



Neat 5 Video Overviews & Tutorials Data Migration

Hey, so today's the day: Upgrading to Neat 5.

To get you up and running quickly, we've created tools and resources that make upgrading to Neat 5 and migrating your data straightforward and hassle-free.

One of the benefits Neat 5 introduces is the folder tree. The folder tree provides powerful flexibility in how you can organize and manage your data. Let's walk through some steps and tips that will help make the migration of your current folders and data to Neat 5 as seamless as possible.

In NeatWorks version 4 and earlier, you named and defined your folders using various fields such as Folder Name, Folder Label or Folder Type. The values you used for these fields will be used to organize your folders in Neat 5.

During the upgrade and data migration process, three first level folders will be created for you. They'll be named: Migrated Documents, Migrated Contacts and Migrated Receipts.

For receipts and documents the migration wizard will build out a folder tree. Under Migrated Documents or Migrated Receipts the wizard will create subfolders for each "Folder Type" value used. For example, you may have ten folders with the "Folder Type" value of "Expense Report". Under the Migrated Receipts Folder, you'll see a subfolder named "Expense Report", and under this folder, you'll see all your folders that used this Folder Type value. These folders will be shown using the "Folder Name" value if it exists. For example, June 2011 Expenses, July 2011 Expenses, and so on. If it doesn't, the system will use the "Folder Label" value.

To minimize duplicate folder names, make sure that "Folder Name" values are set and are unique within any given "Folder Type". If you do not have values for these fields -- or if you do not have unique Folder Names for each Folder Type -- we strongly recommend that you make these changes before proceeding with the upgrade.

The system allows duplicate folder names as a result of migration, but it will block the creation of duplicate folder names moving forward. You'll want to change any duplicate names to avoid confusion. Oh -- and any Contacts you had in NeatWorks v4 or earlier: they will all appear in the folder named "Migrated Contacts".

Plus any metadata used for folders in NeatWorks version 4 or earlier -- like "Project" or "Client" -- will be viewable by hovering over the folder with the mouse, or when editing the folder.

When you're ready, download the upgrade following the on-screen instructions. The amount of time it takes to upgrade to Neat 5 will depend on the size of the Neat database you're upgrading from. Once you've upgraded and your data has migrated, you can easily reorganize your items or folders, if necessary, by simply dragging and dropping items to new locations.

Neat 5 is our best version to date because it introduces many enhancements and new features requested by customers just like you.

Once you've upgraded, for more help or information please be sure to visit the Support section of our website: www.neat.com.