Welcome to the Neat Experience with HP

Features & Benefits

▶ Transform your home office into a more productive and efficient work space

▶ Track expenses and export to Excel®, TurboTax®, or Quicken®

▶ Organize and access scanned files from virtually anywhere

Your Neat for HP plan includes:

• Neat mobile app and web access

• InDocument Identification - 45 uses per month

• Ability to create expense reports

• Automatic backup of images to the Officejet 8040 hard drive

HP Officejet 8040 with Neat

Check Out The Getting Started With Neat Video

Start Scanning to Neat

1 Place your item, one at a time, on the glass scanning bed, at the bottom-right corner

2 Select Neat as your destination on the touchscreen menu

3 Your document will be on its way to Neat, and backed up to the printer's 1TB hard drive

NEAT

Download the Neat mobile app

Download on the App Store   GET IT ON Google play

Welcome to the Neat Experience with HP

What Neat Does

UNLOCK YOUR INFORMATION

With the magic of Neat's InDocument Identification technology (ID2), there's no need to enter data by hand. ID2 recognizes the type of item you scan and knows what's important for that item type. Neat then makes it easy to create reports, export data to other programs, and get more out of your files.

Receipts
Neat instantly identifies information like Vendor, Date, Amount, and Payment Type.

Contacts
Neat transforms business cards into digital contacts, automatically capturing contact information

Documents
Neat reads and recognizes every word of every document, so you can keyword search anything.

YOUR MONTHLY ID2 LIMIT

As an HP customer, you can use Neat's ID2 technology on 45 individual pages each month. You can scan and store as many pages as you want in Neat, and each month you'll be able to run ID2 on 45 more items, including anything you've previously sent to Neat.

LEARN ABOUT PLAN UPGRADES

What You Can Do With Neat

UNLEASH YOUR DATA

Once an item's in Neat, you can edit information, create expense reports, share files, export data to other programs, and more. We let you automate and expedite your workflow, so you can spend less time dealing with mundane tasks and more time doing what really matters.

Excel

intuit. TurboTax
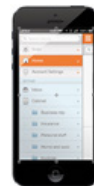
intuit. Quicken

Expense Reports

Share

▶ Turn receipts into expense reports in seconds

▶ Easily export information to Excel, Quicken, and TurboTax

▶ Share files or folders with anyone

Learn How to Access & Organize Your Information Anywhere

ON THE WEB
Sign in to **cloud.neat.com** to access your Neat account anywhere, anytime.

ON MOBILE
Just download the Neat app, then sign in to your Neat account on your phone

Download the Neat mobile app

Download on the **App Store**

GET IT ON **Google play**

USING NEAT ON THE WEB

If you can get to the internet, you can get to your Neat files. Sign in to your Neat account from anywhere at cloud.neat.com.
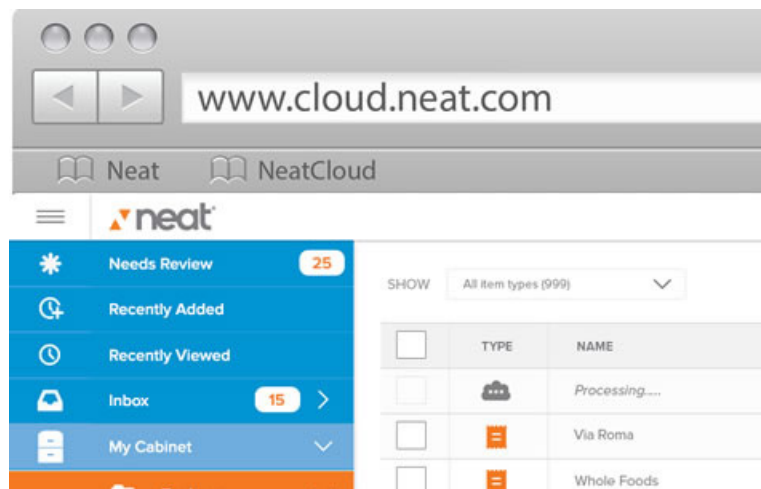
Sign In

ACCESSING YOUR FILES IS EASY

When you go to cloud.neat.com, you'll be asked to sign in with your username and password. Use your HP Connected account info to sign in to Neat.
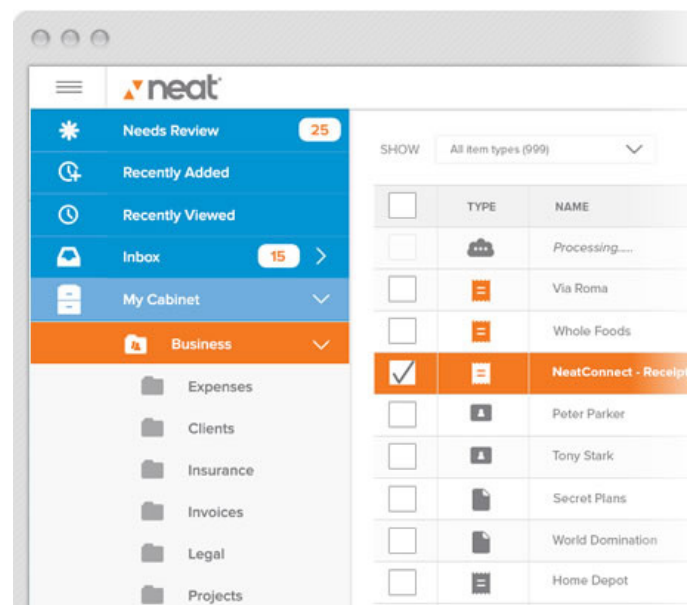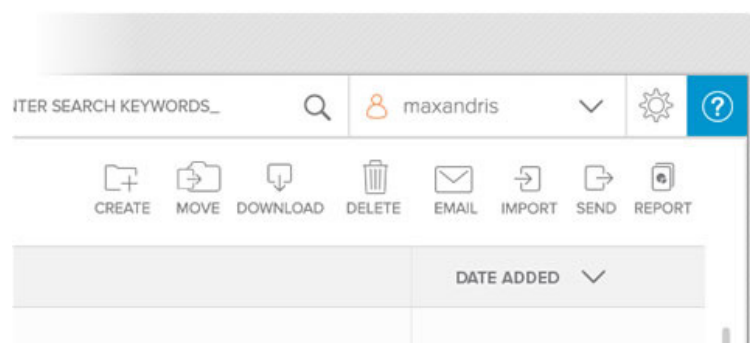
Web Interface

THE EASY WAY TO BE ORGANIZED

Folders
FOR CUSTOMIZED ORGANIZATION

Neat uses a simple folder tree structure that lets you organize your files any way you want. Create folders and subfolders, then move your files exactly where you want them.

Double click on any item to edit or add info.

Actions
DO MORE WITH YOUR DATA

The actions menu bar lets you create and delete items, move or download files, share files and folders, and more. The options presented in this menu will vary depending on whether you are viewing a file or folder.

Add Items To Neat

NEAT IS ABOUT MORE THAN JUST SCANNING
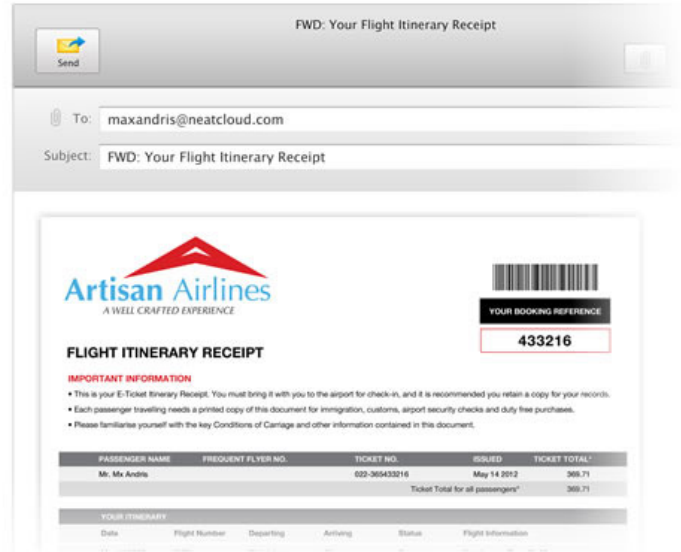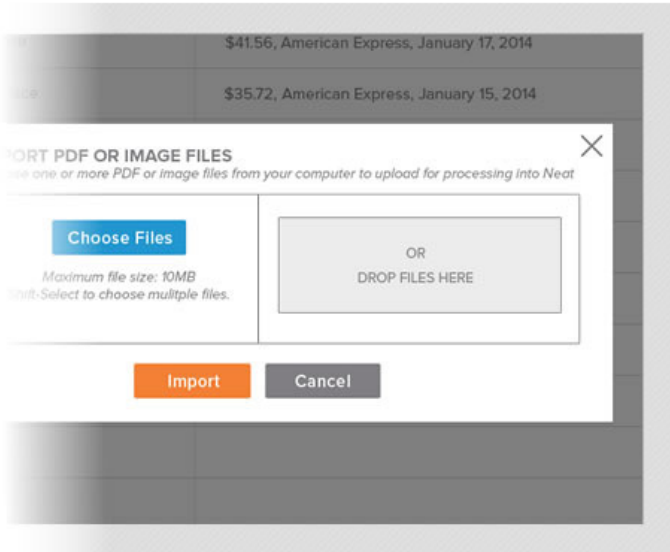
Import Files
QUICKLY ADD ITEMS FROM YOUR COMPUTER

Neat uses a simple folder tree structure that lets you organize your files any way you want. Create folders and subfolders, then move your files exactly where you want them.

Email IN
FORWARD IMPORTANT EMAILS

Neat uses a simple folder tree structure that lets you organize your files any way you want. Create folders and subfolders, then move your files exactly where you want them.

SHARED FOLDER OPTIONS FOR "BUSINESS"
Sharing a folder allows other users to view and comment on the contents of that folder.

Collaborate

TEAMWORK MADE EASY

Emailing an Item
You can email individual items through Neat. Select the item you want to share, then choose "Email Selected Item" from the menu bar.

Sharing a Folder
You can use Neat to share entire folders with other people at any time - even if they don't have Neat. They'll get read-only access to your files, and will be able to comment on items.

Simply select the folder you'd like to share, and choose "Share Folder" from the actions menu.

Commenting
When you share a folder, each user can add comments to the items in that folder. Comments can be added when viewing an item.

Expense Reports

QUICKLY REPORTING EXPENSES

To create an expense report in Neat, begin by placing all items you'd like included in the report into a single folder. Then use the Report button to create your report.

Your report will be saved in the same folder you used to create it. You'll also have the option to instantly download your report to your computer.

Keyword Search

FINDING ITEMS IS EASY WITH NEAT

When you perform a search in Neat, you'll see a Save Search button. When you save a search, it will appear beneath your folder tree, in the left-hand column of your screen. This makes your future workflows more efficient.
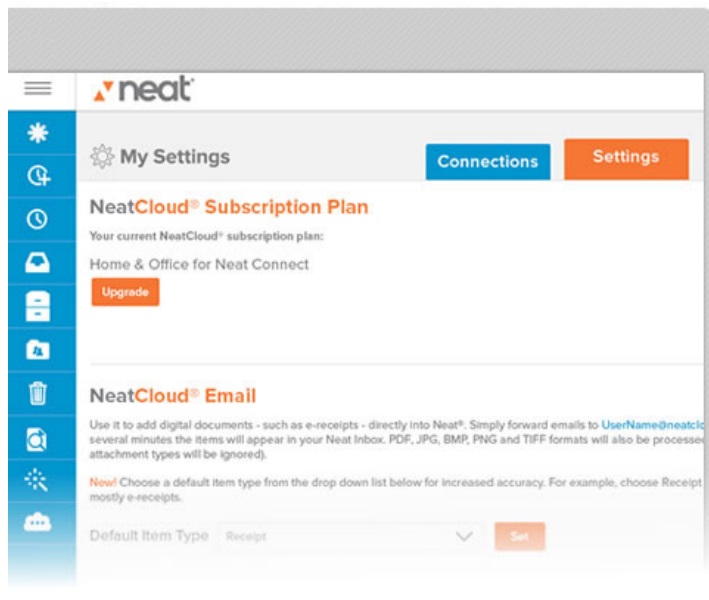

Account Settings

SETTING UP YOUR ACCOUNT

The first time you sign in to Neat, it's a good idea to get familiar with your account settings. Access your account info by clicking your name in the upper right-hand corner of the screen.

Personal Info
View or edit your basic information. Please note that your email address is used for your account username and cannot be changed.

Neat Subscription Plan
This section displays your current Neat subscription type. Learn about Premium plan options.

Neat Email
Forward emails and attachments directly into your Neat account by sending them to the @neatcloud address given here.

USING NEAT ON MOBILE

Be Neat everywhere, with the Neat app. With the Neat app, your important files are always close at hand and available wherever you go.

Download the mobile app and sign in to your HP Connected account.

DOWNLOAD THE APP
Get the Neat mobile app

[Download on the App Store] [GET IT ON Google play]

**NEAT RECOGNIZES EVERY ITEM AS A RECEIPT, CONTACT, OR DOCUMENT**

Receipts
Neat instantly captures information like Vendor, Date, Amount, and Payment Type.

Contacts
Neat transforms business cards into digital contacts, instantly recognizing all of the contact information.

Documents
Neat runs Intelligent Text Recognition on every word of every document, so you can keyword search anything.
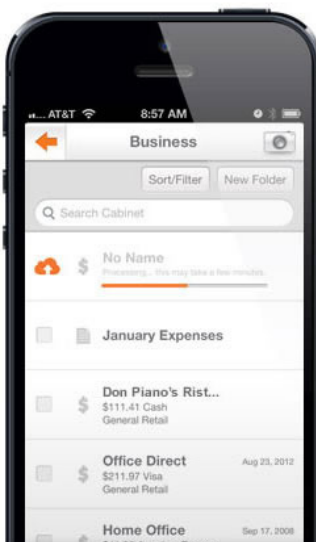
Expense Reports
QUICKLY REPORTING EXPENSES

When you scan an item with your phone, it will be uploaded to Neat for intelligent processing with InDocument Identification (ID2). While this happens, you'll see a placeholder item appear in the destination folder you selected during scanning. You'll get a pop-up notification on your device when your item is ready.

ID2 recognizes the type of item you scan and knows what's important for that item type. It's what makes the Smart Organization System so smart.
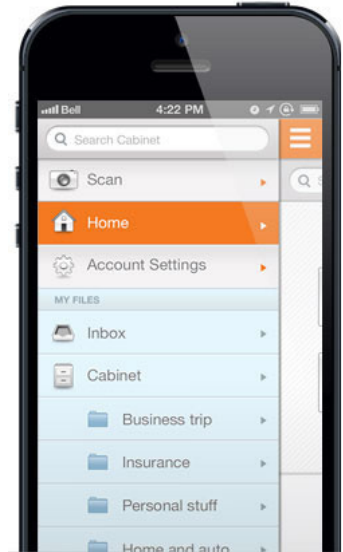
Files

VIEWING YOUR INBOX

Your Inbox is divided into the following folders: From Email, From Mobile, From NeatScan, and From Web Import. Items you send to Neat will be put into the appropriate folder automatically so they're easy to find.

Scans you take with your mobile device will appear in the "From Mobile" folder of your Inbox when they're done processing.

Scan

YOU GET THE PICTURE

The Neat app lets your use the camera on your mobile device to scan items into Neat. Just select "Scan", choose the item type, and takes a picture of the item you'd like to scan.

Select the destination folder, add any notes you want to include ... and Neat will do the rest!

As an HP customer, you can use Neat's ID2 technology on 45 individual pages each month. You can scan and store as many pages as you want in Neat, and each month you'll be able to run ID2 on 45 more items, including anything you've previously sent to Neat.
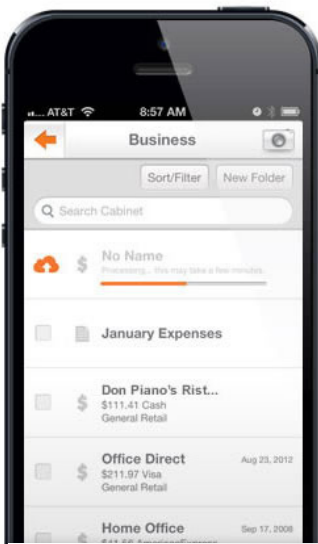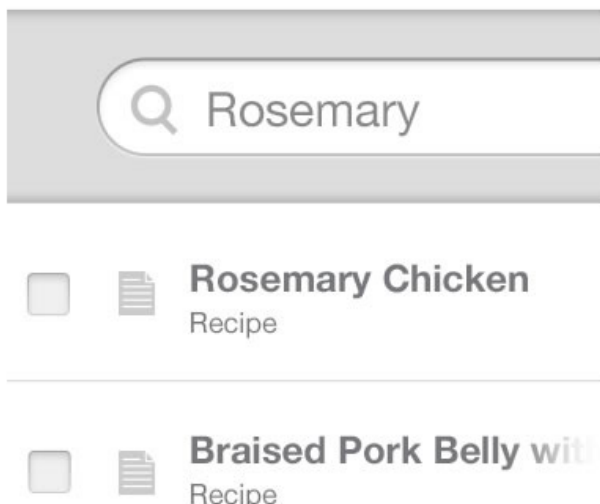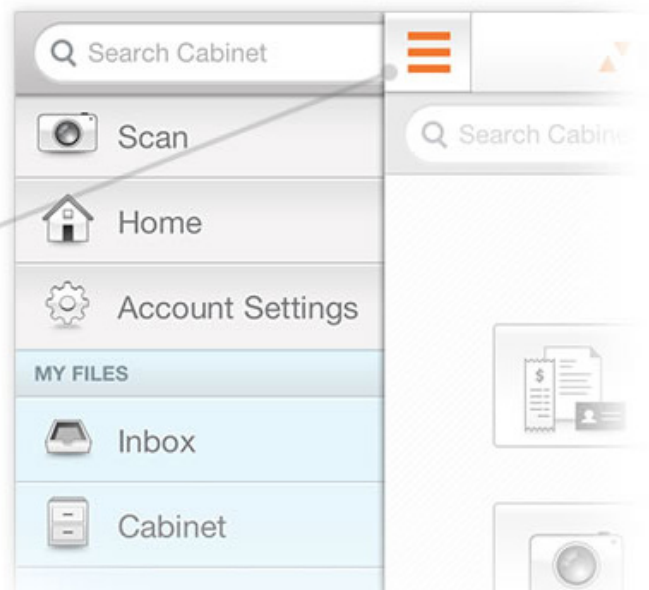
Download the Neat mobile app

Additional Features

OF NEAT'S MOBILE APP

EASY NAVIGATION
Swipe in the Menu from any screen to quickly access top folders and actions

FIND ANYTHING
Search your entire Neat database by keyword and quickly find exactly the file you're looking for. Every work of every item is searchable!
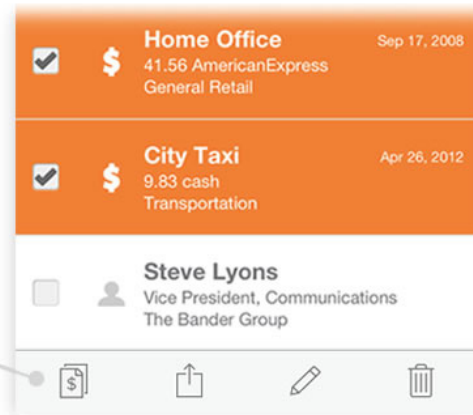
Additional Features
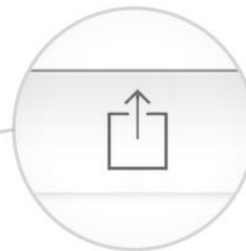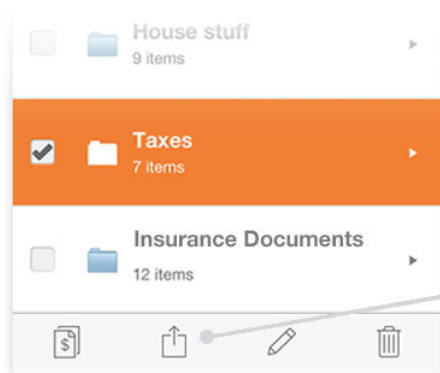
OF NEAT'S MOBILE APP

REPORT EXPENSES
Quickly creat expense reports from your receipts, and share them via email.

COLLABORATE
Easily share files and folders with anyone, and even commebt back and forth on items within shared folders.

EDIT ON THE GO
Whether you scanned it at home or on your phone, any item in Neat can be edited throught the mobile app.