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Aug. 29, 2016

Dawn W. Brolin, CPA, MSA, is the chief executive officer at Powerful Accounting, a technology-focused accounting firm that delivers and conquers the numbers end of small businesses. Based in Windham, CT, with a second office in New Haven, Powerful Accounting has seven full time employees, two of whom work remotely in North Stonington, CT and Washington D.C. With employees throughout the Northeast and clients across the United States, it was imperative that Dawn implemented technology that allowed her, her employees and their clients to share documents and collaborate on projects in real time.

Neat and the Everyday Client

To work effectively with both colleagues and clients, Dawn chose Neat's unique combination of cloud, mobile, desktop software and hardware scanning solutions that transform important documents into usable digital information. As part of Powerful Accounting's new client onboarding process, Dawn, a member of Neat's

madness so that we can provide them with the most accurate accounting services."

One of the reasons Dawn chose Neat's solutions is because of its ease of use. Dawn works with a number of small business owners and sometimes they're not the most technologically savvy individuals, but Neat's simple scanning solution and user-friendly interface makes digitizing important data and documents a breeze.

Dawn's clients use their NeatConnect to easily scan important business documents, such as expense receipts and vendor invoices before letting Neat's intuitive software takes over. Once captured within Neat's software, key data points and information are extracted and made keyword searchable using Neat's InDocument Identification Technology ™.

After the documents are scanned into Neat's software, depending on the client, Powerful Accounting's "Data Manager" takes over. Neat's software lets users create a custom folder structure and the Data Manager ensures expense receipts from July are dragged and dropped in the "Expense Receipts" folder, June Bank Statements are dropped in the "Bank Statements" folder and so on. As the relationship grows, some of Dawn's clients will take over the role of the data manager and organize the data on their own.

In addition to providing Dawn and her team with the proper data that allows them to deploy the most accurate accounting services, Neat also allows Dawn's clients to discover opportunities for reimbursement. For example, before hiring Dawn, one client was missing out on thousands of dollars of reimbursable expenses because of a sloppy, outdated expense reporting system.

"Prior to our arrival and Neat's functionality, this client was missing out on many thousands of dollars of reimbursable cost because their expense receipt management system was so outdated – they were taping their receipts to a piece of paper and

photo copying them," said Dawn. "Who knows how many receipts they lost? They

clients, but it may be most beneficial when a client is criminally audited by the IRS because of the potential consequences to the client.

"When and if the IRS comes in and seizes the financial records of a client, I take my personal Neat scanner into the IRS office and scan everything into Neat's Smart Organization System," said Dawn. "It's almost like a production line – one person is pulling the documents out of a box, another person is scanning the documents into Neat's software and the third person puts it back in the box the same way we found it."

Once Dawn's team scans a document into the Neat software, team members and clients from remote locations are able to analyze the documents in real time and make sure they're capturing all of the documents and data points that they need.

"Adopting Neat's technology allows us to walk into the IRS office with a certain confidence. I am able to position myself as a professional to an IRS agent who I will be working with for six months to a year without saying one word." said Dawn. "In the eyes of our clients, it makes us look like absolute heroes."

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