

User's Guide Neat for Mac

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Need Help Taming Your Paper Monster?

You're in the right place!

Neat for Mac 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 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 for Mac know-how.

	reat.	How Tech Savvy are you?			
before?		Very Tech Savvy	Not So Tech Savvy		
Neat for Windows	YES I've Used a Previous Version of Neat	 Start here: Organizing Your Items: Libraries, Cabinet, Folders & Subfolders After that: NeatCloud 	Start here: • <u>Getting Started with Neat for Mac</u> • <u>The Neat for Mac Interface</u> After that: • <u>Getting Items Into Neat for Mac</u> • <u>Organizing Your Items: Libraries,</u> <u>Cabinet, Folders & Subfolders</u> • <u>Working with Your Items</u> • <u>Exporting, Reporting and Printing</u>		
Have you used	NO I've Never Used Neat	 Start here: <u>Getting Started with Neat for Mac</u> After that: <u>Getting Items Into Neat for Mac</u> <u>Organizing Your Items:</u> <u>Libraries, Cabinet, Folders & Subfolders</u> <u>Working with Your Items</u> <u>Exporting, Reporting and Printing</u> <u>NeatCloud</u> 	 Start here: <u>Getting Started with Neat for Mac</u> <u>The Neat for Mac Interface</u> After that: <u>Getting Items Into Neat for Mac</u> <u>Organizing Your Items: Libraries, Cabinet, Folders & Subfolders</u> <u>Working with Your Items</u> <u>Exporting, Reporting and Printing</u> 		

1

At The Neat Company, 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 for Mac
- 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 for Mac database
3	Creating an Expense Report	Create a report to track business expenses
4	Exporting Data	Export expense data to a variety of formats including Quicken, CSV, spreadsheet, PDF and image formats.
5	<u>Scanning bank statements, bills,</u> <u>credit card statements</u>	Scan bank statements, bills credit card statements and other such documents and capture key information in the Neat for Mac database
6	Syncing to NeatCloud	Synchronize to the NeatCloud and access your data from anywhere.
7	<u>Organizing Personal Docs</u> (Recipes, Articles, Warranties)	Scan the documents you use most so save clutter
8	Creating a Tax Reports	Create a tax report to maximize your tax savings
9	Print to Neat for Mac	Use the Neat printer driver to print from other applications (e.g. web browsers, email clients, word processing) directly into Neat for Mac.
10	<u>Splitting a Receipt</u>	If a receipt contains multiple items that need to be expensed to more than one client or project, you can split a receipt across multiple folders.

User Case Studies

Wondering how to make the best use of Neat for Mac? 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

Getting Started with Neat for Mac

- 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 Address Book
- 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 for Mac 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 for Mac

The processing time for a scan will vary based on the number of items, document size, and amount of content. Neat for Mac 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 for Mac may not be able to read every detail clearly. Therefore, each scan should be reviewed for accuracy.

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 on the right side of the screen. What you will see depends on which view you are in and whether or not you have the Browse and/or Table panes open. If you are in <u>Item view</u>, the scanned item appears in the <u>Image Viewing</u> pane in the middle of the screen. The <u>Thumbnail View</u> pane displays a tiny image of the scanned item. If you have the <u>Table pane</u> open, you will also see the scanned item in there as well, along with its name, description, create and modify dates and any notes you have added.

- 4. Look at the <u>Item Type dropdown menu</u> (above the Thumbnail pane). Did Neat for Mac 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 menu.
- **TIP:** The Neat for Mac interface is color coordinated! The line beneath the toolbar indicates what type of item is currently selected. Receipts display a blue line; documents display an orange line and contacts display a red line.
- 5. Want a closer look at the scanned item? Double-click on the item in the Item Viewing pane to view it in the Item Editor. The item will open in a separate window, with editing and zooming capabilities.
- 6. Click on the I con View button at the top of the window to review the item in that view.

WHAT'S NEXT?

So far, so good, right!? Neat for Mac 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 for Mac. Links to a few topics of interest follow:

- <u>Scanner Settings</u>
- Organizing Your Items: Libraries, Cabinets, Folders & Subfolders
- Working with Items
- Exporting, Reporting & Printing

Getting Started with Neat for Mac

The Neat for Mac interface puts everything you need to use the program effectively and efficiently on a single screen, including the following:

- Navigate and view the contents of your Cabinet and Folders
- · Scan documents directly into a Folder
- Use Smart Folders to view like items at a glance
- Change the way you view items
- Show/hide the Browse pane (not pictured)
- Show/hide the Table pane (pictured)
- · Search for any item in your Cabinet



Neat for Mac Interface

TIP: The Neat for Mac interface is color coordinated! In the screenshot above the blue line beneath the toolbar indicates that the currently selected item is a receipt. For documents, that line color is orange. For contacts, that line color is red.

In this section:

<u>Neat for Mac Interface Buttons</u>

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Neat for Mac Interface Buttons

On the main screen 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.

Screenshot	Command	Description
Scan	Scan	Begins scan.
	Import	Allows you to import a PDF, Image or vCard into Neat as well as bring in legacy Neat files and Quicken Account information
Import New	New	Allows you to create a new contact, receipt or document without a related scan.
	Delete	Allows you to delete an item.
🙀 🖉 🗁	Editor	Allows you to edit an item.
Delete Editor Email	Email	Allows you to send an item as an attachment to an email.
O Sync	Sync	Animates to show sync in progress.
	I tem View	Displays the screen with the scanned image visible in the top left of the screen, and the receipt or document fields populated with information at the top right of the screen.
Icon View	Icon View	Displays thumbnail images for each item in the folder you're viewing. In other words, the thumbnails you see represent the items in the folder you've selected from the Cabinet. Additionally, the specific receipt or document you've selected will be highlighted with an orange border.
	Report View	Allows you to generate reports and to access summary information. You can combine items from multiple folders in any given report.
Browse	Browse	Toggles a separate browsing grid for intuitive searching. The Browse feature aggregates and displays information about your folder as a whole and for all fields, including Amount, Date, and Vendor.

The Neat for Mac Interface

Screenshot	Command	Description
Table	Table	Toggles a grid (table) in the bottom pane containing the other receipt or document rows visible for that folder, while the specific row you've selected will be highlighted. Any notes that you've created will display in the table.
Q+ Type here to search Search	Search	Let's you perform keyword searches to locate your items quickly.

Neat for Mac 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>
- <u>Getting Data Into Neat for Mac</u>
- <u>Scanning Basics</u>
- Importing an Item
- Printing to Neat for Mac
- Creating a New Item

Neat Scanners

Mobile Scanner	The <i>Mobile Scanner</i> is a 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 for Mac software.
Desktop Scanner	The Desktop Scanner is a powerful, full-featured automatic document feeder (ADF) scanner for scanning in multiple pages automatically. This scanner offers faster scanning speeds, double sided scanning, and an input tray that can be loaded with multiple business cards, receipts and documents at the same time.

Getting Data into Neat for Mac

There are five ways to get data into Neat for Mac: scanning, importing, manual input, sending to, or NeatCloud. 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. See <u>Scanning Basics</u> for more information.



Button

IMPORTING

Use the Import button 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.



Import & New Buttons

MANUAL INPUT

Use the New (Receipt, Contact, Document) button (pictured above) to manually add a new receipt, contact or document. Benefit: retain and organize important information for which you have no paper or electronic record. Alternatively, click the New menu, choose I tem of Type and select the type of new item you wish to create (pictured below).

🗯 NeatWorks	File Edit Scan View Format	t Window Help
00	New 🕨	Item Of Type Receipt
B & W Text Scan Scan	Open ₩O Open Recent	Folder Smart Folder
🚨 Inbox	Close #W	Cabinet
Cabinet	Save 第5 Save As 企業S	hicken Hut
Business	Export	hu Sep 29 2011
Home	Revert	7.43
Biz Cards	Create Report Email Report	0.55
	Quick Look Selected Items	ash 💌
On My Mac	Email Selected Items	eneral Retail
Modress Book	Page Setup 企業P Print 業P	• ?

New > File of Type Menu

SENDING TO

Use the Neat printer driver to print from other applications (e.g. web browsers, email clients, word processing) directly into Neat for Mac. Benefit: organize important digital information in Neat.

NEATCLOUD

Use <u>NeatCloud</u> to add receipts, contacts or documents.

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 for Mac 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 for Mac 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.

4

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
- Reviewing a Scan

Chapter 4 Getting I tems Into Neat for Mac: Scanning, Importing and Sending

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 for Mac.

USING THE SCANNER BUTTON

- Press the Scan button to scan an item into Neat for Mac. Neat for Mac 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.
- By default, the PDF button on your scanner does the same thing as the Scan button. However, this can be customized in the Preferences > Scanning dialog box. See <u>Setting</u> <u>Preferences > Scanning Preferences</u> for more information.

USING THE NEAT FOR MAC SCAN COMMAND

• Click the Scan button in Neat for Mac to scan an item into the application. Neat for Mac 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. Alternatively, choose Scan New Item from the Scan menu or use the Command + K keyboard shortcut.

Click here to try your first scan!



Scanner Settings

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

- Choose to scan in color or black & white
- Select a processing mode
- Choose a scan destination
- Choose to scan individual pages or combine several pages into a single document
- Change the document type (after scanning)

Each of these options is described in the next few pages.

Also in this section:

- Choose to scan in color or black & white
- <u>Select a processing mode</u>
- <u>Choose a scan destination</u>
- Choose to scan individual pages or combine several pages into a single document
- Change the document type (after scanning)

Choosing Color or Black & White



Scan Options - Color Mode

You can choose to scan an item in color or in black & white.

- 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 Scan Options.
- 3. Choose the option you want: Black & White (Text), Black & White (Image) or Color.
- 4. Feed the item into the scanner and then click Scan.
- TIP: What's the difference between Black & White (Text) and Black & White (Image)?
 - Black & White (Text) is true black and white
 - Black & White (Image) is gray scale

Setting the Processing Mode



Scan Options - Processing Mode

The Scan Options menu (pictured above) offers three processing modes:

Mode	Overview	Example
Quick	Scans just the image	Use this mode when you need to scan an image quickly and don't' need Optical Character Recognition (OCR). This mode provides the fastest processing time since there is no OCR or data extraction being done. However, this also means that words in items scanned using this mode will not be searchable.
Normal	Analyzes just the first page of a multi-page scan	Using this mode means that only the very first page of a multi-page document will incorporate OCR. The remaining pages will be scanned as image only. This means that the text on the first page of the document is searchable, but not the text on the remaining pages.
Full	Analyzes all pages of a multi-page scan	This mode performs OCR analysis for every page. Although this takes longer, it means that text on all pages of the document are searchable.

Choosing the Scan Destination



Scan Options - Destination

The Scan Options menu (pictured above) offers three potential destinations for a scan:

I nboxPlaces the scan in the InboxCurrent FolderPlaces the scan in whatever folder is currently selectedDirect to PDF FileScans directly to a PDF file

TIP: For more information on scanning directly to a PDF file, see <u>Scanning to a PDF</u>.

Scanning Separate Pages vs. Scanning Multi-Page



ADF Settings & Options

By default, Neat for Mac 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 multi-page document using the Neat Desktop Scanner.</u>

- 1. Click Scan Options.
- 2. Choose Combined Item With All Pages.
- 3. Feed the item into the scanner and then click Scan. Neat for Mac will prompt you for each page until you click Complete.

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.
- 2. Choose the correct item type from the I tem Type dropdown menu. (Located above Thumbnail view.)



Item Type Dropdown Menu

Δ

Scanning to a PDF

You can scan an item directly to a PDF file.

- 1. Click Scan Options.
- 2. In the Scan Options menu, under the Destination heading, choose Direct to PDF File.
- 3. Position the item in the scanner and click Scan. The Save As dialog box opens (pictured below).
- 4. Type a name for the file in the Save As field.
- 5. Choose a location for the file from the Where dropdown.
- 6. Click Save.

Save As:	Name PDF File Here	
Where:	Documents	•
	(ancel Save

4

	Macintosh HD		\$ Q	 \supset
V DEVICES Macintosh HD Disk Disk	Applications Library NeatWorkease.dmg opt System User Guiformation Users	7 7 7 7		

Save As Dialog Box (expanded Save As)



Save As Dialog Box (Where dropdown list showing)

Understanding the Processing Queue

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

00		鼶 Neat Library		\Box
B & W Text Normal Inbox	- 🚺 🔂 🐼		Ш 🖳 💭 🖓 От Ту	pe here to search
Scan Scan Options	Import New Delete Edito		Browse Table	Search
📮 Inbox				Document 🔹
Cabinet	Title			
Business	Date			
Home	Date			
	Author			
Biz Cards	-			
📋 Trash	Notes		neat	
▼ On My Mac				
Address Book				
▼ Smart Folders				
MI Receipts				
All Documents				
		Constant International Interna		
		Scanning		
	Vame	Description		Date Modified Date Notes 🔶
3 Receipts, 5 pages:	No Name Andrew Schaps	Senior Engineer Neatco (215) 382-3300		14 Wed Mar 14
Amount \$0.00 Sales Tax \$0	Karin Rex	Professional Writer Course development traini		14 Wed Mar 14
Sales Tax 50	Cris Thomas	Manager, Information The Neat Company (215		14 Wed Mar 14
	No Name	Cash General Retail		14 Wed Mar 14
	No Name	Cash General Retail	Tue Mar	13 Tue Mar 13
Scanning	I Road Maps		Fri Feb 24	4 2 Tue Mar 13
3	shannon1948.dvi	Sat Jun 28 2008	Fri Feb 24	4 2 Tue Mar 13 🔻
+ - 🌣 📖	C) + + (

Neat Window During Scanning

When you are scanning multiple items, the queue area at the bottom of the Navigation pane (pictured above) lets you keep track of how many items have been processed. This area says "Scanning" while actively scanning and "Idle" when not actively scanning (pictured below).

6 Receipts, 7 pages: Amount \$115.28 Sales Tax \$3.00 Idle

Queue area when not scanning (idle)

Reviewing a Scan

As an item is scanned, Neat for Mac 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 for Mac may not be able to read every detail clearly. Therefore, each scan should be reviewed for accuracy.

- 1. Look at the <u>Item Type dropdown menu</u> (above the Thumbnail pane). Did Neat for Mac 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 menu.
- **TIP:** The Neat for Mac interface is color coordinated! The line beneath the toolbar indicates what type of item is currently selected. Receipts display a blue line; documents display an orange line and contacts display a red line.
- 2. Want a closer look at the scanned item? Double-click on the item in the Item Viewing pane to view it in the Item Editor. The item will open in a separate window, with editing and zooming capabilities.
- 3. Click on the I con View button at the top of the window to review the item in that view.

Importing an Item

Scanning is not the only way to capture data in Neat for Mac - you can also import from a PDF or image file.



- 1. Click Import.
- 2. Browse to the folder containing the file you want to import.



Importing an Item into Neat for Mac

- 3. Select the files you wish to import. (Use the Ctrl key to select multiple items.)
- 4. Click Open. The Analyzing icon (pictured below) 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 for Mac will optimize the scanned item for readability, convert it into digital text, and parse it for key information.

00		🃒 Neat Library				
B & W Text Normal Inbox	¬ √ 🔒 👘					
Scan Scan Options	Import New I	Delete Editor Email Sync	Vie			
🚨 Inbox			_			
V 🔂 Cabinet	Title	About Stacks				
🚞 Business	Date	Wed Jun 17 2009				
E Home						
🛅 Biz Cards	Author					
🚞 New Folder	Application	Preview	Documents Stack			
📋 Trash			- Provinger			
▼ On My Mac	Notes		and a particular optimize on the particular optimize the particular optimized by the particular of the particular optimized by the particular optimized the particular optimized by the particular optimized optimized by particular optimized optimiz			
📕 Address Book			Barr PCA Factor featured in works of the possibility inside out II another sector and the exit requestion of the standard of 11 standard interposition must 1 and independencies approximately properties from the possibility of the standard of the standard optimizers of the standard out of sign metrics.			
▼ Smart Folders						
All Receipts						
All Documents						
		Analyzing				
	Name	Description	-			
	About Stacks	1100 CULT 1 2009				
4 Receipts, 6 pages: Amount \$0.00	Andrew Schaps	Senior Engineer Neatco (215) 382-3300			
Sales Tax \$0	Karin Rex	Professional Writer Course d	lovolopment training ins			
Idle	The Neat Company	Manager, Information (215) 7	17-9568			
INTE	No Name					
	No Name	Cash General Retail	000 0000			
Analyzing	Andrew Schaps Karin Rex		Senior Engineer Neatco (215) 382-3300 Professional Writer Course development training ins			
+ - *	Rann Hex	Professional Writer Course of	evelopment training ins			

Importing an Item into Neat for Mac (Analyzing Icon)

5. When the import is complete, double-click on an item to review it.

Printing to Neat for Mac

Use the Neat printer driver to print from other applications (e.g. web browsers, email clients, word processing) directly into Neat for Mac. This feature lets you organize important digital information in Neat.

- 1. Open the document you wish to send to Neat for Mac. (This could be a PDF, an image file, Word document, etc.)
- 2. Choose Print. The Print dialog box opens.
- 3. Click the PDF button (bottom left of Print dialog box) and choose the appropriate item type:
 - Add Contact
 - Add Document

Add Receipt

_	Print	
Printer:	No Printer Selected	•
Presets:	Standard	•
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Print to Neat

4. The Analyzing icon (pictured below) 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 for Mac will optimize the scanned item for readability, convert it into digital text, and parse it for key information.

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Print to Neat (Analyzing Icon)

5. When the import is complete, double-click on an item to review it.

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. Click New.

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- 2. Choose the type of item you are creating:
 - Contact

New

- Receipt
- Document

The item is created.

3. Modify each of the fields as needed to provide details for the new item.

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New Receipt Created

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 small taxi receipts 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 for Mac software processes images in the background so there's no delay between scans.
- The scanner is duplex, allowing you to scan both the front and back of an item at the same time.

Also in this section: • Duplex Scanning

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 for Mac 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 for Mac.



Scan Options -ADF Settings & Options

By default, Neat for Mac 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 Desktop Scanner. <u>Click here for instructions on scanning a</u> <u>multi-page document using the Neat Mobile Scanner.</u>

- 1. Click Scan Options.
- 2. Choose Combined Item With All Pages.
- 3. Click Scan Options again.
- 4. Choose Double Sided.

5. Feed the item into the scanner and then click Scan.

Neat for Mac stores all items in a secure digital database called the Neat Library, which is stored in the Documents folder on your Mac. A Neat Library consists of a Cabinet, Folder and subfolders which you view when you work with your documents. 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.
- Currently all your folders and subfolders will be organized under a cabinet called 'My Cabinet'.
- You may create additional new <u>folders</u> and subfolders as needed. In the future, Neat will provide ways to create multiple cabinets in the same Neat library as well.

EXAMPLES OF FOLDER ORGANIZATION

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

In this section:

- Library Basics
- <u>Cabinet Basics</u>
- Folder Basics
- Smart Folders

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

Library Basics

The Neat Library is stored in your Documents folder on your hard drive. The Library consists of a Cabinet and any Folders and Sub-folders that you will create under them. You can create multiple libraries, and each library will consist of a Cabinet.

Libraries are a good way to keep a large number of documents organized separately. For example, a couple may want their business documents in separate libraries. You can also reach the same level of organization by creating multiple folders in the same cabinet based on your organizational needs. For example, a separate folder for Business A and Business B.

In this section:

- <u>Creating a New Library</u>
- Opening a Library
- Renaming a Library

Creating a New Library

- 1. Click the File menu.
- 2. Choose New > Library. The Save dialog box opens.

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File > New > Library

3. Type a name for the library in the Save As field.

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

	Save
Save As:	
Where:	Documents
	(Cancel) (Save

Creating a New Library

- 4. Choose a location for the library using the Where dropdown.
- 5. Click Save. The library opens in a separate window.

Opening a Library

- 1. From the File menu, choose Open. The Open dialog box opens.
- 2. Navigate to and select the library you wish to open.



Open Library

3. Click Open. The library opens in its own window.

Renaming a Library

- 1. Double-click on the library icon. The library name is highlighted.
- 2. Type a new name for the library.

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

3. Tap Return.

Cabinet Basics

Like a real-world file cabinet, the Neat Cabinet can contain folders to organize your documents, receipts and contacts. The cabinet is stored within a Neat <u>library</u> which is stored in your Documents folder Neat for Mac can remember one cabinet to open automatically on startup.

Note: Currently, a library can contain only one cabinet. In the future, Neat will introduce a feature that will allow a library to contain multiple cabinets. You can create an unlimited number of folders and subfolders in a cabinet.

- By default, your cabinet's name is Cabinet. To rename a cabinet, see Renaming a Cabinet.
- In the Folder Navigation pane, click on the arrow next to the cabinet name to expand or collapse that cabinet.



Navigation Pane

In this section:

• Renaming a Cabinet

Renaming a Cabinet

- 1. Double-click on the cabinet icon. The cabinet name is highlighted.
- 2. Type a new name for the cabinet.
- 3. Tap Return.

Folder Basics

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

Viewing Folder Content

To view the contents of a folder, simple click on it. Use the View buttons to change the current view if necessary.

Also in this section:

- Folder Best Practices
- <u>Creating a New Folder or Subfolder</u>
- <u>Viewing Folder Content</u>
- <u>Renaming a Folder</u>
- <u>Deleting a Folder</u>
- Moving a Folder

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

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

- 1. In the Folder Navigation pane, select the cabinet in which you wish to create a new folder.
- 2. Do either of the following:
 - Click on the File menu and choose New Folder
 - Click on the New Folder button at the bottom of the Navigation pane.

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There are two ways to create a new folder

- 3. Type the current year as the folder name and click OK.
- 4. Select the Year folder you just created.
- 5. Again, do either of the following:
 - Click on the File menu and choose New Folder

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

• Click on the New Folder button at the bottom of the Navigation pane.

5

- 6. Type January as the folder name and click OK.
- 7. 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, select the cabinet in which you wish to create a new folder.
- 2. Do either of the following:
 - Click on the File menu and choose New Folder
 - Click on the New Folder button at the bottom of the Navigation pane.
- 3. Type Clients as the folder name and click OK.
- 4. Select the Clients folder you just created.
- 5. Again, do either of the following:
 - Click on the File menu and choose New Folder
 - Click on the New Folder button at the bottom of the Navigation pane.
- 6. Type a client name as the folder name and click OK.
- 7. 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 User Case Studies.

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

Creating a New Folder or Subfolder

- 1. In the Folder Navigation pane, select the cabinet or folder in which you wish to create a new folder.
- 2. Do either of the following:
 - Click on the File menu and choose New Folder
 - Click on the New Folder button at the bottom of the Navigation pane.

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3. Type a name for the folder.

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

Viewing Folder Content

You have four options for viewing folder content: *Item View, Icon View, Report View and Table View.* To change between the views, use the Views buttons near the top right corner of the screen (pictured below).



View	Description	Screenshot (click to view larger)
Item View	Displays the scanned image alongside the receipt or document fields.	Image: Section of the section of th
Icon View	Displays a thumbnail image for each scanned item.	<complex-block><complex-block></complex-block></complex-block>

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

Report View	Displays reports and lets you view and generate reports. You can combine items from multiple folders in a report.	<complex-block></complex-block>
Table	Displays a list of items in a table (grid) format at the bottom of the screen. Table view can be displayed in Item, Icon or Report view. Click the Table button to add the table to your current view.	Image: Internal Index: Ind

Renaming a Folder

- 1. Double-click on the folder you wish to rename. The folder name is highlighted.
- 2. Type a new name for the folder.
- 3. Tap Return.

Deleting a Folder

- 1. In the Folder Navigation pane, click on the folder you want to delete. (To select multiple folders, use the Command/Apple key.)
- 2. Do either of the following:
 - Click on the Edit menu and choose Delete Selected Folders
 - Click on the Delete Folder button at the bottom of the Navigation pane.
 - Drag the folder to the Trash icon and release it.

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

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Documents		-				
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Immigration	Crop	Right				
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There are two ways to delete a folder

 Click Trash to confirm the deletion. If you do not wish to be prompted for future deletions, click in the Do not ask me again checkbox before clicking on Trash.

l item to

Tip: Your Folder has been sent to the Trash. To permanently delete the folder from Neat, see <u>Permanently Emptying all Trash Contents</u>.

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

See also:

- <u>Retrieving a Deleted Folder</u>
- <u>Permanently Emptying all Trash Contents</u>
- 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, click on the Trash icon.
- 2. Drag the folder you wish to retrieve out of the Trash and into another folder.

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

Permanently Emptying all Trash Contents

- 1. In the Folder Navigation pane, click on the Trash icon.
- 2. From the Neat menu choose Empty Trash.

Empty Trash?
Are you sure you wish to delete the 1 folder in the Trash, and the 7 items it contains? These will be PERMANENTLY deleted and this action cannot be undone.
🗌 Do not ask me again
(Delete) Cancel

- Click Delete to permanently delete the contents in the Trash. If you do not wish to be prompted for future deletions, click in the Do not ask me again checkbox before clicking on Delete.
- **TIP:** Once you have emptied the trash, you can no longer retrieve deleted items from the trash.

Moving a Folder

Folders can be moved into other folders.

- 1. In the Folder Navigation pane, click on the folder you wish to move.
- 2. Drag the folder you wish to move into another folder and release.

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

Smart Folders

Smart Folders appear at the bottom of the Folder Navigation pane, serving as shortcuts to saved searches. To view the content of a Smart Folder, simply click on its icon. Two Smart Folders are automatically added to a cabinet when it is created: All Receipts and All Documents. You can create your own Smart Folders as well.

🔒 Inbox	
Vabinet A	
Business	
🚞 Home	
Trash	
▼ On My Mac	
📕 Address Book	
▼ Smart Folders	-
All Receipts	
All Documents	

Smart Folder Name	Description
All Receipts	Displays all receipts in the cabinet
All Documents	Displays all documents in the cabinet

Creating a Smart Folder

With Neat for Mac, you can create a Smart Folder of receipts or documents based on specific criteria such as vendor name, category or date. Smart Folders are saved searches similar to Smart Playlists in iTunes. Smart Folders are created using either the Browse function or the Search function, as outlined below.

In this section:

- Creating a Smart Folder Using the Browse Function
- Creating a Smart Folder Using the Search Function

Creating a Smart Folder Using the Browse Function

- 1. Click the Browse button in the toolbar on the top right of the screen.
- 2. The Browsing pane opens near the top of the screen.

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Inbox Cabinet New Folder 1 New Folder 2 Folderss Project A	Amount Application Created Created Date Date Folder Item Type Last Modified Modified Date			All items General R Meals/Re			
							Receipt 👻
Project B		1			1017	l.	

- Browse Pane
- 3. Clicking a field such as "Amount" or "Category" will display the number of items that fit that category in the Detail pane on the right side of the Browse pane. Clicking on an item in the Detail pane will display those items in the table at the bottom of the screen. (Note that you may use Clear to clear the search if necessary.)

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	Sales Tax				-02-		
Address Book	Sales Tax	-			200825		
▼ Smart Folders	Payment Type	Visa			1000 and 100		
All Receipts	Category	General Re			+ 315482-974		
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	Vame	6	Description			Created	Last Modified Nc
4 Receipts, 4 pages:	RadioShack Fri Apr	r 18 2008	\$55.34 Visa G	eneral Retail			Tue Mar 13
Amount \$98.98	Chicken Hut Wed J		\$9.50 Visa Ge	and the product of the second s			Tue Mar 13
Sales Tax \$2.26	Chicken Hut Thu S ABC Store Mon Jul		\$7.43 Cash G	eneral Retail card General Retail			Tue Mar 13 /U
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Browse Pane with an Item Selected in the Detail Pane

4. To create a Smart Folder based on this criteria, click the Save button.

Name:	New Folder
	(Cancel)

Naming a Smart Folder

5. Type a name for the Smart Folder and click OK.

TIP: For more information on browsing or searching for specific items, see <u>Finding Items</u>.

Organizing Your Items: Libraries, Cabinets, Folders & Subfolders

Creating a Smart Folder Using the Search FunctionNew topic

1. Type a term such as *Meals* or *Fuel* in the Search bar at the top right.

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▼ Smart Folders	Application Scar	nSnap Manager		www.myspace.com/10h1ghdar	rkhorse			
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2 Receipts, 3 pages: Amount 516.30 Sales Tax \$0.74	Au Bon Pain Tue Jul 08 20		leals/Restaurant				Tue Mar 13	
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Searching in Neat

- 2. Items matching that criteria are displayed. (Note that you may use Clear to clear the search if necessary.)
- 3. To create a Smart Folder based on this criteria, click the Save button.

Name:	New Folder
	(Cancel)

Naming a Smart Folder

- 4. Type a name for the Smart Folder and click OK.
- **TIP:** For more information on browsing or searching for specific items, see <u>Finding Items</u>.

Within a Neat 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 for Mac all items must live in a folder. That said, you can be as organized - or as disorganized - as you wish to be in Neat for Mac. If you want to place every item in a single folder, you can! Alternatively, you can choose to completely <u>master Neat for Mac file management</u> by creating folders and subfolders and consistently organizing items into those folders.

In this section:

- <u>Viewing Items</u>
- Editing Items
- Moving or Copying Items Between Folders
- Deleting & Retrieving Items
- Sorting Items in List View
- Finding Items
- Combining Multiple Items
- Splitting a Receipt
- <u>Customizing Columns</u>
- Creating a New Item without Scanning
- Working with Images
- Working with Contacts

Viewing Items

To change between the three views, use the Views buttons at the top of the screen (pictured below). Note that the Navigation pane remains on the left side of the screen for all views. Each of these views is described in the table below.



View	Description	Screenshot (click to view larger)
Item View	Displays the scanned image alongside the receipt or document fields.	Image: Second Data Image: Se
Icon View	Displays a thumbnail image for each scanned item.	<complex-block> Image: Sector Secto</complex-block>

Report View	Displays reports and lets you view and generate reports. You can combine items from multiple folders in a report.	<complex-block></complex-block>
Table	Displays a list of items in a table (grid) format at the bottom of the screen. Table view can be displayed in Item, Icon or Report view.	Image: Intermediation Image: Non-Direct Links Image: Intermediation Image: Intermediation Image: Intermediation Image: Inte

6

Editing Items

You can edit items in I tem View or in the I tem Editor. Each detail is presented in its own field. Some fields offer a dropdown menu of items.

Editing Items in Item View

- 1. In the Folder Navigation pane, navigate to the folder containing the item you want to edit.
- 2. Click the I tem View button.
- 3. Click the Table button to display the grid.

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V Business	Sales Tax \$0.55		SUB10TAL 6.88	
Project A	Payment Type Cash		TAK 1 0.55	
Project B	casii		CASH 20.00 UMM2 21.57	
	Category General Retail		CUMCE 12.57	
Home	Tax Category	• ?	CASHIER \$001-001-00092-1980 09/29/2011 12:49-R	
🔚 Biz Cards			SABOJ JAPAN 198 LUSERTV PLACE - PHILADELPHIA PA	
1 Trash	Reimbursable		TEL: 215-832-0318	
	Paid 🗌	Ĭ.		
On My Mac	Vame	Description		Created Last Modified Notes
📕 Address Book	RadioShack Fri Apr 18 2008	\$55.34 Visa General Retail	h	Fri Feb 24 2 Tue Mar 13
Smart Folders	Chicken Hut Wed Jul 16 2008	\$9.50 Visa General Retail		Fri Feb 24 2 Tue Mar 13
All Receipts	Chicken Hut Thu Sep 29 2011	\$7.43 Cash General Retail		Fri Feb 24 2 Tue Mar 13
	ABC Store Mon Jul 30 2007	\$26.71 Mastercard General Retail		Fri Feb 24 2 Tue Mar 13 /User
All Documents	Au Bon Pain Tue Jul 08 2008	\$11.30 Cash Meals/Restaurant		Fri Feb 24 2 Tue Mar 13
5 Receipts, 6 pages: Amount \$110.28				
Sales Tax \$3.00				
Idle				
+ - *	C) + + (

Item View (with the Table Showing)

- 4. In the table, click on the item you wish to edit.
- 5. Using the I tem Type dropdown list, modify the item type if necessary.
- 6. 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, simply 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.
- 7. Changes will be saved automatically.

Editing I tems in the I tem Editor

- 1. In the Folder Navigation pane, navigate to the folder containing the item you want to edit.
- 2. In either I tem View or I con View, select the item you want to edit.

		Receipt 💦			
Vendor	Au Bon Pain	Contact ✓ Receipt Document			
Date	Tue Jul 08 2008	Reset Fields Shown		NERAL RIDGE MPO ERAL RIDGE, Ohio	
Amount	\$11.30	Use Fields Shown for A Create or Modify Fields		444409793 800870440 -0098	02:35:04 PM
Sales Tax	\$0.74	create of mounty freid.	Product	Sales Receipt Sale Unit	Final
Payment Type	Cash		Description	Qty Price	Price \$3.69
Category	Meals/Restaurant		3x36 - RP CHURCHTON MD Zone-3 Prior 1 lb. 1.30 c	20733 ity Mail	\$4.90
Tax Category	[• ?	Issue PVI:		\$4.90
Reimbursable	Π		Total:		\$8.59
Paid	0		Paid bv: AMEX Account #: Approval # Transactio 23 9027825	: 511602	\$8.59 XXX2014
Notes			Order stamps 1-800-Stamp2	at USPS.com/shop of 4. Go to USPS.com/ pping labels with g formation call 1-80	or call clicknship oostage. 30-ASK-USPS.
			clerk: 02	00932647	
			Refunds f Than	final on stamps ar or guaranteed servi k you for your bus LP US SERVE YOU BET	ces only.
			Go to:	http://gx.gallup.c	com/pos
			TEL	L US ABOUT YOUR REC POSTAL EXPERIENCE	CENT
			*********	YOUR OPINION COUNTS	********
				Customer Copy	

Item Editor

- 3. At the top of the screen, click on the Editor button. (Alternatively, from the Edit menu, choose Open I te-m Editor.) The item opens in the separate I tem Editor window.
- 4. Using the Item Type dropdown list, modify the item type if necessary.
- 5. 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, simply 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.
- 6. Changes will be saved automatically.

Duplicating an Item

Individual items in a folder can be duplicated (copied) as needed.

- 1. In the Folder Navigation pane, navigate to the folder containing the item you want to duplicate.
- 2. In the Table View pane, select the item you want to duplicate
- 3. From the Edit menu, choose Duplicate Selected I tem. The item is duplicated and the duplicate is placed in the same folder as the original.



4. Click OK.

Moving an Item to Another Folder

Items in a folder can be moved to another folder as needed.

- 1. In the Folder Navigation pane, navigate to the folder containing the item you want to move.
- 2. In the Table View pane, select the item you want to move and drag it to the desired folder in the Navigation Pane. When you release the mouse, the item will be moved to the new location.

00				Neat Library
Scan	3 & W Text Normal Inbox Scan Options	Import New		C C
Cabine Cabine Cabine Clier	et ABC	C Store 1 Jul 30 2007	Au Bon Pain Tue Jul 08 2008 \$11.30 \$0.74 Cash \$ Receipt T	
Pr Hom	Cards		RadioShack Fri Apr 18 2008 \$55.34 Visa	
	ress Book			

In this image, a receipt from the Business Folder is being moved to the ABC Folder.

Deleting an Item

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

- 1. In the Folder Navigation pane, navigate to and open the folder containing the item you want to delete.
- 2. At the top of the screen, click the Delete button. (Alternatively, under the Edit Menu, choose Delete I tem.)

	📒 Neat Libr	ary		
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New Delete Edito	or Email Sync	View	Browse Table	Se
	ABC Store Mon Jul 30 2007 \$26.71 \$1.71			Au Bon Pair Tue Jul 08 2 \$11.30 \$0.74
- CONSIDER-	Mastercard Rece	Move to Trash? Are you sure you wan the Trash?		litem to

- 3. When prompted, confirm the deletion by clicking Trash.
- Tip: Your item has been sent to the Trash. To empty the Trash, see Permanently Emptying All Trash Contents.

Also in this section:

- <u>Retrieving an Item</u>
- Permanently Emptying All Trash Contents

6

Retrieving an Item

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

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ABC					\$1.71 Mastercard			
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v Business			-					
Project A								
Project B								
Home								
Biz Cards								
Trash								
▼ On My Mac								
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▼ Smart Folders								
All Receipts	U							
All Documents	* *							
1 Receipt, 1 page: Amount \$26.71 Sales Tax \$1.71								
Idle								
+ - *								

- 1. In the Folder Navigation pane, click on the Trash icon.
- 2. Select the item you want to retrieve and drag it to the desired folder in the Navigation pane. When you release the mouse, the item will be moved from the Trash to the new location.

Permanently Emptying All Trash Contents

- 1. In the Folder Navigation pane, click on the Trash icon.
- 2. From the Neat menu, choose Empty Trash.



- 3. Click Delete 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.

Delete

Cancel

Sorting Items in Table View

In Table 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.

Finding Items

Neat for Mac offers two options for finding items in your cabinets: Search and Browse. The Search feature will return information for specific searches across all folders in a cabinet. The Browse feature enables you to filter that search by your desired criteria.

TIPS: Each library is its own separate entity; that is, you cannot search across multiple libraries to find information. You may, however, search across all folders within a single library. You could go to the Business Library to search across all folders within it, and the search would not return any information from the Personal Library. Likewise, you could go to your Personal Library and search across all folders within it, but the search would not return any information from the Business Library.

Neat is fully integrated with the Apple Spotlight search utility. Spotlight can be used for general searches across all Neat libraries.

Using Search

The Search feature is used to search for specific information across and within any folder(s). The Search function can find all text on any item page, not just field values. You cannot search across libraries; in other words, you may only search within one cabinet at a time. (Note that, while the Search feature will return information for specific searches across all folders in a library, it is the Browse feature that will enable you to filter that search by your desired criteria.



Search Field (With Options Displayed)

- 1. Type one or more search terms in the Search field near the top right corner of the Neat for Mac window.
- 2. On the Search Bar (pictured above), choose where you want to search: All Folders, the current folder or Trash.
- 3. To filter your search, use the browse feature.
- **TIP:** To save the results of your search for future reference, click the Save button. Your saved search displays under the <u>Smart Folders</u> heading on the left side of the screen.

Using Browse

The Browse feature aggregates and displays information about your folder as a whole and for all fields, including Amount, Date, and Vendor. For example, if you wanted to know how many receipts you have in the folder "Receipts 2008" that total between \$2.00 to \$4.99, you could browse the folder for that information. If you have 1 receipt in your folder with a total between \$2.00 to \$4.99, you would then see "(1)" next to that category: Amount: \$2.00 to \$4.99 (1)

- 1. Click the Browse button in the toolbar at the top right of the screen.
 - The Browsing pane will open as the topmost pane of your current view.
 - To deactivate the Browsing pane, just click the Browse button again.
 - If a Browse or Search (a browse is really a search behind the scenes) is currently active, a search bar displays immediately below the browse window.

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can Scan Options	Import New	Delete Edit	or Email Sync	View	Browse	Table	Search
Cabinet Cabinet New Folder 1 New Folder 2 Cabiness Project A	Amount Application Category Created Date Folder Item Type Last Modified Modified Date			All litems General R Meals/Re			
							Receipt
Project B					-		

Browse Pane

2. Clicking a field such as "Amount" or "Category" will display the number of items that fit that category in the Detail pane on the right side of the Browse pane.

000			🏮 Neat Library					0
B & W Text Normal Inbox	- 5					🗐 Q.	Type here to sear	ch
Scan Scan Options	Import New E	elete Editor Ema	ail Sync	View	Browse	Table	Search	
Cabinet V Cabinet New Folder 1 New Folder 2 V Business Project A	Amount Application Category Created Date Folder Item Type Last Modified Modified Date Search: All Folde	rs "Business"			ns (5) I Retail (4) Restaurant (1)		× Clear	Save
Project B								Receipt
i Home Biz Cards	Vendor Date	RadioShack Fri Apr 18 2008	3					
▼ On My Mac	Amount	\$55.34		U	Warmanan.			
📗 Address Book	Sales Tax				44- 2002			
V Smart Folders	Payment Type	Visa			1000 transation distance			
MI Receipts	Category	General Retail	•					
MI Documents	V Name		Description	¥ 🕴			Created	Last Modified Nc
	RadioShack Fri Apr	18 2008	\$55.34 Visa General Reta	3			Fri Feb 24 2	
4 Receipts, 4 pages:	Chicken Hut Wed J		\$9.50 Visa General Retail				Fri Feb 24 2	CONTRACTOR OF A
Amount \$98.98 Sales Tax \$2.26	Chicken Hut Thu Se	p 29 2011	\$7.43 Cash General Reta	1			Fri Feb 24 2	Tue Mar 13
Sales fax 52.20	ABC Store Mon Jul		\$26.71 Mastercard Gener	al Retail			Fri Feb 24 2	Tue Mar 13 /U
Idle				A.				
+ - *	C			*****	*****) + + /

Browse Pane with an Item Selected in the Detail Pane

- 3. Clicking on an item in the Detail pane will display those items in the table at the bottom of the screen. (Note that you may use Clear to clear the search if necessary.)
- **TIP:** To save the results of your search for future reference, click the Save button. Your saved search displays under the <u>Smart Folders</u> heading on the left side of the screen.

Combining Multiple Items

You can combine multiple items into a single item.

- 1. In the Folder Navigation pane, navigate to the folder containing the items you want to combine.
- 2. Select all of the items you wish to combine. (Hold down the Ctrl key to select multiple images.)
- 3. From the Edit menu, choose Combine Selected Items. A separate window opens, displaying thumbnails of all of the selected items.

	the primary item, and pages from h as Amount or Sales ⊤ax may be		in order from left to right. Notes for all it x below.	ems <mark>will b</mark> e
Vendor Chicken Hut Bate Thu Sep 29 2011 Amount \$7.43 Sales Tax \$0.55 Payment Cash Category General Retail Tax Cat Reimbar No Paid No	EL 1998 WILL & HORSE BUTHER 4.07 WILL & HORSE BUTHER 1.07 WILL & HORSE	Ministry Ministry and Ministry Min		
Application ScanSnap Manager #	Inter des Hauters (Verte Index) Inter des Hauters (Verte Index) (Vert Lander Aussi, Annuellander en No., Inter des Hauters	in the second second	1050 + 1000.01	

Combine Multiple Items

- 4. Drag the thumbnails into the order you wish to combine them. The leftmost item will be used as the primary item. Pages from all other items will be appended in order from left to right.
 - If you are combining receipts, click in the Use combined total for currency fields to add all of the receipt totals. (Otherwise, the total for the primary receipt is used.)
 - Notes for all items will be combined.
- 5. Click Combine.

Splitting a Receipt

A receipt may contain multiple items that need to be expensed to more than one client or project.

- 1. In the Folder Navigation pane, navigate to the folder containing the receipt you want to split.
- 2. Select the receipt you want to split.
- 3. Duplicate the receipt.
- 4. Adjust the totals in each of the receipts.

Customizing Default Fields

After an item has been scanned, you'll see its image on the right side of the screen and fields populated with the item's information on the left side of your screen. All of the fields on the left are able to be customized by using the plus/ minus signs. You can:

- Add fields
- Delete fields
- Drag and drop fields to rearrange them

• Set default fields for each item type

Hover your mouse over the field name to bring up the plus/ minus signs next to any field (pictured below).

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Scan Scan Options	Import New Delete Editor E	imail Sync	View	Browse Table
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V Cabinet	Vendor RadioShack	(Actival 5-304 8-31 Denvil 5 Nicestro 9-305-00	
▼ Clients	Date		LINE BOARD	
ABC				
TYZ XYZ	Amount \$55.34		2 m B	1
V Business	Sales Tax		ante commendati e la con el la con el come ante desta	
Project A	O O Payment Type Visa		The prove of the second	
🚞 Project B	Category General Retai		granner. Nacional, velocita per los crigital activo escrito en inspirar los cristados, activo de marco en inspirar o con tempo activo de marco en	
🚞 Home	Category General Retai			
🚞 Biz Cards	Tax Category	• ?	Annual An	
Trash	Reimbursable		Account	
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📕 Address Book	Application ScanSnap Ma	Mage ✓ Contact Fields	Received	
Smart Folders	<u> </u>	Document Fields	GST/HST	
Clear value?	Notes	Receipt Fields	Personal	
	requires clearing the value set for	System-defined Fields	Project PST/QST	
this field.	Chicken Hut Thu See 29 2011		Tax Category	V Description
Do not ask m		Reset Fields Shown	Transaction	
Sales Tax \$0.55	(PadioBrack	Use Fields Shown for A	Fri Feb 24	2 Wed Apr 04
Clear value	and remove Cancel			
Idle				
+ - •	C) 4 1 /

Also in this section:

- Adding a Field
- Deleting a Field
- Rearranging Fields
- Setting Default Fields

Adding a Field

- 1. Point to the field below where you wish to add the new field and click on the Plus Sign icon.
- 2. Choose an existing field from any of the submenus (Contact Fields, Document Fields, Receipt Fields, System-defined Fields or User-designed Fields) or choose New Field to create a new user-defined field.

Field Label	[Field labels are displayed in column headers and beside the fields in the Item View and printed reports. They can be an text, and are editable after creation in the Modify Fields pa
Field Name		Field names are used as internal, unchanging identifiers. The must be unique and contain only letters and numbers. Space and punctuation characters are not permitted.
Type	Text	Field name and type may not be changed after creation.

3. If you are creating a new user-defined field, provide a Field Label, a Field Name and a Field Type and then click Create Field.



Deleting a Field

1. Point to the field you wish to move and click on the Minus Sign icon. If the field contains a value, you will be prompted as to whether or not you wish to remove that value. If the field does not contain a value, it will be removed immediately.



2. Click Clear value and remove to remove the value and the field.

Rearranging Fields

- 1. Point to and click on the field you wish to move.
- 2. Drag the field to its new location. A black horizontal line (pictured below) indicates where the item will be moved to.
- 3. Release the mouse.

	Vendor	RadioShack
	Date	
	Amount	\$55.34
K	Sales Tax	
	Payment Type	Visa
	Category	General Retail
0	Tax Category	• ?
	Reimbursable	
	Paid	
	Application	ScanSnap Manager
	Notes	

Drag a field up or down to move it (the line shows you where it will be moved to)

Setting Default Fields

You can set the view as the default view for all future items (Contacts, Documents or Receipts) in that item type.



- 1. View an item.
- 2. Add, delete and arrange fields as desired.
- 3. Click on the Plus Sign icon next to any of the fields.
- 4. Choose Use Fields Shown for all [Item Type].
- 5. Choose one of the following:
 - Use for this library only: to apply the field changes to all items of that type in the current library only. (Note that previously customized items of the that type in that cabinet will not be modified.)
 - Use for this library and others: to apply the field changes to all items of that type in the current cabinet as well as any other libraries that have not been previously customized.



Creating a New Item Without Scanning or Importing

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. Click New.

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-	B & W Text	Normal	Inbox	- 🇯			
Scan	Scar	Option	s	Im	port	Contact	it
	nbox			-		Receipt	N
	Cabinet					Documer M	nt 🔨 🗌

- 2. Choose the type of item you are creating:
 - Contact

New

- Receipt
- Document

The item is created.

3. Modify each of the fields as needed to provide details for the new item.

00		📒 Neat Library		\bigcirc
B & W Text Normal Inbox	- 🗐 🔂 🐼	Z D G I		Q- Type here to search
Scan Scan Options	Import New Delete	e Editor Email Sync	View Browse Table	Search
📮 Inbox				Receipt 👻
 Cabinet Business Home Biz Cards New Folder Trash On My Mac Address Book Smart Folders All Receipts All Documents 	Vendor Date Amount Sales Tax Payment Type Category Tax Category Reimbursable Paid Notes			ţ
	▼ Name	Description		Created Date Modified Date Notes 🔶
5 Receipts, 6 pages:	neot No Name Microsoft Word - Documen		k	Wed Mar 14 Wed Mar 14
Amount \$0.00 Sales Tax \$0	Microsoft Word - Documen			Wed Mar 14 Wed Mar 14
2011 TA CONTRACTOR CLASS	Microsoft Word - Documen			Wed Mar 14 Wed Mar 14
	Microsoft Word - Documen			Wed Mar 14 Wed Mar 14
	Microsoft Word - Documen			Wed Mar 14 Wed Mar 14
Idle	About Stacks	Wed Jun 17 2009		Wed Mar 14 Wed Mar 14
	Andrew Schaps	Senior Engineer Neatco	(215) 382-3300	Wed Mar 14 Wed Mar 14
+ - •	(

New Receipt Created

Working with Images

There are many ways to work with a scanned image in Neat for Mac:

- Zooming an image
- Rotating an image
- Cropping an image
- Deleting an image
- Printing an image

Viewing an Image in the Item Editor

- 1. In the Folder Navigation pane, navigate to the folder containing the item you want to edit.
- 2. In either Item View or Icon View, select the item you want to edit.
- 3. Click the Editor button at the top of the screen. (Alternatively, choose Open I tem Editor from the Edit menu.

	12. 12.	Receipt Contact			
Vendor	Au Bon Pain	✓ Receipt Document			
Date	Tue Jul 08 2008	Reset Fields Shown		NERAL RIDGE MPO ERAL RIDGE, Ohio	
Amount	\$11.30	Use Fields Shown for A Create or Modify Fields		444409793 800870440 -0098 (800)275-8777 0	2:35:04 PM
Sales Tax	\$0.74		Product	Sales Receipt Sale Unit Oty Price	Final
Payment Type	Cash		Mail Tube 3x36 - RP	1 \$3.69	\$3.69
Category	Meals/Restaurant		CHURCHTON MD Zone-3 Prior 1 1b. 1.30 c	ity Mail	\$4.90
Tax Category	(• ?	Issue PVI:		\$4.90
Reimbursable			Total: Paid by:		\$8.59
Paid			AMEX Account #: Approval # Transactio	: 511602	\$8.59 XX2014
Notes			Order stamps 1-800-Stamp2 to print shi For other in	at USPS.com/shop or 4. Go to USPS.com/c pping labels with po formation call 1-800	call Stage -ASK-USPS.
			2111#: 10002 Clerk: 02	00932647	
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			87.000	http://gx.gallup.co	
			TEL	L US ABOUT YOUR RECE POSTAL EXPERIENCE	NT
			*********	YOUR OPINION COUNTS	*******
				Customer Copy	

Item Editor

Also in this section:

- Zooming an Image
- Rotating an Image
- <u>Cropping an Image</u>
- Deleting an Image
- Printing an Image

Zooming an Image

- 1. View the image you want to work with in the Item Editor.
- 2. Use the zoom controls at the bottom of the window to zoom in (+) or zoom out () on the image. Alternatively, use the Zoom In or Zoom Out commands on the View menu.

	Receipt 👻		
Vendor	Chicken Hut		
Date	Thu Sep 29 2011		
Amount	\$7.43		
Sales Tax	\$0.55		
Payment Type	Cash		
Category	General Retail	BILL	1995(
Tax Category		SPECIAL A CHICKEN IERIYAKI BOTTLE DRINK	5.09
	• ?		
Reimbursable		SUBTOTAL TAX_1	6.88 0.55
Paid		SUBTOTAL	7.43
Application	ScanSnap Manage	CASH	20.00
Notes		CASHIER #001-001-000092-1980 09/29/ SARKU JAPAN 198 LIBERTY PLACE - PHILA TEL: 215-832-031	DELPHIA PA
		Page	1 of 1

Zoom

Rotating an Image

- 1. View the image you want to work with in the Item Editor.
- 2. Under the Edit menu, choose Rotate Left or Rotate Right.

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	Redo		企業	Ζ
	Cut		æ	Х
	Copy		ж	С
	Paste		æ	V
	Paste an	d Match St	tyle	
	Select Al	1	H.	A
	Delete Se	elected Ite	ms ೫	\otimes
	Delete Se	elected Fo	lders	
	Open Ite	m Editor	imount.	
	Duplicat	e Selected	ltem	
	Combine	Selected	ltems	
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	Item Typ	e		•
		r Modify F	ields	
	Find			•
	Spelling			۲
	Constal C	haracters	7- 00	т

Cropping an Image

- 1. Double-click on the image you want to crop to open it in the Item Editor.
- 2. Click the Crop icon (center-top of the window).
- 3. Use the crop controls to modify the image.

Deleting an Image

- 1. Double-click on the image you want to delete to open it in the Item Editor.
- 2. Click the Delete Page icon (top-right corner of the window). (Note that this delete icon will only be available if you are looking at an item with a single image.

Printing an Image

- 1. View the image you want to print in the Item Editor.
- 2. Under the File menu, choose Print.

3. In the Print dialog box, choose a printer and a Preset as needed.

Brother MFC-8890DW	1 🗘	
Standard	\$	
Preview	Cancel	Print
	Brother MFC-8890DW Standard	Standard 🛟

4. Click Preview to preview what the item will look like when printed. Use the scrollbar or the Previous and Next buttons to move from page to page in the preview window. Use the Zoom controls to zoom in (+) or out (-).

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Previous Next Zoom	Move Text Select A	nnotate Sidebar	Search	
	BILL	19950		Î
	SPECIAL A CHICKEN IERIYAKI	5.09		
	BOTTLE DRINK	1.79		
	SUBTOTAL	6.88		
	TAX 1	0.55		
	SUBTOTAL	7.43		
	CHANGE	20.00		U
	CASHIER #001-001-000092-1980 09/29	9/2011 12:49-R		
	SARKU JAPAN 198 LIBERTY PLACE - PHIL TEL: 215-832-03	LADELPHIA PA		
				¥ *
	. <u>I</u>		Cancel)	Print
	Previei	N		115

- 5. Click Print to print the item.
- **TIP:** To print to a PDF file, click the PDF button in the Print dialog box, and choose Save as PDF.

Working with the Address Book

Neat for Mac offers you complete control over your contacts, including the ability to scan business cards and sync contacts with the Apple Address Book and/or your iPhone. For information on scanning a business card, see <u>Scanning Basics</u>.

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B & W Text Normal Inbox	- 5	3 7 🔼	0	88 [Q- Rex		8
Scan Scan Options	Import New D	elete Editor Eman	Sunc	View		wse Table		Search	
🚨 Inbox	Search: All Folde	rs ("Biz Cards") T	rash					X Clear	Save
V Cabinet									lontact 🚽
The clients	First	Karin							
ABC	Middle								AND A CONTRACT
TYZ XYZ	Last	Rex	1						
v Business				-					1
Project A	Job Title	Professional Writer		CO	nical writing ourse develo rence guide	pment tra		ctions	
Project B	Company	Geeky Girl, LLC			ser guides	handbooks	document	tation	
Home	Work Phone	(215) 393-7640			KARI	NAL WRITER		8. A	
Biz Cards	Work Email	rex@karInrex.com			GEEKY	IRL, LLC			
📋 Trash	Street Address				rex@karl 215-39	nrex.com	devel	oper	
▼ On My Mac					www.geekyg	donline.com	0ec	ak!	
📕 Address Book	City								
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all Receipts	Zip Code		•	4					
All Documents		Deer		× v				Created	1 14 156 1
1 Contact, 1 page:	Vame Karin Rex		ription essional Writer Geeky (airl, LLC (2	215) 393-7640				Last Modified 🔶 Thu Apr 05
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6

In this section:

- Emailing a Contact
- <u>Searching for a Contact</u>
- Syncing Contacts
- Creating a New Contact Manually

Emailing a Contact

- 1. In the Folder Navigation pane, navigate to the folder containing the contact you want to email.
- 2. Click Table.
- 3. Select the contact you want to email.
- 4. Click the Email button. A new, blank email opens.



5. Address and type the email using the usual methods.

Searching for a Contact

The Search field (top right corner) lets you quickly find a specific contact.

00		📒 Neat Library	1			0
B & W Text Normal Inbox				D 🛡 🗖 🖉	Q- Rex	Ø
Scan Scan Options	Import New D	Pelete Editor Eman	View	Browse Table	Search	
Inbox	Search: All Folde	rs "Biz Cards" Trash			× Clear	Save
	Concession of the local division of the loca				0	Contact 🗸
V Cabinet	142.5					
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ABC	Middle					antin an
XYZ	Last	Rex				1
V Business	Job Title	Professional Writer		and a second		
Project A	-		cou	se development trainin	alearning modules ing instructions articles tutorials	
Project B	Company	Geeky Girl, LLC		ar guides handbooks	documentation	
Home	Work Phone	(215) 393-7640		KARIN REX	and a state	
🛅 Biz Cards	Work Email	rex@karInrex.com		PROFESSIONAL WRITER GEEKY GIRL, LLC		
Trash		restoration		rex@karInrex.com	writer	
	Street Address			215-393-7640 www.geekygirionline.com	trainer geek!	
▼ On My Mac					_	
Address Book	City					
▼ Smart Folders	State					
🗃 All Receipts	Zip Code					
all Documents						
1 Contact, 1 page:	Vame	Description Professional Writer	Geeky Girl LLC (21	5) 393-7640	Created Tue Mar 13	Last Modified . Thu Apr 05
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Idle						
+ - 🌣	(1	24 1

- 1. Type what you are looking for in the Search field.
- 2. In the Search bar, do one of the following:
 - To search for that contact within all of the folders in the current cabinet, click All Folders.
 - To search only in the currently selected folder, click the name of the folder.
 - To search the trash, click Trash.
- 3. If multiple contacts are found, use the scrollbar at the bottom of the module to scroll through the search results and select the contact.

Syncing Contacts

The Apple Address Book displays alongside your folders in the Navigation pane on the left side of the screen. Simply drag and drop to copy!

Creating a New Contact Manually

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. Click New.

New								
(NeatWorks	File	Edit	Scan	View	Format	Window	Help
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-	B & W Text	Normal	Inbox	- (- 😡		-
Scan	Scan	Option	s	Im	port	Contact	itor En	nail S
	nbox		0				A	
V	Cabinet					Documen	t	

- 2. Choose Contact. The item is created.
- 3. Modify each of the fields as needed to provide details for the new item.

000		鼶 Neat Library	\bigcirc
B & W Text Normal Inbox	¬ 🗐 📮 🔂 🕅 1		Type here to search
Scan Scan Options	Import New Delete Editor E	mail Sync View Browse Table	Search
🚨 Inbox			Contact 👻
Cabinet Clients ABC XYZ Business Project A Project B Home Biz Cards Trash On My Mac Address Book Smart Folders All Receipts All Receipts All Documents 4 Contacts, 5 pages:	First Middle Last Job Title Company Company Work Phone Work Email Street Address City State Zip Code Country		ţ
	🔻 Name	Description	Created Last Modified Notes
Idle	No Name	Senior Engineer Neatco (215) 382-3300	Thu Mar 15 Thu Mar 15 Tue Mar 13 Tue Mar 13
iuie	Karin Rex	Senior Engineer Neatco (215) 382-3300 Professional Writer Course development training (215) 393-7640	Tue Mar 13 Tue Mar 13
+ - 🌣 💷		Protessional Writer Course development training (213) 335-7040	

New Contact Created

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

In this section:

• Exporting

<u>Reporting</u>

• Printing

Exporting

The Export menu lets you export to the following formats:

- PDF
- Image
- CSV (Comma Separated Values)
- Spreadsheet
- Quicken
- Tax Data

Also in this section:

- Exporting to an Image Format
- Exporting to PDF Format
- Exporting to Comma Separated Values (CSV)
- Exporting to Excel
- Exporting to Quicken
- Exporting Tax Data

Exporting to PDF Format

- 1. Navigate to and select the folder and/or items you want to export.
- 2. From the File menu, choose Export.

000	Export
PDF Image CS	
O Selected i	in currently selected folders tems only de items between dates:
07/08/20	008 and 10/01/2008
PDF Options	
	Image Quality: Highest Typical file size for single item export : Highest - 1.5 MB High - 1.2 MB Medium - 500 kB Low - 100 kB Combine all items into single PDF
5 items totalling	\$10.94 will be exported. Cancel Export

Export to PDF

- 3. In the Export dialog box, click the PDF button.
- 4. Do one of the following:
 - To export only the items you currently have selected, click in the Selected items only radio button.
 - To export all of the items in the current folder, click in the All items in currently selected folder radio button.
- 5. To restrict the export to specific dates, click in the Restrict dates from checkbox and indicate the dates in the fields provided.
- 6. In the PDF Options area, from the Quality dropdown menu, choose the desired image quality setting.
- 7. In the PDF Options area, if you want all items combined into a single PDF, click in the Combine all items into single PDF checkbox.
- 8. Click Export.
- 9. Choose a folder location for the exported file and click Open. The file is exported to that folder.

Exporting to an Image Format

You can export receipts to a JPEG, PNG or TIFF image file format.

- 1. Navigate to and select the folder and/or items you want to export.
- 2. From the File menu, choose Export.

0 0	Export
PDF Image	CSV Spreadsheet Quicken Tax Data
O Select	ms in currently selected folders ed items only nclude items between dates:
	3/2008 and 10/01/2008
Export: Quality:	first page only File Type: JPEG + Medium (150 pixels/inch) +
5 items tota	Iling \$10.94 will be exported. Cancel Export

Export to an Image Format

- 3. In the Export dialog box, click the I mage button.
- 4. Do one of the following:
 - To export only the items you currently have selected, click in the Selected items only radio button.
 - To export all of the items in the current folder, click in the All items in currently selected folder radio button.
- 5. To restrict the export to specific dates, click in the Restrict dates from checkbox and indicate the dates in the fields provided.
- 6. In the Image Options area, from the Export dropdown menu, choose whether you want just the first page or all pages exported.
- 7. In the Image Options area, from the File Type dropdown menu, choose the desired image file type (JPEG, PNG or TIFF).

- 8. In the Image Options area, choose the desired image quality setting from the Image Quality dropdown list.
- 9. Click Export.
- 10. Choose a folder location for the exported file and click Open. The file is exported to that folder.

Exporting to Comma Separated Values (CSV)

Exporting to CSV is a good way to get your data into an easy to use format that can be imported into most other spreadsheet and database applications. Images will not be included in the export. To control which fields are exported and in what order, add fields and sort or reorder the columns shown in Table view.

- 1. Navigate to and select the folder and/or items you want to export.
- 2. From the File menu, choose Export.

e O C Export
PDF Image CSV Spreadsheet Quicken Tax Data
Export All items in currently selected folders Selected items only
Only include items between dates:
07/08/2008 and 10/01/2008
CSV Options
Create a comma seperated value (CSV) text document that can be imported into most other spreadsheet and database-driven applications. This will not include images. Add fields and sort or reorder the columns shown in the table to control which fields are exported, and in what order.
Text Encoding: UTF-8 Encoding
5 items totalling \$10.94 will be exported. Cancel Export

Export to Comma Separated Values (CSV)

- 3. In the Export dialog box, click the CSV button.
- 4. Do one of the following:
 - To export only the items you currently have selected, click in the Selected items only radio button.

- To export all of the items in the current folder, click in the All items in currently selected folder radio button.
- 5. To restrict the export to specific dates, click in the Restrict dates from checkbox and indicate the dates in the fields provided.
- 6. In the CSV Options area, from the Text Encoding dropdown menu, choose the desired encoding process (UTF-8 Encoding, ASCII Encoding or Western (Mac OS Roman Encoding).
- 7. Click Export.
- 8. Type a name for the exported file in the Save As field.
- 9. Choose a folder location for the exported file from the Where dropdown menu.
- 10. Click Save.

Exporting to a Spreadsheet

- 1. Navigate to and select the folder and/or items you want to export.
- 2. From the File menu, choose Export.

00	O Export
PDF	
PDF	Image CSV Spreadsheet Quicken Tax Data
Exp	ort
•	All items in currently selected folders
C) Selected items only
	Only include items between dates:
	07/08/2008 and 10/01/2008
Spr	readsheet Options
	 Workbook with table and first page images Workbook with table and all page images Image Size: 75%
5 ite	ems totalling \$10.94 will be exported. Cancel Export

Export to Spreadsheet

- 3. In the Export dialog box, click the Spreadsheet button.
- 4. Do one of the following:
 - To export only the items you currently have selected, click in the Selected items only radio button.
 - To export all of the items in the current folder, click in the All items in currently selected folder radio button.
- 5. To restrict the export to specific dates, click in the Restrict dates from checkbox and indicate the dates in the fields provided.
- 6. In the Spreadsheet Options area, choose one of the following options:
 - Workbook with table only, no images
 - Workbook with table and first page images

- Workbook with table and all page images
- 7. If you are exporting images, choose a size from the Image Size dropdown.
- 8. Click Export.
- 9. Type a name for the exported file in the Save As field.
- 10. Choose a folder location for the exported file from the Where dropdown menu.
- 11. Click Save.

Exporting to Quicken

- 1. Navigate to and select the folder and/or items you want to export.
- 2. From the File menu, choose Export.

0	0			Expo	ort			-
PDF	Image	CSV CSV	XLS Spreads	neet	Quicken	Tax Data	a	
0	All iter Selecte	ed item	s only		ected fo en date:			
	07/08	/2008			01/200			
Qu		Accoun ales ta	Mar			ccounts	_	?
			.94 will				Expo	

Export to Quicken

- 3. In the Export dialog box, click the Quicken button.
- 4. Do one of the following:
 - To export only the items you currently have selected, click in the Selected items only radio button.
 - To export all of the items in the current folder, click in the All items in currently selected folder radio button.

- 5. To restrict the export to specific dates, click in the Restrict dates from checkbox and indicate the dates in the fields provided.
- 6. In the QIF Options area, select a Quicken account name from the Quick Account dropdown list. If you do not have any accounts listed in the dropdown yet, click Manage Quicken Accounts and create a new account by doing the following:
 - Click the plus sign button (+). A new account is added.
 - Double click on the name of the new account to select it and type a better name for the account
 - In the Type column, choose what type of account it is (Bank, Cash or CCard).
 - Click Save Changes.
- **TIP:** You can import an existing Quicken Account by clicking on the Import button, navigating to and selecting the QIF file and clicking Open.
- 7. By default, sales tax is not split. Click in the Split sales tax checkbox if you want sales tax split.
- 8. By default, if items were already exported to Quicken, they will be skipped. If you don't want these items skipped, uncheck the Skip items that were already exported to Quicken checkbox.
- 9. Click Export.
- 10. Type a name for the exported file in the Save As field.
- 11. Choose a folder location for the exported file from the Where dropdown menu.
- 12. Click Save.

Also in this section:

• Importing an Exported QIF into Quicken Importing an Exported QIF into Quicken

- 1. Launch Quicken.
- 2. From the File menu, choose Import > QIF.
- 3. Navigate to and select the exported file.
- 4. Choose the Quicken account that you want the exported file imported into. When the import is complete, the transaction will be in the Transactions to be Approved section of the Quicken Register.

Exporting Tax Data

- 1. Navigate to and select the folder and/or items you want to export.
- 2. From the File menu, choose Export.

\varTheta 🔿 🔿 Export	
PDF Image CSV Spreadsheet Quicken	Tax Data
Export All items in currently selected fol Selected items only	ders
🗌 Only include items between dates	:
07/08/2008 and 10/01/2008	
TXF Options	
Create a Tax Exchange Format (TXF imported into TurboTax or other ta only export receipt items with supp for the appropriate tax year as dete and Amount information will be inc	x applications. NeatWorks will orted values for Tax Category rmined by the Date. Vendor luded.
Only include item	s from:
Year:	All
Quarter:	All 🗘
5 items totalling \$10.94 will be exported.	
	Cancel Export

Export Tax Data

- 3. In the Export dialog box, click the Spreadsheet button.
- 4. Do one of the following:
 - To export only the items you currently have selected, click in the Selected items only radio button.
 - To export all of the items in the current folder, click in the All items in currently selected folder radio button.
- 5. To restrict the export to specific dates, click in the Restrict dates from checkbox and indicate the dates in the fields provided.
- 6. In the TXF Options area, choose the Year and Quarter parameters for the data you wish to export.
- 7. If you are exporting images, choose a size from the Image Size dropdown.
- 8. Click Export.
- 9. Type a name for the exported file in the Save As field.

- 7
- 10. Choose a folder location for the exported file from the Where dropdown menu.
- 11. Click Save.

Reporting

Neat for Mac's Report View lets you view and create reports. You can combine items from multiple folders in any given report.

B & W Text Normal Inbox Scan Scan Options			Browse Table	here to search Search
Cabinet	Report Template: Expense Report Restrict to dates from 07/30/2007 to 09/2	Report Options 29/2011 Only Include Selecte	•	
XYZ Business Project A	# Date	Vendor	Category	Amount
Project B Home Biz Cards	1 Thu Sap 29 2011 Chicken Hut 2 Wed Jul 19 2008 Chicken Hut 3 Tao Jul 02 2008 Au Ban Pain 4 Fin Agri 19 2008 RadioShuck 5 Man Jul 30 2007 ABC Store		Coneral Retail Coneral Retail Media/Restaurant Coneral Retail Coneral Retail	57.43 39.50 811.30 865.34 828.71
On My Mac Address Book Smart Folders All Receipts All Documents	Grand Total Standard Reports ✓ Expense Report Phone List			\$110.20
5 Receipts, 6 pages: Amount \$110.28 Sales Tax \$3.00	Tax Report			
Idle				

Report View

Also in this section:

- Report View
- Creating an Expense Report
- Printing a Report

Report View

Report View displays reports and lets you view and generate reports.

- You can combine items from multiple folders in a report.
- You can restrict a report to specific dates by clicking in the Restrict dates from checkbox and indicating the dates in the fields provided.

ACCESSING REPORT VIEW

You can access Report View in one of two ways:

- Choose Report View from the View menu.
- Click on the Report View button (pictured below) at the top of the screen.





00	📒 Neat	Library		
B & W Text Normal Inbox			🕎 🍙 🔍 Type	here to search
Scan Scan Options	Import New Delete Editor Email Sync	View	Browse Table	Search
🚨 Inbox	Report Template: Expense Report	Report Options	7	
V 🚍 Cabinet			_₩	
The clients	Restrict to dates from 07/30/2007 to 09/29	/2011 Only Include Select	ed Items	-0
ABC				1
🚞 XYZ				
v 💼 Business				U
Project A	# Date	Vendor	Category	Amount
Project B	1 Thu Sep 29 2011 Chicken Hut		General Retail	\$7.43
🚞 Home	2 Wed Jul 16 2008 Chicken Hut		General Retail	\$9.50
Biz Cards	3 Tue Jul 08 2008 Au Bon Pain		Meals/Restaurant	\$11.30
	4 Fri Apr 18 2008 RadioShack		General Retail	\$55.34
📋 Trash	5 Man Jul 30 2007 ABC Store		General Retail	\$26.71
♥ On My Mac	Grand Total			
📕 Address Book				\$110.28
▼ Smart Folders				
	Standard Reports			
🗃 All Receipts	✓ Expense Report			
📓 All Documents 🛛 🔻	Phone List			
5 Receipts, 6 pages: Amount \$110.28 Sales Tax \$3.00	Tax Report			
Idle				
+ - *))+ + ,

Report View

Summary table and items	Group summary	table by field:
O Summary table only	None	•
O Items only		▲ ✓ None
 Use Full Size Images At least 2 + images per page Large item images will be shrunk to fit per printed page, reducing the number Show field values with items Display data such as vendor and date n Print all pages of items Show Page Numbers 	at least this many of printed pages	City Company Company Country Created First Last Last Modified Main Phone State Street Address Tax Category Description Work Email Work Phone Zip Code

Report Options (with Group dropdown menu)

Creating an Expense 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 the Report button.
- 2. From the Report Template dropdown menu, choose Expense Report.
- 3. To restrict the report to specific dates, click in the Restrict dates from checkbox and indicate the dates in the fields provided.

Report Template:	Expense Report			Report Options
Restrict to dates fro	om 10/10/2011	to	10/10/2012	Only Include Selected Items

- 4. To include only items that are currently selected, click in the Only include Selected I tems checkbox.
- 5. Click Report Options and choose the desired settings for your report.

- You can also choose whether you want only a summary table of field values, only items, or both. If you choose to include a table, the columns of the expense report table will be the same as the columns displayed in the table in the main Cabinet window. To the right of these settings, you can choose to group a summary table by a specific field if desired.
- You can set the number of images per page and whether to include the field values associated with each item.
- You can choose to display page numbers by clicking in the Show Page Numbers checkbox.

Summary table and items	Group summary table by field:	
O Summary table only	None	
O Items only	✓ None	
 Use Full Size Images At least 2 + images per page Large item images will be shrunk to fit per printed page, reducing the number Show field values with items Display data such as vendor and date n Print all pages of items Show Page Numbers 	L-8) Printed pages City Company Country Created First Last Last Last Modified Main Phone	tior

Report Options (with Group dropdown menu)

6. To include a cover page, click on the Cover Page tab and provide the information in the fields provided. Note that you can use special coding in these fields, which will automatically provide relevant information:

Coding	Result
%date	Today's date
%name	Your name (take from the OSX Address Book)
%folder	The name(s) of the folder(s) included in the report
%itemcount	The total number of items in the report
%itemrange	The date range used in the report
%templatename	The Report Template used for the report

7. Click Apply.

Creating a Phone List Report

A phone list report consists of first and last names as well as phone numbers.

- 1. Click the Report button.
- 2. From the Report Template dropdown menu, choose Phone List.
- 3. To restrict the report to specific dates, click in the Restrict dates from checkbox and indicate the dates in the fields provided.

Report Template:	e: Expense Report			Report Options
Restrict to dates from	m 10/10/2011	to	10/10/2012	Only Include Selected Items

- 4. To include only items that are currently selected, click in the Only include Selected I tems checkbox.
- 5. Click Report Options and choose the desired settings for your report.
 - You can also choose whether you want only a summary table of field values, only items, or both. If you choose to include a table, the columns of the expense report table will be the same as the columns displayed in the table in the main Cabinet window. To the right of these settings, you can choose to group a summary table by a specific field if desired.
 - You can set the number of images per page and whether to include the field values associated with each item.
 - You can choose to display page numbers by clicking in the Show Page Numbers checkbox.

💽 Summary table and items	Group summary	table by field:
O Summary table only	None	
O Items only		✓ None
 Use Full Size Images At least 2 (*) images per page Large item images will be shrunk to fit a per printed page, reducing the number Show field values with items Display data such as vendor and date n Print all pages (*) of items Show Page Numbers 	at least this many of printed pages	City Company Company Country Created First Last Last Modified Main Phone State Street Address Tax Category Description Work Email Work Phone Zip Code

Report Options (with Group dropdown menu)

6. To include a cover page, click on the Cover Page tab and provide the information in the fields provided. Note that you can use special coding in these fields, which will automatically provide relevant information:

Coding	Result
%date	Today's date
%name	Your name (take from the OSX Address Book)
%folder	The name(s) of the folder(s) included in the report
%itemcount	The total number of items in the report
%itemrange	The date range used in the report
%templatename	The Report Template used for the report

7. Click Apply.

Creating a Tax Report

If you use Neat for Mac 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 for Mac 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 Item view or the List 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 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.

- 1. Click the Report button.
- 2. From the Report Template dropdown menu, choose Tax Report.
- 3. To restrict the report to specific dates, click in the Restrict dates from checkbox and indicate the dates in the fields provided.

Report Template:	Expense Report		\$	Report Options
Restrict to dates fro	m 10/10/2011	to	10/10/2012	Only Include Selected Items

- 4. To include only items that are currently selected, click in the Only include Selected I tems checkbox.
- 5. Click Report Options and choose the desired settings for your report.
 - You can also choose whether you want only a summary table of field values, only items, or both. If you choose to include a table, the columns of the expense report table will be the same as the columns displayed in the table in the main Cabinet window. To the right of these settings, you can choose to group a summary table by a specific field if desired.
 - You can set the number of images per page and whether to include the field values associated with each item.
 - You can choose to display page numbers by clicking in the Show Page Numbers checkbox.

 Summary table and items Summary table only 	Group summary	table by field:
O Items only		V None
 Use Full Size Images At least 2 + images per page Large item images will be shrunk to fit per printed page, reducing the number Show field values with items Display data such as vendor and date r Print all pages of items Show Page Numbers 	at least this many of printed pages next to the item.	City Company Company Country Created First Last Last Modified Main Phone State Street Address Tax Category Description Work Email Work Phone Zip Code

Report Options (with Group dropdown menu)

6. To include a cover page, click on the Cover Page tab and provide the information in the fields provided. Note that you can use special coding in these fields, which will automatically provide relevant information:

Coding	Result
%date	Today's date
%name	Your name (take from the OSX Address Book)
%folder	The name(s) of the folder(s) included in the report
%itemcount	The total number of items in the report
%itemrange	The date range used in the report
%templatename	The Report Template used for the report

7. Click Apply.

Printing a Report

- 1. Click Report View.
- 2. Click Table.
- 3. In the table, click on the report you wish to print.
- From the File menu, choose Print. Click Preview if you wish to see the document onscreen before printing. Use the scrollbar or the Previous and Next buttons to move from page to page in the preview window. Use the Zoom controls to zoom in (+) or out (-).

00	6					Preview of	"unnamed document".	pdf (page 2 of 3)			\bigcirc
Û	0	-++	C C	A		0				Q	
Previous	Next	Zoom	Move	Text	Select	Annotate			Sidebar		Search
					Y Ion Non Ion Non 1 0.0014 0.0014 0.0014 0.001 0.01 1 0.0014 0.0014 0.0014 0.001 0.01 0.01 1 0.0014 0.0014 0.0014 0.0014 0.01 0.01 1 0.0014 0.0014 0.0014 0.0014 0.01 0.01 1 0.0014 0.0014 0.0014 0.0014 0.01 <t< th=""><th></th><th></th><th></th><th></th><th></th><th>Preview of "unna Preview of "unna 2 2</th></t<>						Preview of "unna Preview of "unna 2 2
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<i></i>					-107-		Sealer Section		Cancel	Print	
							n (0		Cancel	(rime)	

Preview Report

5. Click Print.

TIP: To print to a PDF file, click the PDF button in the Print dialog box, and choose Save as PDF.

Printing

Any item in your database can be printed.

- 1. View the image you want to print in the Item Editor.
- 2. Under the File menu, choose Print.
- 3. In the Print dialog box, choose a printer and a Preset as needed.

her MFC-889	UDW		9
dard		\$	
uaru		•	
Preview	G	Cancel	Print
Preview	v)	v) (1	v Cancel (

4. Click Preview to preview what the item will look like when printed. Use the scrollbar or the Previous and Next buttons to move from page to page in the preview window. Use the Zoom controls to zoom in (+) or out (-).

00	Preview of "unnamed docum	nent".pdf (1 page)		\bigcirc
			Q	
Previous Next Zoom	Move Text Select An	notate Sidebar	Search	
	DTI I	10050		
	BILL	19950		- 11
	SPECIAL A CHICKEN IERIYAKI BOITLE DRINK	5.09 1.79		
	SUBTOTAL	6.88		
	1 XAT	0.55		
	SUBTOTAL	7.43		
	CASH	20.00		
	CASHIER #001-001-000092-1980 09/29/	/2011 12:49-R		
	SARKU JAPAN 198 LIBERTY PLACE - PHILA TEL: 215-832-031			
		-		×
			Cancel Print	

Preview

- 5. Click Print to print the item.
- **TIP:** To print to a PDF file, click the PDF button in the Print dialog box, and choose Save as PDF.

Information is more abundant and easier to access than ever before. This is a great thing – except that it's also never been more difficult to stay organized. The overload of information and the scattered places it resides creates "digital clutter." Most digital clutter occurs because your information comes in so many forms – emails, electronic documents, bookmarked web pages, e-receipts – and lives in so many places: your computer, your smartphone, your shiny new tablet. Trying to track down your important files is frustrating and wastes time. NeatCloud provides a solution for digital clutter.

What is NeatCloud?

NeatCloud securely backs up your Digital Filing System, and allows you to add to it – or access it – from anywhere. NeatCloud has been designed from the ground up to work in conjunction with the NeatDesk and NeatReceipts digital filing systems.

When your documents are in NeatCloud, they're not only synchronized between your various devices, they're securely backed up on our servers. That means it's safer to store something in the cloud than on just your computer, and a broken computer or a lost phone no longer means lost files.

Using NeatCloud you can:

- Instantly sync all of your Neat files across multiple devices
- Automatically back up and protect all of your Neat files
- View your Neat files from any Internet browser, from any computer
- E-mail documents directly into your Neat account
- Share individual files or folders with anyone you choose-the person you share with will be able to view and comment on the documents you share
- Have accounts with multiple users two or more people can use the same account

What is Syncing?

Syncing (AKA synchronizing) is the automatic transmitting and updating of data between two or more devices so they will all have the same exact files. That means when you scan an item at the office, it's uploaded to the cloud and instantly available on your home computer, your laptop, your smartphone or tablet.



In this section:

- <u>Accessing NeatCloud</u>
- Syncing Your Neat Data
- Backing Up Your Neat Data

Accessing NeatCloud

Signing Up for NeatCloud

Note: To use NeatCloud, you need to have an Active NeatCloud plan. Please go to www.neat.com to learn more about NeatCloud and sign-up for a Free Trial. You can also click on the 'Start Your Free Trial " button in the notification pop-up in Neat.

NeatCloud IS HERE – START NeatCloud lets you backup, sync, share, ar anywhere. Start today with a FREE TRIAL	nd access your important information anytime,	×
NeatCloud	 Features Include: Automatic, secure backup of your files Sync files across computers and devices Scan and access via iPhone or iPad New web interface for online access Share, files, folders, or your whole account And much more 	
Do not show this message again	Start Your FREE TRIAL Today > Already have a plan? Click here	

1. Click Start Your FREE TRIAL Today. This will take you to the Neat store where you can

NeatCloud

view all of the NeatCloud plans and sign-up for a free trial. Once you have a NeatCloud plan, you will turn activate Sync on the screen below.

CONGRATULATIONS	51
Your NeatCloud accour	nt is ready to use.
くろう ふうぎに ションディー・ション・ション・ション・ション	ur information will automatically be backed up and kept here, anytime, from the web or your smartphone.
	ON OFF
	SELECT "ON" TO START SYNCING
	Please allow time for initial sync. Sync will run in
	the background, and requires an internet connection.

- 2. To turn on Sync, click the On button. That's it! Once you're logged in and have sync turned on, your files will automatically sync every time you launch your Neat software, then every few minutes thereafter. You can also use the Sync button should you want to sync your files manually.
- 3. Access NeatCloud from any web browser by logging in at https://cloud.neat.com

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Https://cloud.neat.com/folders				¢ Q.	• Google	
∡ neat [:]					🤪 Karin R	ex v Help
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Home			Business		Yesterday at 5:55 PM	
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<u> </u> Trash			Misc.		Yesterday at 5:55 PM	Feedback
Add Folder						
► SAVED SEARCHES						
NEAT TIPS	8					
CHECK OUT THE NEW NEAT 5!						2
Go to site Next Tip						
	114					

HOW LONG DOES THE INITIAL SYNC TAKE?

Syncing to NeatCloud is fast - but the amount of time it will take to sync for the very first time will

NeatCloud

be based on the amount of data you are syncing. Subsequent syncs will be faster.

While your account is syncing, the percentage completed will display just under the Sync button.

Syncing Your Neat Data

The backbone of NeatCloud is the ability to sync your Digital Filing System with virtually every piece of technology you own. That means when you scan an item at the office, it's uploaded to the cloud and instantly available on your home computer, your laptop, and virtually every other piece of technology you own. All of this happens automatically, ensuring your files are always up to date.

- 1. Start Neat for Mac on your desktop computer.
- 2. Click the Sync button. (Note that, if this is the very first time you are doing this, you will be prompted to turn the Sync feature on.)

000		📒 Neat Library		
B & W Text Normal Inbox Scan Scan Options	Import New Delete Editor Email Sync	View	Browse Tabl	
Inbox Cabinet Contacts Contacts Documents Receipts Trash On My Mac Adress Book Smart Folders All Documents All Receipts	SIGN IN TO INITIAT Please sign in to your Neat automatically Username (Email Address Password Cancel × Conternation Conternation	account. Your files will begin syncing b) Forgot Password? in my keychain		ı®
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idie + - & II				

3. Click On.

00	Sync Prog	gress		
G	SYNC IS OFF Your Neat files are not curre			
	NeatCloud™ Sync:		OFF	
	Cancel ×	ave and Clos	e	

4. Click Save and Close. You will be prompted to sign in to your Neat account.

0.0	Neat Online Account Login
SIGN IN TO	YOUR NEAT ACCOUNT
Username (Ema	ail Address)
Password	Forgot Password?
	Folgot Fassword?
Remember this	password in my keychain
Cancel ×	Sign In +

5. Provide your username (email address) and password in the appropriate fields and click Sign in. (Uncheck the Remember this password in my keychain checkbox if you would prefer to be prompted for your password each time you log in.) The Sync button will display the percentage completed while syncing (pictured below).

00)					Nev Nev	v Cabinet				\subset
3	B & W Text Normal Inbox 🔻		-	E	B		0				Q- Type here to sear
Scan	Scan Options	Import	New	Delete	Editor	Email	Sync 38%	View	Browse	Table	Search
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6. That's it! Once you're logged in and have sync turned on, your files will automatically sync every time you launch your Neat software, then every few minutes thereafter. You can also use the Sync button should you want to sync your files manually.

HOW DO I STOP SYNCING TO ONE OF MY OFFICE COMPUTERS?

- To temporarily stop syncing one of your computers with NeatCloud, simply go to Tools > Sync > Sync Settings to turn it Off. Any changes made to your Neat data on any of devices will now stop syncing with this computer.
- To permanently stop syncing one of your computers with NeatCloud, go to www.neat.com, sign in, and click on your account name in the top-right corner of the screen. Select Product Keys & Authorizations and then de-authorize the computer you want to stop syncing.

Backing Up Your Neat Data

When your documents are in NeatCloud, they're not only synchronized between your various devices, they're securely backed up on our servers. That means it's safer to store something in

NeatCloud

the cloud than on just your computer, and a broken computer or a lost phone no longer means lost files. It also means that a new computer or gadget can quickly access all of your Neat files – just sign in to NeatCloud and your files will be there waiting!

When your documents are in NeatCloud, they're not only synchronized between your various devices, they're securely backed up on our servers. That means it's safer to store something in the cloud than on just your computer, and a broken computer or a lost phone no longer means lost files. Despite its online nature, NeatCloud is private and secure. Neat doesn't gather data or peek at your files – your personal information remains visible only to you.

For step-by-step instructions on syncing for the first time, see Syncing Your Data.

Like file syncing, backup is an automatic feature of NeatCloud that requires no extra effort from you. However, should you wish to manually back up your files, all you need to do is press the Sync button. Your files are backed up whenever NeatCloud is synced.

Note: NeatCloud only backs up files within Neat; it does not support backing up your computer's entire contents.

The Neat for Mac Preferences dialog box lets you customize the program in a number of ways to better suit your needs.

- The General tab enables you to select Export Image Quality, Date Format and the default Cabinet that opens whenever you start the system. You can also choose whether the application should check for updates, send crash reports, and integrate with Spotlight.
- The Scanning tab lets you select your active scanner and image settings. You can optimize the images for smaller size or better quality by using the slider bar.
- The Shortcuts tab lets you customize your keyboard shortcuts.
- The Advanced tab lets you reset warnings and remove all cached images used for item previews and reports.

In this section:

- <u>General Preferences</u>
- <u>Scanning Preferences</u>
- <u>Shortcut Preferences</u>
- <u>Advanced Preferences</u>

General Preferences

The General tab enables you to select Export Image Quality, Date Format and the default Cabinet that opens whenever you start the system. You can also choose whether the application should check for updates, send crash reports, and integrate with Spotlight.

Setting Preferences

Export Image Highest	Choosing a lower image quality can dramatically reduce the
ingitest	size of PDF files created by dragging or exporting an item.
Date Format:	
%a %b %d %Y	Example: Mon Nov 25 1963
You must restart or for date format cha	re-open your Library nge to take effect.
	tlight ess Book contacts from Mac OS X Address Book count beside folders
Macintosh H	D 🕨 🛄 Users 🕨 🏠 cberger 🕨 🔯 Documents 🕨 🍔 Neat Library

Preferences Dialog Box - General Tab

Changing the Export I mage Quality

Note that choosing a lower image quality can reduce the size of PDF files created by dragging or exporting an item.

- 1. From the Neat menu, choose Preferences.
- 2. Click the General tab.
- 3. Click on the Export I mage Quality dropdown list and select the desired image quality.
- 4. Close the Preferences dialog box.

Changing the Date Format

Note that you must exit and then restart the application for changes to the date format to tale place.

- 1. From the Neat menu, choose Preferences.
- 2. Click the General tab.
- 3. Choose the desired date format from the Date Format dropdown list. An example of how

Setting Preferences

4. Close the Preferences dialog box.

Changing the Default Library

The default library opens automatically when you launch the application. You can choose any of your libraries to be the default library. Doing so will not move your current default library.

- 1. From the Neat menu, choose Preferences.
- 2. Click the General tab.
- 3. Under the Default Library heading, click Change.
- 4. Navigate to and select the library you wish to make your default library.
- 5. Click Open.
- 6. Close the Preferences dialog box.

Scanning Preferences

The Scanning tab lets you select your active scanner and image settings. You can optimize the images for smaller size or better quality by using the slider bar.

Setting Preferences

0		Pref	erences		
	General	Scarning	Shortcuts	Advanced	}
					Refresh List
Active Scanner					
Choose Sca	nner: Neat A	DF Scanner		•	
Neat Scanner S	attings				
ricat Scamfer 5	errings				
SCAN but	ton a <mark>ction</mark> :	Scan item	using current	t color	\$
PDF butto	n action:	Scan item	using current	t color	•
Calibr	ate		ean	Di	agnostics)
				<u> </u>	<u>,</u>
Imaging					
Image Opt	imization: —				
	Smal	ler Files		Better Quality	

Preferences Dialog Box - Scanning Tab

Choosing the Active Scanner

If you have multiple scanners, there is where you will choose which one you are currently using.

- 1. From the Neat menu, choose Preferences.
- 2. Click the Scanning tab.
- 3. Click on the Choose Scanner dropdown list and select the desired scanner.
- 4. Close the Preferences dialog box.

Changing how Scanner Buttons Behave

Your scanner has two buttons: Scan and PDF. You can customize how those buttons act when pressed. For example, you could have one button scan in color and the other scan in black and white text.

- 1. From the Neat menu, choose Preferences.
- 2. Click the Scanning tab.
- 3. Do one or both of the following:
Setting Preferences

- Click on the Scan button action dropdown and choose the desired action
- Click on the PDF button action dropdown and choose the desired action

0	Preferences
Genera	
Active Scanner	(Refresh List
Choose Scanner: Neat	ADF Scanner 🔹
Neat Scanner Settings	
SCAN button action:	Scan item using current color
PDF button action:	✓ Scan item using current color Scan item in Color
Calibrate	Scan item in Black and White (Image) Scan item in Black and White (Text) Scan to PDF using current color
	Scan to PDF in Color
Imaging Image Optimization: – Sn	Scan Single-Sided using current color
Wed Mar 14 2012 Wed Jun 17 2009	Scan Double-Sided in Black and Write Wed Ma

Preferences Dialog Box - Scanning Tab

4. Close the Preferences dialog box.

Shortcut Preferences

The Shortcuts tab lets you customize your keyboard shortcuts.



Preferences Dialog Box - Shortcut Tab

Advanced Preferences

The Advanced tab lets you reset warnings and remove all cached images used for item previews and reports.

Setting Preferences

000	1	Preferences
	General Scanni	ng Shortcuts Advanced
Reset All W	arnings	Reenables all warnings that you have disabled by checking "Don't Ask Again" when the warning was presented.
Empty C	ache	Removes all cached images used for item previews and reports. They will be regenerated as needed.

Preferences Dialog Box - Advanced Tab

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 for Mac 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>
- <u>Calibrating the Neat Mobile Scanner</u>
- <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.

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 for Mac 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 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 for Mac, click the Scan menu.
- 3. Choose Clean Scanner.

Clean Scanner
Insert the cleaning sheet included with your scanner and press Clean to continue.
Cancel Clean

- 4. Click Clean to confirm.
 - 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. In Neat for Mac, click the Scan menu.
- 2. Choose Clean Scanner.

-	
	Clean Scanner
	Insert the cleaning sheet included with your scanner
	and press Clean to continue.
\sim	
	Cancel Clean

- 3. Click Clean to confirm.
 - 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. Load the calibration sheet into the scanner as shown in the Calibrate Neat Mobile Scanner dialog box.
- 3. In Neat for Mac, click the Scan menu.
- 4. Choose Calibrate Scanner.
- 5. 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.

Scanner Maintenance

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 for Mac 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

Scanner Maintenance

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. Load the calibration sheet into the scanner as shown in the Calibrate Neat ADF Scanner dialog box.
- 3. In Neat for Mac, click the Scan menu.
- 4. Choose Calibrate Scanner.

	Neat Scanner Calibration		
	Calibrating Your NEAT ADF SCANNER		
w	lease insert the special calibration sheet included with the scanner and click the Calibrate button below to start the calibration.		
p	lternatively, you may use any plain white sheet of aper; however, we recommend you use the special alibration sheet to achieve optimal image results.		
_	alibration will take several seconds and the scanner ill stop and start feeding throughout the process.		
c	the paper does not feed through during the alibration process, please insert the sheet more rmly and try again.		

	Cancel Calibrate		

Calibrating Your Scanner

5. 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.

Scanner Maintenance

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

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