

User's Guide

Neat for Windows Version 5.0

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Need Help Taming Your Paper Monster?

You're in the right place!

Neat 5 Help aims to have you turning receipts, business cards and documents into organized digital files as quickly and effortlessly as possible.

This digital filing cabinet is a place to track and manage all your information and transform it into actionable, usable information—without the paper or the headache!



The Paper Monster!

In this section:

- Where to Start
- What's New in Version 5?

Where to Start

We know you don't have all day to read our Help files (as scintillating as they might appear). So let's get you on the right path ASAP. In the table below, follow the path that best corresponds to your technical savvy and current Neat 5 know-how.

	r neat	How Tech Savvy are you?		
before?		Very Tech Savvy	Not So Tech Savvy	
you used Neat for Windows bef	YES I've Used a Previous Version of Neat	Start here: • <u>What's New in Version 5</u> After that: • <u>Organizing Your Items:</u> <u>Cabinet, Folders & Subfolders</u>	Start here: • <u>What's New in Version 5</u> • <u>Getting Started with Neat 5</u> • <u>Introducing The Neat 5</u> • <u>Dashboard</u> After that: • <u>Getting Items Into Neat 5</u> • <u>Organizing Your Items: Cabinet, Folders & Subfolders</u> • <u>Working with Your Items</u> • <u>Exporting, Synchronizing, ing and Printing</u>	
Have	NO I've Never Used Neat	Start here: • <u>Getting Started with Neat 5</u> After that: • <u>Getting Items Into Neat 5</u> • <u>Organizing Your Items:</u> <u>Cabinet, Folders & Subfolders</u> • <u>Working with Your Items</u> • <u>Exporting, Synchronizing,</u> <u>Reporting and Printing</u>	Start here: • <u>Getting Started with Neat 5</u> • <u>Introducing the Neat 5 Dashboard</u> After that: • <u>Getting Items Into Neat 5</u> • <u>Organizing Your Items: Cabinet,</u> <u>Folders & Subfolders</u> • <u>Working with Your Items</u> • <u>Exporting, Synchronizing,</u> <u>Reporting and Printing</u>	

What's New in Version 5?

Dashboard

The Neat 5 Dashboard is the first screen you'll see when you start the program. Think of it as your home base for all things Neat.

∡ neat		Help File Tools Settings 🔔 🔂 🗙
Scan Settings Import Export Reports		Keyword Search
+ New Folder	Quick Start	Cabinet Stats
🔺 🚍 My Cabinet	Neat 5	Location: C:\Users\\rromanoff\Documents\Neat Data\My Cabinet.nwcab
Gusiness	inear 5	in 10 Folders in 26 Docs in 4 Receipts in 26 Contacts
 Image: Trach Image: Trach 	Next 5 is the fartest way to transform your business and personal receipt, business cards, and documents in the saccura and report on. Ready to gat standed: Clack on the ink below to launch the Quak Slart video. Watch Demo 4	Data 0% full 35wr / 400
	Resources	Total Cabinet Size: 31.7///8 Contacts See See Contacts
 SMART FILTERS Wew All 	rspecific tasks, the library contains both manufactivities and uner guides to help you get the most out of your Next solution.	Vex VI AC D.F G.I JA M.O P.R S.U V.Z
Recently Added Items		
Onreviewed		

The Neat for Windows Dashboard

The Dashboard puts everything you need to use Neat 5 effectively and efficiently on a single screen, including the following:

- An express lane to all of your Neat folders and files
- An easy to navigate, searchable contact list
- At-a-glance information on your Neat 5 cabinet space statistics
- One-click links to support, tutorials and service as well as to the Neat website

Click here for more on the Dashboard

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Folder Based Organization

The previous version of Neat (version 4) display a "folder" as a "row" in an Excel-like grid of rows and columns. Version 5 uses the visual metaphor of folder icons within a Folder Navigation Pane. You can:

- Scan directly into a specific folder
- Create subfolders within folders
- Save different items types in a single folder

Click here for more on working with folders

Smart Filters

Smart Filters serve as shortcuts to convenient item groupings, including View All (which displays all items in the cabinet), Recently Added Items (items added to the cabinet in the past three days) and Unreviewed (items you have not yet reviewed in Details View or Grid View for more than 2 seconds.

Click here for more on Smart Filters

Import a Web Receipt, Email or Document Directly into Neat 5

Scanning is not the only way to capture data in Neat 5 - you can also import from a PDF, image file, vCard, legacy Neat file or Quicken account.

Click here for more on Importing

Enhanced Direct Export to QuickBooks

Enhanced direct export to QuickBooks now includes customer & job information.

Click here for more on direct export to QuickBooks

What's In It for You?

At NeatReceipts, we believe you shouldn't have to work hard to use your information.

That's why we've developed a flexible system of intelligent solutions that transform information—taking it from paper to digital, cluttered to organized, single use to multi-tasking, static to dynamic.

Simply put, we transform information—any kind of information—into something that works for you. From business cards and receipts to tax documents and recipes and even your child's art collection, we free the information that's trapped in your documents—so you can organize, store, secure, and activate it.

Because when your information is transformed, you are too— from cluttered to confident, from overwhelmed to accomplished.

In this section:

- Top 10 Common Tasks in Neat 5
- User Case Studies

Top 10 Common Tasks

The table below contains links to ten of the most common tasks performed in Neat.

#	Task & Link	Description/Benefit	
1	Creating a PDF file	Scan a document directly to a PDF file that can be shared via email	
2	<u>Scanning receipts</u>	Scan a receipt and capture key information in the Neat 5 database	
3	Importing PDF Receipts	Import an existing electronic receipt and capture key information in the Neat 5 database	
4	Creating an Expense Report	Create a report to track business expenses	
5	Tracking Expenses	Track and organize expenses	
6	Exporting Data to Financial Applications	Export expense data from Neat 5 into Excel, Quicken, QuickBooks or Turbo Tax	
7	<u>Scanning bank statements, bills, credit card statements</u>	Scan bank statements, bills credit card statements and other such documents and capture key information in the Neat 5 database	
8	Syncing Contacts with Outlook	Synchronize your Neat 5 contacts with your Outlook contacts	
9	<u>Organizing Personal Docs</u> <u>(Recipes, Articles, Warranties)</u>	Scan the documents you use most so save clutter	
10	Creating Tax Reports	Create a tax report to maximize your tax savings	

User Case Studies

Wondering how to make the best use of Neat 5? Here are a few scenarios of how others use Neat:

The Business User

- Scan and organize receipts, bills, invoices and checks
- · Scan business cards to create an organized contact list
- Sync contacts with Outlook
- Create expense reports
- Scan and store business contracts and other legal documents
- Create PDFs of documents to share (no more faxing!)
- Search for any detail in the cabinet

The Home User

- Track family expenses
- Manage health documents and medical records
- Scan and organize recipes
- Scan and organize receipts for tax purposes
- Create tax reports
- Organize warranties and instructions for appliances
- · Maintain records of purchases for insurance purposes
- Organize children's school documents, report cards or assignments
- Search for any detail in the cabinet

The Traveling User

- Use the mobile scanner during airport downtime to catch up on organizing
- Create expense reports
- Scan business cards to create an organized contact list
- Sync contacts with Outlook
- Scan and organize receipts, bills and checks
- Scan and store sales contracts
- Create and PDFs of documents to share (no more faxing!)
- Search for any detail in the cabinet

Try It: Your First Scan

These instructions assume that Neat 5 is installed and the scanner is properly attached to your computer.

Scanning and Reviewing Your First Item

SCANNING

- 1. In the Folder Navigation pane, click on a folder. (This is where your scanned item will be saved. You also have the option of <u>creating a new folder</u>.)
- 2. Place the item to be scanned in the scanner as follows:

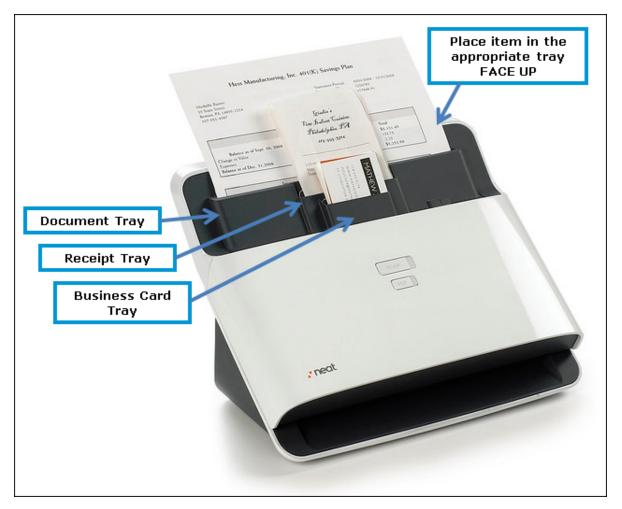
Mobile Scanner

- Face down (text facing away from you)
- Aligned at the far right front edge (under the PDF and Scan buttons)
- **TIP:** The mobile scanner will lightly grab the item when it is placed in the proper position.



Desktop Scanner

- Face up (text facing you)
- In the appropriate tray of the Desktop Scanner (documents in the back, receipts in the middle, business cards in the front)



- 3. Do either of the following:
 - Press the Scan button on the scanner
 - Click the Scan button in Neat 5



Queue Icon

As you scan an item, the Queue icon (pictured above) animates to let you monitor the scan's progress. The processing time for a scan will vary based on the number of items, document size, and amount of content. Neat 5 will optimize the scanned item for readability, convert it into digital text, and parse it for key information. The accuracy of this

process depends on the quality of the item being scanned. For example, if the text on a receipt is very light or the vendor name on a business card is in a highly stylized font, Neat 5 may not be able to read every detail clearly. Therefore, each scan should be reviewed for accuracy.

Scans do not have to be reviewed immediately after scanning. You can scan items and then review them later. Neat 5 lists scans you have not yet reviewed for more than two seconds into a <u>Smart Filter called Unreviewed</u>. After you have reviewed an item for more than two seconds, it will no longer appear in the Unreviewed list.

REVIEWING

In step 1, you selected a folder to scan your first item into. That folder is still selected. Once the scan is complete, the item will appear in the Thumbnail View Pane on the right side of the screen. Thumbnail View displays a tiny image of the scanned item along with key details (if applicable) and the Item Type dropdown menu.

- 4. Look at the I tem Type dropdown menu. Did Neat 5 correctly identify the type of item you scanned? If so, leave it as is. If not, reclassify the item by choosing the correct type from the Item Type dropdown menu.
- 5. Want a closer look at the scanned item? Double-click on the thumbnail to view the item in Details View. (Alternatively, click the Details View button under the Toggle Item View heading in the top right corner of the window.) Details in this view can be edited if necessary.
- 6. Click on the Grid View button under the Toggle Item View heading in the top right corner of the window to review the item in that view. Note that several fields concatenate into the Description column to provide as many details as possible. Details in this view can be edited if necessary.
- 7. Click on the Thumbnail View button under the Toggle Item View heading in the top right corner of the window to return to Thumbnail View.

So far, so good, right!? Neat 5 has a lot more to offer as far as helping you track and manage information and transform it into actionable, usable information. Where you go from here depends on how you plan on using Neat 5. Links to a few topics of interest follow:

- Scanner Settings
- Organizing Your Items: Cabinets, Folders & Subfolders
- Working with Items
- Exporting, Reporting & Printing

The Neat 5 Dashboard is the first screen you'll see when you start the program. Think of it as your home base for all things Neat.

∡ neat [:]		Help Hile Tools Settings _ the X
Scan Settings Import Export Reports		Keyword Search
+ New Folder	Quick Start	Cabinet Stats
 My Cabinet Image: Business Image: Home 	Neat 5 Neat 5 is the fastest way to transform your business and	Location: Clubers/Wromanoff/Documents/Neat Data/My Cabinet.nwcab 10 Folders 👔 26 Docs 😢 4 Receipts 📓 26 Contacts
🕨 📷 Trach	Next Si the factors way to transform your business and your compared digital files: bits you can easily store, search, condocurse of the second store, second store, search, co	Data 0% full 3500 / 400
 SMART PLTERS 	Video Tutorials From comprehensive overviews to insights into how to perform specific task, his fileavy contains tooth nerrated videos and user guides to help you get the most out of your viset solution. Community Learn how others are using Nest, share your ideas and experiences, and experiences to the solution of the solution of the solution. Help Center Visit the Neat Help Center to find answers to your technical support questions or to open a support ticket.	Launch > Launch > Launch > Launch > Launch > Launch > Launch >
View All Recently Added Items		
 Wineviewed 		

The Neat for Windows Dashboard

The Dashboard puts everything you need to use Neat 5 effectively and efficiently on a single screen, including the following:

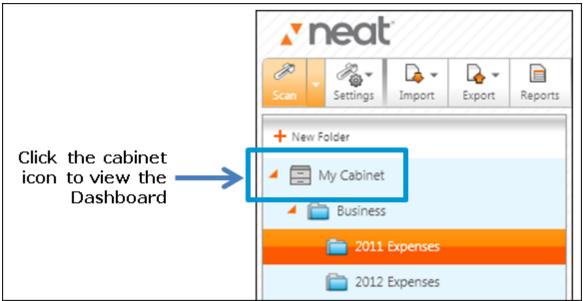
- An express lane to all of your Neat folders and files
- An easy to navigate, searchable contact list
- At-a-glance information on your Neat 5 cabinet space statistics
- One-click links to support, tutorials and service as well as to the Neat website

In this section:

- <u>Viewing the Dashboard</u>
- Dashboard Panes
- Dashboard Commands & Links

Viewing the Dashboard

You can return to the Dashboard from any other Neat screen by clicking on the cabinet icon at the top of the Folder Navigation Pane (pictured below).

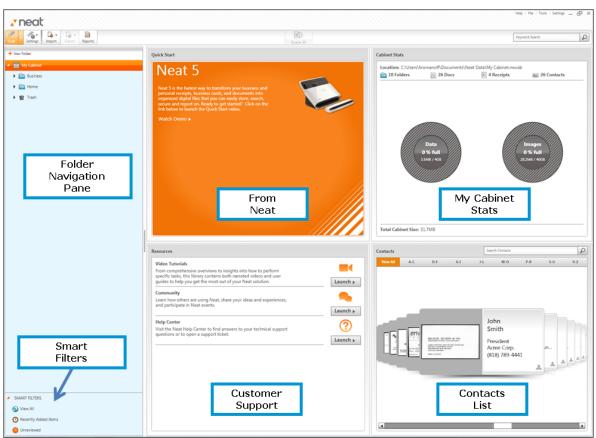


Neat for Windows Folder Navigation Pane

Dashboard Panes

The Dashboard is visually organized into five separate panes: folder navigation, From Neat, Customer Support, My Cabinet Stats and Contacts. Each of these panes is described below.

Dashboard Pane	Description
Folder Navigation Pane	Provides access to all of your folders and subfolders. Smart Filters are listed at the bottom of the pane.
From Neat	Provides easy access to Neat 5 product information, including useful tips and video demonstrations
My Cabinet Stats	Offers analytical data about your cabinet (number of folders, number of items, amount of space being taken up, etc.)
Customer Support	Direct access to troubleshooting information, frequently asked usage questions, video tutorials, the online knowledge base, and customer service
Contacts	Provides an easy-to-browse electronic rolodex



Neat for Windows Dashboard

Dashboard Commands & Links

Within the Dashboard panes you will find one-click buttons to commands you will use most often as well as a search tool to help you locate anything you've ever scanned into your cabinet.

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Screenshot	Command	Description
	Scan	Begins scan
Theat	Settings	Allows you to select scanner settings in advance of scanning (scanner, item type, color, B&W, etc.) as well as clean and/or calibrate your scanner
Scan Settings Import Export Report	Import	Allows you to import a PDF, Image or vCard into Neat as well as bring in legacy Neat files and Quicken Account information
	Export	Allows you to export Neat data to an image, PDF, CSV (comma separated value), Excel, QuickBooks, Quicken, TurboTax or vCard
	Report	Let you create a new report
Search Bar Keyword Search	Search	Let's you perform keyword searches to locate your items quickly.
Queue (1)	Queue	Animates to show scan in progress.
	Help Menu	Neat 5 Help Files
	File Menu	Offers options for creating a new Folder or creating a new Receipt, Contact or Document without scanning
	Tools Menu	Allows you to access advanced search and sorting capabilities as well as to sync with Outlook
Help File Tools Settings 🔔 🗗 🗙	Settings Menu	Allows you to customize column or field names and personalize Neat 5 lists (Action Type, Author, Category, etc.). Also lets you create an expense report profile define field mapping for exporting purposes
	Minimize	Shrinks the Neat 5 window to the Windows Task Bar
	Maximize	Enlarges the Neat 5 window to encompass the entire screen
	Close	Closes the window and exits Neat 5

The Neat 5 Dashboard

Neat 5 exists to help free the information that's trapped in your documents so you can organize, store, secure and activate it. Neat's scanners and software solutions use patented OCR and parsing technology to read and extract key information from your paper, so you can organize it, export it, or securely store it in our easy-to-use database system.

In this section:

- <u>Neat Scanners</u>
- Getting Data Into Neat 5
- <u>Scanning Basics</u>
- Importing
- Sending to Neat 5
- Creating a New Item
- Working with the Neat Desktop

Neat Scanners

Mobile Scanner	The <i>Mobile Scanner</i> is lightweight portable scanner designed for scanning on the go. You can take it on the road and connect to your laptop with a USB cable, allowing you to scan items from any location using the Neat 5 software.
Desktop Scanner	The <i>Desktop Scanner</i> is a powerful, full-featured automatic document feeder (ADF) scanner. This scanner offers faster scanning speeds and an input tray, which lets you perform more complex scanning such as scanning in multiple pages automatically.

Getting Data into Neat 5

There are four ways to get data into Neat 5: scanning, importing, sending to or manual input. Each method is described below:

SCANNING

Use the Mobile or Desktop Scanner to read and extract key information from a receipt, business card or document. Benefit: reduce paper clutter and retain and organize important information.

IMPORTING

Use the Import command to bring in key information from any PDF file or image already stored on your computer. Benefit: reduce electronic clutter and retain and organize important information.

SENDING TO

Use the Send to Neat printer driver to send an existing document on your computer to the Neat 5 program. Benefit: reduce electronic clutter and retain and organize important information.

MANUAL INPUT

Use the New (Receipt, Contact, Document) command to manually add a new receipt, contact or document. Benefit: retain and organize important information for which you have no paper or electronic record.

Scanning Basics

What Can I Scan?

You can scan any item containing information you want to retain and organize: receipts, business cards or almost any document you wish to store electronically.

RECEIPTS

Scan receipts to track expenses. Neat 5 finds key information on the receipt and organizes it into common categories for you. You have full control over the scanned information and categories and all of the scanned information can be searched. Scanned receipts can easily be transformed into useful reports.

BUSINESS CARDS

Scan business cards to create an instant contact list. Neat 5 will find key information on a business card and organize it into common contact list categories for you and all of the scanned information can be searched.

DOCUMENTS

Use the Neat mobile scanner or desktop scanner to scan any document and transform it into a PDF.

Any kind of document can be scanned - get creative!

- Articles
- Bank Statements
- Bills
- Contracts
- Credit Card Statements
- Estimates
- Legal Documents
- Nutritional Labels
- Product Warranties
- Recipes
- Resumes

Also in this section:

- How Do I Scan?
- <u>Scanner Settings</u>
- Understanding the Processing Queue
- <u>Reviewing a Scan</u>

How Do I Scan?

How Do I Scan?

Items can be scanned using the physical buttons on the scanner or the Scan command in Neat 5.

USING THE SCANNER BUTTONS

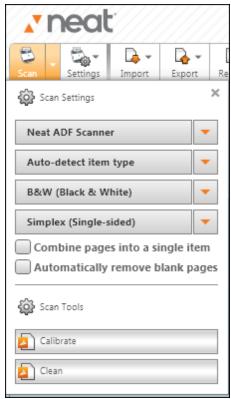
- Press the Scan button to scan an item into Neat 5. Neat 5 will use its patented OCR and parsing technology to read and extract key information from a scanned receipt or business card and store it into common categories.
- Press the PDF button to scan an item directly to a PDF file. You will be prompted to save the PDF on your hard drive in a folder of your choosing. Once scanned and saved, the PDF can be easily shared via email.

USING THE NEAT 5 SCAN COMMAND

• Click the Scan command in Neat 5 to scan an item into the application. Neat 5 will use its patented OCR and parsing technology to read and extract key information from a scanned receipt or business card and store it into common categories.

Click here to try your first scan!

Scanner Settings



Neat 5 Scanner Settings Menu

Neat 5 scanner settings give you full control over every aspect of scanning. Using scanner settings, you can do any of the following:

- Choose which Neat scanner to use (if you have more than one)
- Choose the type of document being scanned or let Neat 5 classify it automatically
- Choose to scan in color or black & white
- Choose to scan individual pages or combine several pages into a single document
- Choose to automatically remove blank pages from multi-page scans
- Calibrate or clean your scanner

Each of these scanner settings is described below.

Also in this section:

- <u>Setting the Document Type</u>
- <u>Changing the Document Type After Scanning</u>
- Choosing Color or Black & White
- Scanning Separate Pages vs. Scanning Multi-Page

Setting the Document Type

and Sending

Neat 5 offers four choices for document choice: Auto-detect item type, Scan a receipt, Scan a business card, and Scan a document. Each choice is described in the table below.

Gettings Items Into Neat 5: Scanning, Importing

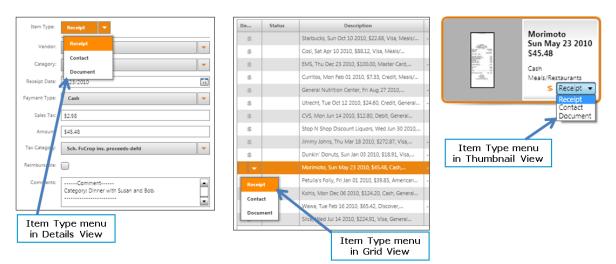
TIP: If you are scanning several like items (for example a pile of business cards or a stack of receipts), it makes sense to preselect a document type. This way, Neat 5 doesn't have to intelligently guess what type of item is being scanned.

Document Type Selection	Description
Auto-detect item type	Use to have Neat 5 automatically classify items as receipts, business cards or documents. This setting is especially useful when scanning an assortment of items. Note that the document type can be changed (i. e. reclassified) after scanning if the program did not classify an item correctly.
Scan a receipt	Use when scanning a receipt or other item containing receipt type categories, such as bills or invoices.
Scan a business card	Use when scanning a business card or other item containing contact information.
Scan a document	Use when scanning any document.

Changing the Document Type After Scanning

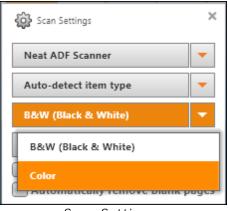
The document type can be changed (i.e. reclassified) after scanning if the program did not classify an item correctly.

- 1. View the item in either Thumbnail, Grid or Details View.
- 2. Choose the correct item type from the I tem Type dropdown menu.
 - In Details View, the Item Type menu is at the top of the screen
 - In Grid View, the Item Type menu is located in the first column
 - In Thumbnail View, the Item Type menu is located at the lower right corner of an image



The Item Type menu in Details View, Grid View and Thumbnail View

Choosing Color or Black & White



Scan Settings (B&W and Color Submenu)

You can choose to scan an item in color or in black & white. Typically, receipts and business cards are scanned in black & white since these items consists primarily of text. Documents can be scanned using either setting.

- 1. In the Folder Navigation pane, click on a folder. (This is where the new item will be stored. You also have the option of creating a new folder.)
- 2. Click Settings.
- 3. Click on B&W (Black & White) or Color and choose the setting you want to use.
- 4. Feed the item into the scanner and then click Scan.

Scanning Separate Pages vs. Scanning Multi-Page

By default, Neat 5 scans each item as a separate receipt, business card or document. However, you scan multiple pages into a single receipt or document.

These instructions are for the Neat Mobile Scanner. <u>Click here for instructions on scanning a multipage document using the Neat Desktop Scanner.</u>

- 1. In the Folder Navigation pane, click on a folder. (This is where the new item will be stored. You also have the option of creating a new folder.)
- 2. Click Settings.
- 3. Click in the Combine pages into a single item checkbox.
- 4. Feed the item into the scanner and then click Scan. Neat 5 will prompt you for each page until you click Complete.

Understanding the Processing Queue

As you scan an item, the *Queue* icon animates to let you monitor the scan's progress. Neat 5 will optimize the scanned item for readability, convert it into digital text, and parse it for key information.

Ē
Queue (1)

The processing time for a scan will vary based on the number of items, document size, and amount of content. Clicking on the Queue icon opens a separate Processing Queue window which displays a thumbnail view of each item being scanned.

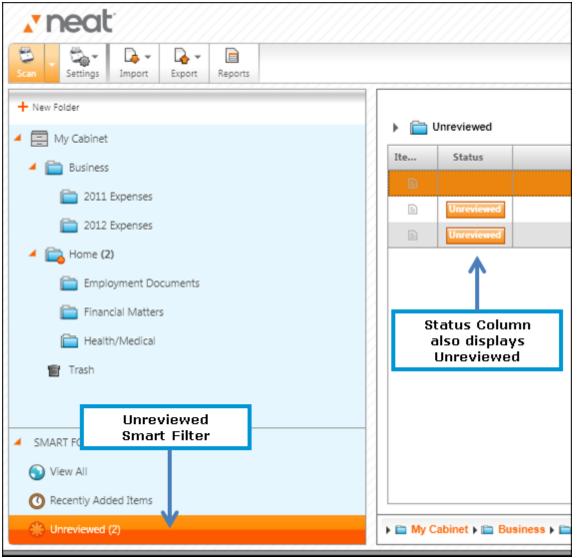
Scan Settings	Processing Queue				×
+ New Folder Key Kolder My Cabinet Key			A series of the		
Employ	Processing	Processing	Processing		
Financi Health,					
View All	litems			Θ	Cancel All

Processing Queue Window

Reviewing a Scan

As an item is scanned, Neat 5 will optimize it for readability, convert it into digital text, and parse it for key information. The accuracy of this process depends on the quality of the item being scanned. For example, if the text on a receipt is very light or the vendor name on a business card is in a highly stylized font, Neat 5 may not be able to read every detail clearly. Therefore, each scan should be reviewed for accuracy.

Scans do not have to be reviewed immediately after scanning. You can scan items and then review them later. Neat 5 lists scans you have not yet reviewed into a *Smart Filter* called Unreviewed.

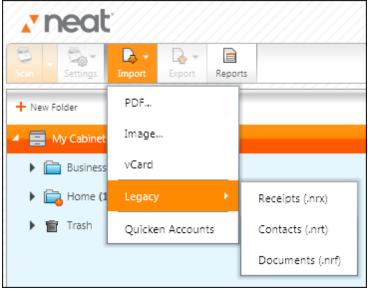


Unreviewed Smart Filter

After you have reviewed (looked at) an item for more than two seconds in either Details or Grid View, it will no longer appear in the Unreviewed Smart Filter list.

Importing

Scanning is not the only way to capture data in Neat 5 - you can also import from a PDF, image file, vCard, legacy Neat file or Quicken account.



Import Menu

Also in this section:

- Importing a PDF
- Importing an Image
- Importing a vCard
- Importing a Legacy Neat File
- Importing a Quicken Account

Importing a PDF

- 1. In the Folder Navigation pane, click on a folder. (This is where the imported item will be stored. You also have the option of <u>creating a new folder</u>.)
- 2. Click Import.
- 3. Choose PDF. The Selected PDFs dialog box opens.

Selected PDF's		Browse	
Auto-detect imported item type			
	Ок	Cancel	V

Selected PDFs Dialog Box

- 4. Click Browse and navigate to the folder containing the PDF(s) you want to import.
- 5. Select the PDF(s) you wish to import. (Use the Ctrl key to select multiple items.)
- 6. Click the I tem Type dropdown menu and choose the type of item you are importing. Alternatively, choose Auto-detect imported item to let Neat 5 determine the item type.
- 7. Click OK. The Queue icon animates to let you monitor the importing progress. The processing time for importing will vary based on the number of items, document size, and amount of content. Neat 5 will optimize the scanned item for readability, convert it into digital text, and parse it for key information.
- When the import is complete, double-click on an item to view it in Details View. (Alternatively, click the Details View button under the Toggle Item View heading in the top right corner of the window.) Details in this view <u>can be edited</u> if necessary.
- 9. Choose a different item type if necessary.

Importing an Image

- 1. In the Folder Navigation pane, click on a folder. (This is where the imported item will be stored. You also have the option of <u>creating a new folder</u>.)
- 2. Click Import.
- 3. Choose Image. The Selected Images dialog box opens.

Selected Images			× Browse
Combine images into a single i	tem		
Auto-detect imported item type	•		
		ок	Cancel

Import Images Dialog Box

- 4. Click Browse and navigate to the folder containing the image(s) you want to import.
- 5. Select the images(s) you wish to import. (Use the Ctrl key to select multiple items.)
- 6. Click the I tem Type dropdown menu and choose the type of item you are importing. Alternatively, choose Auto-detect imported item to let Neat 5 determine the item type.
- 7. Click OK. The Queue icon animates to let you monitor the importing progress. The processing time for importing will vary based on the number of items, document size, and amount of content. Neat 5 will optimize the scanned item for readability, convert it into digital text, and parse it for key information.
- When the import is complete, double-click on an item to view it in Details View. (Alternatively, click the Details View button under the Toggle Item View heading in the top right corner of the window.) Details in this view <u>can be edited</u> if necessary.
- 9. Choose a different item type if necessary.

Importing a vCard

- 1. In the Folder Navigation pane, click on a folder. (This is where the imported item will be stored. You also have the option of <u>creating a new folder</u>.)
- 2. Click Import.
- 3. Choose vCard. The Open dialog box opens.

🗷 Open	State of the local division of the local div	x
🚱 🕞 🗢 🖳 🕨 Computer 🕨	🗸 🍫 Search Computer	Q
Organize 🔻	5.∓ 19=	- 🔳 🔞
 ✓ □ Libraries ▷ □ Documents ▷ ○ Music ▷ □ Pictures ▷ □ Videos 	 Hard Disk Drives (3) OS (C:) 638 GB free of 919 GB HP_RECOVERY (D:) 1.48 GB free of 12.1 GB 	
▷ 🔣 Homegroup	My Book (J:)	
▲ 🖳 Computer ▷ 🏭 OS (C:) 	Devices with Removable Storage (2)	L)
▷ 📻 HP_RECOVERY (D:) ▷ 🚾 My Book (J:)	DVD RW Drive (E:)	-
File name:	▼ vCard (*.vcf) Open	▼ Cancel

Open Dialog Box

- 4. Navigate to the folder containing the vCard you want to import.
- 5. Select the vCard file you wish to import. (You cannot select multiple vCards.)
- 6. Click Open. The Queue icon animates to let you monitor the importing progress. The processing time for importing will vary based on the amount of content. Neat 5 will optimize the scanned item for readability, convert it into digital text, and parse it for key information.
- When the import is complete, double-click on the item to view it in Details View. (Alternatively, click the Details View button under the Toggle I tem View heading in the top right corner of the window.) Details in this view <u>can be edited</u> if necessary.

See also: • Exporting Contacts to vCard

Importing a Legacy Neat File

- 1. In the Folder Navigation pane, click on a folder. (This is where the imported item will be stored. You also have the option of <u>creating a new folder</u>.)
- 2. Click Import.
- 3. Choose Legacy.

∡ neat				
Scan Settings	De - Import	Export	Repor	rts
+ New Folder	PDF			
🔺 📄 My Cabinet	Image.			
🕨 🚞 Business	vCard			
🕨 🔁 Home (2	Legacy	,	•	Receipts (.nrx)
👕 Trash	Quicke	n Account	ts	Contacts (.nrt)
				Documents (.nrf)

Import Legacy File Submenu

- 4. Choose the type of legacy file you are importing:
 - Receipts (.nrx)
 - Contacts (.nrt)
 - Documents (.nrf)

The Open dialog box displays.

- 5. Navigate to the folder containing the legacy file you want to import.
- 6. Select the legacy file you wish to import. (Use the Ctrl key to select multiple files.)
- 7. Click Open. The Queue icon animates to let you monitor the importing progress. The processing time for importing will vary based on the amount of content being imported.
- TIP: When importing a legacy receipts file (.nrx), folders will be created as needed to match those used in the legacy file. When importing a legacy contact file (.nrt), folders will not be created automatically created; you can import the contacts into the folder of your choice.

Importing a Quicken Account

- 1. In the Folder Navigation pane, click on a folder. (This is where the imported item will be stored. You also have the option of <u>creating a new folder</u>.)
- 2. Click Import.
- 3. Choose Quicken Accounts.
- 4. Click Import. The Quicken import dialog box displays.

//////////////////////////////////////
Click the Import button to import Quicken Accounts. The following Quicken Accounts cannot be imported into NeatWorks: Brokerage, IRA or Keogh Plan, 401(k) or 403(b), and 529 Plan.
Import Edit Delete Close

Quicken Import Dialog Box

- 5. Navigate to the folder containing the Quicken Account you want to import.
- 6. Click I mport. The Queue icon animates to let you monitor the importing progress. The processing time for importing will vary based on the amount of content being imported.

A NOTE ABOUT QUICKEN FILE FORMATS

Different versions of Quicken use different file formats, such as QFX, QIF, and QDF. Neat only uses QIF file formats. Because Neat uses only the QIF file format, it's necessary to perform a simple workaround to ensure Neat and Quicken can work together using same format.

- 1. Start Quicken.
- 2. Under File choose Export and then Export QIF to export the file in a format Neat can then import.

For additional information and screenshots, see Exporting Data to Quicken on the Neat Help Center.

Sending to Neat 5

You can use the Send to Neat printer driver to send an existing document on your computer to the Neat 5 program. This feature lets you reduce electronic clutter and retain and organize important information.

- 1. Open the document you wish to send to Neat 5. (This could be a PDF, an image file, Word document, etc.)
- 2. Choose Print.
- 3. In the list of printers, choose Send to Neat.

	Printer	3
	Brother M	FC-8890DW Printer 👻
	Brother Ready	MFC-8890DW Printer
	Brother Ready	PC-FAX v.2.1
	Fax Ready	
	PDF Co Ready	mplete
Send to Neat appears in printers list in the	Send Te	o Neat
Print dialog box	Add Printer Print to File	

- 4. Click OK. The Progress dialog box lets you know the sending has begun.
- 5. In Neat 5, choose an item type from the I tem Type dropdown menu. Alternatively, choose Auto-detect print job to let Neat 5 determine the item type.
- 6. Select the folder you want the item stored in. (You also have the option of <u>creating a new</u> <u>folder</u>.)
- 7. Click OK. The Queue icon animates to let you monitor the item's progress. The processing time will vary based on the document size and amount of content. Neat 5 will optimize the scanned item for readability, convert it into digital text, and parse it for key information.
- When the import is complete, double-click on an item to view it in Details View. (Alternatively, click the Details View button under the Toggle Item View heading in the top right corner of the window.) Details in this view <u>can be edited</u> if necessary.
- 9. Choose a different item type if necessary.

Creating a New Item

You can use the New (Receipt, Contact, Document) command to manually add a new receipt, contact or document. This feature lets you retain and organize important information for which you have no paper or electronic record.

- 1. In the Folder Navigation pane, click on a folder. (This is where the new item will be stored. You also have the option of <u>creating a new folder</u>.)
- 2. Click the File menu (top right corner of the window).
- 3. Choose New.
- 4. Choose the type of item you are creating:
 - Receipt
 - Contact
 - Document

The item is created.

- 5. Double-click on the new item to view it in Details View.
- 6. Modify each of the fields as needed to provide details for the new item.

Working with the Neat Desktop Scanner



The Neat Desktop Scanner is an award-winning Automatic Document Feeder (ADF) scanner. The patented paper input tray lets you scan different kinds of paper - from the smallest taxi receipt to 2-sided legal documents - all in a single pass. Or insert up to 50 pages at once for lightning-fast batch scanning. Key features include the following:

- ADF scanner offers very fast scanning and reliability across papers of different widths, qualities and textures.
- The patent-pending paper input tray design lets you stack your receipts, cards and documents and scan them all at once. It handles up to 10 receipts, 10 business cards and 10 letter-sized documents, or you can remove the tray to scan up to 50 pages of a standard document.
- The Neat ADF Scanner is FAST. It can scan up to 25 pages per minute and Neat 5 software processes images in the background so there's no delay between scans.

Also in this section: • <u>Duplex Scanning</u>

Duplex Scanning

Duplex Scanning

The Neat Desktop Scanner can scan BOTH sides of a two-sided document, receipt or business card.

TIP: Need to scan both sides of a paper item but you don't have the Neat Desktop Scanner? To scan a double-sided item (e.g. a document or a business card) with the Neat mobile scanner, first scan one side of the item, and then flip it over and scan the other side. Neat 5 creates each side as a separate item in the application; however, you can combine the two sides by using the Multi-Page Scanning option. To learn how to do that, see Scanning a Multi-Page Document in Neat 5.

v n	eat				
Scan -	Settings	Import	Export	Re	
င်္လြို့ Scan S	ettings			×	
Neat AD	F Scanne	r		-	
Auto-de	tect item	type		•	
B&W (B	lack & W	hite)		•	
Simplex (Single-sided)					
Combine pages into a single item Automatically remove blank pages					
🐼 Scan Tools					
Calibrate					
Clean	Clean				

Scan Settings

SCANNING A MULTI-PAGE DOCUMENT IN NEAT 5

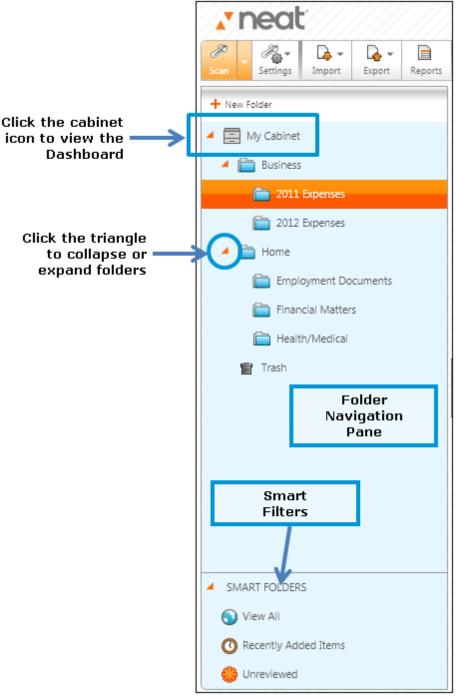
These instructions are for the Neat Desktop Scanner. <u>Click here for instructions on scanning a</u> <u>multi-page document using the Neat Mobile Scanner.</u>

- 1. In the Folder Navigation pane, click on a folder. (This is where the new item will be stored. You also have the option of <u>creating a new folder</u>.)
- 2. Click Settings.
- 3. Click in the Combine pages into a single item checkbox.

4. Place the items in the appropriate Neat Desktop Scanner tray and then click Scan. All pages will be combined into one document.

Neat 5 stores all items in a secure digital database called a cabinet. Within the cabinet you can create folders and subfolders to organize related items.

- Two folders are created automatically for new users upon installation: Business and Home. You can rename or delete these folders as needed as well as create subfolders within them.
- You may create additional new folders as needed.



Folder Navigation Pane

Legacy User Tip:

The previous version of Neat 5 (version 4) display a "folder" as a "row" in an Excel-like grid of rows and columns. Version 5 now uses the visual metaphor of folder icons within a Folder Navigation Pane.

EXAMPLES OF FOLDER ORGANIZATION

Curious how others organize their cabinet folders? Check out our User Case Studies.

In this section:

- <u>Cabinet Basics</u>
- Folder Basics
- Smart Filters

Cabinet Basics

By default, your cabinet's name is My Cabinet.

Expanding/Collapsing the Cabinet

In the Folder Navigation pane, double-click on the cabinet to expand or collapse its contents.

Viewing Cabinet Properties

Cabinet statistic display on the dashboard by default.



My Cabinet Stats

You can also choose to view cabinet properties in a separate window.

- 1. In the Folder Navigation pane, right-click on the cabinet.
- 2. Choose Properties.

		×
=	My Cabinet	
Location:	C:\Users\Geeky Girl LLC Admin\Documents\Neat Data\My Cabinet.nwcab	
Contains:		
0 Receip	ots, 0 Contacts & 0 Documents in this Folder.	
24 Recei	ipts, 830 Contacts & 24 Documents in 11 Folders.	
Size on di	sk:	
Data:	3.5 MB out of 4 GB used (0.1% full)	
Images:	70.7 MB out of 40 GB used (0.2% full)	
Cabinet:	74.2 MB	
	Close	

My Cabinet Properties Dialog Box

5

Folder Basics

Unlike your physical office, where you can "file" important papers on every surface, in Neat 5 all items must live in a folder. That said, you can be as organized - or as disorganized - as you wish to be in Neat 5. If you want to place every item in a single folder, you can! Alternatively, you can choose to completely master Neat 5 file management by creating folders and subfolders and consistently organizing items into those folders.

Also in this section:

- Folder Best Practices
- Opening & Closing a Folder
- Creating a New Folder or Subfolder
- <u>Viewing Folder Content</u>
- Filtering Folder Items by Item Type
- <u>Renaming a Folder</u>
- <u>Deleting a Folder</u>
- Moving or Copying a Folder

Folder Best Practices

Folder organization is subjective. There is no single right way to do it. What may seem flawless and self-explanatory to one person may leave another completely baffled. There are, however, a few tips that can help almost everyone:

- Keep folder names short and meaningful
- Adopt a consistent naming convention
- Store like with like (receipts in one folder, canceled checks in another, etc.)
- File as you go whenever possible
- Folders are displayed alphabetically use that to your advantage
- Don't fear depth it's OK to have subfolders inside of subfolders
- Stick to your system

Examples

GOAL: TRACKING PERSONAL RECEIPTS CHRONOLOGICALLY BY MONTH

- In the Folder Navigation Pane, right-click on the Home folder. (If the folder does not exist, create a new folder; if you wish to change the folder name to something else, such as Personal, do so.)
- 2. Choose New Folder.
- 3. Type the current year as the folder name and click OK.
- 4. Right-click on the Year folder you just created and choose New Folder.
- 5. Type January as the folder name and click OK.
- 6. Repeat steps 4 and 5 for each month.
- **TIP:** Want to create the same exact folder structure for the previous or next years? Before placing items in your new folder structure, copy the year folder. When pasting the folder, <u>rename it</u> to the appropriate year.

GOAL: TRACKING BUSINESS EXPENSES BY CLIENT

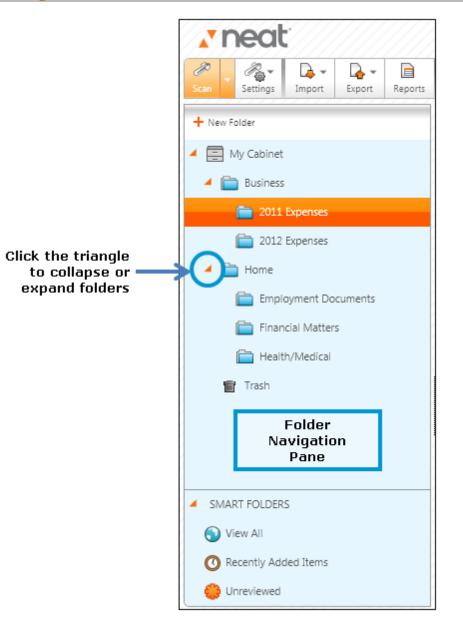
- 1. In the Folder Navigation Pane, right-click on the Business folder. (If the folder does not exist, <u>create a new folder</u>; if you wish to change the folder name to something else, such as Personal, do so.)
- 2. Choose New Folder.
- 3. Type Clients as the folder name and click OK.
- 4. Right-click on the Clients folder you just created and choose New Folder.
- 5. Type a client name as the folder name and click OK.
- 6. Repeat steps 4 and 5 for each client.
- **TIP:** Need to track client expenses by specific project or purchase order number? <u>Create</u> <u>subfolders</u> with those attributes within each client folder.

USER CASE STUDIES

Curious how others organize their cabinet folders? Check out our <u>User Case Studies</u>.

Opening & Closing a Folder

Opening a Folder



- **TIP:** A triangle next to a folder indicates that the folder contains one or more subfolder(s). Click the triangle to show or hide a folder's contents.
- 1. In the Folder Navigation pane, click the folder and/or subfolder you want to open. The folder's contents display on the right side of the screen.
- 2. Use the scroll bar to scroll through the folder contents as necessary.

Closing a Folder

To close a folder, simply click on another folder in the cabinet or on the cabinet icon (which will

display the Dashboard).

Creating a New Folder or Subfolder

- 1. In the Folder Navigation pane, right-click on a cabinet or folder and choose New Folder.
- **TIP:** Alternatively, you can click on the File menu and choose New > Folder.

			×
Folder Name:	New Folder		
Description:			
Select where to	place the folder:		
My Cabin	et		
🕨 📄 Bus			
▶ 🛅 Hor	ne		
		0	K Cancel

New Folder Dialog Box

- 2. Type a meaningful name for the folder in the Folder Name field.
- 3. Type a description of the folder in the Description field (optional).
- 4. Under Select where to place the folder, choose the location where you want the folder to be stored.
- 5. Click OK.

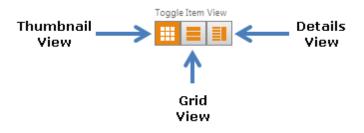
Viewing Folder Content

You have three options for viewing folder content: Thumbnail View, Grid View or Item View.

View	Description	Screenshot (click to view larger)
Thumbnail View	Displays a tiny image of the scanned item along with key details (if applicable) and the Item Type dropdown menu	Actions Dem Type Togde Rem View The Type Togd
Grid View	Displays a list of items in a table (grid) format	Actions: Toggle Item View Image: Colspan="2">Toggle Item View Image: Colspan="2"
Details View	Displays a close-up look at a single scanned item	Actions Item Type Toggie Item View Item Type: Items (16) Items (16) Items (16) Item Type: Receipt Items (16) Items (16) Items (16) Vendor: Starbucks Items (16) Items (16) Items (16) Items (16) Payment Type: Items (16)

Changing Views

To change between the three views, use the Item View Toolbar near the top right corner of the screen (pictured below).



Filtering Folder Contents by Item Type

To filter items by type, use the Item Type dropdown menu near the top right corner of the screen (pictured below).



dropdown menu

- Choose All I tems to view all receipts, contacts and documents in the current folder
- Choose Receipts to view only receipts in the current folder
- Choose Contacts to view only contacts in the current folder
- Choose Documents to view only documents in the current folder

A combination of view (Thumbnail, Grid or Details) plus Item Type selection will determine which key details display.

Renaming a Folder

1. In the Folder Navigation pane, right-click on a folder and choose Edit [Folder Name].

		×
Folder Name:	2011 Expenses	
Description:		
	usiness Expenses	·
User: neat co Date Created:	3/3/2011 4:58:22 PM	
Last Modified:	3/3/2011 5:16:42 PM	•
		OK Cancel

- 2. Type a new name for the folder in the Folder Name field.
- 3. Modify the description of the folder in the Description field (optional).
- 4. Click OK.

Deleting a Folder

1. In the Folder Navigation pane, right-click on a cabinet or folder and choose Delete [Folder Name]. (Alternatively, select the folder and tap the Delete key.)

Confirm Folder Deletion			×
Are you sure you wish to delete the fol into the Trash folder?	lder 2011 Expenses a	and move	e all of its contents
	Ye	15	No

2. Click Yes to delete. The folder and its contents are placed in the Trash.

See also:

- Retrieving a Deleted Folder
- Permanently Emptying all Trash Contents
- Permanently Deleting a Single Folder from the Trash

Retrieving a Deleted Folder

You can retrieve a deleted folder as long as you have not yet emptied the trash.

- 1. In the Folder Navigation pane, right-click on the Trash icon.
- 2. Right-click on the folder you want to retrieve and choose Move [Folder Name].

Select the location to move the folder to	×
My Cabinet	ОК
📕 🛅 Business	Cancel
a 2011 Expenses	New
a 2012 Expenses	
Image: Provide the matrix of the matrix	
Trash 🗑	

- 3. Select the location where you want the folder to be moved to.
- **TIP:** Alternatively, you can click New to create a new folder location.
- 4. Click OK.

Permanently Emptying all Trash Contents

1. In the Folder Navigation pane, right-click on the Trash icon and choose Empty Trash.

Empty Trash		×
Are you sure you wish to permanently Trash folder?	y delete all the items and	d sub-folders from the
	Yes	No

- 2. Click Yes to permanently delete the contents in the Trash.
- **TIP:** Once you have emptied the trash, you can no longer retrieve deleted items from the trash.

Permanently Deleting a Single Folder from the Trash

- 1. In the Folder Navigation pane, right-click on the Trash icon. Deleted folders items are displayed on the right.
- 2. Right click on the folder you want to permanently delete and choose Delete [Folder Name].

🔺 👕 Trash	
🚞 Health/Medical	
	Move 'Health/Medical'
	Delete 'Health/Medical'
	Properties

3. Click Yes to permanently delete that folder from the Trash.

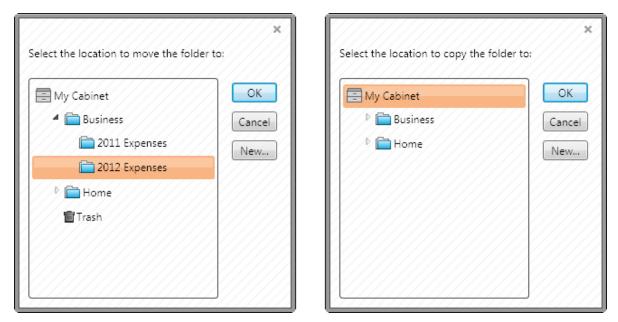
Confirm Folder Deletion		×
Are you sure you wish to permanently contents from the Trash folder?	delete the folder Health/	Medical and all of its
	Yes	No

TIP: Once you have emptied the trash, you can no longer retrieve deleted items from the trash.

Moving or Copying a Folder

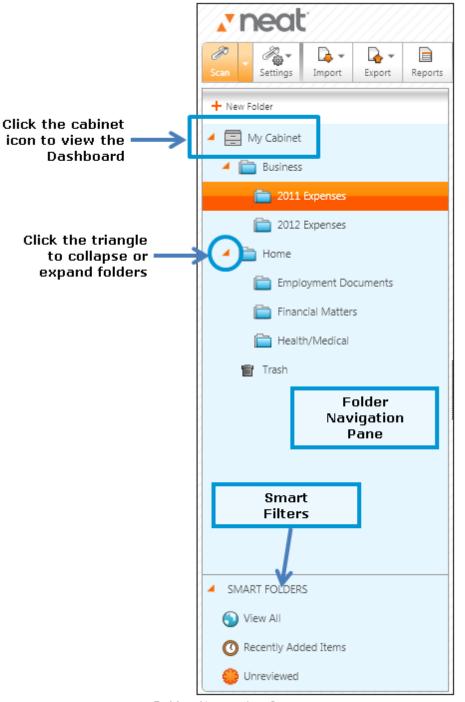
Folders can be moved or copied as needed.

- 1. In the Folder Navigation pane, right-click on the folder your wish to move or copy.
- 2. Do one of the following:
 - To MOVE a folder, right-click on the folder you want to retrieve and choose Move [Folder Name].
 - To COPY a folder, right-click on the folder you want to retrieve and choose Copy [Folder Name].



- 3. Select the location where you want the folder to be moved or copied to.
- **TIP:** Alternatively, you can click New to create a new folder location.
- 4. Click OK.

Smart Filters



Folder Navgation Pane

Smart Filters appear at the very bottom of the Folder Navigation Pane, serving as shortcuts to convenient item groupings. To view the content of a Smart Filter, simply click on its icon.

Smart Filter Name	Description	
View All	Displays all items in the cabinet	
Recently Added Items	Displays items added to the cabinet in the past three days	
Unreviewed	Displays processed items that have not been reviewed for more than 2 seconds	

Neat 5 stores all items in a secure digital database called a cabinet. Within the cabinet you can create folders and subfolders to organize related items.

Unlike your physical office, where you can "file" important papers on every surface, in Neat 5 all items must live in a folder. That said, you can be as organized - or as disorganized - as you wish to be in Neat 5. If you want to place every item in a single folder, you can! Alternatively, you can choose to completely <u>master Neat 5 file management</u> by creating folders and subfolders and consistently organizing items into those folders.

In this section:

- <u>Viewing Items</u>
- Editing Items
- <u>Working with Unreviewed Items</u>
- Moving or Copying Items Between Folders
- Deleting & Retrieving Items
- Sorting Items in Grid View
- Searching for an Item
- <u>Combining Multiple Items</u>
- <u>Creating a New Item without Scanning</u>
- <u>Working with Images</u>
- Working with Contacts

Viewing Items

You have three options for viewing folder content: Thumbnail View, Grid View or Item View.

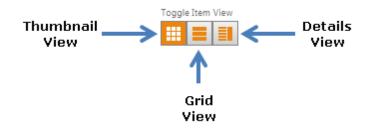
View	Description	Screenshot (click to view larger)
Thumbnail View	Displays a tiny image of the scanned item along with key details (if applicable) and the Item Type dropdown menu	Actions Tem Type Togle herr View Tem Type Togle herr View Tem Type Togle herr View Tem Type Togle herr View Tem Type Tem Type
Grid View	Displays a list of items in a table (grid) format	Actions Toggle herr View Item Status Description S Status Status S Cosi, Sat Apr 10 2010, \$22.68, Visa, Meals/ S Cosi, Sat Apr 10 2010, \$23.68, Visa, Meals/ S Cosi, Sat Apr 10 2010, \$23.68, Visa, Meals/ S Curitos, Non Feb Di 2010, \$73.3, Credit, Meals/ S Curitos, Non Feb Di 2010, \$73.3, Credit, Meals/ S General Nutrition Center, Fri Aug 27 2010, S Utrecht, Tue Oct 12 2010, \$22.80, Credit, General S CVS, Mon Jun 14 2010, \$12.80, Debit, General S Stop N Shop Discount Liquors, Wed Jun 30 2010, Jimmy Johns, Thu Mar 18 2010, \$27.87, Visa, Total
Details View	Displays a close-up look at a single scanned item	Actions: Item Type Toggle Item View Item Type: 2011 Expenses Items (10) Item Type Item Type: Receipt Item Type: Item Type: Vendor: Starbucks Item Category: Meals/Restaurant Item Type: Item Type: Receipt Date: 10/10/2010 Item Sales Tac: 51.66 Item Type: Item Type: Amount: 522.66 Item Type: Item Type: Receipt Date: Item Comment: Item Comment: Item Comment: Comments: Item Comment: Item Comment: Item Comment item Comment item Comment item Comment

Also in this section:

- Changing Views
- Filtering a View by Item Type

Changing Views

To change between the three views, use the I tem View Toolbar near the top right corner of the screen (pictured below).



Filtering a View by Item Type

To filter items by type, use the Item Type dropdown menu near the top right corner of the screen (pictured below).

	Item Type	
	All Items (18)	•
1	All Items (18)	Ъ
	Receipts (15)	im
	Contacts (1)	իս 27
	Documents (2)	isa

- Choose All I tems to view all receipts, contacts and documents in the current folder
- Choose Receipts to view only receipts in the current folder
- Choose Contacts to view only contacts in the current folder
- Choose Documents to view only documents in the current folder

A combination of view (Thumbnail, Grid or Details) plus Item Type selection will determine which key details display.

Editing Items

You can edit items in Details View. In Details View each detail is presented in its own field. Some fields offer a dropdown menu of items.

Item Type:	Receipt 💌	
Vendor:	Dunkin' Donuts 🔻	
Category:	Meals/Restaurants 🗸	
Receipt Date:	1/3/2010	
Payment Type:	Visa 👻	
Sales Tax:	\$0.67	
Amount:	\$18.91	
Tax Category:	Frm. 2106::Meal/Entertainment Expenses	
Reimbursable:		
Comments:	Comment A Receipt Date: Business lunch with JP.	

Receipt shown in Details View

Editing I tems in Details View

- 1. In the Folder Navigation pane, navigate to the folder containing the item you want to edit.
- 2. Double-click on the item you wish to edit to open it in Details View. (Alternatively, click the Details View button at the top right corner on the window.)
- 3. Modify the item type if necessary.
- 4. Modify each field as desired. Keep in mind the following:
 - Use the Tab key to move from field to field.
 - Depending on the item being edited, some fields may present as dropdown boxes. These fields can be edited by choosing another item from the list OR by adding a new item to the list. To add a new item to the list, choose the top blank item in the list and type the new label.
 - Date fields can be modified by typing a new date (MM/DD/YYYY format) OR by clicking on the calendar icon and choosing a date from the calendar.
- 5. Changes will be saved automatically.

Neat 5 lists scan items you have not yet reviewed for more than two seconds into a Smart Filter called Unreviewed. After you have reviewed an item for more than two seconds in either Details or Grid Views, it will no longer appear in the Unreviewed list. This allows you the luxury of not having to review items immediately after scanning. Scan as many items as you wish and then review them later when you have more time. The Unreviewed Smart Filter icon displays the number of Unreviewed items pending and Unreviewed items are marked as such in Thumbnail View. Viewing items in Thumbnail View will not mark them as reviewed.

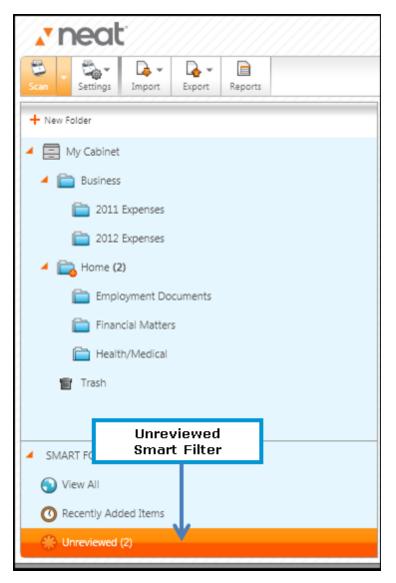
Also in this section:

- <u>Reviewing an Item</u>
- <u>Personalizing Your Review/Unreviewed Settings</u>

Working with Your Items

Reviewing an Item

- 1. Click the Unreviewed Smart Filter. Unreviewed items appear in Thumbnail View.
- 2. Double click on an item to review it in Details View. (Alternatively, click the Details View button under the Toggle Item View heading in the top right corner of the window.)
- 3. Choose a different I tem Type if necessary.
- 4. Modify details as necessary.



Personalizing Your Review/Unreviewed Settings

By default, items are marked as reviewed only after having been viewed for more than two seconds in either Details View or Grid View. You can turn this feature off if you would prefer to have all items automatically marked as reviewed upon scanning.

1. Click Settings (top right corner of the window). Note that Enable Unreviewed Tracking has a check mark next to it, indicating that it is active.

Help	File Tools Settings _ 🗗	ź
	Column / Field Names	,
Keyv	Lists	
	Expense Report Profile	
Filters	Excel Expense Report Maps	
All Items	Sync with Outlook Configuration	
_	✓ Enable Unreviewed Tracking	

- 2. Choose Enable Unreviewed Tracking to deselect that feature. You will be asked to confirm the change.
- 3. Click Yes to confirm the change.

Moving or Copying Items Between Folders

Individual items in a folder can be moved or copied as needed.

- 1. In the Folder Navigation pane, navigate to the folder containing the item you want to move or copy.
- 2. Right-click on the item you want to move or copy and do one of the following:
 - To MOVE an item, right-click on the item you want to retrieve and choose Move.
 - To COPY an item, right-click on the item you want to copy and choose Copy.

Select the location to move the item to:	×	Select the location to copy the item to:	×
My Cabinet My Cabinet Business Home Trash	OK Cancel New	My Cabinet My Cabinet Business Home	OK Cancel New

3. Select the location where you want the folder to be moved or copied to.

TIP: Alternatively, you can click New to create a new folder location.

4. Click OK.

Deleting an Item

When an item is deleted, it is placed in the Trash where it will remain until the Trash has been permanently emptied.

- 1. In the Folder Navigation pane, navigate and open the folder containing the item you want to delete.
- 2. Right-click on the item you want to delete and choose Delete. (Alternatively, select the item and tap the Delete key.)

Delete Item		×
Are you sure you wish to send the se	elected item to Trash?	
	Yes	No

3. Click Yes to delete. The item is placed in the Trash.

Also in this section:

- Retrieving an Item
- Permanently Emptying All Trash Contents
- Permanently Deleting a Single Item from the Trash

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Retrieving an Item

You can retrieve a deleted item as long as you have not yet emptied the trash.

- 1. In the Folder Navigation pane, right-click on the Trash icon.
- 2. Right-click on the item you want to retrieve and choose Move.
- 3. Select the location (folder and/or subfolder) where you want the folder to be moved to.

TIP: Alternatively, you can click New to create a new folder location.

4. Click OK.

Permanently Emptying All Trash Contents

1. In the Folder Navigation pane, right-click on the Trash icon and choose Empty Trash.

Empty Trash		×
Are you sure you wish to permanent Trash folder?	ly delete all the items ar	nd sub-folders from the
	Yes	No

- 2. Click Yes to permanently delete the contents in the Trash.
- **TIP:** Once you have emptied the trash, you can no longer retrieve deleted items from the trash.

Permanently Deleting a Single Item from the Trash

- 1. In the Folder Navigation pane click on the Trash icon.
- 2. Right click on the item you want to delete and choose Delete.

Delete Item		×
Are you sure you wish to permanentl	y delete the selected ite	em from Trash?
	Yes	No

- 3. Click Yes to permanently delete that item from the Trash.
- **TIP:** Once you have emptied the trash, you can no longer retrieve deleted items from the trash.

Sorting Items in Grid View

In Grid View, items can be sorted by clicking on a column heading. Keep in mind the following:

- Clicking on a heading for a column containing text sorts the rows alphabetically from A to Z. Clicking a second time on that heading changes the sort from Z to A.
- Clicking on a heading for a column containing dates sorts the rows from oldest to newest date. Clicking a second time on that heading changes the sort to newest date to oldest date.
- Clicking on a heading for a column containing numbers sorts the rows from highest to lowest. Clicking a second time on that heading changes the sort to lowest to highest.

Sorting Items in Thumbnail View

The order of items in Thumbnail View is driven by the current Grid View sort. To sort items in Thumbnail View, first go to Grid View and sort the items as needed and then go to Thumbnail View.

Searching for an Item

Neat 5 offers two search options: basic keyword search and advanced search.

Basic Keyword Search

Neat 5 lets you search for keywords in your receipts, contacts, and documents. The Keyword Search feature not only retrieves information that you've entered manually, but also retrieves text from scanned items, which means it can read Optical Character Recognition (OCR) text, or the text recognized in scanned images.

Keyword Search	Q
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- 1. Type one or more search terms in the Keyword Search field near the top right corner of the Neat 5 window.
- 2. Tap Enter or click the Search button (magnifying glass icon) to begin the search. Search results are displayed.
- 3. By default, the entire cabinet is searched. To filter your results to a specific folder, choose the folder from the Search Results In dropdown menu near the top left of the search results screen.
- **TIP:** The Refine Search button at the top left of the search results window provides access to advanced search techniques that you can use to refine a search. See Advanced Search.
- 4. To view an item in the search results list, double-click on it. (Click Back to return to the search results list.)
- 5. Click Close Search Results (top right corner of the results window) to close the search results.

Advanced Search

Neat 5 provides advanced search features that allow you to search by folder and use filters and wildcards.

Search Results In: Entire Cabinet	X Close Search Results
Item Type Receipt Keyword EMS	
- Delete Filter Amount V Less Than V \$150.00	
- Delete Filter Date Created Before 1/1/2011 15	
Further Refine Search Go	

Advanced Search Example

- 1. Choose Advanced Search from the Tools menu.
- 2. Leave Entire Cabinet selected in the Search Results In dropdown list or select a specific folder to search in.

- 3. Choose an item type from the I tem Type dropdown menu
- 4. Type one or more search terms in the Keyword field.
- 5. To further narrow the search, click Refine Search.
- 6. Add additional filter selections and then choose the desired parameters from the filters provided. For example:
 - If you are looking for a specific receipt amount, choose Amount from the field dropdown list, a mathematical operator from the operator list and then type an amount in the field provided.
 - If you are looking for a specific date, choose Receipt Date from the field dropdown list, a date modifier from the operator list and then type a date in the field provided.
- 7. Add additional filters by clicking on the Further Refine Search button and providing the necessary details.
- **TIP:** To delete a filter, click Delete Filter.
- 8. Click Go to begin the search.
- 9. To view an item in the search results list, double-click on it.
- 10. Click Back to return to the search results.
- 11. Click Close Search Results (top right corner of the results window) to close the search results.

You can combine multiple items into a single document.

- 1. In the Folder Navigation pane, navigate to the folder containing the items you want to combine.
- 2. In Thumbnails View or Grid View, select all of the items you wish to combine. (Hold down the Ctrl key to select multiple images.)
- 3. Right-click on any one of the selected images and choose Combine.

Changing the Order of Images in a Multi-Page Document

If you have a single document comprised of multiple images you can change the order in which the images appear.

- 1. View the image you want to save in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Right click on the image you want to move.

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oper dev assal Proj rpos assal iting resal arsal addy sach	Show Full Screen Export Move Current Image Backward	therest in and to all intellectual selectual property rights were valued and reduced to practice by applies. Golffies, trade secrets a third party other flux for fix r to incorporating any such Consultant IP to Company in Pheing deerned inventions. If halton IP in any Deliverables, before, perpetual, inrecouble, ellectual property rights in and filly, use, market, sell, offer at product offer any service. ng and after the term of this print, and assist. Company, and ring, defending and enforcing

- 3. Do one of the following:
 - Choose Move Current I mage Forward to move the image forward in the list

- Choose Move Current I mage Backward to move the image backward in the list
- Choose Move Current I mage To in order to open the move panel. Use the number dropdown list to select the page number you want the image moved to and then click Go. Click Save & Close to save your changes. (Note that you can also access the move panel by choosing Move from the I mage Tools button.)
- **TIP:** Click Reverse All Pages to reorder the images in reverse order.

Separating Items

Changing the Order of Multiple Scanned I mages

If you have a single document comprised of multiple images you can move one or more of the images into a separate document.

- 1. In the Folder Navigation pane, navigate to the folder containing the document you want to separate.
- 2. In Thumbnails View or Grid View, select the document you want to separate.
- 3. In the Image Pane, view the page containing the image you want to separate from the rest of the document. If you want to separate all of the pages, view any page in the document.
- 4. In Thumbnails View or Grid View, right-click on the document.
- 5. Choose Separate.

//////////////////////////////////////
The second
Current Image
Separate Current Image into a New Document
Separate All Images into Individual Documents
OK Cancel

- 6. Do one of the following:
 - To separate just the current image from the rest of the document, choose Separate Current I mage into a New Document
 - Toe separate all of the pages in the document, choose Separate All Images into Individual Documents
- 7. Click OK.

Splitting a Receipt

A receipt may contain multiple items that need to be expensed to more than one client or project. Neat 5 makes it easy for you to split a receipt across multiple Folders.

- 1. In the Folder Navigation pane, navigate to the folder containing the receipt you want to separate.
- 2. In Thumbnails View or Grid View, right-click on the receipt you want to split.
- 3. Choose Split Expense.

Step 2: Enter	amount or per	centage: Split Equally	
	Amount	Percentage	Category
Item 1:	0.00 😂	0.00 😂	General Retail 🔹 🔻
Item 2:	0.00 😂	0.00 🍣	General Retail 🔹
Split Total:	\$0.00	0.00 %	
Difference:	\$224.91		
(Receipt Am	ount - Split Tot	al)	

- 4. Choose the number of splits required from the number dropdown list (the maximum is 10).
- 5. Specify how you want the expense split as follows:
 - To split the expense equally, click Split Equally
 - To specify a specific amount or percentage, use the fields provided
- 6. Choose a category for each item from the Category dropdown menu.
- 7. Click OK.

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Customizing Columns

Columns can be customized to suit the information you're interested in tracking.

- 1. Under the Views heading, click on the List View button.
- 2. From the Filters dropdown list, choose the type of item you want to customize columns for.
- 3. Customize the columns as needed, keeping the following in mind:
 - To show or hide a column, right-click on the column heading and check or uncheck a column in the list. Checked columns will display. Unchecked columns are hidden.

🕨 📄 My C	Cabinet 🕨 🚞 Busine:	ss 🕨 🚞 201	1 Expenses	Actions	Filter	-	Views Prev /	(Ne
Status	Vendor	Category	Receipt Date	Payment T	Sales	Am	Tax Category	•
		Gensia R	Item Type		\$0.00	\$224.91	Sch. F::Crop ins. proceed.	
	Wawa	Convenie	Vendor	r	\$0.24	\$65.42	Sch. B::Dividend Income.	
	Kohis	General R	Category		\$9.47	\$124.20	Frm. 8863::Lifetime Qual.	
	Petulia s Folly	General R	Receipt Date	an Expre	\$0.00	\$39.85	Frm. 8829::Insurance	
	lick on any	Meals/Re:			\$2.98	\$45.48	Sch. F::Crop ins. proceed.	
	heading to the list of	Meals/Re:			\$0.67	\$18.91	Frm. 2106::Meal/Entertai.	
	available for ent item type	Meals/Re:			\$0.00	\$272.87	Frm. 2106::Travel (Away	
		General R 🕏			\$1.96	\$29.94	Sch. E::Management Fees	
	ed items will . Unchecked	General R	Client		\$0.32	\$12.80	Frm. 8839::Adoption Fee:	
	are hidden.	General R	Project		\$1.61	\$24.60	Sch. D.:Stock & Bond Sa.	
	General Nutrition Ce	General R	Bill Paid		\$0.00	\$13.99	Sch. C::Contract Labor	
	Curritos	Meals/Re:	Billable		\$0.54	\$7.33	Sch. A::Other Taxes	"
	EMS	General R	Paid By Co.	Card	\$0.00	\$100.00	Frm. 2106::Job Seeking	
	Cosi	Meals/Re:	Personal		\$6.53	\$88.12	Sch. A::Medicine & Drug:	
	Starbucks	Meals/Re:	Split ID		\$1.68	\$22.68	Frm. 1040::Dividend Inc	
			Tran ID					
			GST/HST					
			PST/QST					
			Last Modified		\$26.00	\$1,091.10	=	
•			Date Created Comments		220,00	91,051,10	•	

Showing/Hiding Columns/Fields

• To change the name of a column or field, click on the Settings menu (top right corner of the window) and choose Column/Field Names. Choose an item type from the submenu and then click in the Custom Name field next to the name of the column / field you wish to change. Type a new name and click OK.

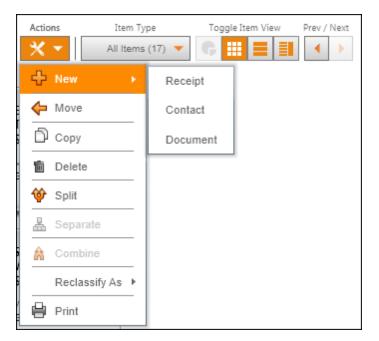
	Help File Tools Settings 🔔 🗗 🗙		
Receipts	Column / Field Names 🕨 🕨	Default Name	Custom Nam
Contacts	– Lists	Amount	
Documents	Expense Report Profile	Bill Paid	
Actions Filters	Excel Expense Report Maps	Billable	
🗙 🔻 Receipts (1		Category	
		Client	Customer
	✓ Enable Unreviewed Tracking	Comments	
		Date Created	
		GST/HST	
		/ Item Type	
		Last Modified	
		Paid By Co.	
		Payment Type	
		Personal	
		Project	
		PST/QST	
		Receipt Date	
		Reimbursable	
		Sales Tax	
		Split ID	

Customizing Column/Field Names

TIP: Changes made to columns/fields in Grid View will carry over to Details View as well as all items of that type in your cabinet.

Creating a New Item Without Scanning or Importing

The New (Receipt, Contact, Document) command can be used to manually add a new receipt, contact or document. This feature allows you to retain and organize important information for which you have no paper or electronic record.



Also in this section:

- Creating a New Receipt
- Creating a New Contact
- Creating a New Document

Creating a New Receipt

Actions Item Typ	pe Toggle Item View Prev / Next
🗙 🔽 All Items	(17) 🔻 🕞 🧮 🗮 🛃 📢 🕨
t New ►	Receipt
de Move	Contact
🗗 Сору	Document
💼 Delete	
🕸 Split	
👗 Separate	
A Combine	
Reclassify As 🕨	
Print	

- 1. In the Folder Navigation pane, navigate to the folder where you want the new receipt stored.
- 2. From the Actions menu choose New and then Receipt.
- 3. Double-click on the new item to open it in Details View. Note that Receipt is already selected in the Item Type dropdown menu.
- 4. Using the dropdown menus and fields provided, add all of the necessary details for the receipt.
- 5. The item will be saved automatically.

Creating a New Contact

Actions Item Typ	pe Toggle Item View Prev / Next
🗙 🔽 All Items	(17) 🔻 🕞 🏭 🗮 📕 📢 🕨
c∲ New →	Receipt
🔶 Move	Contact
Сору	Document
🛍 Delete	
🍄 Split	
🖁 Separate	
A Combine	
Reclassify As 🕨	
Print	

- 1. In the Folder Navigation pane, navigate to the folder where you want the new contact stored.
- 2. From the Actions menu choose New and then Contact.
- 3. Double-click on the new item to open it in Details View. Note that Contact is already selected in the Item Type dropdown menu.
- 4. Using the dropdown menus, checkboxes and fields provided, add all of the necessary details for the contact.
- 5. The item will be saved automatically.

Creating a New Document

Actions Item Typ	pe Toggle Item View Prev / Next
🗙 🗾 All Items	(17) 🔻 🕞 🧮 🗮 🛃 📢 🕨
t New →	Receipt
🔶 Move	Contact
🗗 Сору	Document
Delete	
🔯 Split	
La Separate	
A Combine	
Reclassify As 🕨	
Print	

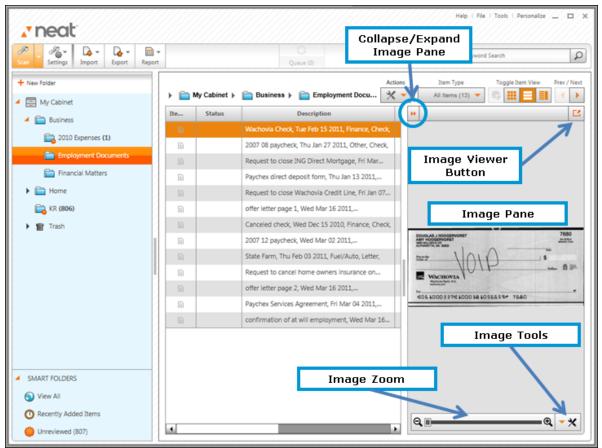
- 1. In the Folder Navigation pane, navigate to the folder where you want the new document stored.
- 2. From the Actions menu choose New and then Document.
- 3. Double-click on the new item to open it in Details View. Note that Document is already selected in the Item Type dropdown menu.
- 4. Using the dropdown menus and fields provided, add all of the necessary details for the contact.
- 5. The item will be saved automatically.

There are many ways to work with an image once it is in Neat 5:

- Viewing an image in Full Screen View
- Viewing an image in the Image Viewer
- Zooming an image
- Rotating an image
- Cropping an image
- Adjusting brightness and contrast
- Deleting an image
- Printing an image
- Saving an image as a graphic file (AKA exporting)
- Saving an image as a PDF (AKA exporting)
- Combining images
- Changing the order of multiple scanned images
- Separating images in a multi-page document

When an item is selected, its image displays in the Image Pane on the right side of the screen (pictured below). Using the Image Tools, you can work with the image right in the Image Pane, in Full Screen View or in a separate Image Viewer window.

TIP: The Image Pane can be collapsed and expanded as needed by clicking on the Collapse/Expand button at the top left corner of the pane.

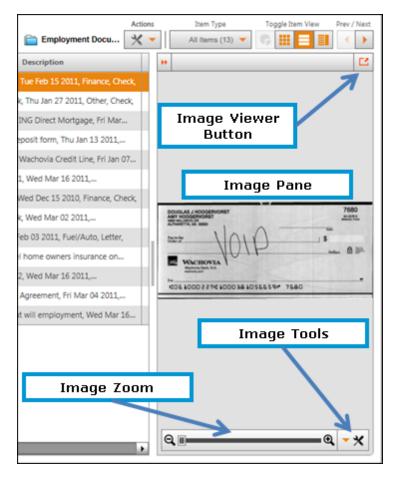


Neat 5 Window with Image Pane Displayed

Also in this section:

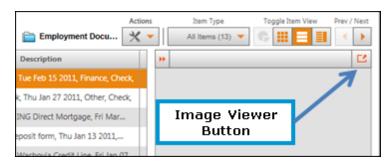
- <u>Viewing an Image in Full Screen View</u>
- Viewing an Image in the Image Viewer
- Zooming an Image
- Rotating an Image
- <u>Cropping an Image</u>
- Adjusting Brightness & Contrast for an Image
- Deleting an Image
- Printing an Image
- Saving an Image as graphic File (AKA Exporting)
- Saving an Image as a PDF (AKA Exporting)
- <u>Combining Multiple Images into a Single Document</u>
- <u>Changing the Order of Multiple Scanner Images</u>
- Separating an Image from a Multi-Page Document

- 1. In the Folder Navigation pane, navigate to and select the item you want to work with. The item image displays in the Image Pane on the right side of the screen.
- 2. Click the Image Tools button in the lower right corner of the Image Pane.
- 3. Choose Full Screen.
- 4. To exit Full Screen View, click on the Close button at the top right corner of the screen.
- **TP:** You can also view an image in Full Screen View by right-clicking on the image and choosing Show Full Screen.



Viewing an Image in the Image Viewer

- 1. In the Folder Navigation pane, navigate to and select the item you want to work with. The item image displays in the Image Pane on the right side of the screen.
- 2. Click the Image Viewer button near the top right corner of the Image Pane.



3. To close the Image Viewer, click on the Close button at the top right corner of the screen.

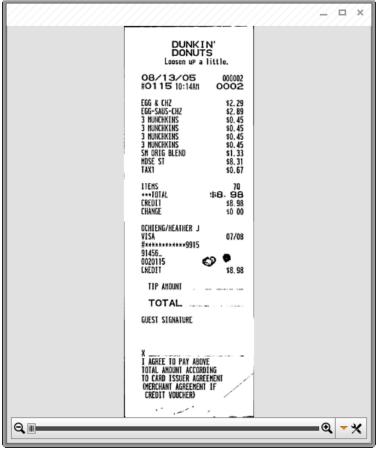
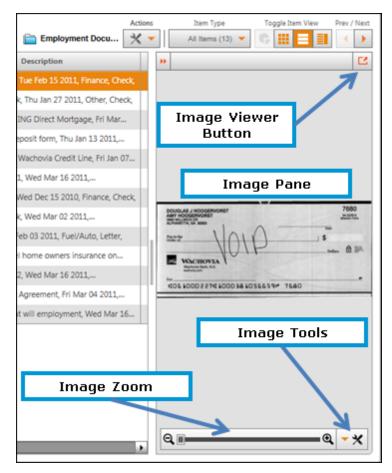


Image Viewer Window

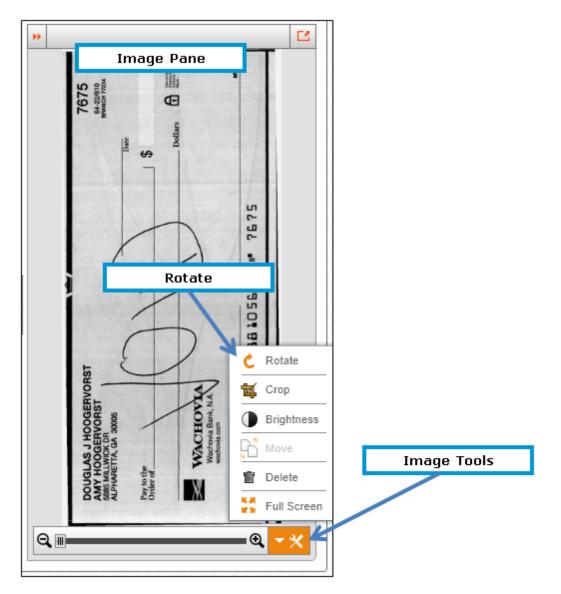
Zooming an Image

- 1. View the image you want to work with in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Use the zoom controls at the bottom of the window to zoom in (+) or zoom out () on the image.



Rotating an Image

- 1. View the image you want to work with in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Click the Image Tools button in the lower right corner of the Image Pane.
- 3. Choose Rotate to rotate the image 45 degrees.
- 4. Repeat step 3 as needed to arrive at the desired orientation.



Cropping an Image

- 1. View the image you want to work with in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Click the I mage Tools button in the lower right corner of the Image Pane.
- 3. Choose Crop. The mouse pointer changes to a selection tool.
- 4. Select the area of the image you want to keep. The area selected will be highlighted in blue.



- 5. Click Crop again.
- **TIP:** Click Reset to return the image to its original dimensions.

Adjusting Brightness & Contrast for an Image

- 1. View the image you want to work with in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Click the Image Tools button in the lower right corner of the Image Pane.
- 3. Choose Brightness to display the Brightness and Contrast controls.
- 4. Adjust brightness by dragging the slider under the Brightness heading. Dragging to the right increases the brightness; dragging to the left decreases the brightness.

		×
Brightness	_	
Contrast		
•		
	🙆 Reset	Save & Close
Q		• • ★

5. Adjust contrast by dragging the slider under the Contrast heading. Dragging to the right increases the contrast; dragging to the left decreases the contrast.

TP: Click Reset to return the image to its original brightness and contrast.

6. Click Save & Close to save your changes.

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Deleting an Image

- 1. View the image you want to delete in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Click the Image Tools button in the lower right corner of the Image Pane.
- 3. Choose Delete.
- 4. Click Yes to confirm the deletion.
- **TIP:** You can also delete an image by right-clicking on the image and choosing Delete Current Image.

Printing an Image

- 1. View the image you want to work with in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Right-click on the image and choose Print. The Print dialog box opens.
- 3. Select a printer and set your printer preferences.
- 4. Click Print.

Saving an Image as a Graphic File (AKA Exporting)

- 1. View the image you want to save in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Right-click on the image and choose Export.
- 3. Choose To Image. The Export to Image dialog box opens.

🕐 Export To Image		×
File Name:		.jpg 🔹
Save To: C:\Users\GeekyGirl\Documents		Browse
	OK	Cancel

- 4. Type a name for the image in the File Name box.
- 5. Choose a file extension from the File Extension dropdown menu (.jpg, .bmp or .png.)
- 6. Click Browse and then navigate to and select the folder where you want the image stored.
- 7. Click OK.

Saving an Image as a PDF (AKA Exporting)

- 1. View the image you want to save in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Right-click on the image and choose Export.
- 3. Choose To PDF. The PDF Settings dialog box opens.

PDF Settings	×
File Name:	
I	
Save To:	
C:\Users\GeekyGirl\Documents	Browse
Open When Done	
	OK Cancel

- 4. Type a name for the image in the File Name field.
- 5. Click Browse and then navigate to and select the folder where you want the PDF stored.
- 6. If you want the PDF to open, leave the checkmark in the Open When Done checkbox. If you do not want the PDF to open, remove the checkmark.
- 7. Click OK.

You can combine multiple images into a single document.

- 1. In the Folder Navigation pane, navigate to the folder containing the images you want to combine.
- 2. In Thumbnails View or Grid View, select all of the images you wish to combine. (Hold down the Ctrl key to select multiple images.)
- 3. Right-click on any one of the selected images and choose Combine.

Changing the Order of Multiple Scanner Images

If you have a single document comprised of multiple images you can change the order in which the images appear.

- 1. View the image you want to save in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Right click on the image you want to move.

	ly to any Proprietary Information of Consultant that is embedd enables licensed to or owned by Company under this Agreents	
7.	Ownership and License.	
algorith ideas, j discove relate i investig or expe patents, world in	7.1 <u>Work Product</u> . Consultant agrees that, excluding Co- g, but not limited to, all Deliverables, software programs or mis, heprovements, inventions, works of authorithy, trade sec processes, techniques, know-how and data, whether er n eed by Constitutus, solely or in collaboration with others, data in any manner to the business of Company that Consulta and or experiment with, or which Consultant may become as ritineatation in performing the Services hereunder(collective pattert rights, copprigits, maids work rights, made securit right on ach inventions (cellectively) 'Right') with the fits oble prop- to ausign (or cause to be assigned) and does hereby assign for a same fit of the sole prop- to ausign (or cause to be assigned).	subroatines, source or object code, rents, technology, designs, formalas, of potentable, conceived, made or ug the term of fitis Agreement which at may be directed to undertake, socimed with in work, investigation dy, "Inventions"), and any and all iss and other rights anywhere in the right of Company. Constitutal faither
rights" applical Rights i would x proper (i) dev Consul	r, finiciouse and withdrawal and any other right that may be (collective): "Mount Right"). To the examt such Meral de law and to the extent the following is allowed by the laws in taint, Consultant hereby writes such Moral Rights and consultate induce such Mathematical Rights advances of such consent. Show Full Screen	Rights cannot be assigned under in the various countries where Moral ents to any action of Company that therest in and to all intellectual telectual property rights were: ved and reduced to practice by applies, facilities, thate secrets
er Proj purpos Consul vriting	Export	 a third party other than for the r to incorporating any such Consultant IP to Company in P being deemed Inventions. If
Consul Consul voride o such	Move Current Image Forward	ultant IP in any Deliverables, ty-free, perpetual, irrevocable, elicenal property rights in and
o suce oll, ire	Move Current Image Backward	tify, use, market, sell, offer to product or offer any service.
areer Consul Compa (* doce	Move Current Image To	ng and after the term of this rmit and assist Company, at ming, defending and enforcing at are not limited to, execution
e door	Delete Current Image	
	Print	Agreement will commence on ig the completion of Services

- 3. Do one of the following:
 - Choose Move Current I mage Forward to move the image forward in the list
 - Choose Move Current I mage Backward to move the image backward in the list

- Choose Move Current I mage To in order to open the move panel. Use the number dropdown list to select the page number you want the image moved to and then click Go. Click Save & Close to save your changes. (Note that you can also access the move panel by choosing Move from the I mage Tools button.)
- **TIP:** Click Reverse All Pages to reorder the images in reverse order.

Separating an Image from a Multi-Page Document

If you have a single document comprised of multiple images you can move one or more of the images into a separate document.

- 1. In the Folder Navigation pane, navigate to the folder containing the document you want to separate.
- 2. In Thumbnails View or Grid View, select the document you want to separate.
- 3. In the Image Pane, view the page containing the image you want to separate from the rest of the document. If you want to separate all of the pages, view any page in the document.
- 4. In Thumbnails View or Grid View, right-click on the document.
- 5. Choose Separate.

×/		
 The second second		
Current Image		
Separate Current Image into a New Document		
Separate All Images into Individual Documents		
OK Cancel		

- 6. Do one of the following:
 - To separate just the current image from the rest of the document, choose Separate Current Image into a New Document
 - Toe separate all of the pages in the document, choose Separate All Images into Individual Documents
- 7. Click OK.

Working with Contacts

Neat 5 offers $\,$ you complete control over your contacts, including the ability to scan business cards and sync contacts with Outlook.

In this section:

- <u>Scanning a Business Card</u>
- Emailing a Contact
- Viewing & Navigating Contacts on the Neat Dashboard
- Searching Contact on the Neat Dashboard
- <u>Syncing Contacts with Outlook</u>
- Creating a New Contact Manually
- Importing and Exporting Contacts

Scanning a Business Card

- 1. In the Folder Navigation pane, click on the Business or Home folder. (This is where your scanned business card will be saved. You also have the option of creating a new folder.)
- 2. Click Settings and choose Scan a Contact from the Item Type dropdown menu.

v r	neat			
Scan	Settings	Import	Export	Rep
🕼 Scar	n Settings			×
Neat /	ADF Scanne	r	-	•
Scan a	document		•	
Auto	Auto-detect item type			
Scan a receipt				
Scan a business card				
_ Scan a document				
င့်ပွဲ Scan Tools				
Calibrate				
Clean				

3. Place the business card in the scanner as follows:

Mobile Scanner

- Face down (text facing away from you)
- Aligned at the far right front edge (under the PDF and Scan buttons)
- **TIP:** The mobile scanner will lightly grab the item when it is placed in the proper position.

Desktop Scanner

- Face up (text facing you)
- In the business card tray of the Desktop Scanner
- 4. Do either of the following:
 - Press the Scan button on the scanner

Click the Scan button in Neat 5



As the business card is scanned, the Queue icon animates to let you monitor the scan's progress. The processing time for a scan will vary based on the amount of content on the card. Neat 5 will optimize the scanned item for readability, convert it into digital text, and parse it for key information. The accuracy of this process depends on the quality of the item being scanned. For example, if the text on a business card is in a highly stylized font, Neat 5 may not be able to read every detail clearly. Therefore, each scan should be reviewed for accuracy.

Scans do not have to be reviewed immediately after scanning. You can scan items and then review them later. Neat 5 lists scans you have not yet reviewed for more than two seconds into a Smart Filter called Unreviewed. After you have reviewed an item for more than two seconds, it will no longer appear in the Unreviewed list.

In step 1, you selected a folder to scan the business card into. That folder is still selected. Once the scan is complete, the item will appear in the Thumbnail View Pane on the right side of the screen. Thumbnail View displays a tiny image of the scanned item along with key details (if applicable) and the Item Type dropdown menu.

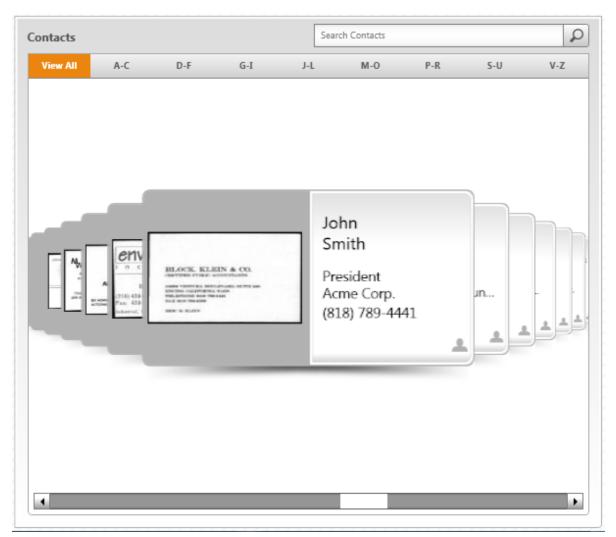
 Review the contact by double-clicking on the thumbnail to view it in Details View. (Alternatively, click the Details View button under the Toggle Item View heading in the top right corner of the window.) Details in this view <u>can be edited</u> if necessary.

Emailing a Contact

- 1. In the Folder Navigation pane, navigate to the folder containing the contact you want to email.
- 2. Right-click on the contact you want to email.
- 3. Choose Email. A new, blank email opens.
- 4. Address and type the email using the usual methods.

Viewing & Navigating Contacts on the Neat Dashboard

The Contacts module on the Neat Dashboard lets you quickly find and view contacts.



- 1. In the Folder Navigation pane, click on the cabinet icon to view the Dashboard.
- 2. The Contacts module displays all contacts by default. To reduce the number of contacts visible, click on the alphabetic letter sets at the top of the module (A-C, D-F, etc.).

TIP: Click View All to return to the default view.

3. Use the scrollbar at the bottom of the module to navigate through the contacts.

Searching Contacts on the Neat Dashboard

The Search field in the Dashboard Contacts module lets you quickly find a specific contact.



- 1. In the Folder Navigation pane, click on the cabinet icon to view the Dashboard.
- 2. Type what you are looking for in the Search Contacts field and then tap Enter or click Search (magnifying glass icon).
- 3. If multiple contacts are found, use the scrollbar at the bottom of the module to scroll through the search results.

Syncing Contacts with Outlook

To sync your contacts with Outlook, you must first configure how you want the contacts to be synchronized.

CONFIGURING THE SYNC

1. Choose Sync with Outlook Configuration from the Settings menu.

Direction Of Sync	Contacts To Sync
 Neat <==> MS Outlook. Sync both ways between Neat and MS Outlook Neat => MS Outlook. Sync 	 Sync ALL contacts in Neat to MS Outlook Sync ONLY Neat contacts of 'Contact Type':
one way from Neat to MS Outlook	Neat
MS Outlook => Neat. Sync one way from MS Outlook to Neat	 Sync ALL contacts in MS Outlook to Neat Sync ONLY MS Outlook contacts of 'Contact Category':

Sync with Outlook Configuration

- 2. Make a selection under the Direction of Sync heading.
 - Choose Neat < == > MS Outlook to sync both ways between Neat and Outlook
 - Choose Neat = > MS Outlook to sync one way between Neat and Outlook
 - Choose Neat < = MS Outlook to sync one way between Outlook and Neat
- 3. Under the Contacts to Sync heading, specify which contacts will be synchronized.
- 4. Click Save.
- TIP: Neat will remember these settings, so if you always want to synchronize in the same manner, you will not have to configure the sync again.

SYNCING

1. Choose Sync with Outlook from the Tools menu. A progress bar displays where you are in the process. The greater the number of contacts to be synchronized, the longer the process will be.

P	rogress	
	Adding Outlook Contacts To Neat	

- 2. If new contacts are going to be created in Neat as a result of the synchronization process, a dialog box will prompt you to choose (or create) a folder where the new contacts will be stored. Select a folder and then on OK.
- **TIP:** In Outlook, you may be alerted that a program is trying to access your email addresses. Click in the Allow access for checkbox and choose 10 minutes from the time dropdown list. Click Yes.

Microsoft Office Outlook			
⚠	A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this?		
	If this is unexpected, it may be a virus and you should choose "No".		
	Allow access for 1 minute		
	Yes No Help		

3. When the sync is complete, the Outlook Sync Completed dialog box opens. Click OK.

Outlook Sync Completed	×
From Microsoft Outlook to Neat:	
Contacts added to Neat: 807 Contacts updated in Neat: 0	
From Neat to Microsoft Outlook:	
Contacts added to Microsoft Outlook: 19 Contacts updated in Microsoft Outlook: 0	
	ОК

TIP: Syncing does not delete contacts in either Neat 5 or Outlook. For example, if you delete a contact in Outlook after synchronizing, the contact will NOT be deleted the next time you sync. Likewise, if you delete a contact in Neat 5 after syncing, the contact will NOT be deleted in Outlook the next time you run the sync.

NEAT 5 TO OUTLOOK FIELD MAPPINGS

The table below shows how Neat 5 fields are mapped to Outlook fields.

Neat 5 Field Names (Default)	Outlook Field Names
Display Name	Nick Name
Prefix	Title
First Name	First Name
Suffix	Suffix
Last Name	Last Name
Title	Job Title
Company Name	Company
Address	Business Address/Mailing Address
Mobile	Mobile Phone
Fax	Business Fax
Other Phone 1	Home Phone
Other Phone 2	Other
Contact Type	Categories

Creating a New Contact Manually

- 1. In the Folder Navigation pane, navigate to the folder where you want the new contact stored.
- 2. From the Actions menu choose New and then Contact.
- 3. Double-click on the new item to open it in Details View. Note that Contact is already selected in the Item Type dropdown menu.
- 4. Using the dropdown menus, checkboxes and fields provided, add all of the necessary details for the contact.
- 5. The item will be saved automatically.

Importing and Exporting Contacts

Neat 5 lets you import and export contacts in a variety of formats.

In this section:

- Importing a vCard
- Importing a Legacy Neat contact file
- Exporting Contacts to vCard

Importing a vCard

- 1. In the Folder Navigation pane, click on a folder. (This is where the imported item will be stored. You also have the option of <u>creating a new folder</u>.)
- 2. Click Import.
- 3. Choose vCard. The Open dialog box opens.
- 4. Navigate to the folder containing the vCard you want to import.
- 5. Select the vCard file you wish to import. (You cannot select multiple vCards.)
- 6. Click Open. The Queue icon animates to let you monitor the importing progress. The processing time for importing will vary based on the amount of content. Neat 5 will optimize the scanned item for readability, convert it into digital text, and parse it for key information.
- When the import is complete, double-click on the item to view it in Details View. (Alternatively, click the Details View button under the Toggle Item View heading in the top right corner of the window.) Details in this view <u>can be edited</u> if necessary.

Working with Your Items



Importing a Legacy Neat Contact File

- 1. In the Folder Navigation pane, click on a folder. (This is where the imported item will be stored. You also have the option of <u>creating a new folder</u>.)
- 2. Click Import.
- 3. Choose Legacy and Contacts (.nrt). The Open dialog box displays.
- 4. Navigate to the folder containing the legacy contact file you want to import.
- 5. Select the legacy file you wish to import. (You cannot select multiple files.)
- 6. Click Open. The Queue icon animates to let you monitor the importing progress. The processing time for importing will vary based on the number of contacts being imported.

Exporting Contacts to vCard

To quickly sync a small number of contacts with MS Outlook or to export to other contact management applications, you can export them as vCards.

- 1. In the Folder Navigation pane, navigate to and select the folder containing the contacts you want to export to vCard.
- 2. From the Export menu, choose vCard.
- 3. From the vCard submenu, choose Selected Folder (to export an entire folder of contacts) or choose Selected I tems (to export only selected contacts). The Save vCard File dialog box opens. Note that if you choose Folder, you will be further prompted on how you want the cards exported.

Working with Your Items

🔊 Save vCard File				X
🚱 🗢 📼 Desktop 🔸	→	Search		Q
🌗 Organize 👻 🏢 Views 👻 📑 New Folder			_	0
Favorite Links	Name	Size	Туре	»
Documents	Public Geeky Girl			
🕕 Dropbox	CCCKy OIII			
Advanced E-Learning Inst Design				
📳 Recent Places				
📃 Desktop				
🖳 Computer				
More »				
Folders	•			Þ
File name:				-
Save as type: vCard Export Format (*.vcf)				-
Hide Folders		Sa	ave Ca	ncel
				i.i

Save vCard File Dialog Box

- 4. Type a name for the export in the File Name field.
- 5. Navigate to and select a folder where you want the exported vCards to be stored.
- 6. Click Save.

See also: • Importing a vCard

Working with Your Items

Neat 5 gives you total control over - and complete flexibility with - your data. You can export data to numerous formats, synchronize your Neat 5 and Outlook contacts, create meaningful reports from your data and print anything in your database.

In this section:

- Exporting
- <u>Syncing Contacts with Outlook</u>
- <u>Reporting</u>
- Printing

Exporting

The Export menu lets you export to the following formats:

- Image
- PDF
- CSV (Comma Separated Values)
- Excel
- QuickBooks
- Quicken
- TurboTax
- vCard (contacts only)

Also in this section:

- Exporting to an Image Format
- Exporting to PDF Format
- Exporting to Comma Separated Values (CSV)
- Exporting to Excel
- Exporting to QuickBooks
- Exporting to Quicken
- Exporting to TurboTax
- Exporting to vCard (Contacts Only)

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Exporting to an Image Format

You can export receipts to a .jpg, .bmp or .png image file format.

- 1. In the Folder Navigation pane, navigate to and select the folder or items you want to export.
- 2. From the Export menu, choose To I mage.
- 3. From the Image submenu, choose Selected Folder (to export an entire folder of receipts) or choose Selected Items (to export only selected receipts). The Export to Image dialog box opens.

🕐 Export To Image		×
File Name:		jpg 🔻
Save To: C:\Users\GeekyGirl\Documents		Browse
	ОК	Cancel

- 4. Type a name for the image in the File Name field.
- 5. Choose a file extension from the File Extension dropdown menu (.jpg, .bmp or .png.)
- 6. Click Browse and then navigate to and select the folder where you want the image stored.
- 7. Click OK.

Exporting to PDF Format

- 1. In the Folder Navigation pane, navigate to and select the folder or items you want to export.
- 2. From the Export menu, choose To PDF.
- 3. From the Image submenu, choose Selected Folder (to export an entire folder of receipts) or choose Selected Items (to export only selected receipts). The PDF Settings dialog box opens.

PDF Settings	×
File Name:	
Save To:	
C:\Users\GeekyGirl\Documents	Browse
🗹 Open When Done	
	OK Cancel

- 4. Type a name for the image in the File Name field.
- 5. Click Browse and then navigate to and select the folder where you want the PDF stored.
- 6. If you want the PDF to open, leave the checkmark in the Open When Done checkbox. If you do not want the PDF to open, remove the checkmark.
- 7. Click OK.

Exporting to Comma Separated Values (CSV)

Exporting to CSV is a good way to get your data into an easy to use format. For example, you could export to CSV if you wanted to get your data into a simple Excel format that you could then manipulate without building an Excel map. Or, export your data to CSV and then import those contacts or receipts into programs not directly supported through other export processes.

- 1. In the Folder Navigation pane, navigate to and select the folder or items you want to export.
- 2. From the Export menu, choose To CSV.
- 3. From the CSV submenu, choose Receipts, Contacts or Documents.
- 4. From the item type submenu, choose Selected Folder (to export an entire folder) or choose Selected Items (to export only selected items). The Save CSV File dialog box opens and the Save as type dropdown menu displays CSV Export Format. Do not change this.

Save CSV File	X
Solution → Libraries →	👻 🐓 Search Libraries 🔎
Organize 🔻	
🔚 Recent Places 📔 Dropbox	Libraries Open a library to see your files and arrange the
 ✓ Contraction ✓ Documents ✓ Music ✓ Pictures ✓ Videos 	Documents Library Music Library
▷ 🤣 Homegroup	Pictures Library
File name: Save as type: CSV Export Format (*.csv)	•
🔿 Hide Folders	Save Cancel

Save CSV Dialog Box

- 5. Type a name for the image in the File Name field.
- 6. Navigate to and select the folder where you want the CSV file stored.
- 7. Click Save.

When exporting to Excel, you must first create a mapping plan that describes how your Neat 5 data will flow into the Excel program. Mapping associates one set of values or format (in this case, Neat 5 data) to a different set of values or format, such as Excel. You may create as many maps as needed to accommodate your data. Once a map is created, you can use it repeatedly. Neat 5 walks you through this procedure in three steps as outlined below.

- 1. In the Folder Navigation pane, navigate to and select the folder or items you want to export.
- 2. From the Export menu, choose To Excel.
- 3. From the Excel submenu, choose Selected Folder (to export an entire folder) or choose Selected I tems (to export only selected items). The Excel Map To Use dialog box opens.

[]]]]]]]	//////////////////////////////////////
Excel Map 1	To Use
Excel Map:	Sample Excel Map 🔹
	r Manage Excel Maps' button to create a new update the previously created excel map.
	Create or Manage Excel Maps
	Export Cancel

- 4. By default, Sample Excel Map is selected as the map to use. Alternatively, if you have created a custom map, you can choose it from the Excel Maps dropdown menu or click Create or Manage Excel Maps to create a new custom map. (Instructions on how to create a new Excel map are below.)
- 5. Click Export. A progress bars displays as the export takes place. The Export Complete dialog box opens when the export is complete.

xport Complete		
Your data was successf	ully exported to: 'C:\Users\vdesa	i\Desktop\Vikram Sample.xlsx',
		ОК

Also in this section:

- <u>Creating a New Excel Map</u>
 <u>Creating a New Excel Template</u>

Creating a New Excel Map

- 1. In the Excel Map To Use dialog box, click Create or Manage Excel Maps. The Excel Map Wizard opens.
- 2. Click New.

In the Step 1 dialog box you will name your map and designate an Excel template.

×
Step 1 of 3: Select an Excel Map and Template File
Please select an excel map from the excel map combo box to edit or delete the selected excel map. To edit the selected excel map click the 'Next' button. To delete the selected excel map click the 'Delete' button. To create a new excel map click the 'New' button.
Excel Map: Sample Excel Map New Delete
Please select the excel template file (*.xlt or *.xltx or *.xls or *.xlsx extension) by clicking on the 'Browse' button. To set the worksheet and column mapping click the 'Next' button.
Excel Template file: C:\Program Files\Neat\exec\bin\templates\Sample Excel Template: Browse
Next Cancel

Excel Wizard Step 1

- 3. Type a name for the map in the Excel Map Name field,
- 4. Click Create.
- 5. Click Browse to locate and select an Excel template file. (You can use the sample template file that was installed with Neat 5 if you like. This can be found in the Neat Programs folder.)
- **TIP:** A template file is required to export to Excel. A sample template is included when Neat 5 is installed. However you may wish to create and customize your own template. Instructions on how to create a new Excel template are below.
- 6. Click Next.

In the Step 2 dialog box, you will map your Excel worksheets and designate a starting row.

		////×
Step 2 of 3: Define Mappings to Exce	el Sheets	
Please set the excel sheet names for receipt on names from the excel template file set up in the excel temp	data, images and comments by entering excel v the previous step.	vorksheet
	Excel Sheet Name	
Neat	Folder	
Neat	Receipt Images	
Neat	Comments	
per row, click the 'Details' button. The imag	ting row, header columns, image size and numb re size represents small, medium and large. Larg r increase the size of the exported excel map. Details	-
Previous	Next	Cancel

Excel Wizard Step 2

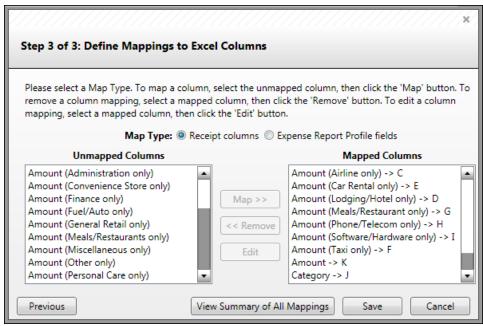
- 7. Type the names of your Excel Template worksheets into the three Excel Sheet Name fields.
- TIP: Neat 5 automatically separates exported data into three separate sheets in Excel: receipt data, receipt images and receipt comments. You need to specify the destination sheet for each of these data types by entering its corresponding Excel sheet name. For example, if your Excel template worksheets were named Receipts, Images and Comments, you would type those worksheet names into the three Excel Sheet Name fields.
- 8. Click Details to confirm or change the starting row for the export. The default is Row 2 but you should change that to suit the template you are using.
- **TIP:** The default starting row is Row 2 because, if you have pre-populated column names in Row 1 of your Excel template files, receipt data will begin in Row 2. However, if your template has receipt data starting in row 7 instead, you would want to change the Starting Row number to Row 7.

	//////	////×/
Receipt Data		
Starting Row:		14 🤤
🔲 Include Receipt I	Header Row	
Receipt Images		
Image Size:	Small	•
Images Per Row:	2	
		Close
Excel Wi	zard Details	

9. By default, receipt row headers are not included in the export. To change that, click in the Include Receipt Header Row checkbox.

- 10. By default, Receipt I mage size is set to Small. To change that, choose a different size from the I mage Size dropdown list. The I mages Per Row field will adjust accordingly.
- **TIP:** The larger the image the higher the quality of the image; likewise, the larger the exported file will be.
- 11. Click Close.
- 12. Click Next.
- **TIP:** If the worksheet names you provided in step 7 do not match the worksheet names in the selected template, you will be prompted to update the sheet names.

In the Step 3 dialog box, you will define mappings to Excel columns.



Excel Wizard Step 3

13. Select a map type from the following:

- Receipt columns
- Expense Report Profile fields

Items in the Unmapped Columns list reflect the selected map type.

- 14. Map each column as needed by doing the following:
 - Select a column in the Unmapped Columns list
 - Click Map to move that column to the Mapped Columns list
 - Select the appropriate column from the Excel Column dropdown list
 - Click Update
- **TIPS:** To remove a column from the Mapped Column list, select it and then click Remove. To edit a mapped column, select it and the click Edit.

The Amount and Category fields MUST be mapped.

The Amount (by category) fields allow for cross mapping by category. For example, you can map the total amount for all receipts that are tagged as "airline."

- 15. When you have finished mapping columns, click View Summary of All Mappings to review.
- 16. Click Save.

Creating a New Excel Template

- 1. Start MS Excel.
- 2. If you are using the Neat 5 sample Excel map, label three worksheets with the following titles: Folder, Receipt Images, and Comments.
- 3. Add any personal information to the worksheet (such as an employee name and employee number) or simply leave the sheets blank.
- 4. Choose the Save As command.
 - In Excel 2003: Under the File menu and choose Save As.
 - In Excel 2007: Click the MS Office Button and choose Save As.
 - In Excel 2010: Click the File ribbon and choose Save As.
- 5. From the Save type as drop down menu, choose Template (*.xlt) (Excel 2003) or Excel Template (Excel 2007/2010).
- 6. Navigate to the desired location on your hard drive.
- 7. Click Save.

You can quickly export multiple types of receipts into multiple accounts in a few simple steps. These exports appear in your QuickBooks "Bills" section. Neat 5 makes it quick and easy to connect Category and Payment type to your QuickBooks Chart of Accounts. You can export an entire folder or selected items.

- NOTE: If you are exporting to a QuickBooks account for the very first time, you will need to facilitate the connection between your QuickBooks Company File and Neat 5. See <u>Connecting Your QuickBooks Company File to Neat</u>.
- 1. In the Folder Navigation pane, navigate to and select the folder or items you want to export to QuickBooks.
- 2. From the Export menu, choose QuickBooks.
- 3. From the QuickBooks submenu, choose Selected Folder (to export an entire folder of receipts) or choose Selected I tems (to export only selected receipts).
- **TIP:** If an exported receipt is missing important information, the Validating Data dialog box will open to alert you of what should be fixed prior to exporting. To fix the issue, click Cancel and the edit the receipt in Details View. To ignore the issue and continue exporting, go to Step 4.

Validating						
export the re export proce	emaining ess again.	receipts or er	nsure that each	n receipt ha	ceipt Date. Press Co Id Receipt Date and	
			Date Created			
No Value	10.98	9/29/2011	10/4/2011	Business		
					Continue	Cancel

QuickBooks Validating Data Dialog Box

- **TIP:** If any of the receipts in the selected folder have already been exported, you will be prompted to choose whether to export all receipts or only the new receipts that have not been exported previously.
- 4. Click Continue.

In Step 1: You will select your QuickBooks Company File

			/////>
Step 1: Select Company File			
Summary			
4 Receipts in 1 folder with a total value of	\$273.04		
QuickBooks Company File			
			Browse
Company Information			
Name:			
Tax Form:			
Website:			
Employer ID:			
		Next	Cancel

QuickBooks Wizard Step 1

- 5. Click Browse and then navigate to and select a QuickBooks company file.
- 6. Click Next.
 - NOTE: If you are exporting to a QuickBooks account for the very first time, a message in the export wizard will alert you that Neat is having trouble connecting to the Company File. You will need to cancel the export at this point and facilitate the connection between your QuickBooks Company File and Neat 5. See Connecting Your QuickBooks Company File to Neat.

Step 2: Category Mapping

		×
Step 2: Category Mapping		
Map each Category used by the data you each Category must be mapped to a Qui	're exporting to a QuickBooks account. To continue the export, ckBooks account.	
Category	QuickBooks Account	
General Retail	Office Supplies	
No Value	Ask My Accountant	
	Next Cancel	

QuickBooks Wizard Step 2

- 7. Map each category used by the data you're export to a QuickBooks account by selecting an account from the dropdown list provided.
- 8. Click Next.

Step 3: Payment Type Mapping

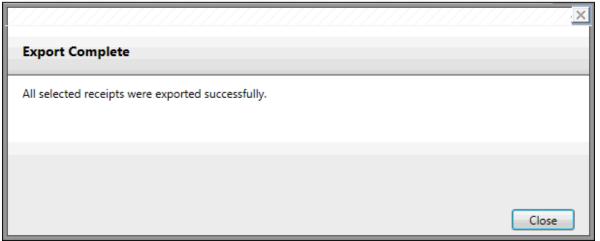
	×				
Step 3: Payment Type Mapping					
Map each Payment Type used by the export, each Payment Type must be	e data you're exporting to a QuickBooks account. To continue the mapped to a QuickBooks account.				
Payment Type	QuickBooks Account				
Visa Card	The Big Company Checking Accoun				
	Preview Back Export Cancel				

QuickBooks Wizard Step 3

- 9. Map each payment type used by the data you're export to a QuickBooks account by selecting an account from the dropdown list provided.
- × Preview Vendor Amount Receipt Date QuickBooks Bill Category QuickBooks Account Quicl Home Depot 30.94 2/1/2011 Office Supplies The Big Company Checking Account Amazon.com 185.87 9/20/2011 Office Supplies The Big Company Checking Account Amazon.com 45.25 9/20/2011 Office Supplies The Big Company Checking Accoun Trader Joes 10.98 9/29/2011 Ask My Accountant The Big Company Checking Account 4 Export Back Cancel
- 10. Click Preview to preview the export.

QuickBooks Preview

11. Click Export to complete the export. An alert dialog box opens



QuickBooks Export Complete

Also in this section:

• Connecting Your QuickBooks Company File to Neat 5

Connecting Your QuickBooks Company File to Neat 5

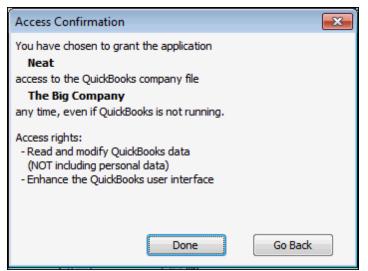
If you are exporting to a QuickBooks account for the very first time, you will need to facilitate the connection between your QuickBooks Company File and Neat 5 by configuring it to grant access to Neat.

- 1. Launch QuickBooks and open the Company File you want to configure for export.
- 2. In Neat, follow the <u>exporting instructions found earlier</u>. When you get to Step 6, toggle over to QuickBooks. The QuickBooks Application Certificate dialog box is open.

QuickBooks - Application Cer	tificate 💽
Gerdifi	An application is requesting access to the following QuickBooks company file: The Big Company Access may include reading and modifying QuickBooks data as well as enhancing the QuickBooks user interface. The Application Calls Itself
	Neat Certificate Information Description: Neat Developer: The Neat Company Developer identity has been verified by: VeriSign Class 3 Code Signing 2010 CA
	QuickBooks Solutions Marketplace Search for information about this application at the <u>Solutions Marketplace</u>
© No	ation to read and modify this company file?
 Yes, prompt each time Yes, whenever this QuickBoo 	ks company file is open
 Yes, always; allow access ev 	
Allow this application to acce customer credit card informa	ss personal data such as Social Security Numbers and tion. <u>Tell me more</u>
	Continue Cancel Help

QuickBooks Application Certificate

3. Under the heading Do you want to allow this application to read and modify the company file? Click in the Yes, always; allow access even if QuickBooks is not running button.



QuickBooks Application Certificate Confirmation

- 4. Click Done.
- 5. Toggle back to Neat 5 and retry the export process as outlined previously.

Exporting to Quicken

- NOTE: If you are exporting to a Quicken account for the very first time, you will need to facilitate the connection between Quicken and Neat 5 by importing an account. See Importing Your Quicken Account to Neat.
- 1. In the Folder Navigation pane, navigate to and select the folder or items you want to export to Quicken.
- 2. From the Export menu, choose Quicken.
- 3. From the Quicken submenu, choose Selected Folder (to export an entire folder of receipts) or choose Selected I tems (to export only selected receipts).
 - NOTE: If an exported receipt is missing important information, the Validating Data dialog box will open to alert you of what should be fixed prior to exporting. To fix the issue, click Cancel and the edit the receipt in Details View. To ignore the issue and continue exporting, go to Step 4.

[The followin Date. Press	ig receipt Continue	is missing im to export the	portant inform remaining rec Date and start	ation: Vend eipts or ens	lor an ure th	d/or Receipt nat each
	Vendor	Amount	Receipt Date	Date Created	Folder		
	No Value	10.98	9/29/2011	10/4/2011	Business		
					Continue		Cancel

Validating Data

TIP: Quicken has shorter character limits than Neat for the Category (40), Tran ID (12) and Comments (64) fields. If any of your receipts contain data that exceeds those limits, a dialog box will open listing those receipts. You can choose to cancel the export and edit the receipts in question or click Continue to have the data in those receipt fields truncated to fit the Quicken limits.

Quicken has shorter character limits than Neat for the following fields: Category (40), Tran ID (12) and Comments (64). The following receipts contain fields where the character length exceeds the limit set by Quicken. These fields will be truncated if you choose to continue; you can go back to shorten these fields and start the export process again.

Vendor	Amount	Receipt Date	Date Created	Fo
Starbucks	22.68	10/10/2010	9/14/2011	Business\2
EMS	100.00	12/23/2010	9/14/2011	Business\2
General Nutrition Center	13.99	8/27/2010	9/14/2011	Business\2
Utrecht	24.60	10/12/2010	9/14/2011	Business\2
•	070.07	2 /4 0 /2004 0	0.44.00044	• • •
		(Continue	Cancel

Quicken Character Limits Alert

4. Choose a Quicken Account from the Select Quicken Account dropdown menu.

	//////////////////////////////////////
Summary	
4 Receipts in 1 folder with a total value of \$2	73.04
Select Quicken Account	
Checking (Type: Bank)	Manage Quicken Accounts
Split Sales Tax	
QIF File Export to:	
	Browse
	Export Cancel

Select Quicken Account

- NOTE: If you are exporting to a Quicken account for the very first time, you will need to facilitate the connection between Quicken and Neat 5 by importing an account. See Importing Your Quicken Account to Neat.
- 5. By default, Sales Tax is not split. To have sales tax split, click in the Split Sales Tax checkbox.
- 6. Click Browse to choose a folder in which to save the exported file.
- 7. Click Export. The Save QIF File dialog box opens.

×

- 8. Type a name for the exported file in the File name field.
- 9. Click Save.

10. Click Close when prompted that the export is complete.

	////x/
4 receipts were exported successfully.	
	Close

NOTE: Only text data will be exported. Neat cannot export images into Quicken.

A NOTE ABOUT QUICKEN FILE FORMATS

Different versions of Quicken use different file formats, such as QFX, QIF, and QDF. Neat only uses QIF file formats. Because Neat uses only QIF file format, it's necessary to perform a simple workaround to ensure Neat and Quicken can work together using same format.

- 1. Start Quicken.
- 2. Under File choose Import and then Import QIF to import the exported file from Neat.

For additional information and screenshots, see Exporting Data to Quicken on the Neat Help Center.

Also in this section:

Importing Your Quicken Account to Neat

Importing Your Quicken Account to Neat 5

If you are exporting to a Quicken account for the very first time, you will need to facilitate the connection between Quicken and Neat 5 by importing an account.

- 1. During the Neat 5 export, when prompted to select a Quicken Account, click Manage Quicken Accounts.
- 2. Click Import.
- 3. Navigate to and select the .QIF file you want to import.
- 4. Click Open.
- 5. Click OK in the Success dialog box.

Success	×
Your accounts were successfully updated; if an account already ex be readded to the list.	xisted in Neat, it won't
	ок

6. Click Back to return to the export dialog box.

Exporting to TurboTax

- 1. In the Folder Navigation pane, navigate to and select the folder or items you want to export to TurboTax.
- 2. From the Export menu, choose TurboTax.
- 3. From the TurboTax submenu, choose Selected Folder (to export an entire folder of receipts) or choose Selected I tems (to export only selected receipts).
- 4. Under the Select Date Range heading choose a year and period.

Select	t Date Range	×
Year	2011 • Period Year to date •	
~		
1744	t Tax Categories	
3 Ite	ems selected 🔹 📼 Select All	
200	Sch. C::Other Costs, Cost of Goods	
2 🔳 🤄	Sch. C::Pension/Profit Sharing Plans	
/ 🔳 🤄	Sch. C::Purchases, Cost of Goods	
// 🔳 🤉	Sch. C::Rent/Lease Other Business Property	
/ 🔳 🤅	Sch. C::Rent/Lease Vehicles, Equipment	
<u> </u>	Sch. C::Repairs and Maintenance	
	Sch. C::Returns and Allowances	
	Sch. C::Supplies (not from COGS)	
	Sch. C::Taxes and Licenses	
	Sch. C::Travel	
	Sch. C::Utilities	
	Sch. C::Wages Paid	

- 5. Under the Select Tax Categories heading, select the categories to export by clicking in the checkboxes next to each category in the dropdown list. Alternatively, to mark all for exporting, clicking the Select All checkbox.
- **TIP:** Only US tax categories can be exported to TurboTax
- 6. Click Export. The Save TurboTax File dialog box opens.
- 7. Type a name for the exported file in the File name field.
- 8. Navigate to the folder where you want the exported file saved.
- 9. Click Save.
- 10. Click OK when prompted that the export is complete.

Export Complete	×
Your data was successfully exported to 'C:\Users\dabbondi\Desktop\karin.txf',	
ОК	

Exporting to vCard (Contacts Only)

To quickly sync a small number of contacts with MS Outlook or to export to other contact management applications, you can export them as vCards.

- 1. In the Folder Navigation pane, navigate to and select the folder containing the contacts you want to export to vCard.
- 2. From the Export menu, choose vCard.
- 3. From the vCard submenu, choose Selected Folder (to export an entire folder of contacts) or choose Selected I tems (to export only selected contacts). The Save vCard File dialog box opens. Note that if you choose Folder, you will be further prompted on how you want the cards exported.

🗷 Save vCard File				×
🚱 🗢 📼 Desktop 🕨	→	Search		Q
🌗 Organize 👻 🏢 Views 👻 📑 New Folder	_			0
Favorite Links	Name	Size	Туре	»
Documents	Public Geeky Girl			
🕕 Dropbox	CCCKy OII			
Advanced E-Learning Inst Design				
🗐 Recent Places				
📃 Desktop				
👰 Computer				
More »				
Folders	•			•
File name:				•
Save as type: vCard Export Format (*.vcf)				•
Hide Folders		Sa	ive Ca	ancel

Save vCard File Dialog Box

- 4. Type a name for the export in the File Name field.
- 5. Navigate to and select a folder where you want the exported vCards to be stored.
- 6. Click Save.

See also:

• Importing a vCard

Syncing Contacts with Outlook

To sync your contacts with Outlook, you must first configure how you want the contacts to be synchronized.

CONFIGURING THE SYNC

1. Choose Sync with Outlook Configuration from the Settings menu.

Direction Of Sync	Contacts To Sync
 Neat <==> MS Outlook. Sync both ways between Neat and MS Outlook Neat => MS Outlook. Sync 	Neat Sync ALL contacts in Neat to MS Outlook Sync ONLY Neat contacts of 'Contact Type': Birthday *
 Neat => MS Outlook. Sync one way from Neat to MS Outlook MS Outlook => Neat. Sync one way from MS Outlook to Neat 	Neat Sync ALL contacts in MS Outlook to Neat Sync ONLY MS Outlook contacts of 'Contact Category': Business

Sync with Outlook Configuration

- 2. Make a selection under the Direction of Sync heading.
 - Choose Neat < == > MS Outlook to sync both ways between Neat and Outlook
 - Choose Neat = > MS Outlook to sync one way between Neat and Outlook
 - Choose Neat < = MS Outlook to sync one way between Outlook and Neat
- 3. Under the Contacts to Sync heading, specify which contacts will be synchronized.
- 4. Click Save.
- **TIP:** Neat will remember these settings, so if you always want to synchronize in the same manner, you will not have to configure the sync again.

SYNCING

1. Choose Sync with Outlook from the Tools menu. A progress bar displays where you are in the process. The greater the number of contacts to be synchronized, the longer the process will be.

Pr	ogress	
	Adding Outlook Contacts To Neat	

- 2. If new contacts are going to be created in Neat as a result of the synchronization process, a dialog box will prompt you to choose (or create) a folder where the new contacts will be stored. Select a folder and then on OK.
- **TIP:** In Outlook, you may be alerted that a program is trying to access your email addresses. Click in the Allow access for checkbox and choose 10 minutes from the time dropdown list. Click Yes.

Microsoft Office Outlook						
⚠	A program is trying to access e-mail addresses you have stored in Outlook. Do you want to allow this?					
	If this is unexpected, it may be a virus and you should choose "No".					
	Allow access for 1 minute					
	Yes No Help					

3. When the sync is complete, the Outlook Sync Completed dialog box opens. Click OK.

Outlook Sync Completed	×
From Microsoft Outlook to Neat:	
Contacts added to Neat: 807 Contacts updated in Neat: 0	
From Neat to Microsoft Outlook:	
Contacts added to Microsoft Outlook: 19 Contacts updated in Microsoft Outlook: 0	
	ОК

TIP: Syncing does not delete contacts in either Neat 5 or Outlook. For example, if you delete a contact in Outlook after synchronizing, the contact will NOT be deleted the next time you sync. Likewise, if you delete a contact in Neat 5 after syncing, the contact will NOT be deleted in Outlook the next time you run the sync.

NEAT 5 TO OUTLOOK FIELD MAPPINGS

The table below shows how Neat 5 fields are mapped to Outlook fields.

Neat 5 Field Names (Default)	Outlook Field Names
Display Name	Nick Name
Prefix	Title
First Name	First Name
Suffix	Suffix
Last Name	Last Name
Title	Job Title
Company Name	Company
Address	Business Address/Mailing Address
Mobile	Mobile Phone
Fax	Business Fax
Other Phone 1	Home Phone
Other Phone 2	Other
Contact Type	Categories

Reporting

Neat provides a report wizard to walk you through the four steps of creating a report.

NOTE: Reports contain only receipt data; other items are excluded.

tep 1 elect Report Type Step 2 Report Options	Step 3 Refine Report Data Step 4 Report Preview/Export
elect Report Type	
Expense: Expense Report The Expense Report provides a detailed summary of all your expenses.	Expense Report Receipt Date between 1/1/2010 and 9/22/2011 User Profile
Tax: Tax Category Report	Name Sample User Finst Name Sample User Last Name Street Sample Street City Sample City State / Province Sample City Zip 12345 Country: Sample Country Co. Name: Sample Location Web Address: www.sampleaddress.com Employee ID: 2345 Work Phone: 123 1234 Mahle: 123 1234 Fac: 123 8274 Fas: 123 8274
Spending: Summary The Spending Summary Report lets you group your expenses by the field of your choice. Within each group you can view your expenses by another field of your choice, such as total number of expenses and total amount for each expense.	Summary Information Amount Number Categliny 0:00 2 N/A 0:00 2 Convention State 65.42 1 General Retail 570.29 8 Meak/Restaurant 118.13 3 Meak/Restaurant 337.26 3 Total 1091.10 17

Report Wizard

Also in this section:

- Creating an Expense Report
- Creating a Spending Report
- Creating a Tax Report

An expense report typically contains expenses that an individual has incurred as a result of the business operation. For example, if a business owner travels to another location for a meeting, the cost of travel, the meals, and all other expenses incurred would be included on the expense report. These expenses are considered business expenses and may be tax deductible.

- 1. Click Report.
- 2. Choose Create New Report. The Report Wizard opens.

Step 1 Step 2 Select Report Type Report Options	Step 3 Refine Report Data Step 4 Report Preview/Export
Select Report Type	
Expense: Expense Report The Expense Report provides a detailed summary of all your expenses.	Expense Report Receipt Date between 1/1/2010 and 9/22/2011 User Profile Name: Sample User Fint Name Sample User Last Name Street: Sample Street City: Sample City:
Tax: Tax Category Report The Tax Category Report quickly organizes your expenses according to the tax category they've been assigned to.	State / Province: Sample State Zip: 12315 PO Box: 12345 PO Box: Sample Company Co. Name: Sample Company Title Sample Trife Location: Sample Location Web Address: www.sampleaddress.com Engloyee ID: 12315 Group ID: 123145 Work Phone: 123 1234 1234 Fac: 123 1234 1234 Fax: samplesemail@sample.com
Spending: Summary The Spending Summary Report lets you group your expenses by the field of your choice. Within each group you can view your expenses by another field of your choice, such as total number of expenses and total amount for each expense.	Summary Information Amount Number Conversion of Store 66.42 1 Conversion of Store 66.42 1 General Retal 570.29 8 Meak/Netstaurant 138.13 3 Meak/Netstaurant 137.26 3 Total 1091.10 27

Expense Report Wizard Step 1

In Step 1 of the Report Wizard you will choose a report type.

3. Click on Expense.

In Step 2 of the Report Wizard you will set report options.

Report Creator Wiza	rd vi Reports only contain	receipt data, other items are excluded		
Step 1 Select Report Type	Step 2 Report Options	Step 3 Refine Report Data	Step 4 Report Preview,	'Export
Report Options				
Paper Size:	4	Title:		
Edit Expense Report Fo		xpense Report		
 Include Cover Page Include Images Include Page Numbers Include Image Captions 	Sort By: Status Report layout preview:	Sort Order:		
	Status Vendor	Category Receipt Date	Payment Type	Sales Tax
	1			▶
◀ Previous Step				Next Step 🔸

Expense Report Wizard Step 2

- 1. The default report paper size is 8.5" x 11". To choose a different size, select one from the Paper Size dropdown menu.
- 2. The default report orientation is portrait. To choose landscape, click Landscape in the Layout dropdown menu.
- 3. Type a title for the report in the Title field.
- 4. Under the Edit Expense Report Formatting heading, design your report by doing the following:
 - Check or uncheck the options for including a cover page, images, page numbers and image captions
 - Under Sort By dropdown, choose a field to sort the report by
 - Under Sort Order dropdown choose Ascending or Descending
- 5. Click Next Step.

In Step 3 of the Report Wizard you will further refine the report options (optional).

Step 1 Step 2 Step 3 Step 4 Select Report Type Report Options Refine Report Data Step 4						
My Cabinet	+ Add Filter	Further Refine	Your Data	Go		
 Home 	Report Data					
	Vendor	Category	Receipt Date	Am		
	Starbucks	Meals/Restaura	10/10/2010	\$22.68		
	Cosi	Meals/Restaura	4/10/2010	\$88.12		
	EMS	General Retail	12/23/2010	\$100.00		
	Curritos	Meals/Restaura	2/1/2010	\$7.33		
	General Nutrition Ce	General Retail	8/27/2010	\$13.99		
	Utrecht	General Retail	10/12/2010	\$24.60		
	CVS	General Retail	6/14/2010	\$12.80		
	Stop N Shop Discoun	General Retail	6/30/2010	\$29.94		
	Jimmy Johns	Meals/Restaura	3/18/2010	\$272.87		
	Dunkin' Donuts	Meals/Restaura	1/3/2010	\$18.91		
	Morimoto	Meals/Restaura	5/23/2010	\$45.48		
	Petulia's Folly	General Retail	1/1/2010	\$39.85		
	Starbucks	Meals/Restaura	10/10/2010	\$22.68		
	Cosi	Meals/Restaura	4/10/2010	\$88.12		
		C	40.000.0040	*****		

Expense Report Wizard Step 3

- 6. Click Add Filter and then choose the desired parameters from the filters provided. For example:
 - If you are looking for a specific receipt amount, choose Amount from the field dropdown list, a mathematical operator from the operator list and then type an amount in the field provided.
 - If you are looking for a specific date, choose Receipt Date from the field dropdown list, a date modifier from the operator list and then type a date in the field provided.
- 7. Add additional filters by clicking on the Add Filter button and providing the necessary details.
- **TIP:** To delete a filter, click Delete Filter.
- 8. Click Go to preview the report data.
- 9. Click Next Step.

In Step 4 of the Report Wizard you will preview and then export the report.

Report Cre	ator Wizard	(i) Reports only	r contain receipt data, c	ther items are exclue	led.			×
Step 1 Select Report 1	ype	Step 2 Report Options	Ste Refi	p 3 ine Report Data		e p 4 port Previev	v/Export	
Report Previe	w			Title: Expens	e Report v Sub-header			
Print	📑 Save As 🔻	q —	W		82 %	K	< •	M
								1Ê
			Expense Rep between 2/15/2	011 and 11/9/2				
	User Profile	(including	g receipts with da	ite not entered)				
	Name:	John Smith						164
	Street:	100 Market St.						
	City:	Philadelphia						
	State / Province:	PA						
	Zip:	19103						
	PO Box:							
	Country:	USA						
	Co. Name:	ACME Corp						
	Title:	Sales Manager						
	Location:							
	Web Address:							
	Employee ID: Group ID:							
	Group ID.							-
 Previous Ste 	2p							

Expense Report Wizard Step 4

10. Review the report.

- Use the scroll bar on the right side of the window to scroll up and down
- Use the Next Page and Previous button to move from page to page
- Use the First Page and Last Page buttons to move to the first and last pages
- Use the Zoom dropdown menu or icons to make the report larger or smaller
- 11. Click Print to print the report.
- 12. Click Save As to save the report and then choose the appropriate format. You will be prompted for a save location.
- 13. Click the Close button (X in the top right corner) to close the report.

Creating a Spending Report

A spending summary report lets you view expenses grouped by whatever field you choose. Within each group expenses are then summarized by whatever other field you choose, displaying the number of expenses and a total for each value.

- 1. Click Report.
- 2. Choose Create New Report. The Report Wizard opens.

i tep 1 ielect Report Type	Step 2 Report Op	ptions	Step 3 Refine Report	Data	Step 4 Report F	Preview/Export	
elect Report Type		_	_		_	_	
Expense: The Expense Report all your expenses.	Expense Report provides a detailed su	ummary of			ummary Report	-	
			Ke Vendor: Sample Vend	·	n 1/1/2010 and 12/6	/2010	
Тах:	Tax Category Report		Category Convenience Store General Retail Totali: Vendor: Sample Vend Category Medi;Retaurants	# of Expenses 1 3 4 lor 2 # of Expenses 2	Summary Total \$65.42 \$388.96 \$454.38 Summary Total \$66.39	% Of Total 14.40 % 85.60 % 100 mp %	
	eport quickly organize to the tax category th		Totals: Vendor: Sample Vend Category General Fatal Me als/Restaurants Totals:	2	564.59 564.59 527.94 5272.87 5302.81	\$ 00 00 % \$ 0f Total 9.89 % 90.11 % 100.00 %	
			Vendor: Sample Vend	and the second s			
<u> </u>			Category Ceneral Retail Totals:	# of Expenses	Summary Total \$37.40 \$37.40	% Of Total 100:00 % 100:00 %	
	Summary nary Report lets you g		Vendor: Sample Vend Category General Retab Total:	for 5 # of Expenses 1 1	Summary Total \$13.99 \$13.99	% Of Total 100:00 % 200:00 %	
group you can view	d of your choice. With your expenses by ano total number of expe ch expense.	ther field of	Grand Totals:	11	\$872.97	100.00%	

Spending Report Wizard Step 1

In Step 1 of the Report Wizard you will choose a report type.

- 3. Click on Spending.
- 4. Click Next Step.

In Step 2 of the Report Wizard you will set report options.

Step 1 Select Report Type	Step 2 Report Options	Step 3 Refine Rep	ort Data	p 4 oort Preview/Export
eport Options				
Paper Size:	🖣 Layout:	⁺≣ Title:		
Letter (8.5 x 11)	▼ Portrait	 Spending (Summary) 	Report)	
Edit Report Colu	mns			
Group By:	Sort By:	Sort Order:		
Vendor	Category	Ascending	-	
Receipt Date				
O Payment Type	Report layout preview:			
O Client	Vendor			
Project				
	Category T # Of	Expenses Summary 1	「otal % Of Total	
Summarize By:				
Category				
Receipt Date				
O Payment Type	Vendor			
O Client	Category 🔻 🗰 🗰	Expenses Summary 1	fotal % Of Total	
O Project				

Spending Report Wizard Step 2

- 5. The default report paper size is 8.5" x 11". To choose a different size, select one from the Paper Size dropdown menu.
- 6. The default report orientation is portrait. To choose landscape, click Landscape in the Layout dropdown menu.
- 7. Type a title for the report in the Title field.
- 8. Under the Edit Report Columns heading, design your report by doing the following:
 - Under Group By, choose a field to group your report by
 - Under Summarize By, choose a field to summarize your report by
 - Under Sort By dropdown, choose a field to sort the report by
 - Under Sort Order dropdown choose Ascending or Descending
- 9. Click Next Step.

In Step 3 of the Report Wizard you will further refine the report options (optional).

p 1 ect Report Type	Step 2 Report Options	Step 3 Refine Report	Data	Step 4 Report Preview/Export
My Cabinet	+ Add Filter	Further Refine	e Your Data 🛛 🛛	Go
📄 Business	Report Data			
Home	Vendor	Category	Receipt Date	Am
	Starbucks	Meals/Restaura	10/10/2010	\$22.68
	Cosi	Meals/Restaura	4/10/2010	\$88.12
	EMS	General Retail	12/23/2010	\$100.00
	Curritos	Meals/Restaura	2/1/2010	\$7.33
	General Nutrition Ce	General Retail	8/27/2010	\$13.99
	Utrecht	General Retail	10/12/2010	\$24.60
	CVS	General Retail	6/14/2010	\$12.80
	Stop N Shop Discoun	General Retail	6/30/2010	\$29.94
	Jimmy Johns	Meals/Restaura	3/18/2010	\$272.87
	Dunkin' Donuts	Meals/Restaura	1/3/2010	\$18.91
	Morimoto	Meals/Restaura	5/23/2010	\$45.48
	Petulia's Folly	General Retail	1/1/2010	\$39.85
	Kohis	General Retail	12/6/2010	\$124.20
	Wawa	Convenience St	2/16/2010	\$65.42
	Slice	General Retail	7/14/2010	\$224.91

Spending Report Wizard Step 3

- 10. Click Add Filter and then choose the desired parameters from the filters provided. For example:
 - If you are looking for a specific receipt amount, choose Amount from the field dropdown list, a mathematical operator from the operator list and then type an amount in the field provided.
 - If you are looking for a specific date, choose Receipt Date from the field dropdown list, a date modifier from the operator list and then type a date in the field provided.
- 11. Add additional filters by clicking on the Add Filter button and providing the necessary details.
- **TIP:** To delete a filter, click Delete Filter.
- 12. Click Go to preview the report data.
- 13. Click Next Step.

In Step 4 of the Report Wizard you will preview and then export the report.

tep 1 elect Repor	rt Type Step Repo	2 rt Options	Step 3 Refine Report Dat	a Step 4 Repor	4 t Preview/Export	
eport Prev	view		_	nding (Summary Rep how Sub-header	oort)	ī
Print	Save As 🔻	Q] (Ð 82 % 🔻		Þ
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		• •				
	Vendor: Cosi	ceipt Date between	n 1/1/2010 and 12/2			
		• •		3/2010		
	Vendor: Cosi Category	ceipt Date between # of Expenses	n 1/1/2010 and 12/2 Summary Total	% Of Total		
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Spending Report Wizard Step 4

14. Review the report.

- Use the scroll bar on the right side of the window to scroll up and down
- Use the Next Page and Previous button to move from page to page
- Use the First Page and Last Page buttons to move to the first and last pages
- Use the Zoom dropdown menu or icons to make the report larger or smaller
- 15. Click Print to print the report.
- 16. Click Save As to save the report and then choose the appropriate format. You will be prompted for a save location.
- 17. Click the Close button (X in the top right corner) to close the report.

Creating a Tax Report

1. Click Report.

If you use Neat 5 for tax purposes, it is a good practice to assign tax categories to receipts and other tax-related documents that you scan. This can save you some time and work during tax season.

The default value for the tax category field is "No form::Non-deductible." Neat 5 provides a list of over 100 pre-defined tax categories commonly used in the US and Canada. You can select a different tax category in either the Details view or the Grid view from the dropdown list. You can select which tax categories are visible in your views. Please note that you cannot add, edit, or delete tax categories within Neat 5 because tax categories need to match IRS/CRA tax categories.

You can use tax categories to create tax reports to help you analyze and organize your financial information for tax purposes. For example, you can create a tax report for all charitable donations or you can create a tax report for all deductible medical expenses.

2. Choose Create New Report. The Report Wizard opens.

ep 1 Step 2 Report Options	Step 3 Refine Report I	Data	Step 4 Repor	t Preview/Export
lect Report Type				
Expense: Expense Report		Tax Cat	egory Report	
he Expense Report provides a detailed summary of		Sch. E::T	ravel Expense	
I your expenses.	Re	ceipt Date betwee	m 1/1/2010 and 12	2/6/2010
your expenses			dule E, Line 6	
	Vendor: Sample Vend			
	Category	Receipt Date	Amount	% Of Total
	Convenience store	2/16/2010	\$65.42	1440 %
	General Retail General Retail	12/6/2010 7/14/2010	\$124.20 \$224.91	27.33 % 49.50 %
	General Retail	1/1/2010	\$39.85	8.77 %
		Total:	\$454.38	100.00 %
🔵 Tax: Tax Category Report 🛛 🔻	Vendor: Sample Vend	or 4		
	Category	Receipt Date	Amount	% Of Total
he Tax Category Report quickly organizes your	General Retail	10/12/2010	\$24.60	65.78 %
	General Retail	6/14/2010 Total	\$17.80 \$37.40	34.22 % 100.00 %
openses according to the tax category they've been	Marchae Brench March		12000	100.00 %
ssigned to.	Vendor: Sample Vend Category	Receipt Date	Amount	% Of Total
	General Retail	6/30/2010	\$29.54	9.89 %
	Meals/Restaurants	3/18/2010	\$272.87	90.11 %
		Total	\$302.81	100.00 %
	Vendor: Sample Vend	or 5		
	Category	Receipt Date	Amount	% Of Total
Spanding: Summary	General Retail	8/27/2010	\$13.99	100.00 %
Spending: Summary		litter.	\$13.99	100.00 %
	Vendor: Sample Vend			% Of Total
he Spending Summary Report lets you group your	Category Meals/Restaurants	Receipt Date 5/23/2010	Amount \$45.48	% Of Total 70.63 %
openses by the field of your choice. Within each	Meals/Restaurants	1/3/2010	\$18.91	29.37 %
roup you can view your expenses by another field of		Total:	\$64.39	100.00 %
our choice, such as total number of expenses and		Grand total:	\$872.97	100.00 %
tal amount for each expense.				
tal amount for each expense.				

Tax Report Wizard Step 1

In Step 1 of the Report Wizard you will choose a report type.

- 3. Click on Tax.
- 4. Chose a type of report from the dropdown menu next to Tax (Tax Category Report, Sales Tax Report or Tax Form Report).
- 5. Click Next Step.

In Step 2 of the Report Wizard you will set report options.

Report Creator	Wizard Reports only contain receipt data, other items are excluded.
Step 1 Select Report Type	Step 2 Report Options Step 3 Refine Report Data Step 4 Report Preview/Export
Report Options	
Paper Size:	Layout: →≣ Title:
Letter (8.5 x 11)	Portrait Tax Category Report
Edit Report Colu	
Group By:	Sort By: Sort Order:
Category	Category Ascending
O Receipt Date	Report layout preview:
	Vendor
	Category V Receipt Date Amount % Of Total
	Vendor
	Category Receipt Date Amount % Of Total
Previous Step	Next Step 🕨

Tax Report Wizard Step 2

- 6. The default report paper size is 8.5" x 11". To choose a different size, select one from the Paper Size dropdown menu.
- 7. The default report orientation is portrait. To choose landscape, click Landscape in the Layout dropdown menu.
- 8. Type a title for the report in the Title field.
- 9. Under the Edit Report Columns heading, design your report by doing the following:
 - Under Group By, choose a field to group your report by

- Under Sort By dropdown, choose a field to sort the report by
- Under Sort Order dropdown choose Ascending or Descending
- 10. Click Next Step.

In Step 3 of the Report Wizard you will further refine the report options (optional).

	Step 2 Report Options	Step 3 Refine Report	Data	Step 4 Report Preview/Expor	rt
My Cabinet	Receipt Date	- Last Y	ear 🔻		
Business	Tax Category	- 95 Ite	ms selected	▼ Select All	
▶ 🛅 Home	+ Add Filter Report Data	Go			
	Vendor	Category	Receipt Date	Am	_
	Starbucks	Meals/Restaura	10/10/2010	\$22.68	
	Cosi	Meals/Restaura	4/10/2010	\$88.12	
	EMS	General Retail	12/23/2010	\$100.00	
	Curritos	Meals/Restaura	2/1/2010	\$7.33	
	General Nutrition Ce	General Retail	8/27/2010	\$13.99	
	Utrecht	General Retail	10/12/2010	\$24.60	
	CVS	General Retail	6/14/2010	\$12.80	
	Stop N Shop Discoun	General Retail	6/30/2010	\$29.94	
	Jimmy Johns	Meals/Restaura	3/18/2010	\$272.87	
	Dunkin' Donuts	Meals/Restaura	1/3/2010	\$18.91	
	Morimoto	Meals/Restaura	5/23/2010	\$45.48	
	Petulia's Folly	General Retail	1/1/2010	\$39.85	

Tax Report Wizard Step 3

- 11. Click Add Filter and then choose the desired parameters from the filters provided. For example:
 - If you are looking for a specific receipt amount, choose Amount from the field dropdown list, a mathematical operator from the operator list and then type an amount in the field provided.
 - If you are looking for a specific date, choose Receipt Date from the field dropdown list, a date modifier from the operator list and then type a date in the field provided.
- 12. Add additional filters by clicking on the Add Filter button and providing the necessary details.

- TIP: To delete a filter, click Delete Filter.
- 13. Click Go to preview the report data.
- 14. Click Next Step.

In Step 4 of the Report Wizard you will preview and then export the report.

Step 1 Select Report Type Step 2 Report Options Step 3 Refine Report Data Step 4 Report Preview/Export Report Preview Tax Category Report Show Sub-header Image: Print Save As Image: Print Save As Save As Image: Print Save As Image: Print Image: Print Save As Image: Print Save As Image: Print Tax Category Report Save As Image: Print Image: Print Tax Category Report Save As Image: Print Image: Print Tax Category Report Save As Image: Print Image: Print Tax Category Report Save As Image: Print Image: Print Tax Category Amount % Of Total Protal </th <th></th> <th>ator Wizard</th> <th>Reports only contain recei</th> <th>ipt data, other items are e</th> <th>excluded_{ind}</th> <th></th> <th>(</th>		ator Wizard	Reports only contain recei	ipt data, other items are e	excluded _{ind}		(
Report Preview Show Sub-header Image: Print Image: Save As Image: Category Report Tax Category Report Image: Save As Image: Category Report Frm. 2106::Meal/Entertainment Expenses Receipt Date between 1/1/2010 and 12/23/2010 Image: Save As Form 2106, Line 5 Image: Save As Image: Save As Image: Save As Unkin' Donuts Meals/Restaurants \$18.91 100.00 % Image: Save As Image: Save As Image: Save As Image: Save As) 1				Preview/Export	
Print Save As Category Report Frm. 2106::Meal/Entertainment Expenses Receipt Date between 1/1/2010 and 12/23/2010 Form 2106, Line 5 Receipt Date: 1/3/2010 Vendor Category Amount % Of Total Dunkin' Donuts Meals/Restaurants \$18.91 100.00 %	Report Previe	2W					
Frm. 2106::Meal/Entertainment Expenses Receipt Date between 1/1/2010 and 12/23/2010 Form 2106, Line 5 Receipt Date: 1/3/2010 Vendor Category Amount % Of Total Dunkin' Donuts Meals/Restaurants \$18.91 100.00 % Total: \$18.91 100.00 %	Print	📑 Save As 🔻	ବ୍ଅ			₩ ◄ ►	M
Frm. 2106::Meal/Entertainment Expenses Receipt Date between 1/1/2010 and 12/23/2010 Form 2106, Line 5 Receipt Date: 1/3/2010 Vendor Category Amount % Of Total Dunkin' Donuts Meals/Restaurants \$18.91 100.00 % Total: \$18.91 100.00 %							T
Frm. 2106::Meal/Entertainment Expenses Receipt Date between 1/1/2010 and 12/23/2010 Form 2106, Line 5 Receipt Date: 1/3/2010 Vendor Category Amount % Of Total Dunkin' Donuts Meals/Restaurants \$18.91 100.00 % Total: \$18.91 100.00 %			Tour Code	.			
Form 2106, Line 5 Receipt Date: 1/3/2010 Vendor Category Amount % Of Total Dunkin' Donuts Meals/Restaurants \$18.91 100.00 % Total: \$18.91 100.00 %		Frm	-		xpenses		
Receipt Date: 1/3/2010 Vendor Category Amount % Of Total Dunkin' Donuts Meals/Restaurants \$18.91 100.00 % Total: \$18.91 100.00 %		R	-		3/2010		
VendorCategoryAmount% Of TotalDunkin' DonutsMeals/Restaurants\$18.91100.00 %Total:\$18.91100.00 %				100, Line 5			
Dunkin' Donuts Meals/Restaurants \$18.91 100.00 % Total: \$18.91 100.00 %		Pagaint Datas 1/2/2	010				h
				Amount	% Of Total		h
Grand total: \$18.91 100.00 %		Vendor	Category				l
		Vendor	Category Meals/Restaurants	\$18.91	100.00 %		
		Vendor	Category Meals/Restaurants Total:	\$18.91 \$18.91	100.00 % 100.00 %		
		Vendor	Category Meals/Restaurants Total:	\$18.91 \$18.91	100.00 % 100.00 %		
		Vendor	Category Meals/Restaurants Total:	\$18.91 \$18.91	100.00 % 100.00 %		
		Vendor	Category Meals/Restaurants Total:	\$18.91 \$18.91	100.00 % 100.00 %		

Tax Report Wizard Step 4

15. Review the report.

- Use the scroll bar on the right side of the window to scroll up and down
- Use the Next Page and Previous button to move from page to page
- Use the First Page and Last Page buttons to move to the first and last pages
- Use the Zoom dropdown menu or icons to make the report larger or smaller

16. Click Print to print the report.

17. Click Save As to save the report and then choose the appropriate format. You will be

prompted for a save location.

18. Click the Close button (X in the top right corner) to close the report.

Printing

Any item in your database can be printed.

Printing an Item (Receipts, Contacts, Documents)

- 1. Right-click on the item you wish to print and choose Print. The Print dialog box opens.
- 2. Select a printer and set your printer preferences.
- 3. Click Print.

Printing a Report

- 1. Right-click on the report you want to print and choose Print. The Print dialog box opens.
- 2. Select a printer and set your printer preferences.
- 3. Click Print.

Printing an Image

- 1. View the image you want to work with in the Image Pane, Full Screen View or the Image Viewer window.
- 2. Right-click on the image and choose Print. The Print dialog box opens.
- 3. Select a printer and set your printer preferences.
- 4. Click Print.

A clean, calibrated scanner is a happy scanner!

Keeping your scanner clean is an important part of scanner maintenance. Dust and other obstructions on the scanner lens can cause streaks on scanned images and potentially impact the accuracy of the scanned images. The cleaning process will remove flecks of dust or small pieces of paper that have been caught in the scanner, which will in turn improve the quality of your scans.

The calibration process helps the scanner "see" correctly and therefore provide crisp accurate scans by differentiating between black, white, shades of gray and other colors. Calibrating your scanner is simple and quick. Neat 5 may prompt you to calibrate the scanner during installation; however you may occasionally need to recalibrate if scans appear faint or off-balance.

Instructions for cleaning and calibrating your scanner are below.

In this section:

- <u>Cleaning the Neat Mobile Scanner</u>
- Calibrating the Neat Mobile Scanner
- <u>Cleaning the Neat Desktop Scanner</u>
- <u>Calibrating the Neat Desktop Scanner</u>

Maintaining the Neat Mobile Scanner

A clean, calibrated scanner is a happy scanner!

Keeping your scanner clean is an important part of scanner maintenance. Dust and other obstructions on the scanner lens can cause streaks on scanned images and potentially impact the accuracy of the scanned images. The cleaning process will remove flecks of dust or small pieces of paper that have been caught in the scanner, which will in turn improve the quality of your scans.

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Instructions for cleaning and calibrating your Neat Mobile scanner are below.

In this section:

- <u>Cleaning the Neat Mobile Scanner</u>
- <u>Calibrating the Neat Mobile Scanner</u>

Cleaning the Neat Mobile Scanner

Cleaning the Neat Mobile Scanner

Two types of cleaning paper are included in the Welcome Kit: one dry and one wet.

Dry	The dry cleaning paper is a small, white, 'cottony' piece of paper that resembles a dryer sheet. Always try this dry cleaning paper first.
Wet	The wet (alcohol-based) cleaning paper is especially useful for scanners that are producing very streaky images as it will help remove particularly stubborn dust and paper particles. Only use the wet cleaning paper if you've already tried cleaning with the dry cleaning paper and have not had optimal results.

USING THE DRY CLEANING PAPER

- 1. Feed the dry cleaning paper into the scanner, just as you would a receipt.
- 2. In Neat 5, click Settings.
- 3. In the Scan Settings menu, click Clean.
 - NOTE: During the cleaning process, you will see a message that says "Please wait cleaning in progress" and the cleaning paper will move back and forth through the scanner for approximately 25 seconds before being pulled through all the way.
- 4. When cleaning is complete, you will be prompted to click OK to continue.

Important: Store the dry cleaning paper in the Welcome Kit for safe-keeping.

USING THE WET CLEANING PAPER

Only use the wet cleaning paper if you've already tried cleaning with the dry cleaning paper and have not had optimal results.

- 1. Remove the alcohol cleaning paper from its packet and unfold the paper fully.
- 2. Feed the paper into the scanner, just as you would a receipt.
- 3. In the Scan Settings menu, click Clean.
 - NOTE: During the cleaning process, you will see a message that says "Please wait cleaning in progress" and the cleaning paper will move back and forth through the scanner for approximately 25 seconds before being pulled through all the way.
- 4. When cleaning is complete, you will be prompted to click OK to continue.

Important: Discard the wet cleaning paper.

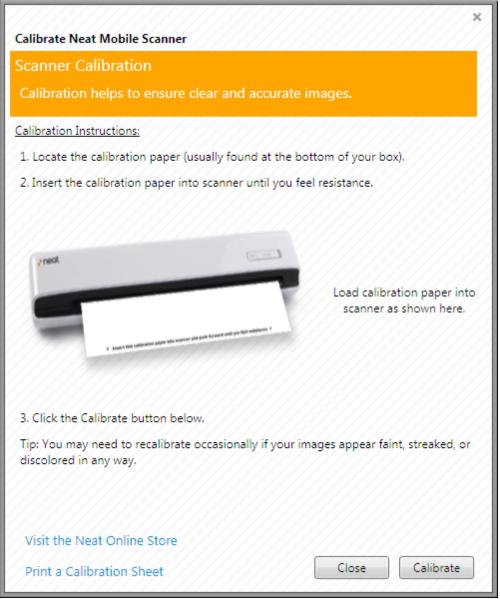
To Purchase Additional Wet Cleaning Paper

Go to the <u>Neat Website</u> and order a Scanner Maintenance Kit, which includes 6 sheets of alcohol cleaning paper and 3 sheets of calibration paper!

Calibrating the Neat Mobile Scanner

Calibrating the Neat Mobile Scanner

- 1. Remove the calibration paper from its special pocket in the Welcome Kit.
 - NOTE: Be certain to use the calibration paper, and not the cleaning paper. The cleaning paper resembles a dryer sheet, while the calibration paper is a thin, white piece of paper. If you can't find your calibration sheet, you can print a new one by clicking Print Calibration Sheet in the Calibrate Neat Mobile Scanner dialog box (pictured after step 2). As an alternative, if you can't print from your computer, click Restore Default Calibration Values.
- 2. In the Scan Settings menu, click Calibrate. The Calibrate Neat Mobile Scanner dialog box (pictured below) appears.



Calibrate Neat Mobile Scanner Dialog Box

- 3. Load the calibration sheet into the scanner as shown in the Calibrate Neat Mobile Scanner dialog box.
- 4. Click Calibrate. An alert box will let you know when calibration is complete.

Important: Store the calibration paper in its special pocket in the Welcome Kit for safekeeping.

TIP: If you still notice that scans appear faint or don't look quite right, you may repeat the calibration process.

Maintaining the Neat Desktop Scanner

A clean, calibrated scanner is a happy scanner!

Keeping your scanner clean is an important part of scanner maintenance. Dust and other obstructions on the scanner lens can cause streaks on scanned images and potentially impact the accuracy of the scanned images. The cleaning process will remove flecks of dust or small pieces of paper that have been caught in the scanner, which will in turn improve the quality of your scans.

The calibration process helps the scanner "see" correctly and therefore provide crisp accurate scans by differentiating between black, white, shades of gray and other colors. Calibrating your scanner is simple and quick. Neat 5 may prompt you to calibrate the scanner during installation; however you may occasionally need to recalibrate if scans appear faint or off-balance.

Instructions for cleaning and calibrating your Neat Desktop scanner are below.

In this section:

- <u>Cleaning the Neat Desktop Scanner</u>
- <u>Calibrating the Neat Desktop Scanner</u>

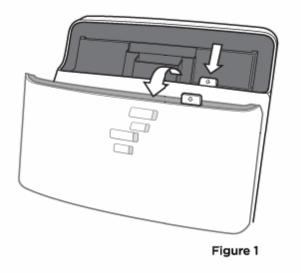
Cleaning the Neat Desktop Scanner

Cleaning the Neat Desktop Scanner

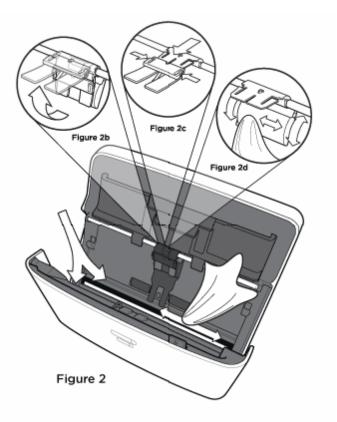
Click here to watch a video on this topic.

- 1. Turn off the scanner and disconnect the power cord.
- 2. Dampen the provided cleaning cloth with *isopropyl alcohol* (95%).
 - Do NOT use water.
 - Do NOT use abrasive cleaners.
 - Do NOT spray isopropyl alcohol or any other solvent into the scanner or anywhere on the scanner.
- 3. Open the scanner by pushing the lever down on the front right side (as shown in Figure 1 below).





- 4. Clean the feed roller & paper pad. as follows:
 - Gently push the paper pad mechanism to the left and lift it gently until you feel resistance. (Figure 2b) and then squeeze both sides of the paper pad mechanism and gently pull it out. (Figure 2c)



- Clean the paper pad mechanism. Be careful not to bend the metal tab.
- Wipe the feed roller from side to side and then rotate it. Repeat until its entire surface

is cleaned. (Figure 2d)

- Replace the paper pad mechanism. Be sure you hear the paper pad mechanism 'click' back into place.
- 5. Clean the lower glass imager by gently wiping over the length of the glass image. (See Figure 2 above)
 - Be extremely careful not to catch the plastic tab with your cloth.
 - Do NOT spray isopropyl alcohol or any other solvent into the scanner or anywhere on the scanner.
- 6. Clean the upper glass imager by gently wiping over the length of the glass image. (See Figure 2 above).
 - Be extremely careful not to catch the plastic tab with your cloth.
 - Do NOT spray isopropyl alcohol or any other solvent into the scanner or anywhere on the scanner.
 - Use extreme caution when cleaning around the paper sensor (the small plastic arm just above the upper glass imager).
- 7. Wait for cleaned areas to dry completely BEFORE closing the scanner cover.
- 8. Close the scanner cover by pushing it back down until it snaps back into place.

Calibrating the Neat Desktop Scanner

Calibrating the Neat Desktop Scanner

- 1. Remove the calibration paper from its special pocket in the Welcome Kit.
 - NOTE: Be certain to use the calibration paper, and not the cleaning paper. The cleaning paper resembles a dryer sheet, while the calibration paper is a thin, white piece of paper. If you can't find your calibration sheet, you can print a new one by clicking Print Calibration Sheet in the Calibrate Neat Mobile Scanner dialog box (pictured after step 2). As an alternative, if you can't print from your computer, click Restore Default Calibration Values.
- 2. In the Scan Settings menu, click Calibrate. The Calibrate Neat ADF Scanner dialog box (pictured below) appears.



Calibrate Neat ADF Scanner Dialog Box

- 3. Load the calibration sheet into the scanner as shown in the Calibrate Neat ADF Scanner dialog box.
- 4. Click Calibrate. An alert box will let you know when calibration is complete.

Important: Store the calibration paper in its special pocket in the Welcome Kit for safekeeping.

TIP: If you still notice that scans appear faint or don't look quite right, you may repeat the calibration process.

It is a good idea to back up your Neat 5 database on a regular basis. This way, if anything happens to your computer, your data is safe. This method can also be used when moving to a new computer.

Backing Up the Database

- 1. Click the Tools menu.
- 2. Choose Database.
- 3. Choose Offline Backup. The Back Up Database to File dialog box opens.

🗷 Backup Database to File	
G ⊂ □ ↓ Libraries ↓	 ✓ ✓
Organize 🔻	u≓ ▼ ()
 ▷ Documents ▷ Documents ▷ Music ▷ Pictures ▷ Videos ■ Videos ■ Homegroup ▲ ○ Computer ▲ ○ OS (C:) 	Libraries Open a library to see your files and arrange the Music Library Pictures Library E
▷ 🎉 Brother ▷ 🕌 Camtasia7Data 🗸 👻	Videos Library
File name: Save as type: Neat Database Backups (*.nbak)	▼ ▼
lide Folders	Save Cancel

Back Up Database Dialog Box

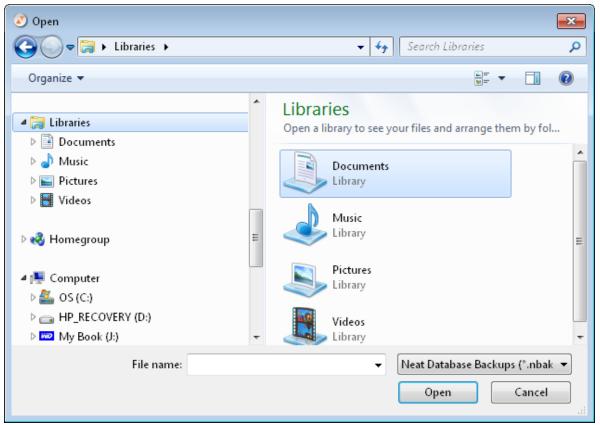
- 4. Navigate to and open the folder in which the backup should be saved.
- Type a name for the backup file in the File Name field. Do not type a file extension - it will be provided for you (.nbak).
- 6. Click Save.

See Also:

<u>Restoring the Database</u>

Restoring the Database

- 1. Click the Tools menu.
- 2. Choose Database.
- 3. Choose Offline Restore. The Open dialog box opens.



Open Dialog Box

- 4. Navigate to and open the folder where your backups are saved. Neat 5 backup files have a .nbak file extension.
- 5. Select the backup file.
- 6. Click Open.

See Also:

Backing up the Database

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