



AUTOMATE BOOKKEEPING TASKS

AND GET BACK TO WHAT MATTERS

Quickly transform the information on invoices, receipts, business cards, and other documents into usable, organized data that can be sent directly to QuickBooks, TurboTax, and other business software. With Neat, your information is secure, easy to find, and accessible from virtually anywhere.

The Neat software platform provides small businesses, particularly those with a high volume of monthly expense transactions with the need to streamline the storage and organization of all business documentation, with the ability to quickly enter or import and convert document images into a digital data format. Neat helps organize and categorize the data and satisfy business reporting needs related to accounting and taxes. Neat is also a valuable solution for document retention for audit preparedness, provides the ability to create and leverage a variety of spending report and analysis tools, and offers integrations with contact management and marketing automation tools.

Key Features

Capture your Data

It's fast and easy to get your items into Neat! Snap a picture with your mobile phone, email in, import in or scan with ANY scanner.

Manage your Information Anywhere

Neat keeps your files synced in the cloud and across your devices. Access your most up-to-date information, add or share files, edit information and even create reports on the go.

Reduce Manual Data Entry

Neat automatically extracts the key information from your documents, receipts and invoices, making your information useful and keyword-searchable.

Securely Back-Up your Files

Neat keeps your files up to date and securely backed with 256-bit TSL encryption. Plus, we offer unlimited captures and storage, so you can keep all of your data in one safe place.

With Neat, bookkeeping tasks will be simplified.

- ⇒ Process transactions faster and account for business spend easily.
- ⇒ Track spending with enhanced reporting and find ways to adjust and save money.
- ⇒ Quickly process or receive expense reimbursements
- ⇒ Manage invoices and avoid late fees
- ⇒ Retain receipts and invoices year round and be more prepared for tax time
- ⇒ Remain audit-compliant with IRS-accepted receipts and invoices