So you'd like to export your data to QuickBooks? With Neat 5 it's quick and easy.

You can connect Category and Payment type to your QuickBooks Chart of Accounts, and export an entire folder or just selected items. Here's how…

If you're exporting to a Quickbooks account for the first time open the Company file you want to configure for export.

Then in Neat, go to the Folder Navigation pane. Then navigate to the folder or items you want to export to QuickBooks and select them.

Next, go to the Export menu, and choose QuickBooks.

From the QuickBooks submenu, choose either Selected Folder -- to export an entire folder of receipts; or you can pick Selected Items – if you only want to export certain receipts.

Now: If a receipt is missing some important information, the Validating Data dialog box will open, and it will specify what needs to be fixed before exporting.

To fix the issue, click Cancel; then edit the receipt in the Item View. Or you can ignore it and click Continue to keep on exporting.

Click Browse and navigate to a QuickBooks company file, select it, and click Next.

Now if you're exporting to a QuickBooks account for the first time you will need to facilitate the connection between Your QuickBooks Company file and Neat 5 by configuring QuickBooks to grant access to Neat.

In the step where you select Company file, toggle over to QuickBooks. The QuickBooks application certificate box will open. Under the heading "Do you want to allow this application to read and modify the company file?" click in the "Yes, always allow access even if QuickBooks is not running" button. Click done. Toggle back to Neat and retry the export process.

Now, map each category used by the data you're exporting to a QuickBooks account by selecting an account from the dropdown list. And click Next.

Then map each payment type used by the data you're exporting to an account. Just select an account from the dropdown list.

Click Preview to see what the export will look like. Then click Export and you are done. That was easy.

Exporting to QuickBooks doesn't get any quicker – that's Neat 5.

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