications (web browsers, email clients, word processors) directly into Neat.

Import

Use the Import command to bring any PDF file or image already stored on your computer into Neat.

Manual Entry

If you don't have anything to scan, just use the New (Receipt, Contact, Document) command from the Actions menu to manually create a new item in Neat. *For example, you could use this to record tolls or other expenses that don't include a receipt*.

Review your items!
Items will show up in Neat as "Unreviewed" until the first time you take a look at them. Review each item to make sure it has scanned properly and that key information has been correctly read and recorded.
Click here to learn more about editing items and adding information.

Organizing with Neat

Neat makes it easy to arrange your files any way you want.
Maintaining an organized folder tree in Neat is key to managing
your Digital Filing System.

FOLDERS

The heart of Neat's digital organization is the intuitive folder tree system. Everything you scan in or send to Neat can be organized
any way you want it.

1 INBOX

Your Inbox contains several folders, each dedicated to items
from NeatCloud. Please note that you cannot scan directly
into the Inbox. Click here to learn more about NeatCloud.

2 MY CABINET

Your Cabinet contains all of your Neat files and folders.
Create folders and subfolders, and keep everything exactly
where you choose. Note that folders will always be arranged
in alphabetical order.

3 ADDING/EDITING FOLDERS

Creating new folders is easy in Neat. Either use the New
Folder button at the top of the folder tree, or right-click within
the tree and select New Folder from the menu that appears.
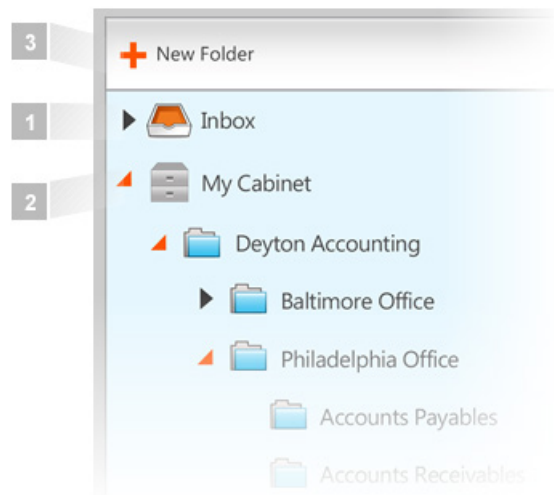
Drag-and-Drop Organization

Folders can be dragged and dropped to create subfolders for detailed organization.
Dragging a folder to the trash will remove it from your Neat Digital Filing System.

VIEWING YOUR ITEMS

Neat provides several ways to view your items, making it easy to see exactly what you're looking for.

Thumbnail View

Thumbnail View shows a grid of "cards" for your items, each with key data and a thumbnail image of the file. This view makes it easy to see many items at once, so you can quickly change item types, or open an item to further edit its properties.
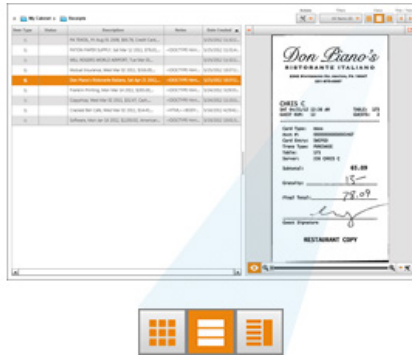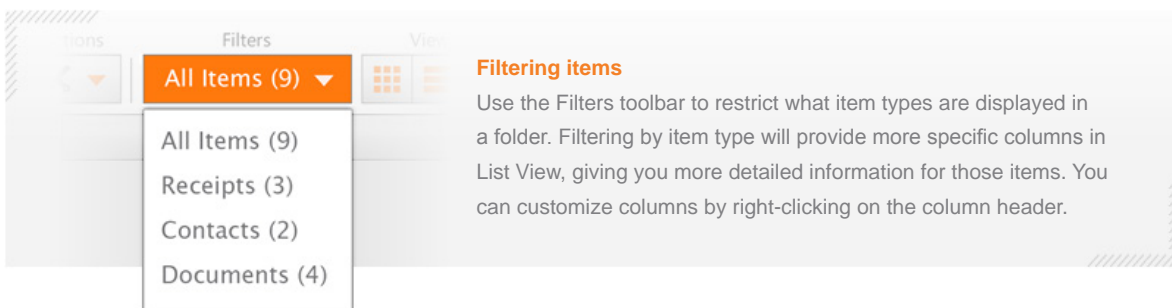
List View

List View lets you see all the contents of a folder, but also quickly edit content. Customizable columns for each item type let you sort receipts by total, contacts by name, documents by date created, and more.

Item View

Item View displays all of the detailed information of your files and allows you to browse your folder, item by item, and easily edit the information.


Filtering items

Use the Filters toolbar to restrict what item types are displayed in a folder. Filtering by item type will provide more specific columns in List View, giving you more detailed information for those items. You can customize columns by right-clicking on the column header.

EDITING ITEMS AND ADDING DETAIL

Each type of folder view provides different options for editing items and adding detail. Neat will automatically recognize information for many of these values and fill them in for you.
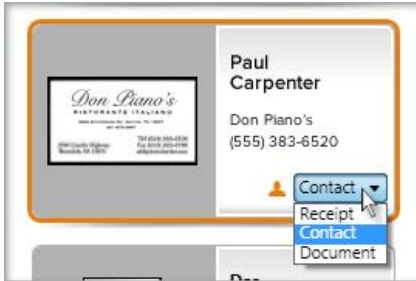
Thumbnail View

Thumbnail View lets you quickly change item types through a drop-down menu in the lower right corner of each thumbnail. For more detailed changes, double-click an item to open it in Item View.

List View

List View makes it easy to edit many items at once, as you can work directly within each column to change values. Be sure to set your item filters to get more detailed columns for the specific item type – see the section above for more about item filters.

Item View

Item View lets you add comments, change details, and make other important edits to an item. Each item type will have different informational fields to work with. To learn more about editing items, including how to add tax categories to receipts, see the Neat 5 PDF User Guide.

Using your information

Once your information is in Neat, there's so much you can do with it. Neat brings your files to life, making them easier to find and allowing you to create reports, export data, and share with others.

SEARCHING YOUR NEAT FILES

One of the biggest benefits of Neat is our keyword search capability. When you search in Neat, we check every word of every document to find what you're looking for.

Advanced Search

Select Advanced Search from the Tools Menu to set up more detailed searches with multiple criteria – all bills paid for the month of April, for example.

Watch a video on using Advanced Search

CREATING REPORTS

You can use Neat to quickly generate expense, tax, and spending reports from your receipts. Our helpful Report Wizard will walk you through creating any kind of report in only four easy steps.

Expense Reports

Expense reports show the money spent by a person or business. Whether you want to see what your company has spent on office supplies or your family's spent on groceries, Neat will quickly analyze your receipts to create the report you need.

Tax Reports

You can use tax categories to create reports that help analyze and organize your financial information for tax purposes. For example, you could create a tax report of charitable donations to make tax time a little faster.

Spending Reports

Spending reports let you group your expenses by type, such as vendor or date. You can then summarize by payment type, client, and more. It's a good way to get a holistic view of your spending.

Watch a video about Creating Reports

EXPORTING DATA

Neat makes it easy to export data, send receipt information to popular accounting software, or instantly add contacts to your digital contact list. Here's how Neat connects with other software to put your information to use.

Exporting to PDF

Exporting an item as a PDF makes it easy to share with others as an email attachment. In the Export menu, select "To PDF." You can choose to export a single item or an entire folder. See Chapter 7 of the Neat 5 User Guide to learn more.

📄 See the Neat 5 User Guide

Syncing contacts with Outlook

Neat transforms business cards into organized digital contacts that are easy to sync with Outlook. Manage your Outlook synchronization through the Settings menu in the top right of the software. Syncing works both ways, so your Outlook contacts can also be imported into Neat. See Chapter 7 of the Neat 5 User Guide to learn more.

🖥 Watch a video about syncing with Outlook   📄 See the Neat 5 User Guide

Exporting to TurboTax

Deduct stress from tax time by quickly exporting your Neat data to TurboTax. In the Export menu, select "To TurboTax." You can choose to export a single item or an entire folder. See Chapter 7 of the Neat 5 User Guide to learn more.

📄 See the Neat 5 User Guide

Other ways to export your data

Neat's versatile software lets you export to **Quicken, QuickBooks, Excel**, and more. Explore the "Exporting" section of the Neat 5 User Guide to learn more, or visit the video tutorials on our site.

🖥 Watch video tutorials on our site   📄 See the Neat 5 User Guide

Using Neat everywhere with
NeatCloud® + NeatMobile®

NeatCloud connects your Digital Filing System, allowing you to access it, or add to it — anytime, anywhere.

- • Scan with your mobile device
- • Access your information anywhere
- • Sync files across multiple devices

- • Securely back up your data
- • Share entire folders
- • And so much more

TRY NEATCLOUD WITH NEATMOBILE FREE FOR 30 DAYS

Already have NeatCloud?

CLICK HERE FOR HELP GETTING STARTED