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document management, has added new capabilities to its financial management platform. Neat now gives small business owners even more options with respect to exporting their ...

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**The Neat Company**, a provider of small business bookkeeping automation and document management, has added new capabilities to its financial management platform. Neat now gives small business owners even more options with respect to exporting their financial data, and more capabilities available through its mobile app.

Since its initial launch in 2021, Neat's all-in-one financial management platform continues to reimagine how small business bookkeeping is accomplished and enables small business owners – with years doing their own bookkeeping or with no accounting expertise at all – to quickly and confidently manage their books and keep business finances in order. The all-encompassing Neat platform helps small business owners simplify the process of organizing and automating their small business bookkeeping, invoicing, and document management.

“When I was a small business owner, I saw firsthand how bookkeeping can seem like a distraction, and learned that traditional small business accounting software can

feel overwhelming while homegrown spreadsheets were both limiting and time-

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back to the work of growing their businesses instead of struggling with record-keeping and complex interfaces,” Baird added.

Key new capabilities added to Neat include:

- ***Enhanced Mobile Updates.*** The Neat mobile app has a streamlined look and feel, and the process of creating and managing invoices from the mobile app has been made simpler – from creating and sending an invoice in just a few taps to a one-tap reminder to pay. Customers can now centrally view all their bank accounts (even across financial institutions) on mobile and pick through a variety of expense categories to organize their transactions. They can also edit the name of their connected accounts so it's easier to identify, assign specific vendors to each transaction, and add custom notes/reminders to their imported items. This mobile app update enables customers to better keep up with their bookkeeping tasks while on the go – reducing or eliminating a pile of “to do” list items at month end.
- ***Transactions Reporting.*** New transaction reports, quickly generated from the “Reports” Dashboard, give customers a snapshot of what has been going in and out of their accounts. Once run, the reports can be quickly emailed to partners/colleagues, or its contents downloaded for further analysis. Other Neat accounting reports include profit and loss, balance sheet, cash flow, expense report, spending detail, tax category, spending summary, and sales tax.
- ***Image Improvements.*** Images of documents, receipts, invoices, and other uploaded items can now be viewed and edited in a large preview window. This makes reviewing items and navigating between them faster than ever. Customers can now also view sample versions of invoices to become more familiar with the invoicing feature.
- ***Report Exporting.*** New functionality makes it even faster to send PDF versions of financial reports from Neat with a custom message to one or multiple recipients.

- **Data Exporting.** Transaction data can be exported as a CSV file from Neat making

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Small Business

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