



Neat 5 Video Overviews & Tutorials Exporting to Quicken

So you want to know how to export your stuff to Quicken? No problem.

First, 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 Quicken.

From the Quicken 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 an exported receipt is missing some important information -- say, the total or the name of the seller -- the Validating Data dialog box will open to alert you, and it will specify what needs to be fixed before exporting to Quicken.

To fix the issue, click Cancel; then edit the receipt in the Item View. Or you can ignore the issue and continue exporting: just click Continue.

Also: remember that Quicken has shorter character limits than Neat for a number of fields: the Category, Tran ID and Comments fields. If any of your receipts contain data that exceeds those limits, a dialog box will open listing those receipts.

You can choose to cancel the export --and edit those receipts; or you can click Continue to have the data in those receipt fields shortened to fit the Quicken limit.

Next, choose a Quicken Account from the Select Quicken Account dropdown menu.

By default, Sales Tax is not split. To have sales tax split, click in the Split Sales Tax checkbox.

Click Browse to choose a folder in which to save the exported file. Click Export. And that's it.

Exporting to Quicken is, well, that quick -- with Neat 5.

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