



Neat 5 Video Overviews & Tutorials Views

In your office, you can pretty much look at your files only one way – but not with Neat 5.

Our software lets you look at items in your folder three different ways: Thumbnail view, List View, or Item view.

Thumbnail View displays a small image of the scanned item and any key details – along with the Item Type dropdown menu.

Or maybe you prefer List View? This shows you a list of items in a table – or list – format. It also shows you a preview of the image on the right of your screen.

And then there's the Item View. One click offers a close-up look at a single scanned item.

You can also filter items by type. It's simple: use the Filters dropdown menu near the top right corner of the screen.

Choose "All Items" to view all receipts, contacts and documents in the current folder.

Choose "Receipts" to view only receipts; "Contacts" to view only contacts; or choose "Documents" to view only documents in the current folder.

Choosing a combination of Views – either Thumbnail, List or Item -- plus the Filters selection will determine which key details are displayed.

If you want to edit your items: go to the Folder Navigation pane, make your way to the folder containing the item you want to edit. Double-click on the item to open it in Item View. Or you can click the Item View button at the top right corner of the window.

Now you can modify the Item Type if necessary or modify each field. Keep in mind: you can use the Tab key to move from field to field.

Plus, if you've filtered your view by item type – say, you're only viewing receipts -- you can edit data directly from the List View by clicking into a field.

Depending on the item being edited, some fields may present as dropdown boxes. These fields can be edited by choosing another item from the list. You can also customize the list of options by adding your own. Simply click into the field and start typing.

Date fields can also be modified by typing a new date -- or by clicking on the calendar icon and choosing a new date.

And all of your changes will be saved automatically.

Thumbnail, List or Item view: Just three more ways Neat 5 makes your life a little easier.

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