



Neat 5 Video Overviews & Tutorials

Search

Searching for better ways to search? You found 'em.

With Neat 5, you can search any text in your Receipts, Documents, and Business Cards.

Now you might think that the data you see in the various item fields is all there is. Not true. In fact, Neat reads and stores all of the text from everything you scan. This is what makes Neat search so powerful. You can search for line items or receipts, ingredients in recipes or, anything else you can think of. How cool is that?

Searching is easy. In the upper right hand corner of your screen, next to the Search box, there's a magnifying glass icon. Just enter a term or a keyword that relates to what you are looking for. In this case, we'll say credit card receipts.

Type 'credit card' in the search field. And press enter or click on the magnifying glass to perform the search.

Neat 5 searches for everything that contains the keyword 'credit card' and returns a list of receipts and documents. Just like that.

By default, the entire cabinet is searched. Now to search a specific folder, choose that folder from the Search Results in the dropdown menu. This is where you find Neat 5's Advanced Search features. These let you search folders and use filters and wildcards.

You can leave "Entire Cabinet" selected in the dropdown list or pick a specific folder to search. To narrow the search even more, click Refine Search. Now you can add more filters. Like if you are looking for a specific receipt amount, choose Amount from the field dropdown list, a mathematical operator and then type an amount. Looking for a specific receipt date? Choose Receipt Date from the dropdown list, a date modifier from the operator list and then type a date or choose from the calendar.

You can add more filters by clicking on the Add Search Criteria button. And Delete Filter will eliminate a filter. And you can always click Close Search result in the top right corner of your window.

It's all so simple – and so fast – with the super search features of Neat 5.

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