

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.

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.

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- ▶ Discovered thousands of dollars in reimbursable expenses for clients upon migrating them from an outdated reporting system to Neat.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.

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