

NeatWorks[®] FOR MAC

Welcome to NeatWorks for Mac v3.5. This help file explains the following NeatWorks for Mac concepts and tasks:

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Scanning Items into NeatWorks

To scan an item:

- Place the receipt, document or business card face down (face up for the NeatDesk ADF scanner) in the scanner.
- Click the Scan toolbar button in the top left corner of the screen. (If you click and hold this button instead, a list of color and black and white scanning options displays for you to choose.)
- The Scan Options button next to the Scan toolbar button allows you to set the color mode (Color, Black & White Text, or Black & White Image). You can also select the processing mode (Quick, Normal or Full) and the scan destination (Inbox, Current Folder or Direct to PDF file).

Color Mode

Black and White

Color

Processing Mode

Quick - Image Only

Normal - Analyze First Page Only

Full - Analyze All Pages

Destination

Inbox

Current Collection

Direct to PDF File

ADF Settings

Separate - Item for Each Page

Combined - Item With All Pages

Neat ADF Options

Single Sided

Double Sided

Note: The difference between Black & White (Text) and Black & White (Image) is that the former is true black and white and the latter is Grayscale.

- You can also select one of the following from the menu: Scan > Scan New Item, or Scan > Scan Additional Page. In addition, you can choose to scan the item directly to a PDF file in color or black and white, and with or without OCR.
- Press the Scan button on your scanner
- The image will then appear in the Image Viewing pane in the middle of the screen
- The NeatDesk ADF Scanner also enables you to simultaneously scan multiple page and double-sided items
- To scan multiple pages as a single item select **Combined – Item With All Pages**
- To scan double-sided pages select Double Sided (only available for the NeatDesk scanner)

Note: The item will be scanned to the destination selected in the Scan Settings menu: Inbox (default), current folder, or PDF file.

How to Save Your Scanned Information

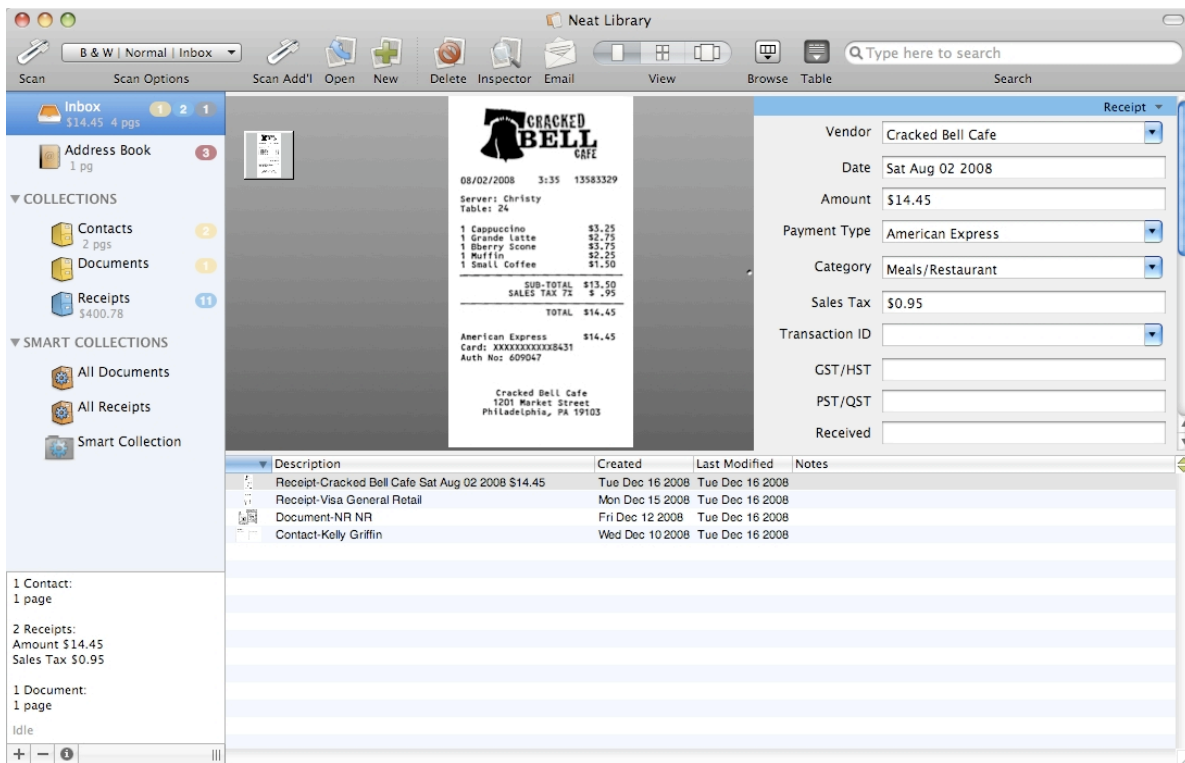
- Once you've scanned an item, NeatWorks for Mac allows you to save it as a .PDF file on your computer.

To save a scanned item:

- Drag and drop a row in the table to a location on your computer (for example, to the Desktop, or anywhere in your file directory). The row will then appear as a .PDF file in that location. You can also navigate to the location on your computer where you'd like to save the image and click Save.

Working with the Inbox

If your scan destination was “Inbox,” your scanned items will display there so that you can verify, edit and/or add notes before filing them in the appropriate folder.



Note: You can drag and drop items from the inbox or any folder into the appropriate folder.

Creating a Cabinet

- NeatWorks for Mac allows you create Cabinets and Folders. A Cabinet--like a real-world filing cabinet--can contain folders to organize your documents, receipts and contacts. Each Cabinet is stored on your hard disk, just like a word-processing file or a spreadsheet. NeatWorks can remember one cabinet to open

automatically on startup, but you can use the File > Open command to open any Cabinet stored on any disk or network drive.

- You would be making good use of your Cabinets if, for example, you created one Cabinet intended only for business purposes, and a second one intended only for personal use.
- Within the Business Cabinet, you might have several folders, such as: "Flights," "Meals," "Hotels," etc.
- Within the Personal Cabinet, you might have several folders, such as: "Groceries," "Mechanic," "Kids," etc.
- Each Cabinet is its own separate entity; that is, you cannot search across multiple cabinets to find information. You may, however, search across all Folders within a Cabinet.
- You could go to the Business Cabinet to search across all folders within it, and the search would not return any information from the Personal Cabinet. Likewise, you could go to your Personal Cabinet and search across all folders within it, but the search would not return any information from the Business Cabinet.

Note: NeatWorks is fully integrated with the Apple Spotlight search utility. Spotlight can be used for general searches across all NeatWorks cabinets.

To Create a Cabinet

- Go to File > New > Cabinet.
- Name and Save the new Cabinet in the desired location.

Creating Folders

To create a new Folder:

- Click the "+" button in the bottom left corner of the screen, or go to File > New > Folder.
- The Folder Properties sheet drops down for you to complete. You can enter the name of the Folder, the item type (document, receipt or contact), and choose a custom icon that identifies the Folder.
- You can also specify whether this will be the default Folder for documents or receipts. The new folder will then appear in your Cabinet with the name you gave it.
- The default folder establishes the table columns that will be used for new folders of the given type. It also allows you to change the colors that are used for each item type.

How to Set Your Preferences

The NeatWorks > Preferences option lets you set up the way you want to work with NeatWorks for Mac.

- 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.

Using Different Views

- In all views, you'll continue to see your Cabinet and folders along the left side of the screen. If you have the Browse feature activated, you will also continue to see the Browsing pane included above each of these views. To select a particular view, click the buttons on the View toolbar along the top of the screen, or use the View menu.
- The Item 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. If you selected the Table feature, in the bottom pane you'll see 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.

Note: The Table feature is also available when using the Icon and Report Views, but stays hidden at the bottom of the screen. To enable the Table feature when using the Icon or Report Views, just click the table icon next to the Search field in the upper right side of the screen.

- The 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.

Note: You can change the size of the items in the Icon View by using the slider button along the bottom right corner of the Icon screen. Just use your mouse to drag the slider, and you will see the size of the icons change.

- The Report View allows you to generate reports and to access summary information. You can combine items from multiple folders in any given report.

- Click the Report Icon at the top center of your screen to open the Report View.
- By checking the box at the top of the Report View, you can choose to restrict your report to a particular date range by checking the box next to “restrict the dates” and entering the start and end dates in the boxes next to “from” and “to. If you check the “Only Include Selected Items” box you can restrict the report to only those items you highlight in the table.

Report Template:

Restrict to dates from to Only Include Selected Items

- In Report View, click on Report Options. 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. You can set the number of images per page and whether to include the field values associated with each item.

Report Options | Cover Page

Summary table and items
 Summary table only
 Items only

Group summary table by field:

Use Full Size Images
 At least images per page (1-8)
 Large item images will be shrunk to fit at least this many per printed page, reducing the number of printed pages

Show field values with items
 Display data such as vendor and date next to the item.

Print of items

Show Page Numbers

To include a cover page, select the Cover Page tab of the Report Options view. Then check the box next to “Include Cover Page.” You can edit the values for Title, Name, Date, Company, and Notes. You can use special tokens in these text boxes which will automatically fill relevant information into the fields.

%date = Today’s Date

%name = Your Name (taken from the OS X Address Book application)

%folder = the Name of the Folder(s) included in the report

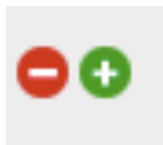
%itemcount = the number of items in the report

%itemrange = the date range of the report

%templatename = the name of the Report Template used

Customizing the Default Field List

Once you have scanned an item, you’ll see the image on the left of your screen and the fields populated with information on the right of your screen. All of the fields are customizable: using the plus/minus signs, you can augment or reduce the list, and you can drag and drop among the fields, rearranging the order of the items in the fields. Hover your mouse over the field name to bring up the plus/minus signs.

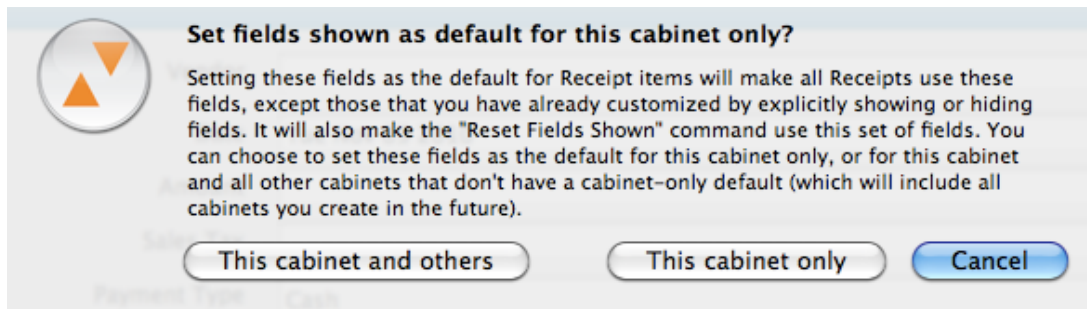


You can set the view as the default view for all future items (Contacts, Documents or Receipts) in that item type:

- Right-click on the caret at the top right of the Field List. Select “Use Fields Shown for Contacts/Documents/Receipts” from the drop-down menu.



The feature will prompt you with the question, “Set Fields Shown as Default for This Cabinet Only?”



- Choosing “This Cabinet Only” will apply to all Receipt items in the Cabinet which have not already been customized.
- Choosing “This Cabinet and Others” will apply the changes to the current Cabinet and all future Cabinets. If you have already customized a Cabinet with the “This Cabinet Only” option, the new selection to customize will not apply to it.

Note: If an item contains a category other than what already appears in the default category fields, that information will appear in a second-tier list below the default one.

Note: Selecting “Reset Fields Shown” will reset the list to the new default field you have set for Receipts.

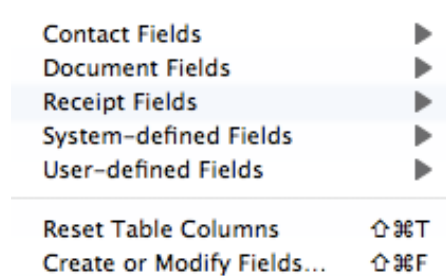


Create or Modify Fields

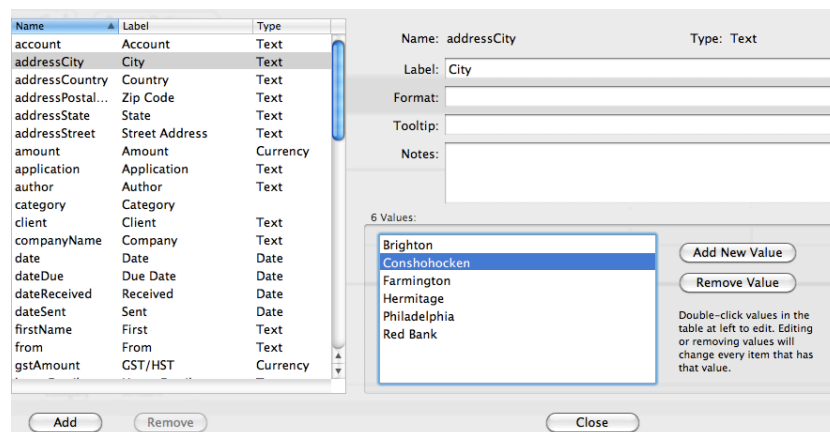
The Create or Modify Fields feature allows you to edit values for an entire Cabinet. You can add to the existing Fields List or add a Value to a Field.

Creating a Field

- Select the Documents/Receipts/Contact drop-down menu or use the green up and down arrows at the top right of the Table View to elicit the drop-down menu. You may also access “Create or Modify Fields” from the Edit menu or via the Item Type drop-down menu in Item View.



- Select Create or Modify Fields . . . to create a new field or remove an existing one. Select Add to add a field (to remove a field, highlight it and click Remove.) Enter Field Name and Label > Create Field. To Add a Value to a Field, select Add New Value (to Remove, select Remove Value).



Field Name Field names are used as internal, unchanging identifiers. They must be unique and contain only letters and numbers. Spaces and punctuation characters are not permitted.

Type Field name and type may not be changed after creation.

Field Label Field labels are displayed in column headers and beside the fields in the Item View and printed reports. They can be any text, and are editable after creation in the Modify Fields panel.

Note: Once you create a new User-Defined Field, that option will then show up in the drop-down menu.

Modifying a Field

- To edit a field, select the Documents/Receipts/Contact drop down menu or use the green up and down arrows at the top right of the Table View to elicit the drop-down menu.
- Select Create or Modify Fields. Choose the Field type for which you would like to modify the content. Click Add New Value and enter the new information in the window.

For more information, see Customizing the Default Field List.

Customizing Table Fields

You can customize the table fields as desired by selecting from a list of fields, or create your own fields.

To choose from a list:

- Click the green up and down arrows on the far right side of the table to open a list of fields, which you can then choose to show or hide.

Contact Fields ▶

Document Fields ▶

Receipt Fields ▶

System-defined Fields ▶

User-defined Fields ▶

Reset Table Columns ⌘T

Create or Modify Fields... ⌘F

- Select Document, Contacts or Receipt from the drop-down menu to the right of the Notes field. >
- Click Document Fields or Receipt Fields and highlight the fields you want from the list that displays.

Note: Table column sets, width, and ordering are preserved for each folder.

Note: Click Edit > Create or Modify Fields from the main NeatWorks menu for more field customization options.

For more information, see Create or Modify Fields.

Using the Item Editor

To use the Item Editor, double-click on the small preview icon in the first table column or double-click the image in Item View or Icon View. You may also select View > Item Editor from the menu.

The screenshot displays the NeatWorks software interface. The main window title is "Neat Receipt-EMS Mon Dec 15 2008 \$82.18". The interface is split into two panes. The left pane shows a receipt for EMS, and the right pane shows the "Item Editor" form.

Receipt Data:

EMS
 UPENN #155
 3401 CHESTNUT STREET
 PHILADELPHIA PA 19104
 (215)382-0930

DESCRIPTION	QTY	ITEM	ORIG\$	DISC	TOTAL
Skeleto11 CX			96.00		T
1 442102663156			76.80		\$76.80
Sub Total					\$76.80
155 PA 1 @	1.0000				0.77
155 PA 6 @	6.0000				4.61
Total					\$82.18

*** YOU SAVED 19.20 ***
 Cash 100.00
 CHANGE -17.82

Looking for a new place to play
 Check out www.mntrlIFE.com
 Share Your Passion

9963 0155 02 40732 12/15/08 13:40

Item Editor Form Data:

Vendor: EMS
 Date: Mon Dec 15 2008
 Amount: \$82.18
 Payment Type: Cash
 Category: General Retail
 Sales Tax: \$5.38
 Transaction ID: [Empty]
 GST/HST: [Empty]
 PST/QST: [Empty]
 Received: [Empty]
 Due Date: [Empty]
 Sent: [Empty]
 Account: [Empty]
 Client: [Empty]
 Project: [Empty]
 Personal:
 Reimbursable:
 Paid:
 Notes: Leatherman Skeletool CX 20% discount

- The Editor window provides a detailed view of the item. You can rotate it, zoom in or out, crop, and view multiple pages (if the item is more than one page long). You can also crop the item by using your mouse to define an area and then selecting Crop.
- Other options include removing a page, or converting an item that you scanned in color to black and white.

Note: The Item Editor gives you the ability to click and drag the yellow, highlighted text on a document or receipt to the fields on the right side of the Item Editor screen. You can Reanalyze the image to highlight the fields.

Note: Item View and Item Editor perform in exactly the same way; the only difference is that you can select Remove Page or Convert to B & W only in the Item Editor.

Creating Expense Reports

Click the Report Icon at the top center of your screen to open the Report View.

- By checking the box at the top of the Report View, you can choose to restrict your report to a particular date range by checking the box next to “restrict the dates” and entering the start and end dates in the boxes next to “from” and “to. If you check the “Only Include Selected Items” box you can restrict the report to only those items you highlight in the table.

The screenshot shows a user interface for creating an expense report. It features a 'Report Template' dropdown menu set to 'Expense Report' with a blue arrow icon. To the right is a 'Report Options...' button. Below these are two checkboxes: 'Restrict to dates from' followed by two date input fields both containing '11/09/2010', and 'Only Include Selected Items'.

- In Report View, click on Report Options. 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. You can set the number of images per page and whether to include the field values associated with each item.

- To include a cover page, select the Cover Page tab of the Report Options view. Then check the box next to “Include Cover Page.” You can edit the values for Title, Name, Date, Company, and Notes. You can use special tokens in these text boxes which will automatically fill relevant information into the fields.

%date = Today’s Date

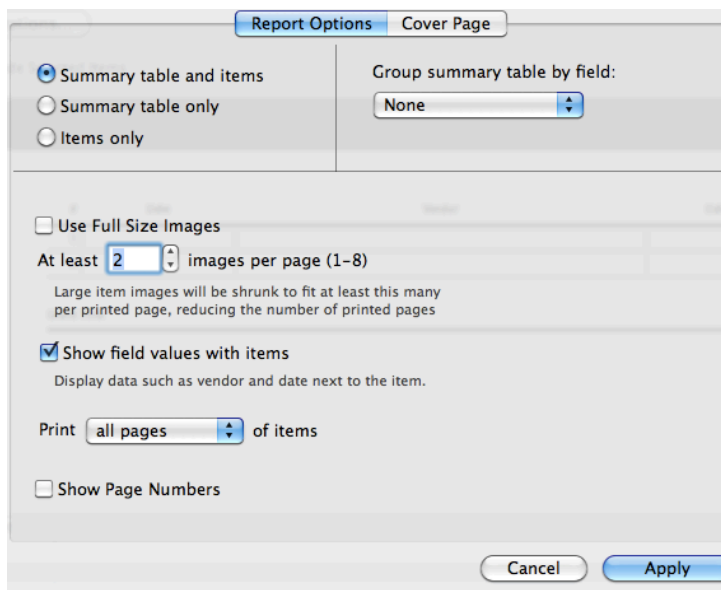
%name = Your Name (taken from the OS X Address Book application)

%folder = the Name of the Folder(s) included in the report

%itemcount = the number of items in the report

%itemrange = the date range of the report

%templatename = the name of the Report Template used



For more information, see Using Different Views> Report View.

Saving the Expense Report

Go to File > Save to save the report as a PDF.

Go to File > Print to print the report.

Saving the Expense Report Template

- Click the drop-down menu to access the Expense Report Template. Select “Save Customized Expense Report” to use the current template as a template for future reports. You will be saving changes to the Table View, including changes to the width of the fields, and any options you selected in the Report Options tab.



To Email Your Expense Report

- To email your expense report as a PDF, go to File > Email Report.

Adding New Documents and Receipts to a Folder

You can manually add a new document, receipt or contact to your folder. To do so:

- Select the folder to which you want to add the new document, receipt or contact.
- With your mouse, hold down the New button in the top left corner of the screen.
- You will see three options appear: Receipt, Document and Contact.
- Choose the appropriate option with your mouse.
- You can also select File > New > Item of Type > Receipt, Document, Contact.

- The new receipt or document displays in the viewing pane on the right side of the screen.

Note: The way in which your new item displays will depend on which view you selected.

For more information, see [Learning to Use Different Views](#).

How to Delete Items from a Folder

You may delete any items from a Folder if you no longer need them.

- To delete an item, select the item and click the Delete button in the top left portion of the toolbar, or select Edit > Delete from the menu and then click Delete.
- You can also delete a Folder by selecting it and then clicking the minus (-) icon on the bottom left side of the screen.

Splitting a Receipt into Multiple Transactions

The Split Receipts command lets you expense portions of a receipt to different clients or projects. For example, if the lodging costs of your hotel bill are to be paid by the client, but any meals or business expenses are to be reimbursed by your company, you can split the bill into two or more transactions.

A separate row is created for each portion of the split transaction and you can then choose the appropriate expense type for each row.

- Click the receipt you'd like to split.
- Click Edit in the menu bar at the top of the screen then Split Selected Item.

- A copy of the receipt will appear and you can now edit all of its corresponding fields.

Combining Receipts

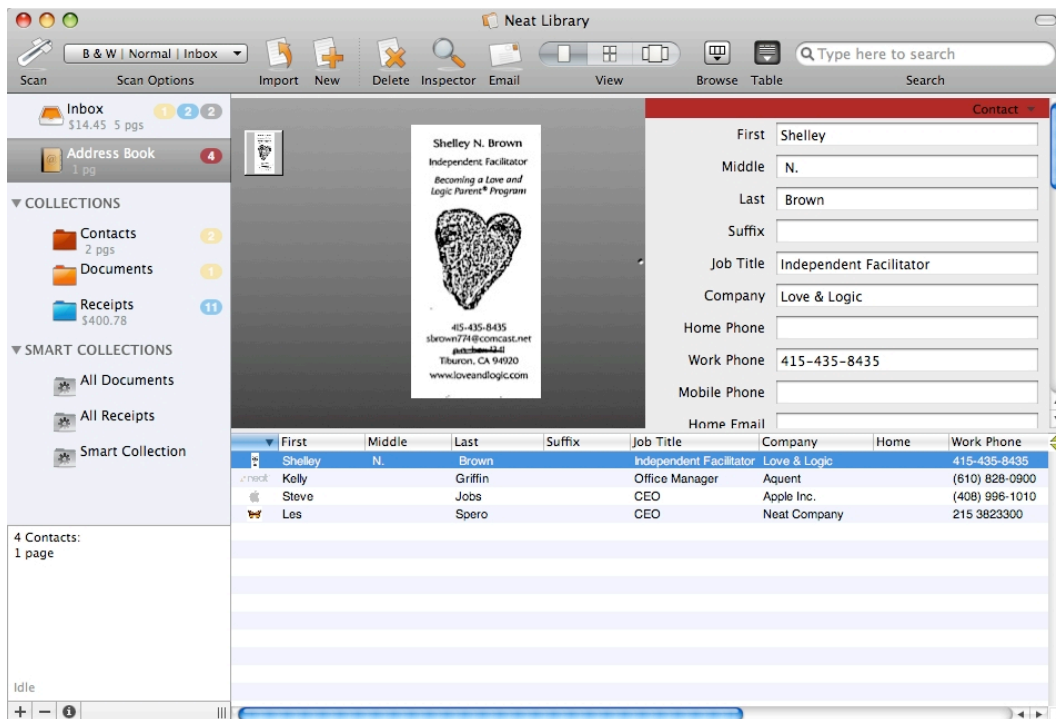
You can group related receipts by combining them. To do so:

- Click the first receipt you want to combine.
- Hold the command (cmd) on your keyboard and click the second receipt.
- Click Edit in the menu bar at the top of the screen.
- Choose Combine Selected Items.
- The Combine Items screen displays, prompting you to select the primary receipt and allowing you to set a new total.
- Click Continue to combine the items and discard the secondary item's data.

Working with the Address Book

You can use the Address Book to:

- Capture Contact information
- Scan and file business cards
- Auto-sync with the Apple Address Book
- Synchronize contacts with your iPhone



To learn more about scanning contacts, See [Scanning](#).

Browsing for Information in NeatWorks

You can Browse and Search for information in NeatWorks for Mac.

- While 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.
- 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)

To browse, Click the Browse button in the toolbar at the top right of the screen.



The Browsing pane will then open, comprising the top pane of your view, regardless of which view you have activated.

- 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 active, a search bar displays immediately below the browse window.
- The search bar enables you to specify whether to search an entire cabinet or a specific folder. You can also use the Save button to save a search for future reference under Smart Folders on the left side of your screen.

Note: If the Browser is collapsed, the Browse filter remains active until you clear it by clicking the Clear button.

Searching in NeatWorks

You can Browse and Search for information in NeatWorks for Mac.

- 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 Cabinets; in other words, you may only search within one cabinet at a time.
- While 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.

- To perform a general search, type a search term in the Search window in the top right corner of the screen. You can choose to search the entire Cabinet or a specific folder. Pressing Return begins your search.
- To save the results of your search for future reference, click the Save button. Your saved search displays under Smart Folders link on the left side of the screen.
- To filter your search, use the browse feature.

Note: NeatWorks is fully integrated with the Apple Spotlight search utility. Spotlight can be used for general searches across all NeatWorks cabinets.

Creating Smart Folders

With NeatWorks 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 analogous to Smart Playlists in iTunes.

To create a Smart Folder using the Browse function:

- Click the Browse button in the toolbar on the top right of the screen.
- The Browsing pane opens, comprising the top pane of your view, regardless of which view you have activated.
- Clicking a field such as "Amount" or "Category" will bring up a window below showing all receipts, documents and contacts that match that criteria.
- To create a Smart Folder from this criteria, click the Save button in the upper right corner. You will be prompted to enter a name and can also drag a custom icon for the folder.

- To create a Smart Folder using the Search function:
- Type a term such as "Meals" or "Fuel" in the Search bar at the top right.
- A window appears below showing the receipts, documents and contacts that match that criteria.
- Click the Save button on the upper right corner to create a Smart Folder containing these items.

Quick Look Functionality

- You can use Quick Look to view items at high resolution in a separate window. You may continue to edit items or perform other actions in the main window while the Quick Look window is displayed. The Quick Look window will always display the currently selected item.

Recover Items

- In the rare instance in which you should discover that a NeatWorks Cabinet (formerly termed "Library") is corrupted, simply select Recover Items from the NeatWorks menu and choose the corrupted Cabinet (or you can select the folder in which it resides).

Printing to NeatWorks

You can print in two different ways:

- Choose File > Print in an item editor if you want to print only the item selected.
- In the Report View, Choose File > Print to print the entire report.
- The report has a cover page which shows the first six fields in the table, and totals any currency fields.

- The following pages show the first page of each item, along with field values. The item pages are reduced in size when necessary so that at least two items fit on each page.

How to Print to NeatWorks from Other Applications

The print to NeatWorks capability allows you to quickly add Web Receipts or any other digital documents to your NeatWorks Cabinet.

- Open your browser, text document, etc.
- Select Print from the File menu.
- Click the PDF button on the bottom left of the screen.
- Select Add Document to NeatWorks, Add Receipt to NeatWorks, Add Contact to NeatWorks, or Add PDF to NeatWorks from the drop-down menu that displays.
- The item is imported directly to to the appropriate folder in NeatWorks for Mac.

Note: Existing PDFs that are added to a Receipt Folder, or items printed to NeatWorks as a receipt will be analyzed for vendor, date, amount, etc. In addition, imported PDF text is searchable via the search bar.

Exporting NeatWorks Data to Quicken

To export NeatWorks data to Quicken:

- Select the receipt(s) you want to export.
- Select File > Export. The Export dialog box opens.



- Select the Quicken tab and choose a quicken account to export the data to.
- Note: You can create a new Quicken account by clicking the Manage Quicken Accounts... button. In the drop-down screen, click on the + sign to create a new Quicken account.
- Click Export. You will be prompted to save the export file. The exported file will be saved with the .qif extension.
- To import the exported file into Quicken:
- Start Quicken and choose File > Import > QIF
- Navigate to the folder containing the file you exported from NeatWorks.
- Choose the Quicken Account into which you want to import the transactions. When the import is complete, the transactions will

be in the Transactions to be Approved section of the Quicken register.

Working with the NeatDesk ADF Scanner

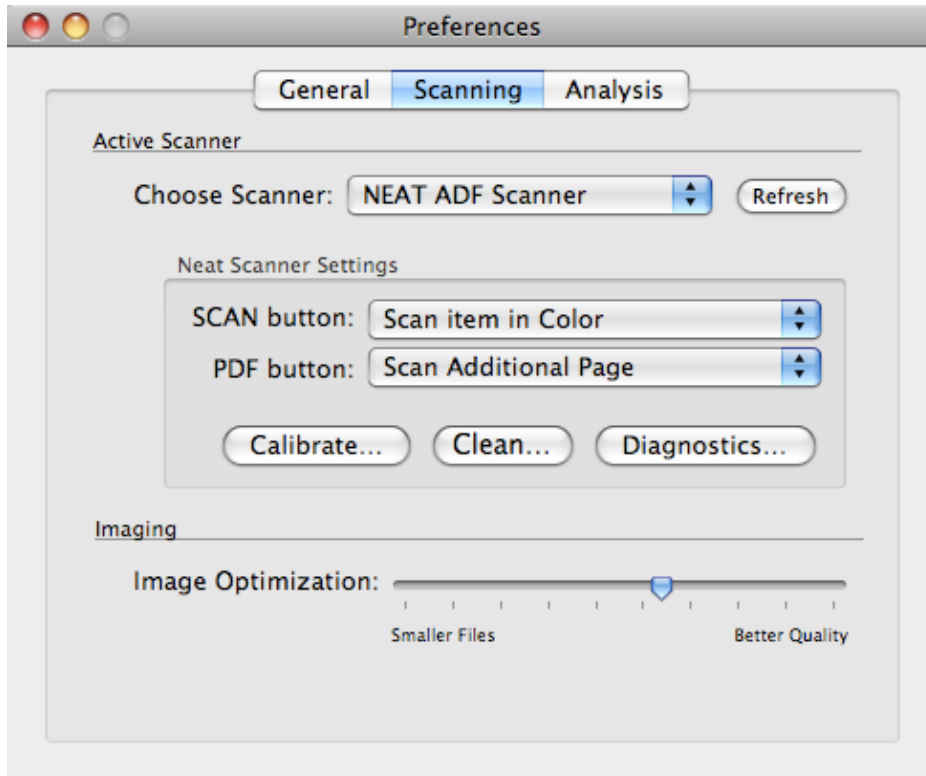
The NeatDesk ADF Scanner enables you to simultaneously scan multiple page and double-sided items.

To scan items with the NeatDesk ADF scanner:

- Insert your items face up in the appropriate sections of the paper input tray.



- Next, choose the NeatDesk ADF Scanner using the NeatWorks > Preferences or Scan > Scanner Settings options.



- You can also set the default action preferences for the SCAN and PDF buttons on your NeatDesk ADF Scanner.
- To scan multiple pages as a single item select **Combined – Item With All Pages**.

Color Mode

Black and White

✓ Color

Processing Mode

Quick – Image Only

✓ Normal – Analyze First Page Only

Full – Analyze All Pages

Destination

✓ Inbox

Current Collection

Direct to PDF File

ADF Settings

Separate – Item for Each Page

✓ Combined – Item With All Pages

Neat ADF Options

Single Sided

✓ Double Sided

- To scan double-sided pages select **Double-Sided**.
- Press the Scan button on your scanner.
- The image will then appear in the Image Viewing pane in the middle of the screen.
- Tips for using the NeatDesk ADF Scanner:
 - When scanning multiple document types, it's best to select the Inbox as your target folder to allow NeatWorks to automatically classify them as receipts, business cards, or documents.
 - You can remove the paper input tray on your NeatDesk ADF Scanner to insert up to 50 pages at once. To do this, press the arrow button on the front panel to open the scanner. Place your thumbs on the tabs at the base of the paper input tray, and gently push up to slide it over the metal bar. Close the door and you are ready to insert up to 50 pages for fast batch scanning.

Working with Third-Party Scanners

NeatWorks for Mac is compatible with the following third-party scanners and multi-function printers:

Fujitsu ScanSnap (S300, S510, S1100, S1300 and S1500), Canon Pixma MX310, Canon Pixma MP480 and HP OfficeJet J6480. For specific instructions on setting up the supported scanners to work with NeatWorks for Mac go to [NeatWorks Third-Party Scanners](#).

Maintaining the Scanner

Calibration

Calibration is a process that helps the scanner differentiate between black, white, shades of gray and different colors.

Calibrating helps the scanner to "see" correctly and provide accurate images. Calibrating your scanner is a simple and quick process. You may need to recalibrate on occasion if your images appear faint or off-balance in any way.

To calibrate your NeatDesk ADF Scanner:

- Place the calibration paper in your scanner.
- Click Scan > Calibrate Scanner.
- Click Calibrate on the screen that displays.

Cleaning

To remove non-sticky dirt such as dust flecks and fibers, use the traditional, dry cleaning sheet. For sticky or gummy substances, use the alcohol cleaning sheet.

Do the following for both kinds of cleaning sheets:

- Remove the cleaning paper from the Scanner box and feed the cleaning sheet into the scanner, just as you would a document.
- Click Scan > Clean Scanner.

NeatWorks for Mac Support

You can view video tutorials on essential NeatWorks for Mac tasks here:

[NeatWorks for Mac Video Tour](#)

Keyboard Shortcuts

You can use your keyboard to quickly accomplish many tasks in NeatWorks for Mac. To find the shortcuts for common commands, look in the menus (or see the list at the bottom of this page).

To do an action, press the keys indicated below.

Action	Shortcut
NeatWorks for Mac menu shortcuts	
Preferences	Command-,
Hide NeatWorks	Command-H

Hide Others Option-Command-H

Quit NeatWorks Command-Q

File menu shortcuts

New Receipt Command-N

Open Command-O

Close Command-W

Save Command-S

Save As Shift-Command-S

Page Setup Shift-Command-P

Print Command-P

Edit menu shortcuts

Undo Command-Z

Redo Shift-Command-Z

Cut Command-X

Copy Command-C

Paste Command-V

Paste and Match Style Option-Shift-
 Command-V

Select All Command-A

Rotate Left Shift-Command-L

Rotate Right Shift-Command-R

Crop Command-K

Special Characters Option-Command-T

Scan menu shortcuts

Scan New Item	Command-T
Scan Additional Page	Command-Y
Black and White	Option-Control-B

View menu shortcuts

Item View	Command-1
Icon View	Command-2
Report View	Command-3
Show Browser	Command-4
Show Table	Command-5
Item Editor	Shift-Command-1
Next Page	Command-->
Previous Page	Command-<-
Go to Page	Option-Command-G
Back	Command-[
Forward	Command-]
Create Report	Command-Option-P
Email Report	Control-Shift-E

Format menu shortcuts

Bold	Command-B
Italic	Command-I

Underline	Command-U
Zoom In	Command-+
Zoom Out	Command--
Show Colors	Shift-Command-C
Copy Style	Option-Command-C
Paste Style	Option-Command-V
Larger Font (for rich text)	Command-Option-+
Smaller Font (for rich text)	Command-Option--
Window menu shortcuts	
Minimize	Command-M