You know, at Neat, we try to think of everything we can to make it easier for you to use your information. Like custom columns and fields…

That's right. Columns and fields can be tailored to meet your needs and to fit the information you want to track.

To customize your columns, just click into the List View, then select the Item fields you'd like to customize. In this example, we're customizing columns for receipts.

To show or hide a column, right-click on the column name. This will display all available columns.

See the column names with checkmarks? They're the ones that are currently showing.

To hide a column, just click on it. The check mark will disappear and the column will be removed.

To add a column, select the column name.

Any changes made to the columns in the List View will carry over to the Item View -- as well as all items of that particular type in your Cabinet.

The same customizations can be made to other Item Types – like Contacts and Documents.

To change the name of a column or field, click on Settings/Column/ Field Names.

Then select the item type you'd like to use to customize the column name.

For example, if you want to change Vendor to Retailer, enter "Retailer" in the Custom Name field next to Vendor and click OK. This field will now appear as "Retailer" in your various views. Nice.

Custom columns and fields: just another part of Neat 5's dynamic digital filing system.

For more help or information, please be sure to visit Support at our website: www.neat.com.