

# Customer Success Story: Powerful Accounting



## CHALLENGES:

- ▶ Working in real time with employees located throughout the Northeast and clients across the United States.
- ▶ Serving clients that are not running their business in the age of technology.
- ▶ Finding a simple way to digitize important data and documents.

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## USE CASE:

- ▶ Onboard every client with Neat's document and expense management solution, including Neat's web and mobile applications.
- ▶ Send all expense receipts and vendor invoices through Neat to eliminate paper documentation and manual data entry.
- ▶ Create custom folder structures and workflow processes for each client.
- ▶ Utilize Neat in the case of an IRS audit by scanning in all documents and analyzing remotely.

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## RESULTS:

- ▶ Cultivated an efficient document management and collaboration solution across all employees and clients.
- ▶ Discovered thousands of dollars in reimbursable expenses for clients upon migrating them from an outdated reporting system to Neat.
- ▶ Acquitted many clients of criminal charges due to IRS audits.

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## TESTIMONIALS:

- ▶ "Introducing Neat into our client's workflows has been company changing for them."
- ▶ "In the eyes of our clients, [Neat] makes us look like absolute heroes."

**Company Name:**  
Powerful Accounting

**Location:**  
Windham, CT

**Industry:**  
Accounting

**Company Size:**  
1-10 employees