



Neat 5 Video Overviews & Tutorials

Quick Start

Hey and welcome. At Neat, we believe you shouldn't have to work hard to use your information. That's why we made Neat 5, the ultimate digital filing cabinet: It transforms your receipts, business cards, all your papers into organized digital files you can really use. It's fast, smart, and simple. Let's get started...

The Neat 5 Dashboard is the first screen you'll see when you open the program.

It has everything you need to use Neat 5. It's like an express lane to all of your Neat folders and files; an easy to navigate, searchable contact list; plus links to Support and Tutorials.

You can get to the Dashboard from any other Neat screen by clicking on the cabinet at the top of the Folder Navigation Pane.

There are four ways to get data into Neat 5: scanning, importing, Print to, or manual input. For now, let's talk about scanning.

You can scan any item you want to keep and organize: receipts, business cards, documents – pretty much any item you want to store electronically. Neat 5 is compatible with both our Mobile and Desktop Scanners.

The lightweight Mobile Scanner is designed for scanning on the go. You can take it on the road and connect to your laptop with a USB cable.

The Desktop Scanner is a powerful, full-featured automatic document feeder. It offers faster scanning speeds and an input tray, which lets you scan multiple pages automatically.

Our patented software identifies and extracts key information from a receipt or business card and automatically organizes it for you. For example, Neat will attempt to read and parse vendor, date, payment type and total from a receipt. Let's try one...

In the Folder Navigation pane, select the folder you want to scan your item into. This is where your scanned item will be saved. We also have the option of creating a new folder.

Place the paper to be scanned face down on the Neat Mobile Scanner; aligned to the far right edge. You'll feel the mobile scanner lightly grab the paper when it is in the right position.

With the Neat Desktop Scanner, place the paper face up with the text facing you.

You can start the scan one of two ways: use the actual buttons on the scanner itself -- or click the Scan icon in Neat 5.

By the way, you can also quickly scan and create a PDF by pressing the PDF button on the scanner. You will be prompted to save the PDF on your hard drive. Please note though that if you scan to PDF, that item will not be saved in the Neat application. For now, we're just going to scan by clicking the Scan command. The Queue icon animates to show you the progress of the scan.

Neat 5 optimizes the scanned item for readability; converts it into digital text, and parses it for key information. As your scans are processed, they are automatically cropped, rotated and sorted according to type.

You can scan items one after the other using Neat's fast batch scanning system. Images are processed in the background as you continue to work.

Once the image has been processed, it will appear in the folder you scanned it to and you can review and edit it in just a few clicks.

Of course, scans don't have to be reviewed immediately. Neat 5 keeps any file you haven't looked at in a Smart Filter called "Unreviewed."

Once your papers are scanned in, you can organize them and do keyword searches.

Plus you can manage and track your expenses, create expense reports, and export data to other applications like Excel, QuickBooks, Quicken, and TurboTax.

And you can manage your contacts by synchronizing with Outlook or exporting to vcard files.



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Neat 5 is a dynamic digital filing system that gives you the power to digitize, organize, search and protect your information -- faster and more simply than ever before.

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