

NeatScan™ To Office

Getting Started with NeatScan To Office

NeatScan To Office is easy and convenient to use. You'll soon be scanning documents, business cards, and receipts into Office applications.

NeatScan™ To Office

What is NeatScan To Office?

NeatScan To Office installs a "Scan" button in Microsoft Office® applications that enables you to:

- Scan receipts into customizable [Excel®](#) expense report templates (called "Neat Sheets")
- Scan business cards into [Outlook® Contacts](#).
- Scan and insert text, images, or entire documents into [PowerPoint®](#) presentations or [Word®](#) documents.

NeatScan To Office will boost your productivity while helping you clear paper and clutter from your desk. You'll be able to store digital records of all your important paperwork with the simple click of a button.

NeatScan™ To Office

Scanning Documents to Excel

You can scan an image directly into an Excel spreadsheet. You can also scan receipt data and images directly into an expense report by using a Neat Sheet, or intelligent template.

Note: To scan to a PDF file instead, click **Scan to PDF**. For more information, see [Scanning to PDF](#).

Scanning Images into an Excel Spreadsheet

1. Open Excel.
2. Insert a document face down in your scanner.
3. If you have not done so already, select the desired color option by clicking the Settings button (see [Excel Settings](#) for more information).
4. Click **Scan to Excel**. When the scan is complete, the image will display at the current cursor location in your Excel spreadsheet.

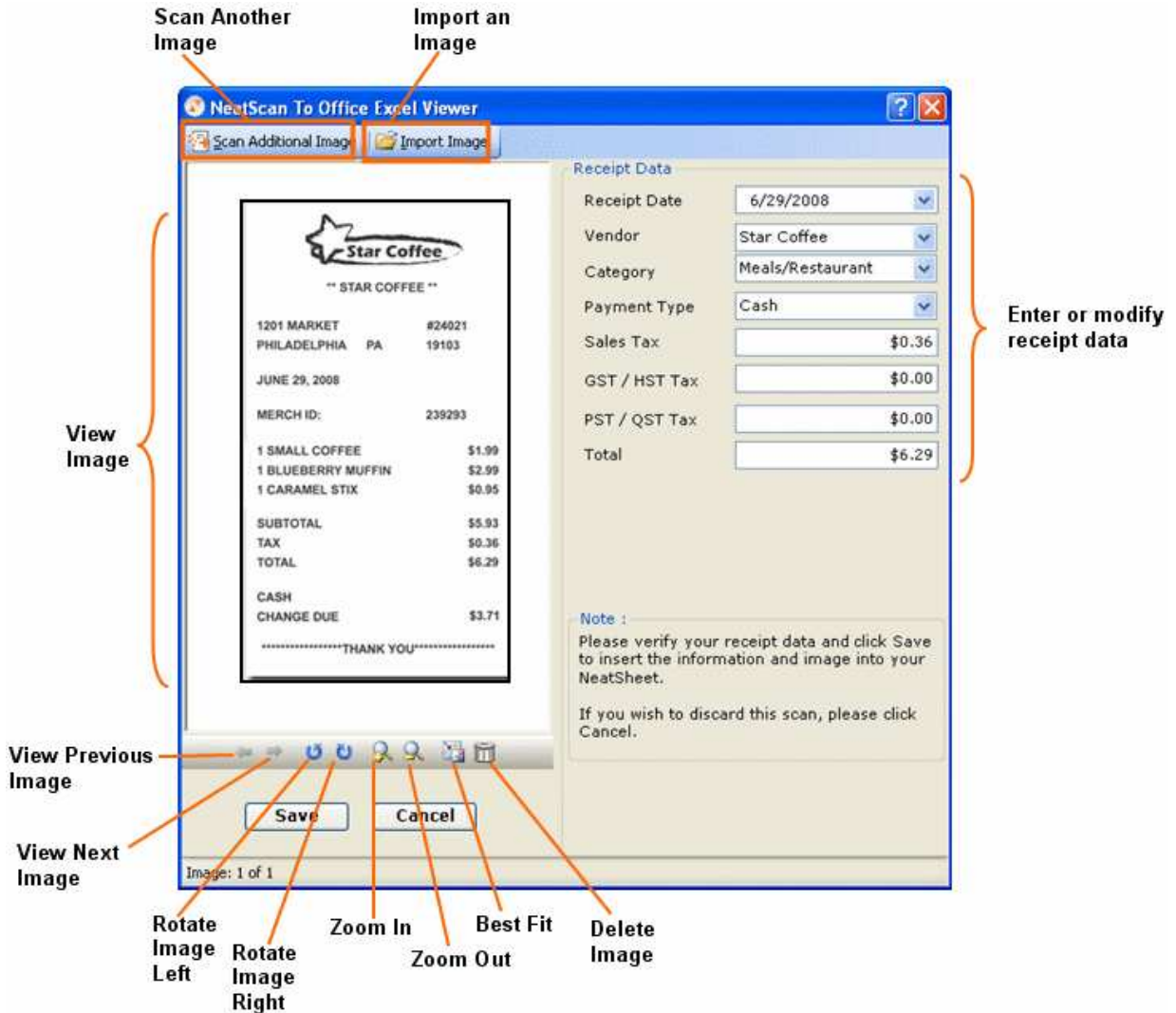
Scanning Receipt Data and Images into a Neat Sheet

By using a Neat Sheet, or intelligent template, receipt data such as date, vendor, sales tax and total will automatically be placed in the appropriate fields of your expense report upon scanning. The receipt image will be scanned as well, and you can modify your view of it as needed.

A variety of Neat Sheets are available for your selection. Just choose the one that best meets your needs. You can even customize a Neat Sheet for your own purposes, and then save it for future use. Follow the steps below to use a Neat Sheet:

1. Open Excel.
2. Insert a document face down in your scanner.
3. Click the **Open Neat Sheet** button on the NeatScan To Office toolbar.
4. When the following screen displays, click **Browse Neat Sheets**.

11. You can change the appearance of cells by modifying the font, color and spacing if desired.
12. Save the Neat Sheet to a location on your computer.
13. Click **Scan To Neat Sheet**. A "Scanning" message displays. When the scan is complete, your results display in the Excel viewer, as explained in the example below:



Note: For detailed information about managing your lists of vendors, categories, and payment types, see [List Manager](#).

14. Modify the results as desired, and click **Save**. Your expense report fills with the receipt information, which is automatically placed in the appropriate fields as shown in the example below:

NeatScan™ To Office

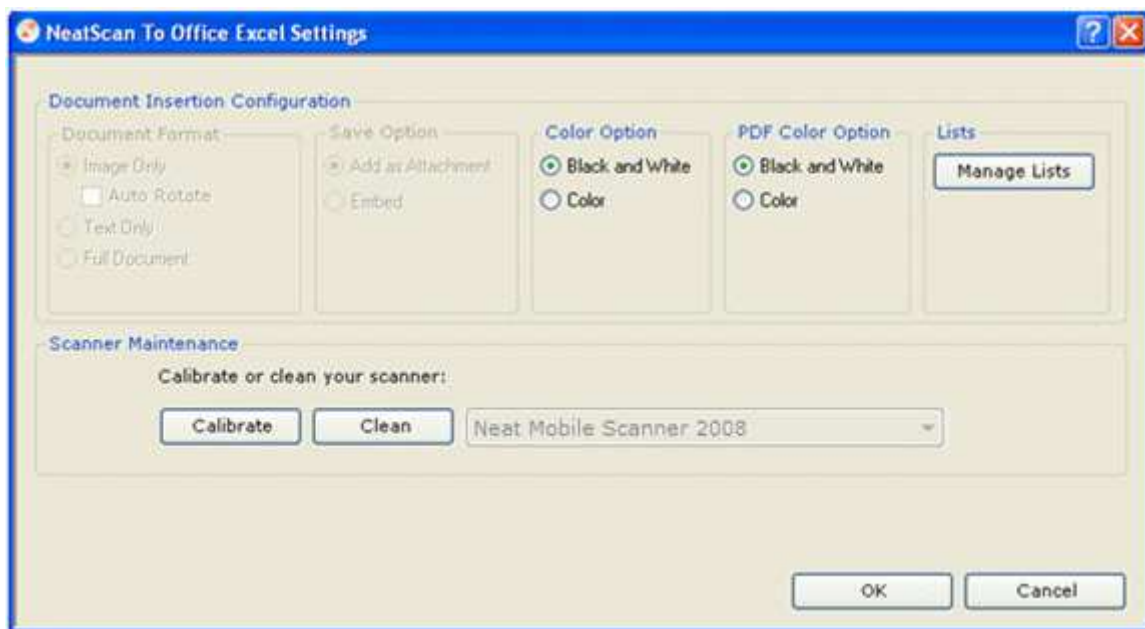
Choosing Your Excel Settings

With NeatScan To Office, you can:

- Choose the color of the images you scan directly into an Excel spreadsheet or a PDF file
- [Manage the list](#) of vendors, categories, and payment types associated with your Neat Sheets

Tip: To view your current default settings, hold your mouse pointer over the Settings button on the toolbar.

1. Click the **Settings** button on the NeatScan to Office Excel toolbar.
2. The Settings screen displays:



Note: Remember that the settings you choose apply only to Excel.

3. Select whether you want images that you scan directly into Excel or PDF to be scanned in color or black and white. To do so, click the appropriate circle(s) in the Color Option and PDF Color Option areas of the screen.
4. Click **OK**.

Note: For information about scanning directly to PDF, see [Scanning to PDF](#).

5. Your settings are now saved as the default and will be used the next time you scan into Excel. To change this default, repeat steps 1-4 above.
6. You can now [calibrate](#) or [clean](#) your scanner by clicking the appropriate button.

NeatScan™ To Office

List Manager

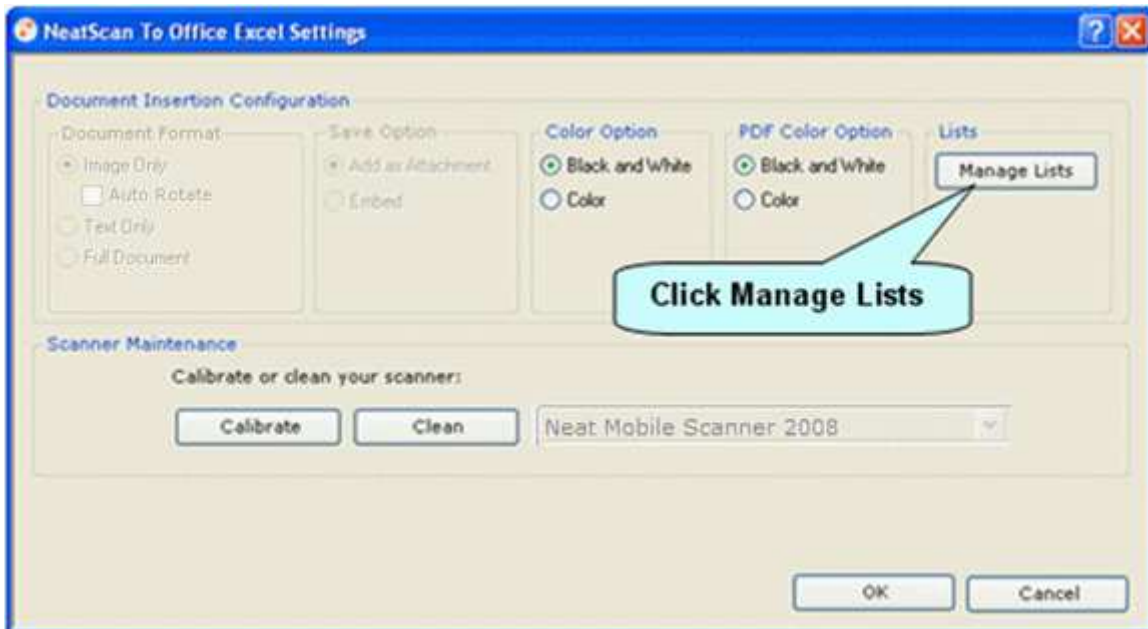
The List Manager enables you to manage three different lists of Excel data. These include:

- Vendor Names
- Category Names
- Payment Types

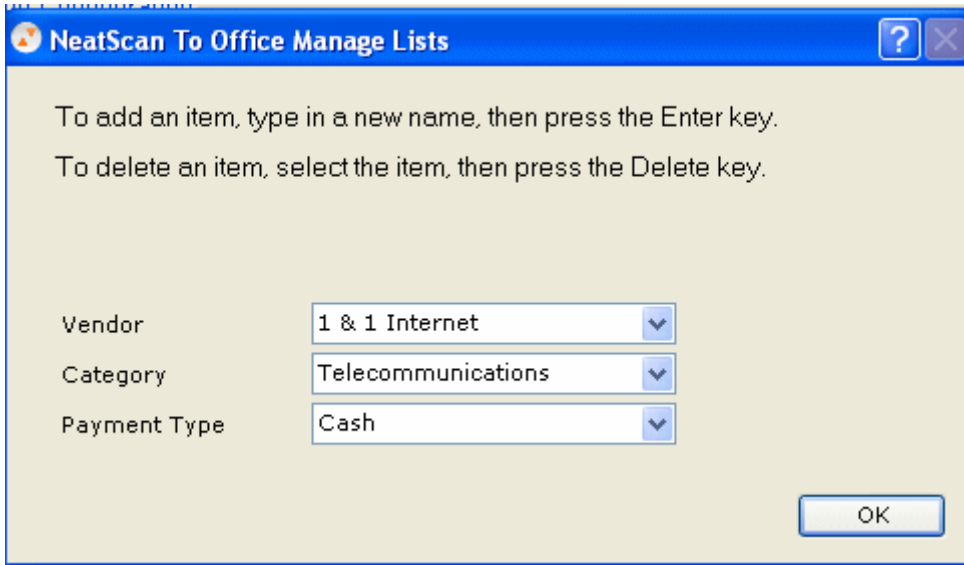
You can manage your lists in two ways: 1) by using the Manage Lists button on the Settings screen, or 2) by using the receipt preview screen that is displayed after you scan a receipt into a Neat Sheet.

Managing Lists by using the Manage Lists Button on the Settings Screen

1. Click **Settings** on the NeatScan To Office toolbar.
2. Click **Manage Lists**, as shown below:



The following screen displays:



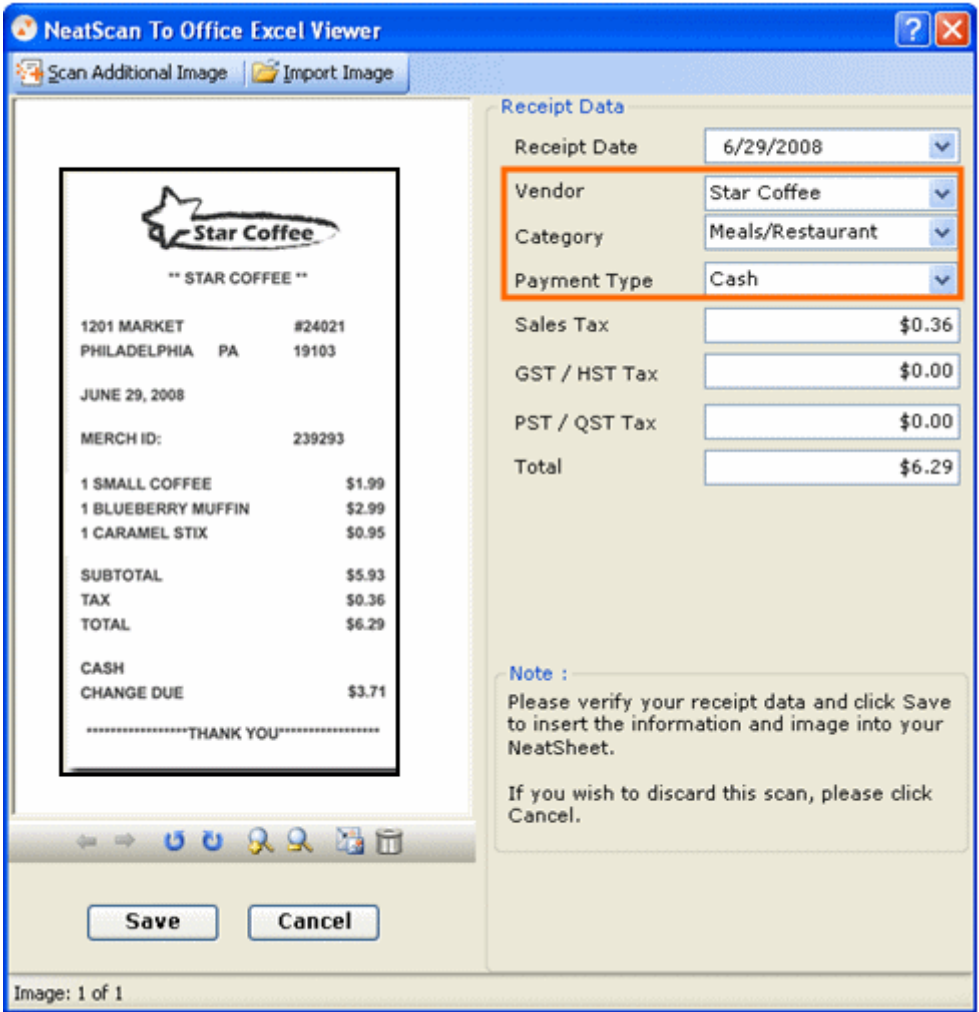
3. The Vendor, Category, and Payment Type dropdown menus enable you to perform the following tasks:
 - **Select an item from the list.** You can use the dropdown menus to select the desired item. You can also search for the item you want by typing the first few letters of that item in the appropriate field and then selecting from the list that displays.
 - **Add an item to a list:** To add an item, just type it into the appropriate field, press the **Enter** key, and then select **Yes** in response to the prompt that displays.
 - **Delete an item from a list.** To delete an item, select that item, press the **Delete** key, and then select **Yes** in response to the prompt that displays. Any vendor name can be deleted from the list. However, certain required Payment Type and Category fields cannot be deleted, and will result in a prompt that states, "Unable to perform requested operation." If you receive this prompt, you must click **OK** to return to the Manage Lists screen.

Note: You cannot rename an item on a list. However, you can delete that item and then add the desired item instead.

4. Click **OK** to close the Manage Lists window.
5. Click **OK** to close the Settings Window.

Managing Lists by Using the Receipt Preview Screen

1. After you [scan a receipt into a Neat Sheet](#), the Receipt Preview screen displays. This screen includes the Vendor, Category, and Payment Type dropdown menus that also appear on the Settings screen.



2. See step 3 above for information about how to manage your lists by using the dropdown menus.

NeatScan™ To Office

Outlook Overview

With NeatScan To Office, you can scan text, images or entire documents directly into Outlook:

- [Contacts](#)
- [Calendar](#)
- [Tasks](#)
- [Mail](#)

NeatScan™ To Office

Scanning to Contacts

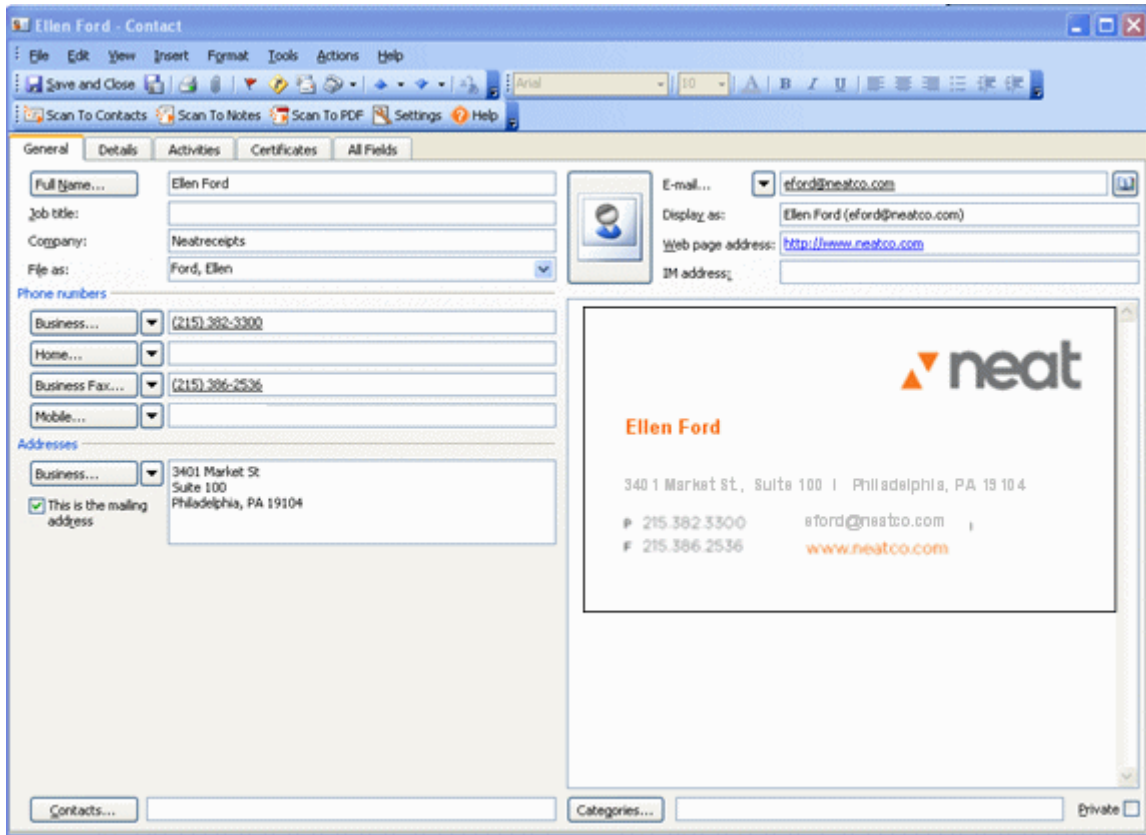
With NeatScan To Office, you can scan contact information from business cards directly into Outlook.

1. Open Outlook.
2. Select **Contacts**. The Contacts screen displays, with the NeatScan to Office toolbar on top.
3. Insert the business card into your scanner with the front of the card facing down, and click **Scan to Contacts** on the NeatScan to Office toolbar.

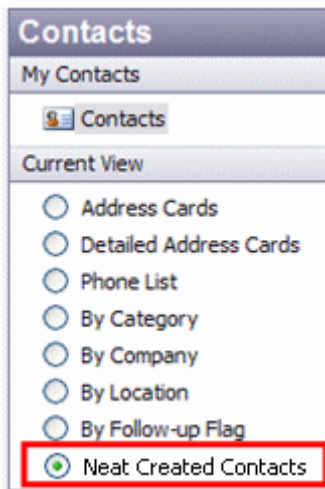


Note: You can also scan by clicking the **New** button, and then clicking **Scan to Contacts** on the toolbar that displays on the New Contact screen.

4. A "Scanning" message displays. When the scan is complete, the information contained on the card fills the appropriate fields, while an image of the card displays on the bottom right side of the screen:



5. Check the scanned information to make sure it is accurate. You can edit it as needed.
6. To scan the other side of the card, place the back of the card face down in your scanner and click **Scan to Notes**. The scanned image will display below the image of the card's front.
7. You can now save the information and exit by clicking **Save and Close**.
8. NeatScan To Office adds an item to the "Contacts" list in Outlook that enables you to view only those contacts you created by scanning. To do so, just click the circle next to Neat Created Contacts, as shown below:



Note: Remember that your results are based on your "Settings" choices. For more information, see [Outlook Settings](#).

Tip: Also, remember that you can scan in other items associated with a contact, such as a resume or notes.

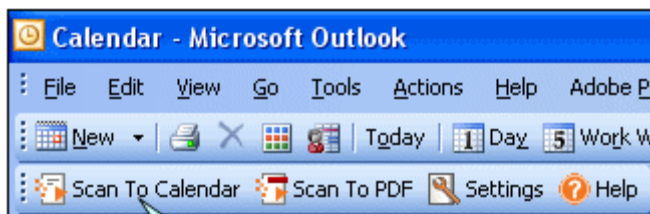
NeatScan™ To Office

Scanning to Your Calendar

With NeatScan To Office, you can scan text, images, or entire documents directly into your Outlook calendar.

Note: You can also scan a document directly to a PDF file. For more information, see [Scanning to PDF](#).

1. Open your Outlook calendar.
2. Insert a document face down into your scanner.
3. If you have not done so already, select the desired save option and document format by clicking the Settings button (see [Outlook Settings](#) for more information).
4. Click the **Scan To Calendar** button on the NeatScan To Office toolbar, as shown below:



5. A "Scanning" message displays. When the scan is complete, the results display on your Calendar.

Note: Remember that your results are based on the "Settings" choices that you make. For more information, see [Outlook Settings](#).

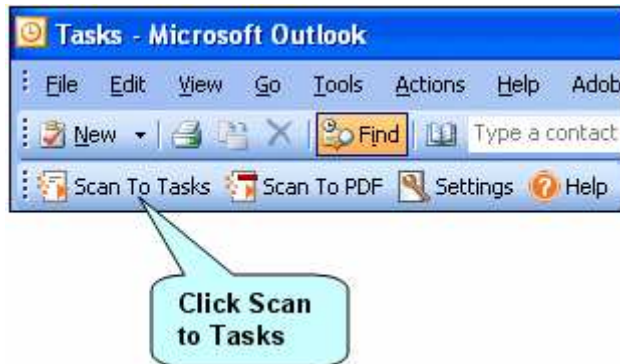
NeatScan™ To Office

Scanning to Tasks

With NeatScan To Office, you can scan text, images, or entire documents directly into your Outlook tasks.

Note: You can also scan a document directly to a PDF file. For more information, see [Scanning to PDF](#).

1. Open your Outlook Tasks.
2. Insert a document face down into your scanner.
3. If you have not done so already, select the desired save option and document format by clicking the Settings button (see [Outlook Settings](#) for more information).
4. Click the **Scan To Tasks** button on the NeatScan To Office toolbar, as shown below:



5. A scanning message displays. When the scan is complete, your results display on the Tasks tab.

Note: Remember that your results are based on the "Settings" choices that you make. For more information, see [Outlook Settings](#).

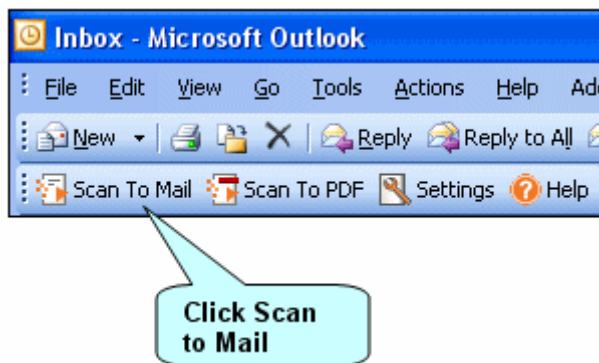
NeatScan™ To Office

Scanning to an Email

With NeatScan To Office, you can scan text, images, or entire documents directly into your email.

Note: You can also scan a document directly to a PDF file. For more information, see [Scanning to PDF](#).

1. Open Outlook.
2. Insert a document face down into your scanner.
3. If you have not done so already, select the desired save option and document format by clicking the Settings button (see [Outlook Settings](#) for more information).
4. Click the **Scan To Mail** button on the NeatScan To Office toolbar, as shown below:



Note: You can also scan by clicking the **New** button, and then clicking **Scan to Mail** on the toolbar that displays on the New Mail screen.

5. A "Scanning" message displays while your document is scanned. When the scan is complete, your results display in the email.

Note: Remember that your results are based on the "Settings" choices that you make. For more information, see [Outlook Settings](#).

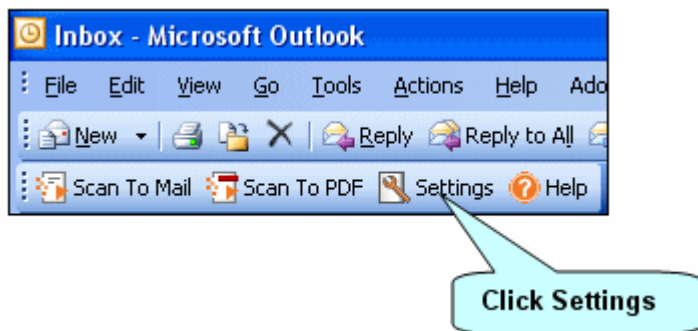
NeatScan™ To Office

Outlook Settings

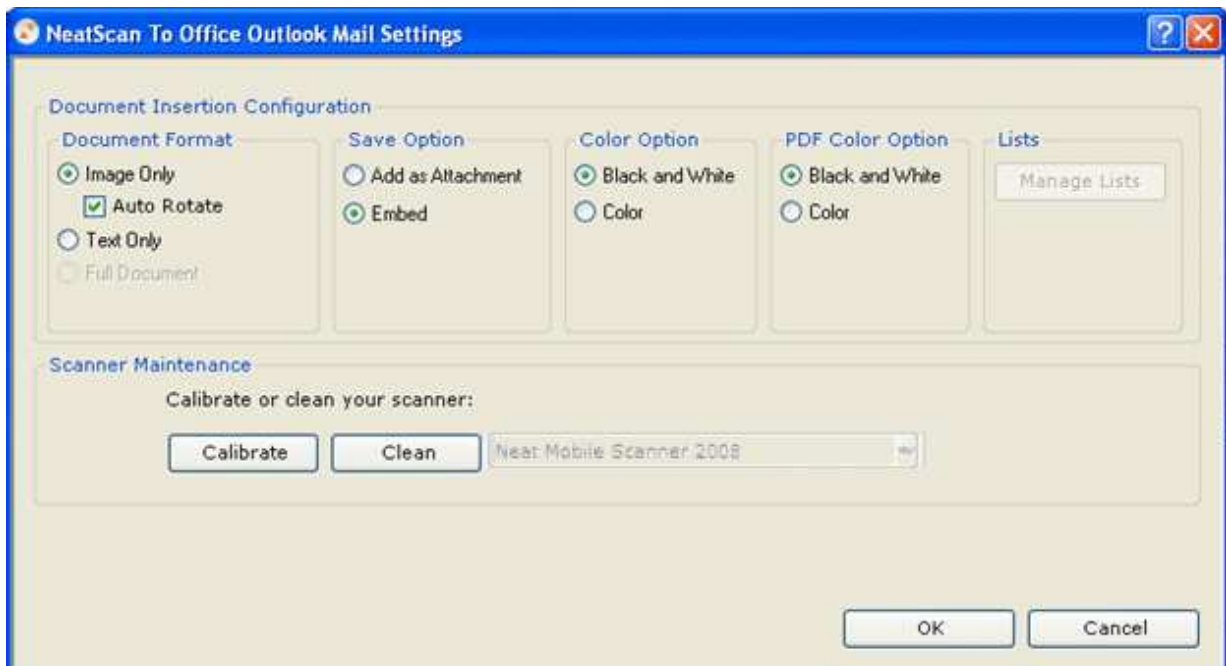
With NeatScan To Office, you can choose the format, color, and way you want to save the document that you scan into Outlook.

Tip: To view your current default settings, hold your mouse pointer over the Settings button on the toolbar.

1. Open Outlook.
2. Click the **Settings** tab on the NeatScan to Office toolbar, as shown below:



3. The Settings screen displays:



Note: Remember that the settings you choose apply only to Outlook.

4. Select the document format you want by clicking the appropriate circle in the Document Format area of the screen:
 - Choose **Image Only** to scan an image of the document. The text will not be editable.
 - Choose **Text Only** to scan the text of your document.. Images will not be scanned.
 - Choose **Full Document** to scan the entire document. This format enables you to edit all text and graphics. However, you cannot select Full Document without first choosing **Add as Attachment** in the Save Option area.
5. Select the way you want to save the scanned item by clicking the appropriate circle in the Save Option area of the screen.
 - Choose **Add as Attachment** to link text and images as attachments to Outlook.
 - Choose **Embed** to embed text and graphics directly into Outlook.
6. Select whether you want items to be scanned in color or black and white by clicking the appropriate circle(s) in the Color Option and PDF Color Option areas of the screen.

Note: For information about scanning directly to PDF, see [Scanning to PDF](#).

7. Click **OK**.
8. Your settings are now saved as the default and will be used the next time you scan a document into Outlook. To change this default, repeat steps 1-7 above.

Note: You can also use the Settings Screen to [Calibrate](#) or [Clean](#) your scanner.

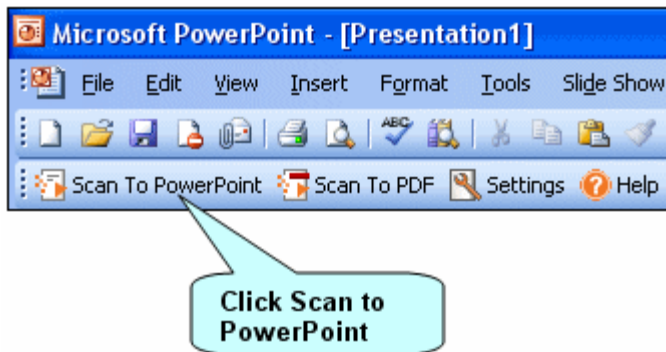
NeatScan™ To Office

Scanning Documents to PowerPoint

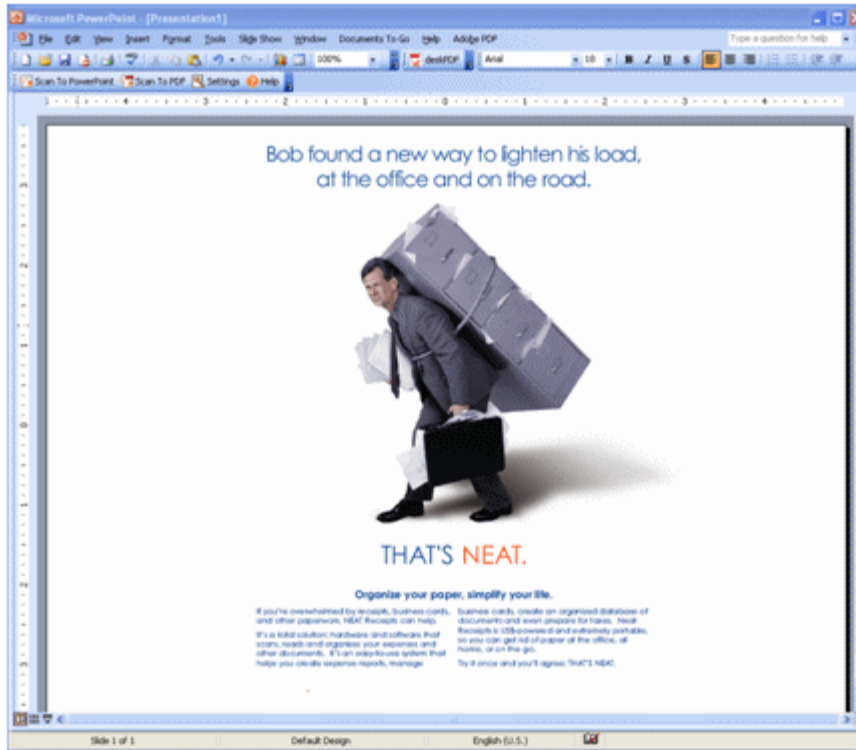
With NeatScan To Office, you can scan text, images, or entire documents directly into your PowerPoint presentation.

Note: You can also scan a document directly to a PDF file. For more information, see [Scanning to PDF](#).

1. Open PowerPoint.
2. Insert a document face down into your scanner.
3. If you have not done so already, select the desired save option and document format by clicking the Settings button (see [PowerPoint Settings](#) for more information).
4. Click the **Scan To PowerPoint** button on the NeatScan to Office toolbar, as shown below:



5. A "Scanning" message displays. When the scan is complete, your results display in the PowerPoint slide, as shown in the example of a scanned image below. (If you selected Text as your setting, the text is scanned into a new text box on the slide.)



Note: Remember that your results are based on the "Settings" choices that you make. In this example, the user selected "Embed" and "Image," so an embedded image displays in the PowerPoint slide. For more information, see [PowerPoint Settings](#).

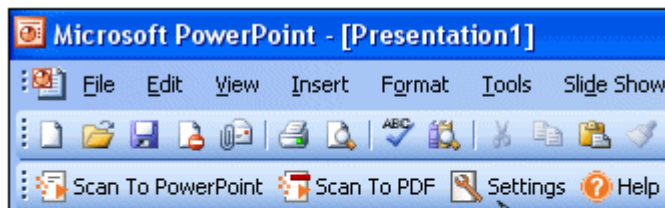
NeatScan™ To Office

Choosing Your PowerPoint Settings

With NeatScan To Office, you can choose the format, color, and way you want to save the documents that you scan into a PowerPoint presentation.

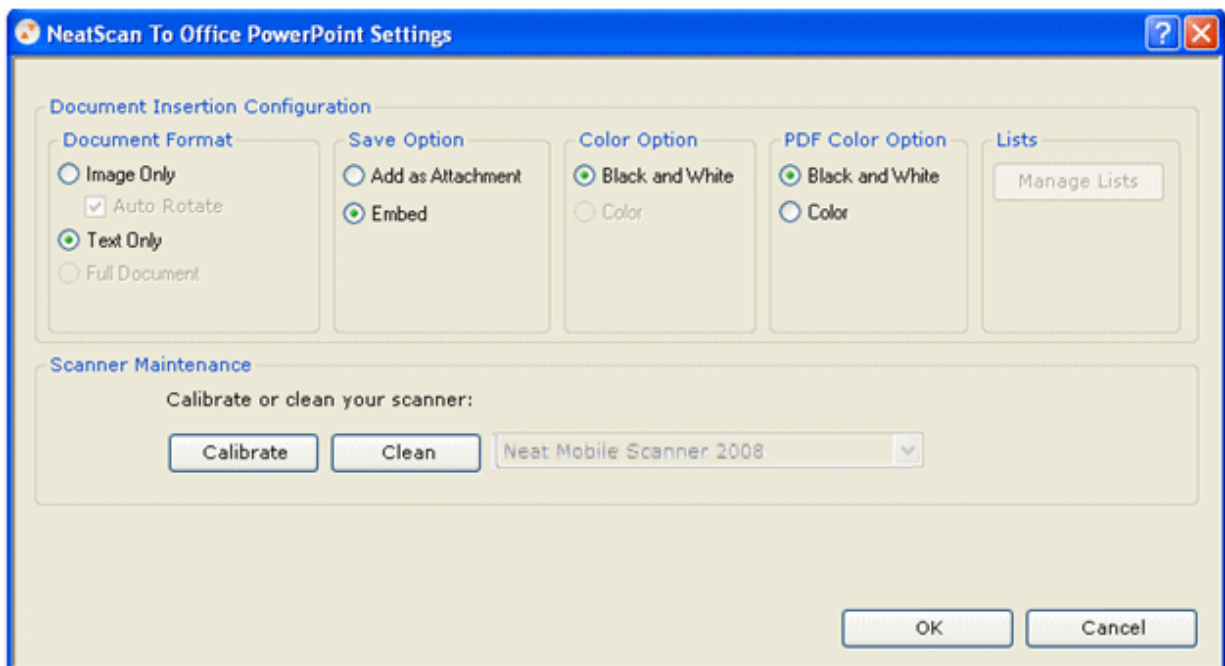
Tip: To view your current default settings, hold your mouse pointer over the Settings button on the toolbar.

1. Open PowerPoint.
2. Click the **Settings** button on the NeatScan to Office toolbar, as shown below:



Click Settings

3. The Settings screen displays:



Note: Remember that the settings you choose apply only to PowerPoint.

4. Select the document format you want by clicking the appropriate circle in the Document Format area of the screen:
 - Choose **Image Only** to scan an image of the document. The text will not be editable.
 - Choose **Text Only** to scan the text of your document. Images will not be scanned.
 - Choose **Full Document** to scan the entire document. This format enables you to edit all text and graphics. However, you cannot select Full Document without first choosing **Add as Attachment** in the Save Option area.
5. Select the way you want to save the scanned item by clicking the appropriate circle in the Save Option area of the screen.
 - Choose **Add as Attachment** to link text and images as attachments to your PowerPoint presentation.
 - Choose **Embed** to embed text and graphics directly into your PowerPoint presentation.
6. Select whether you want items to be scanned in color or black and white by clicking the appropriate circle(s) in the Color Option and PDF Color Option areas of the screen.

Note: For information about scanning directly to PDF, see [Scanning to PDF](#).

7. Click **OK**.
8. Your settings are now saved as the default and will be used the next time you scan a document into PowerPoint. To change this default, repeat steps 1-7 above.

Note: You can also use the Settings Screen to [Calibrate](#) or [Clean](#) your scanner.

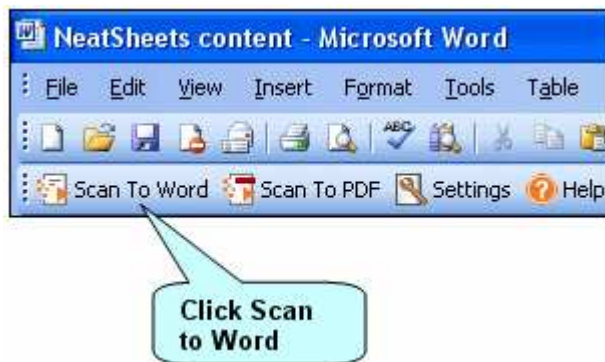
NeatScan™ To Office

Scanning Documents to Word

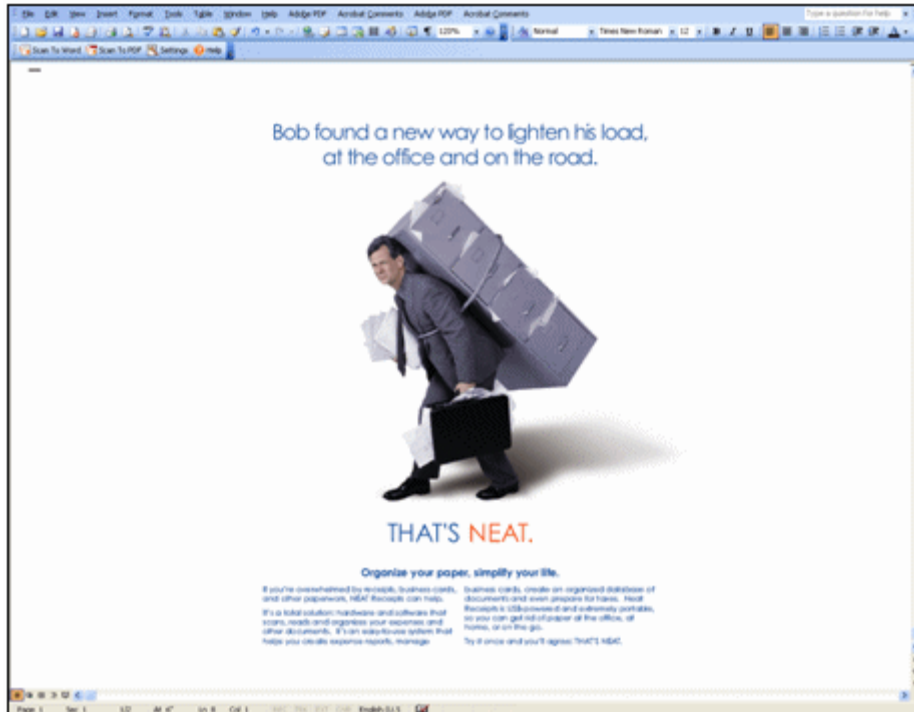
NeatScan To Office enables you to scan documents directly into a Word file as text, image, or an entire document.

Note: You can also scan a document directly to a PDF file. For more information, see [Scanning to PDF](#).

1. Open Word.
2. Insert a document face down into your scanner.
3. If you have not done so already, select the desired save option and document format by clicking the Settings button (see [Word Settings](#) for more information).
4. Click the **Scan to Word** button on the NeatScan To Office toolbar, as shown below:



5. A "Scanning" message displays. When the scan is complete, your results display in the Word file, as shown in the example below:



Note: Remember that your results are based on the "Settings" choices that you make. In this example, the user selected "Embed" and "Image," so an embedded image displays in the Word document. For more information, see [Word Settings](#).

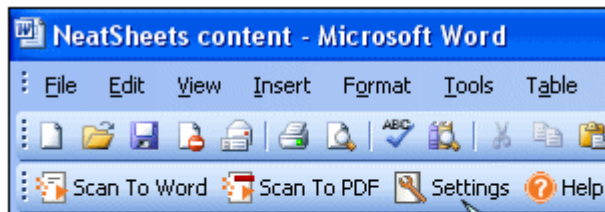
NeatScan™ To Office

Choosing Your Word Settings

With NeatScan To Office, you can choose the format, color, and way you want to save the document that you scan into a Word file.

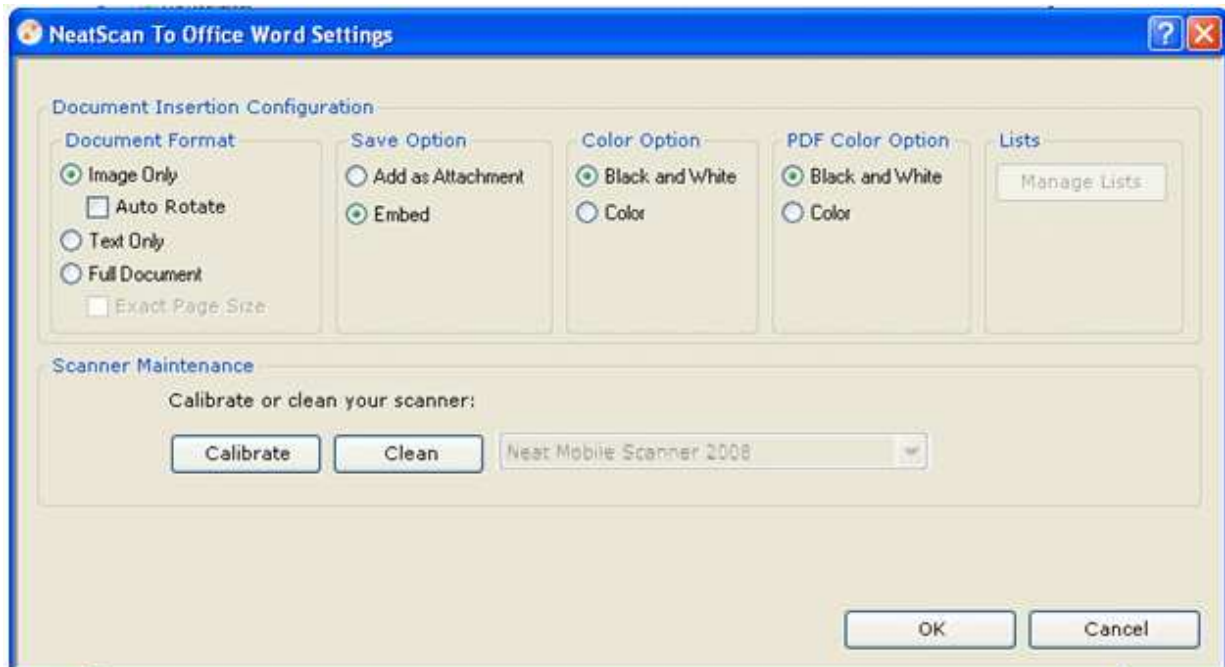
Tip: To view your current default settings, hold your mouse pointer over the Settings button on the toolbar.

1. Open Word.
2. Click the **Settings** button on the NeatScan To Office toolbar, as shown below:



Click Settings

3. The following screen displays:



Note: Remember that the settings you choose apply only to Word.

4. Select the document format you want by clicking the appropriate circle in the Document Format area of the screen:
 - Choose **Image Only** to scan an image of the document. The text will not be editable.
 - Choose **Text Only** to scan the text of your document. Images will not be scanned.
 - Choose **Full Document** to scan the entire document. This format enables you to edit all text and graphics. If you select **Exact Page Size**, the size of the page will match that of the original. However, you cannot select Exact Page Size without first choosing **Embed** in the Save Option area.
5. Select the way you want to save the scanned item by clicking the appropriate circle in the Save Option area of the screen.
 - Choose **Add as Attachment** to link text and images as attachments to your Word document.
 - Choose **Embed** to embed text and graphics directly into your Word document.
6. Select whether you want items to be scanned in color or black and white by clicking the appropriate circle(s) in the Color Option and PDF Color Option areas of the screen.

Note: For information about scanning directly to PDF, see [Scanning to PDF](#).

7. Click **OK**.
8. Your settings are now saved as the default and will be used the next time you scan a document into Word. To change this default, repeat steps 1-7 above.

Note: You can also use the Settings screen to [Calibrate](#) or [Clean](#) your scanner.

NeatScan™ To Office

Scanning to PDF

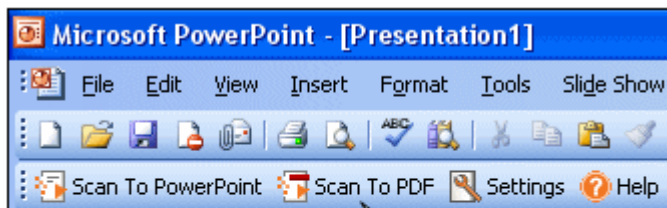
NeatScan To Office enables you to scan documents directly into PDF files, which you can then save, view, search, and print by using the Adobe Reader.

Note: You must have the Adobe Reader installed on your computer in order to open the scanned file. If you do not have the Adobe Reader, click



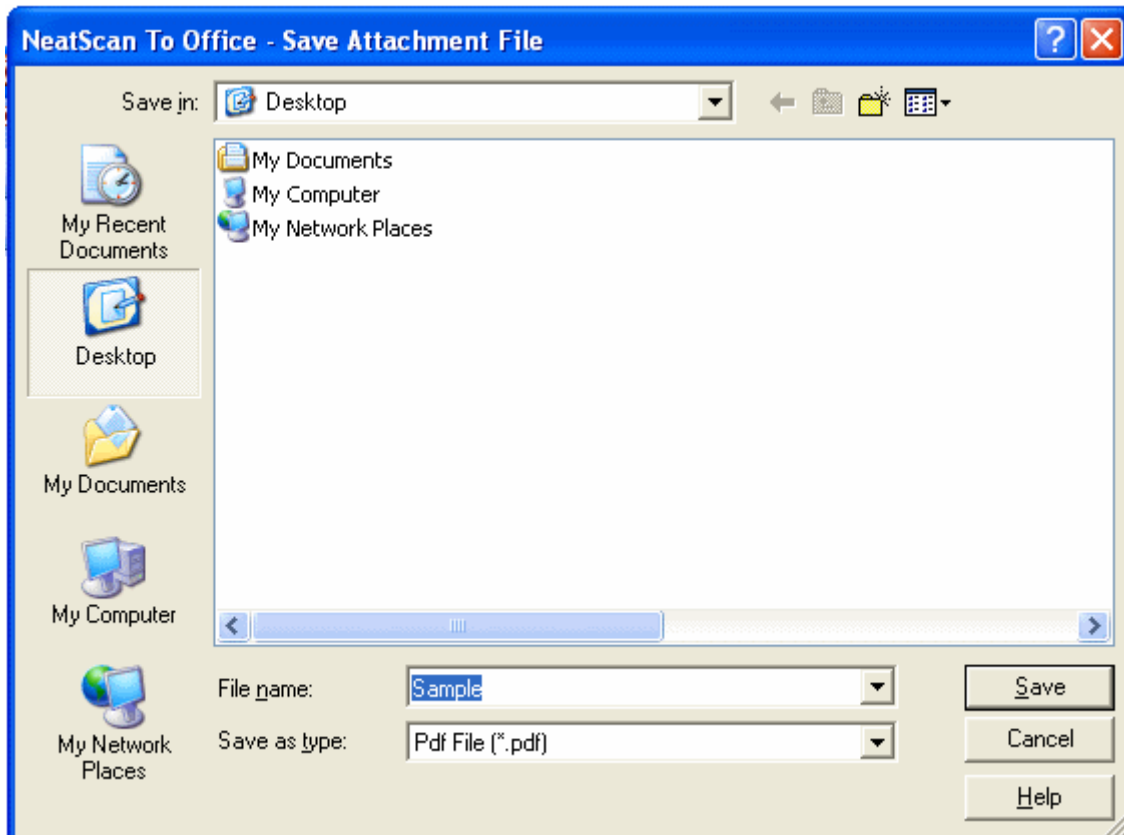
and follow the download instructions provided by Adobe.

1. Insert the document you wish to scan face down in your scanner.
2. Click **Scan to PDF** on any NeatScan to Office toolbar.

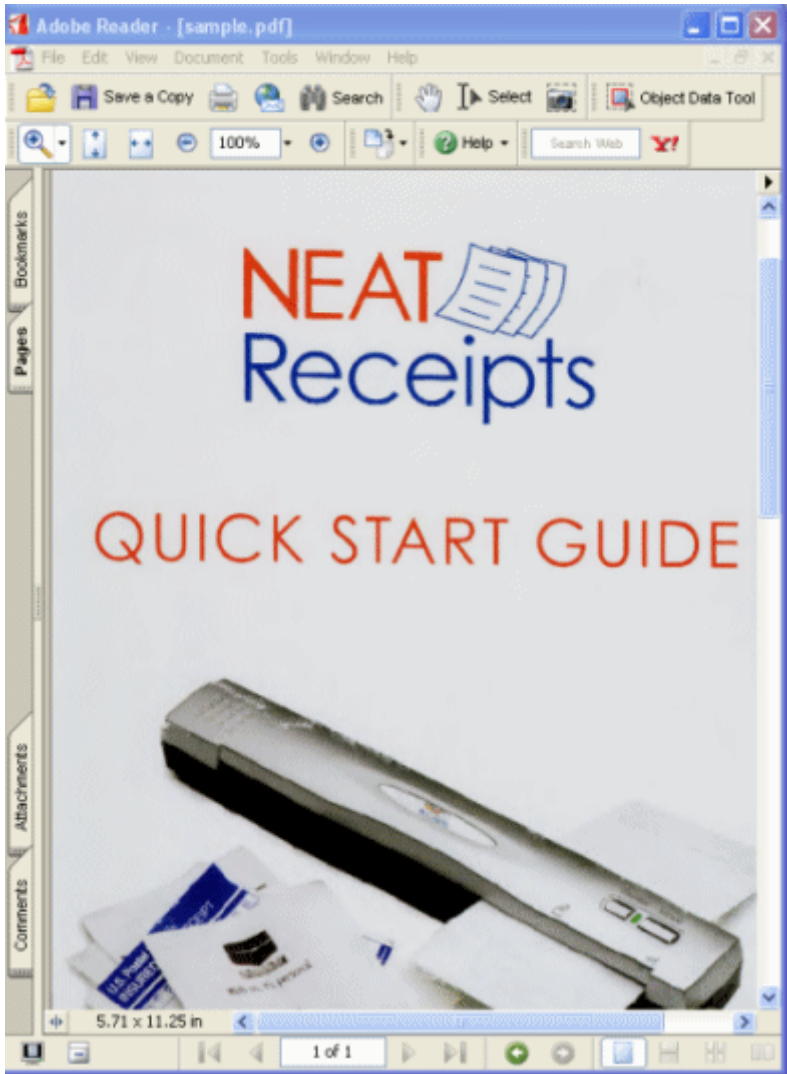


Click Scan
to PDF

3. When the scan is complete, the Save Attachment screen displays, as shown below:



4. Enter a name for the scanned file in the File Name field, and click **Save**.
5. The scanned PDF file opens in the Adobe Reader, as shown below.



Note: You can choose whether to scan a PDF file in color or black and white by using the Settings option on any NeatScan To Office toolbar. The options you select will apply whenever you scan a PDF using any of the applications.

NeatScan™ To Office

Cleaning Your Scanner

How do I clean the scanner?

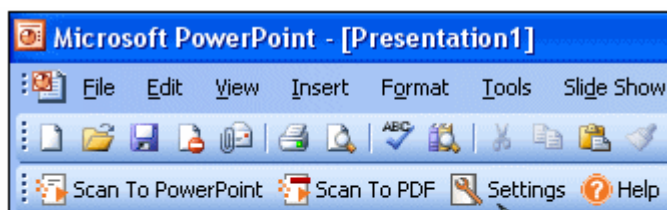
Keeping your scanner clean is an important part of scanner maintenance and should not be overlooked. Dust and other obstructions on the scanner lens can cause streaks on scanned images. The cleaning process will remove flecks of dust or small pieces of paper that have been caught in the scanner, which will in turn improve the quality of your scans.

You will find two types of cleaning paper in the NeatScan To Office box:

- Our traditional, dry NeatScan To Office cleaning paper is a small, white, 'cottony' piece of paper that almost resembles a dryer sheet.
- In addition, scanners come with a sheet of alcohol cleaning paper, which is particularly useful for older scanners, or any scanners that are producing very streaky images.

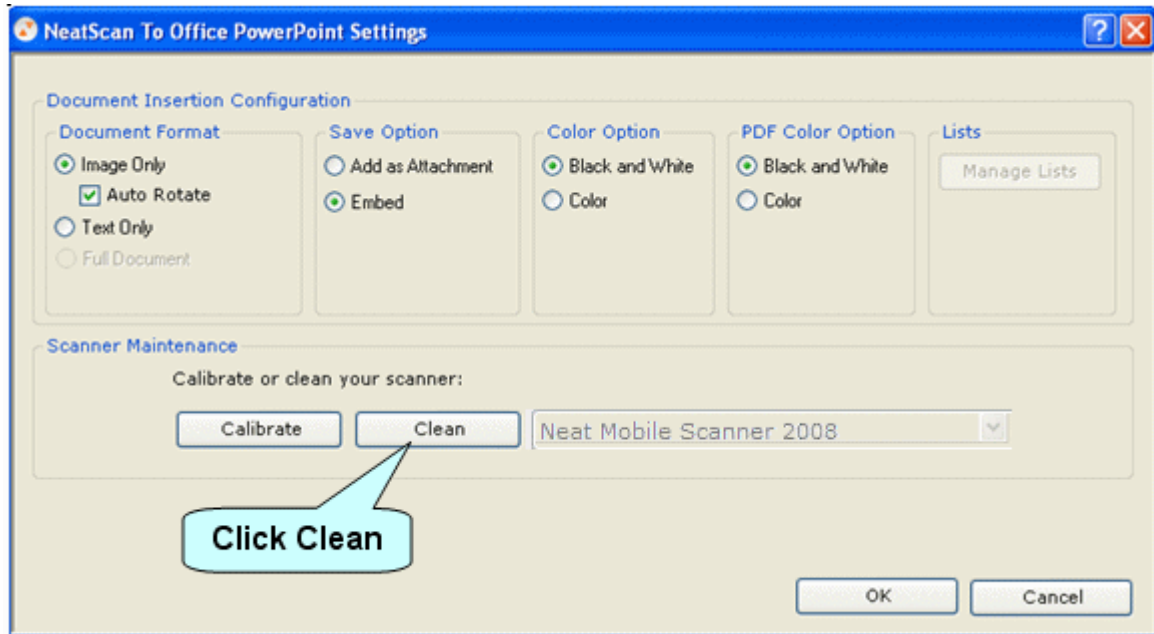
To remove non-sticky dirt such as dust flecks and fibers, use the traditional, dry cleaning paper:

1. Remove the cleaning paper from the NeatScan To Office box.
2. Feed the cleaning paper into the scanner, just as you would a document.
3. Click **Settings** on any NeatScan To Office toolbar, as shown below:



Click Settings

4. Click the **Clean** button on the Settings screen that displays::



Note: During the cleaning process, the cleaning paper will move back and forth through the scanner for approximately 25 seconds before pulling the paper through all the way.

5. During cleaning, you will see a message that says: "Cleaning." When cleaning is complete, you will receive a message that says the scanner has been successfully cleaned.
6. Click **OK**.
7. If, upon scanning, your scans still appear faint or streaky, please try cleaning with the alcohol cleaning paper, as described below.

To remove sticky or gummy substances, use the "wet" alcohol cleaning paper. (It can only be used once.)

1. Remove the alcohol cleaning paper from the NeatScan To Office box.
2. Repeat steps 1 - 6 above.

I love the alcohol cleaning paper--where can I get more?

Should your alcohol cleaning paper dry out, or if you require more, you can go to our [website](#) and order a Scanner Maintenance Kit, which includes 6 sheets of alcohol cleaning paper and 3 sheets of calibration paper!

NeatScan™ To Office

Calibrating Your Scanner

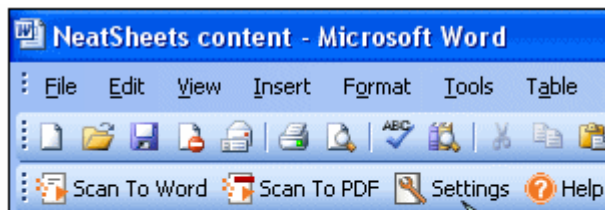
Calibration is a simple process that enables your scanner to distinguish between colors and shades. This helps the scanner to "see" correctly and provide accurate images. While NeatScan To Office prompts you to calibrate the scanner during installation, you may need to recalibrate sometimes if your images appear faint or off-balance in any way.

To calibrate in NeatScan To Office, do the following:

1. Remove the calibration paper from the NeatScan To Office box and load it into your scanner with the arrows facing up, as shown in the following picture:

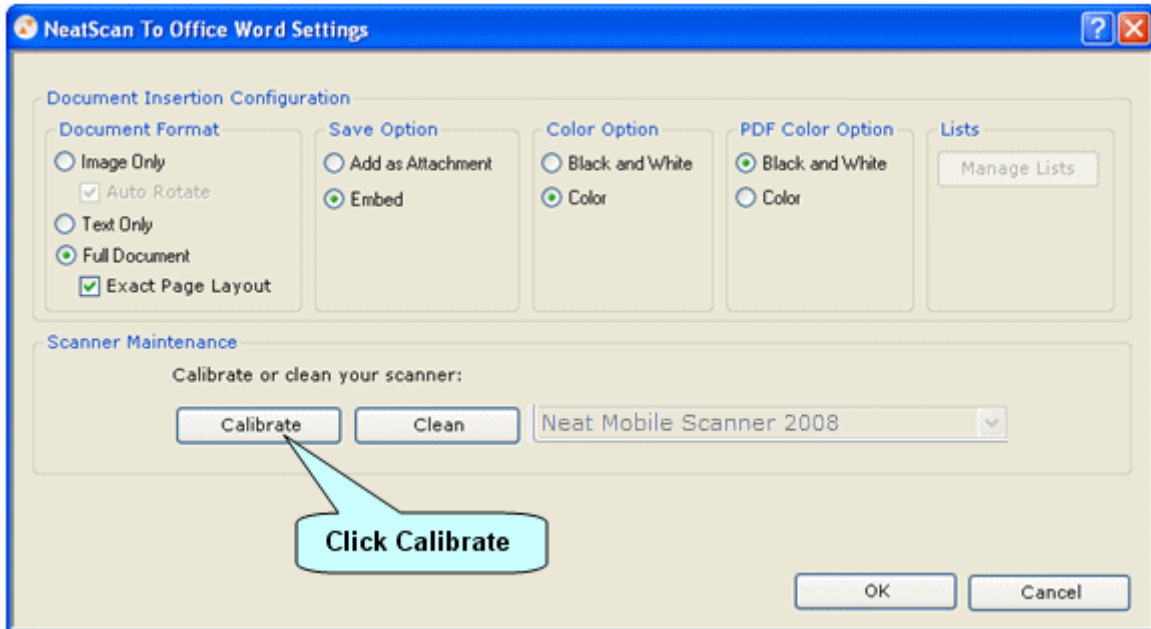


2. Click **Settings** on any NeatScan To Office toolbar.



Click Settings

3. Click the **Calibrate** button on the screen that displays:



4. The calibration paper is scanned.
5. Once the scanning is complete, click the **OK** button.
6. Your scanner has now been successfully calibrated. If your images ever seem faint or unclear, remember to recalibrate by repeating this process.

NeatScan™ To Office

FAQs

Which versions of Microsoft Office is NeatScan To Office compatible with?

NeatScan To Office is compatible with Microsoft Office 2003 and 2007.

Can I install NeatScan To Office on the same computer where NeatReceipts is installed?

Yes, you can. NeatReceipts and NeatScan To Office are two separate applications. One does not overwrite or replace the other, and the two applications can be run side by side. However, if you will be installing side by side, you must be running NeatReceipts Version 3 Service Pack 1 (or higher).

If I'm using Microsoft Vista, do I need Administrative rights to install NeatScan To Office?

No, you do not need to have Administrative rights to install NeatScan To Office.

What are some ways I can use NeatScan To Office?

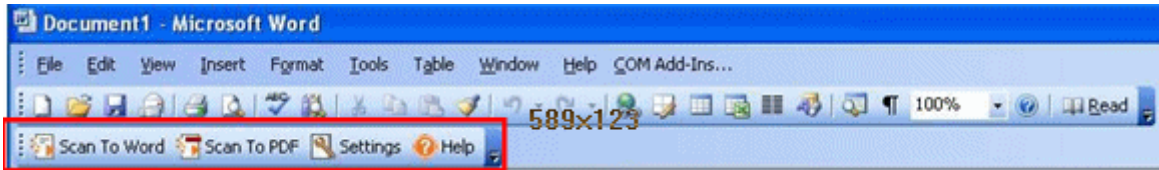
- Instantly create Outlook contacts by scanning business cards
- Instead of faxing, open an Outlook email and scan and attach a PDF, or scan the text or image directly into the body of the email
- Scan documents into an Outlook Calendar entry and send a meeting request
- Create expense reports using one of the provided Neat Sheets
- Instead of re-typing a document, scan it into Word and edit the text
- Scan an image directly into a PowerPoint presentation

Where can I learn how to get the most out of NeatScan To Office?

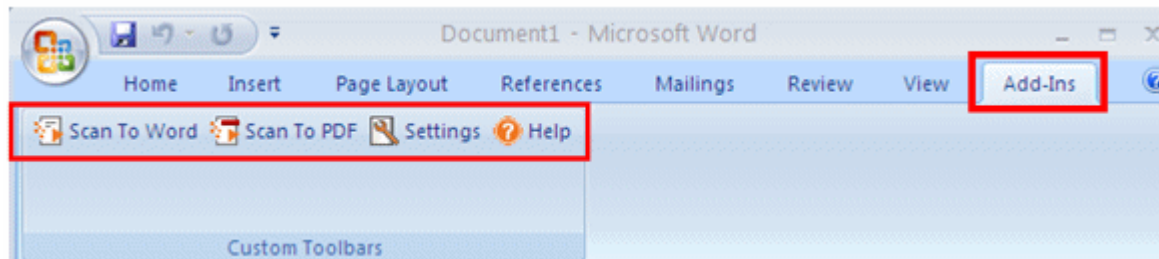
An overview video and tutorials are available in the Additional Resources section of Help.

Where is my NeatScan To Office toolbar?


In Microsoft Office 2003, the NeatScan To Office toolbar displays on the top left, as shown in the example below.



In Microsoft Office 2007, the NeatScan To Office toolbar displays in the Add-Ins Tab, as shown in the example below:



How do I view an item that I've scanned as a PDF file?

You'll need the Adobe reader to view any items that you've scanned as PDF files. If you don't have the Adobe Reader loaded on your computer, click  and follow the download instructions provided by Adobe.

What is a Neat Sheet?

Neat Sheets are intelligent templates that allow you to scan receipt data and images directly into an expense report. Receipt data, such as date, vendor, sales tax and total is automatically placed in the appropriate fields. You can access a Neat Sheet by clicking the "Open Neat Sheet" button on the NeatScan to Office Excel toolbar.

Can I create my own Neat Sheet?

Currently, it is not possible to create your own Neat Sheet. However, if you have an expense template that you would like formatted as a Neat Sheet, please email it to Jenn Choi at jchoi@neatreceipts.com for our review.

How often should I clean my scanner?

You only need to clean your scanner when you feel that the scanned images are less crisp and clear than usual. You received two different kinds of cleaning paper in the NeatScan to Office box. Use the traditional, dry cleaning paper to remove non-sticky dirt such as dust flecks and fibers. The "wet" alcohol paper is for removing sticky, gummy substances from the scanner. For more information, see [Cleaning Your Scanner](#).

I love the alcohol cleaning paper--where can I get more?

Should your alcohol cleaning paper dry out, or if you require more, you can go to our [website](#) and order a Scanner Maintenance Kit, which includes 6 sheets of alcohol cleaning paper and 3 sheets of calibration paper.

What about calibrating my scanner? Is that something I have to do often?

You may need to recalibrate once in a while if your images appear faint or off-balance in any way. Calibration is a simple process that enables your scanner to distinguish between colors and shades. This helps the scanner to "see" correctly and provide accurate images. For more information, see [Calibrating Your Scanner](#).

My scanner isn't responding, what should I do?

Disconnect your scanner, wait 1 minute, and then reconnect it. If the scanner is still unresponsive, please contact customer support at 1-866-632-8732.

NeatScan™ To Office

Overview Video

To view a brief video that explains the features and benefits of using NeatScan To Office, click [here](#).

NeatScan™ To Office

Other Video Tutorials

To view a series of short videos that explain how to use NeatScan To Office with each Office application, click [here](#).

NeatScan™ To Office

Registration

You must register your copy of NeatScan To Office in order to take advantage of free technical support and to qualify for your hardware warranty. To register, follow these steps:

1. Click [registration](#).
2. When the Customer Registration form displays, complete all the mandatory fields.
3. Click **Submit** on the bottom of the form.