

Customer Success Story: The Small Business Accounting Solution



CHALLENGES:

- ▶ Spending too much time hauling clients' documents and manually entering data.
- ▶ Keeping paper organized and locating documents in a timely manner.
- ▶ Running out of space for filing cabinets to store all client files.

USE CASE:

- ▶ Access, share, and transform documents anytime, anywhere with Neat's cloud-based applications..
- ▶ Utilize QuickBooks integration to eliminate the time spent importing and re-entering clients' information.
- ▶ Use Neat for real-time collaborating on accounting and tax documents.

RESULTS:

- ▶ Saved hours each month by automating the scanning process.
- ▶ Eliminated physical visits to clients' offices, which opened up more time to find cost-savings.
- ▶ Provided better service now that all client documents were organized and searchable.

TESTIMONIALS:

- ▶ "Using Neat's Smart Organization System has significantly increased productivity and efficiency for running my business."
- ▶ "Neat offers many great solutions and frequently introduces software enhancements, so I am certain that Neat will be a part of my small business for many year to come."

Company Name:
The Small Business
Accounting Solution

Location:
Philadelphia, PA

Industry:
Accounting

Company Size:
1-10 employees