



NEAT + QUICKBOOKS®

What Neat Does

Neat transforms the information on your receipts, invoices, and other documents into usable data, making your workflow more efficient and putting time back in your day. Reduce data-entry time, create expense reports in seconds, get invoices paid more quickly, and easily retrieve financial transaction documentation—with Neat!

How Neat Works with QuickBooks®

Neat has a seamless integration with **QuickBooks Online and Desktop** that makes it easy to get things done—no more exporting and importing and re-entering information.

New! Multi-Account Access - manage all your clients from a single sign-in.

Simple Setup Process - connect Neat and QuickBooks through easy mapping of category, vendor, payment, employee, project, class, product, and location.

Use with Any Scanner - it's easy to get your documents into Neat using your Neat scanner or nearly any third-party scanning device.

Easy Transfer - With a single click, send data and images from Neat to QuickBooks. Images automatically attach to the transactions so you don't have to upload yourself.

Neat On-The-Go - View, edit and submit your documents from anywhere via web, mobile, or desktop.

Document Types Managed with Neat + QuickBooks®

Invoices - Track and organize in Neat and send the data directly to QuickBooks as bills to be paid.

Receipts - Use Neat to capture paper and digital receipts and send the data directly to a credit card account in QuickBooks to be matched against imported financial institution data.

Expense Reports - Aggregate receipts and invoices you paid out of pocket into Neat, then create expense reports in seconds that can easily be sent to QuickBooks for reimbursement.

“I needed a system that offered comfort and security not only to me, but to my clients as well.”

- Nicole Odeh, The Small Business Accounting Solution