NetSuite for iPhone

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- Did you find any errors?
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- Do you need more examples?
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Overview

NetSuite for iPhone puts all your key business information at your fingertips.

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  See Dashboard Portlets
- **Create and Submit Expense Reports**

  See Tracking Expenses
- **Manage Your Schedule and Events**

  See Managing your Calendar
- **Work with all Main Record Types**

  See Supported Record Types
- **Keep Track of Billable Hours**

  See Tracking Time
- **Make Instant Approvals of Purchase Orders and Expense Reports**

  See The Approvals Portlet

> ⓘ **Note:** NetSuite for iPhone supports all standard roles and the Employee Center role.

Supported Roles

All standard roles, including Employee and Advanced Partner Center, are supported and enabled by default. Customized roles and the System Administrator role will need the Mobile Device Access permission adding before they can access NetSuite from their mobile device. This permission cannot be added to the Administrator role.

If you are the Administrator and you require mobile access for the Administrator role, you can add the Mobile Device Access permission to yourself as a user. See To add the mobile device access permission to a user:.

Administrators can add/remove access for individual roles as required. See Mobile Device Access Permission.

> ⓘ **Note:** Customer, Vendor, and Partner Center roles are not supported.

Supported Record Types

NetSuite for iPhone supports all of the following record types:

Record Type	Supported Actions
†Basic Actions = Create, Delete, Edit, Reset, Save	
Bills	Basic Actions †, Autofill, Cancel Bill, Recalc
Cases	Basic Actions†, Grab

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Record Type	Supported Actions
Contacts	Basic Actions †
Customers	Basic Actions †, Accept Payment
Custom Records	Basic Actions † See Support for Custom Record Types.
Employees	Basic Actions †
Estimates	Basic Actions †, Autofill, Invoice, Sales Order
Events	Basic Actions †, Accept, Decline, Decline this Date, Quick Accept, Tentative
Expense Reports	Basic Actions †, Approve, Complete Later, Reject, Submit. See Tracking Expenses.
Invoices	Basic Actions †, Accept Payment, Autofill, Renew
Issues	Basic Actions †
Items	Basic Actions †
Leads	Basic Actions †
Opportunities	Basic Actions †
Partners	Basic Actions †
Phone Calls	Basic Actions †
Prospects	Basic Actions †
Purchase Orders	Basic Actions †, Approve, Autofill, Bill, Reject, Close (the purchase order), Receive
Sales Orders	Basic Actions †, Approve, Autofill, Bill Remaining, Cancel Order, Close Order, Next Bill
Tasks	Basic Actions †
Vendors	Basic Actions †

In addition NetSuite for iPhone provides limited support for the following record types:

Record Type	Supported Actions	Limitations
†Basic Actions = Delete, Edit, Reset, Save		
Cash Sale	Basic Actions †	Can only be accessed via one of the fully supported record types listed above.
Media Items	Cancel, Delete, Edit, Save	Can only be accessed via one of the fully supported record types listed above.
Messages	Cancel, Create, Forward, Merge & Send, Preview, Reply, Reply to All, Reset	Can only be accessed via one of the fully supported record types listed above, and is not supported for Saved Searches. Only image files are supported. PDF files cannot be uploaded.

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Record Type	Supported Actions	Limitations
Payment	Basic Actions †	Can only be accessed via one of the fully supported record types listed above.
Time Entries	Cancel, Delete, Edit, Save	Can only be accessed via one of the fully supported record types listed above.
User Notes	Basic Actions †	Can only be accessed via one of the fully supported record types listed above.

Support for Custom Record Types

NetSuite for iPhone provides complete access to custom records including support for view, edit, create and delete (for any custom records already accessible via the NetSuite web application). You can also access Saved Searches based on custom records, and search for custom records using the Global Search feature.

> **Note:** Administrators can control which custom record types are available on their user's devices. To be accessible from a mobile device, custom record types must have both the Allow UI Access and the Allow Mobile Access boxes checked. See the help topics Creating Custom Record Types and Prevent Access through the User Interface.

Features with Limited Support

The following features are not fully supported in the NetSuite for iPhone app:

- **VSOE** – NetSuite's Vendor-Specific Objective Evidence (VSOE) feature is not supported. You can access and edit records that have the VSOE feature enabled, but you will not be able to view or edit the VSOE specific fields in those records. See the help topics Using the VSOE Feature and Setting Up VSOE on an Item Record.
- **Advanced Inventory Management** – You can access and edit records that have the feature enabled, but you will not be able to view or edit the Advanced Inventory Management specific fields in those records. See the help topic Advanced Inventory Management.
- **Advanced Bin Management** – You can access and edit records that have the feature enabled, but you will not be able to view or edit the Advanced Bin Management specific fields in those records. See the help topic Advanced Bin / Numbered Inventory Management.
- **File Cabinet** – Browsing and access to the file cabinet is not supported. It is only available on certain fields to select, add, save or view files that are stored in file cabinet.

Security

NetSuite for iPhone utilizes the following features to enhance the security of your data while using a mobile device.

- Mobile Device Access Permission
- Data Security
- Security Questions on Your iPhone
- IP Address Filtering

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Mobile Device Access Permission

Administrators can control who has mobile access to their NetSuite accounts by enabling/disabling the Mobile Device Access permission for each role. This enables administrators to control mobile access on a role by role basis.

The Mobile Device Access permission is enabled, by default, for all roles except:

- **Custom roles** and the **System Administrator** role — require the Mobile Device Access permission to be enabled before they can access NetSuite from their mobile device.

- **Administrator** role — you cannot add the Mobile Device Access permission to this role.

> **Note:** You cannot add the Mobile Device Access permission to the Administrator role.
>
> If you are the Administrator and you require mobile access for the Administrator role, you can add the Mobile Device Access permission to yourself as a user. See To add the mobile device access permission to a user:.

To add the mobile device access permission to a role:

> **Note:** Only administrators can add this permission to a role. See the help topic Customizing or Creating NetSuite Roles for further information on setting permissions.

1. Go to Setup > User/Roles > Manage Roles.
2. Click **Edit/Customize** next to the relevant role.
3. In the Permissions tab, click on the **Setup** subtab.
4. Click **Add** and select the Mobile Device Access permission.
5. Click **Done** then save the changes.

To add the mobile device access permission to a user:

> **Important:** Administrators must ensure Global Permissions is enabled before completing this procedure. See Setup > Company > Enable Features > Permissions > Global Permissions. Check the **Global Permissions** box found in the **Permissions** subsection.

> **Note:** For security reasons we recommend that you do not apply the Mobile Device Access permission directly to a user, but instead apply the permission to the user's role(s). See To add the mobile device access permission to a role: and Using the Global Permissions Feature.

When a permission is added directly to a user, it applies globally regardless of which role the user selects.

1. Go to Setup > User/Roles > Manage Users.
2. Click the relevant user.
3. Click the **Edit** button to enable editing of the user record.
4. In the **Access** tab, click on the **Global Permissions** subtab.

   > **Note:** Administrators — make sure the Global Permissions feature has been enabled.

5. Click **Add** and select **Mobile Device Access** from the dropdown list.
6. Click **Save**.

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Data Security

NetSuite for iPhone does not store any un-encrypted NetSuite data on your mobile device.

The app stores a limited amount of encrypted NetSuite data locally on your iPhone. This includes Time Logs. See Tracking Time.

You can use the Remember Me option to store your NetSuite username and password, enabling you to log in and launch the application by just tapping the NetSuite icon. If you enable this option your NetSuite password will be encrypted and stored on your iPhone. See Saving your login details.

> ⚠️ **Important:** If you enable the Remember Me option be aware that anyone who has access to your iPhone will also be able to access information in your NetSuite account and local data on your phone.

Security Questions on Your iPhone

Whenever you log in to NetSuite using a different device or browser, you are required to provide a second form of authentication in addition to your password. The first time you log in using your iPhone you will be asked one of your three security questions.

> ℹ️ **Note:** After resetting or reinstalling the mobile app you will again be asked one of your security questions during log in.

IP Address Filtering

Any settings for IP address filtering on your NetSuite account will also apply to accessing NetSuite via the NetSuite for iPhone app. It is advised that you do not have this feature enabled for any roles you use with your mobile device.

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Configuring NetSuite for iPhone

NetSuite for iPhone is primarily designed for use on the iPhone, but will work on any iOS device with Apple iOS 12.4 or higher that has access to the internet.

> **ⓘ** **Note:** NetSuite for iPhone is not supported on jailbroken devices

- Saving or Removing Your Login Details
- Setting the Time Zone
- Setting Date, Time and Number Formatting
- Setting Language
- Configuring Maximum Entries in Dropdowns
- Configuring the Navigation Tab Bar
- Arranging the Home Dashboard
- Configuring Quick Add in NetSuite for iPhone
- Changing Application Settings

Saving or Removing Your Login Details

NetSuite for iPhone can store your login details using the Remember Me feature.

Storing your login details in the NetSuite for iPhone app has some inherent risks. When enabling the Remember Me option you are required to accept the following terms.

> *By enabling the Remember Me option, your NetSuite Service password will be stored on your device and encrypted using industry standard security measures. Anyone with access to your unlocked device will be able to access your NetSuite Service account using this device; a person having access will be able to view, add and edit information in your NetSuite Service account. As a precaution, you should always utilize a passcode lock on your device and change your password regularly. If your device is lost or stolen, you should report the incident to your NetSuite account administrator and you must change your NetSuite password immediately.*
>
> *By enabling the Remember Me option, You accept full responsibility for any losses and/or damages, and You agree not to hold NetSuite or its affiliates liable for any losses and/or damages resulting from saving your password information.*

> **ⓘ** **Note:** Your iPhone stores the password securely using Apple's Keychain security functionality. For more information see Data Security.

> **ⓘ** **Note:** Remember me feature requires Touch or Face ID to be enabled on your device.

Saving your login details

1. Go to the **Settings** screen.
2. Tap **Remember Me**.
3. Enter the email address and password that you use to log in to your NetSuite account.

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4. Tap **Enable**.

5. Read the NetSuite's legal statement and only tap Agree if you wish to be bound by the terms.

Removing your login details

1. Go to the **Settings** screen.

2. Tap **Remember Me**.

3. Tap **Disable**.

Setting the Time Zone

The time zone setting for your NetSuite for iPhone app is taken from your NetSuite account. Calendar dates, schedules etc. will be displayed in that time zone. The application ignores the time zone settings of your phone. The time zone setting of your NetSuite account can be configured from your mobile device. See To change your NetSuite account time zone from your mobile device.

Time Zone Synchronization

NetSuite for iPhone is configured (by default) to notify you when your mobile device and your NetSuite account have different time zones. When your mobile device's time zone is adjusted the Global Actions button will display a notifications alert.

Tap the Global Actions button to view the notification.
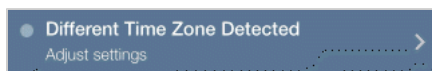
Tap the notification to go to the Time Zone screen. See To change your NetSuite account time zone from your mobile device.

After you have visited the Time Zone screen, or tapped the notification, you will not receive further time zone notifications until another change of time zone is detected.

To change your NetSuite account time zone from your mobile device

1. Go to the Settings screen and tap **Time Zone**.

2. On the Time Zone screen you have the following options:

   - **Notification** - tap to toggle off/on automatic notifications. The default setting is on.
   - **Local** - displays the time zone setting of your mobile device.
   - **NetSuite** - displays the time zone setting of your NetSuite account. Tap to edit.

   > ⓘ **Note:** NetSuite account time zones may not match exactly to the time zone of your mobile device. Select the best fit from the list of available time zones.

Setting Date, Time and Number Formatting

Date, Time and Number formatting for your NetSuite for iPhone app are taken from your NetSuite account. You need to log in to the NetSuite web application to change these settings. See the help topics Number Formats and Date Formats.

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Setting Language

The language settings for your NetSuite for iPhone app are taken from your NetSuite account. You need to log in to the NetSuite web application to change these settings. See the help topic Choosing a Language for Your NetSuite User Interface.

Configuring Phone Call Logging

Phone Call Logging allows you to track all phone calls initiated from your NetSuite for iPhone application. This feature is turned on by default. Phone Call logging can also remind you to log your last call. As soon as a call has ended, a popup alert reminds you to log the call. See Tracking Calls with Phone Call Logging.

To enable or disable phone call logging

1. Go to the Settings screen and tap **Phone Call Logging**.

2. On the Phone Call Logging screen you have the following options:

    ■ **Auto-track Recent Calls** - tap to toggle on/off automatic phone call logging. The default setting is on.

    ■ **Show Alert** - display a notification popup when a call has ended. The popup provides a useful reminder to log the call. This option is only available when Auto-track Recent Calls is enabled.

        The alert provides the option to either log the call immediately or log the call later. If you choose to log the call later, the call will be added to the Recent Calls portlet as an unlogged call. See Dashboard Portlets.
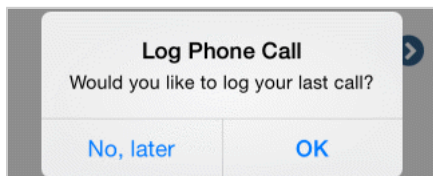
3. Tap Done when you have finished configuring phone call logging.

Configuring Maximum Entries in Dropdowns

The number of entries in a list of options determines the type of selector used. Either a popup selector or a roll selector. This can be configured in the NetSuite web application by setting the Maximum Entries in Dropdowns preference.

To set the Maximum Entries in Dropdowns preference:

1. In the NetSuite web application, go to Home > Set Preferences.

2. On the General subtab, in the Optimizing NetSuite section, enter a value for the Maximum Entries in Dropdowns field.

    If the number of records in a list exceeds this number then the list automatically becomes a popup list, otherwise the list is displayed as a roll selector.

3. Click **Save**.

Configuring the Navigation Tab Bar

You can configure the Tab Bar to display any 4 options from the following: Home, Calendar, Saved Searches, and the list of supported record types. See Supported Record Types.

> **Note:** When selecting record types for the Navigation Tab Bar consider your user roles and which record types each role can access. If you select a record type that is not available in one of your roles, then it will not be displayed when that role is active. Instead the next available item in the list will 'slide up' to join the bar.

To configure the Navigation Tab Bar:

1. On the **Navigation Tab** bar, tap **More**.

2. On the **Menu** Bar, tap **Reorder**.

3. Press and drag the **grab** icon ☰ to move a record type up or down in the list.
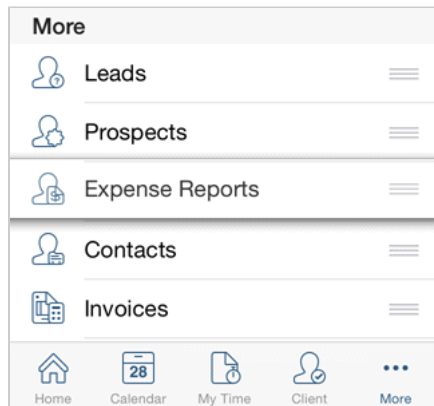
The first 4 items, under the Tab Bar section, will be displayed in the Navigation Tab Bar. The remaining items will be used, in the order listed, to substitute for any item which is not available for the active role.

4. Tap **Done** when you have finished re-ordering your items.

Arranging the Home Dashboard

> **Note:** The portlets in the iPhone application utilize 1-way synchronization. This means that they display synchronized data, but changes to the portlets on your iPhone will not affect the portlets on your NetSuite web application dashboard.

Rearranging the Home Dashboard portlets

1. From the Home Dashboard tap **Reorder** on the **Menu** Bar.

2. Press and drag the **grab** icon ☰ to move a panel to its required position.

3. Tap **Done** when you have finished re-ordering the portlets.

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> **(i) Note:** Which portlets display on your Home Dashboard is defined by your NetSuite web application Dashboard. See the help topic Adding a Portlet to a Dashboard.

Configuring Quick Add in NetSuite for iPhone

Quick Add allows you to quickly add a new record for a selected number of standard record types. The list of available record types is defined in your NetSuite web application. For more information on using Quick Add on your mobile device see Using Quick Add. For more information on setting up Quick Add see the help topics Quick Add Portlet and Using Quick Add for Standard Records.

Changing Application Settings

The Settings screen allows you to configure basic settings for the application as follows:

- **Remember Me** – save your login details. See Saving or Removing Your Login Details.
- **Time Zone** – change you NetSuite account time zone. See To change your NetSuite account time zone from your mobile device.
- **Phone Call Logging** – change you NetSuite account time zone. See Configuring Phone Call Logging.
- **About** – provides the following basic information.
  - App Version.
  - Server Version.
  - User Login – the username you are currently logged in with.
  - Account – the account you are currently logged in with.
  - Role – your current user role.

> **(i) Note:** This information may be required when contacting Support.

- **EULA** – access to read the EULA for the application.
- **Reset to defaults** – reset the application's settings to the factory defaults. After resetting the app you will be required to provide an additional form of authentication upon your next login. See Security Questions on Your iPhone.

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Navigating NetSuite for iPhone

NetSuite for iPhone utilizes standard iPhone touchscreen navigation. Users who are familiar with the iPhone will be able to navigate through the intuitive interface. The following tips should be beneficial in getting the most from NetSuite for iPhone.

- Viewing Lists and Saved Searches
- Using Quick Actions
- Using Quick Add
- Using Recent Records
- Using the Menu Bar
- Using the Navigation Tab Bar
- Home Dashboard

Viewing Lists and Saved Searches

- Lists predominantly display one column only. Rotate the phone 90 degrees to view in landscape mode with all the columns displayed.
- Lists and Saved Searches display the first 50 records returned. Each time you scroll to the bottom of a list an additional 50 records are loaded.
- Swipe a record in the list to reveal Quick Actions (only available in portrait mode). See Using Quick Actions.

> ⓘ **Note:** Quick Actions are not available for Saved Searches.

- Pan and scroll the list in landscape mode to view the required rows and columns.

- The total number of records currently loaded is displayed at the bottom of the list.
- **Additional actions available when viewing Saved Searches:**
  - Tap a column header to order the records in a Saved Search by the selected column. Tap the same column header again to invert the ordering.
  - Tap a record in the Saved Search to open the record for viewing or editing.

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Using Quick Actions

When viewing a list of records or events in portrait mode you can swipe across a record to reveal a selection of Quick Actions.

To hide the Quick Actions simply swipe across the record again.

The following Quick Actions are available:

- **All record types** — Edit.
- **Contacts, Customers, Leads and Prospects** — Call, Map and Email.
- **Events** — Accept, Decline, Edit this Date, Cancel.
- **Phone Calls** — Complete, Call.
- **Tasks** — Complete.

The actions available for a specific record depend on the record type and its state.

> **Note:** Quick Actions are not available for Saved Searches.

> **Note:** Quick Actions are not available when viewing a list in landscape mode.

Using Quick Add

Quick Add lets you quickly add a new record for a selected number of standard record types. See Configuring Quick Add in NetSuite for iPhone.

To add a new record using Quick Add:

1. Tap the **Global Actions** button. See Using the Menu Bar.
2. Tap the **Quick Add** icon.
3. Select the required record type.
4. If your configured Quick Add form does not provide all the details you require, tap the **More Details** button.

If a newly added record is not immediately visible in the list of records, refresh the list view.

Using Recent Records
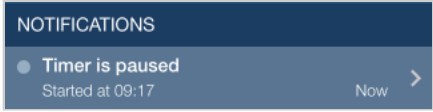
Recent Records lets you access recently viewed or edited records. The list of recent records is synchronized with your NetSuite web application, so any records viewed on your iPhone will also be listed on your web application and vice versa.

Recent records can be found after tapping the **Global Actions** button.

Using the Menu Bar

The menu bar is available on most screens. It offers a selection of options related to the screen you are currently viewing. Some of the most common options are listed here:

Menu Button	Function
Reorder	**Reorder/Done** – on applicable screens you can toggle between editing and saving changes to the layout. See Rearranging the Home Dashboard portlets.
+	**Add** – on applicable screens you can add a new record.
Q	**Global Search** – offers the same functionality as the Global Search in your NetSuite web application. See Searching for records with NetSuite for iPhone.
N	**Global Actions** – Tap the Global Actions button to display the following options: ■ **Home** – return to the Home Dashboard. See Home Dashboard. ■ **Recent Records** – show recently viewed or edited records. See Using Recent Records. ■ **Choose Role** – change user roles. See Changing Roles in NetSuite for iPhone. ■ **Quick Add** - quickly add a new record. See Using Quick Add. ■ **Settings** - configure basic settings for the application. See Changing Application Settings. ■ **Timer** - begin recording a new time log or edit existing time logs. See Creating a New Time Entry. ■ **Help** — access this documentation, contact Support, or visit SuiteAnswers. ■ **Log out** — log out of the application. See Logging out of NetSuite for iPhone. ■ **Notifications** — list current notifications. Click a notification to go directly to that screen. The Global actions button is different if there are pending notifications.
N¹	The **Global Actions** button displays the number of notifications (if any). Tap a notification to go to the relevant screen.

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Menu Button	Function
	NOTIFICATIONS ● Timer is paused Started at 09:17 Now ›

Using the Navigation Tab Bar

The Tab bar is a configurable set of quick link buttons to key features and records. The tab bar is located at the bottom of the screen and is accessible from most parts of the app. To configure the tab bar, tap the **More** icon. Tap the **Reorder** button. Rearrange the order of the tab bar by tapping and dragging an item. To add and replace an existing tab bar button, tap and drag a More item into the Tab Bar area. A typical tab bar configuration includes:

- **Home** – go to the Home Dashboard.
- **Calendar** – go to the calendar screen. See Managing your Calendar.
- **My Time** – go to the My Time screen where you can manage your time sheets. See Tracking Time.
- **Contacts** – go to your list of contacts. From this screen contacts can be sorted, filtered, created and deleted.
- **More** – Displays a list of additional role dependent record types. See Supported Record Types.

> ⓘ **Note:** The record types listed are dependant on your user role.

You can configure the Navigation Tab Bar to display any 4 options from the following: Home, Calendar, Saved Searches, and the list of supported record types. See Supported Record Types.

Home Dashboard

The Home Dashboard displays a selection of NetSuite web application Dashboard Portlets with up to the minute data. See Dashboard Portlets.

> ⓘ **Note:** The portlets in the iPhone application utilize 1-way synchronization. This means that they display synchronized data, but changes to the portlets on your iPhone will not affect the portlets on your NetSuite web application Dashboard.

Dashboard Portlets

Portlets will only be displayed on your Home Dashboard if they are also displayed on your NetSuite web application Dashboard. The following portlets are available.

- **Reminder** - Displays the first 3 reminders from your NetSuite web application Dashboard. Tap View List to see your full list of dashboard reminders. Reminders with an arrow alongside them are based on the results of a saved search. Saved search results are all viewable directly within the app. Reminders generated using a different method, for example workflows, are not supported natively by the app. In such cases, a dialog will prompt you to open the NetSuite application in a browser.

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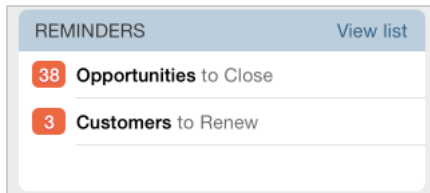
- **Saved Search** - Displays the first 3 custom search portlets from your NetSuite web application Dashboard. Tap View List to see your full list of Saved Searches. See Working with Saved Searches.
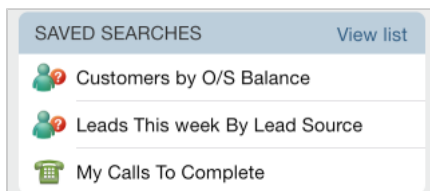
- **Trend Graph** - Displays the first trend graph from your NetSuite web application Dashboard. Tap View List to see your full list of dashboard trend graphs. See the help topic Setting Up Trend Graph Portlets.
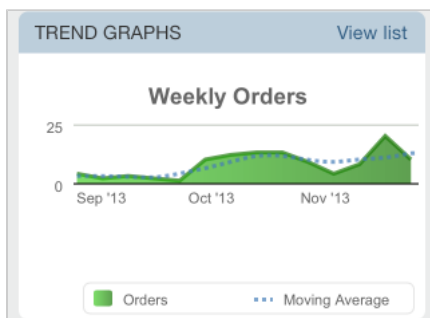
- **Report Snapshot** - Displays the first report snapshot from your NetSuite web application Dashboard. Tap View List to see your full list of report snapshots. To display your dashboard report snapshots on your iPhone Home Dashboard they must be set to chart Display Type. List Display Type is not supported in the iPhone app. See the help topic Setting Up a Report Snapshot Portlet.
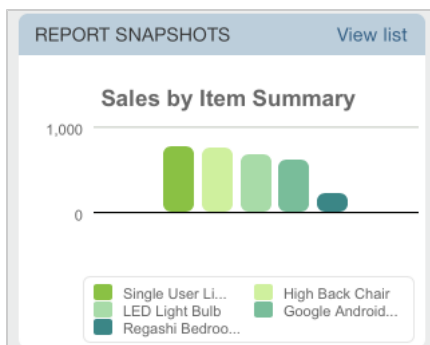
- **Key Performance Indicators** - The default behavior is to display the first 3 KPIs from your NetSuite web application Dashboard. If you have set up headline KPIs the settings from the headline KPIs will override this. Tap View List to see your full list of dashboard KPIs. See the help topic Highlighting KPIs.

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- **KPI Scorecard** - A maximum of 1 KPI Scorecard can be displayed as configured in your NetSuite web application Dashboard. Tap the scorecard to view the scorecard data. See the help topic Adding a KPI Scorecard Portlet to a Dashboard.
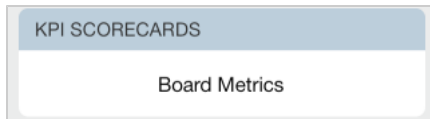
- **KPI Meter** - Displays the first KPI Meter as configured in your NetSuite web application. Use the left and right arrows to view other KPI Meters.
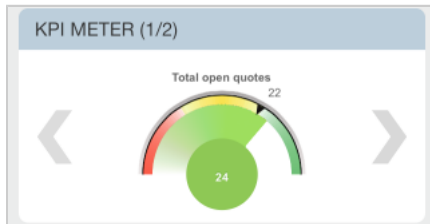
- **My Time** — Displays the number of hours reported for the current time transactions, and the total time recorded in unsaved time logs.

  > **Note:** This portlet is only available to users who have the necessary permission to create a Time Entry record (the Track Time permission), and have the Time Sheet feature enabled on their account. The portlet is included on the Home Dashboard by default.

  - Tap Enter Time to enter a new time entry record. See Creating a New Time Entry.
  - Tap Use Timer to access the Timer screen. See Creating a Time Log.

- **My Expenses** — Displays the number of expense records pending approval, the total value of outstanding expenses, and the value of expenses not yet submitted.

  > **Note:** This portlet is only available to users who have the necessary permission to create Expense Reports. The portlet is included on the Home Dashboard by default.

  - Tap View List to see your full list of outstanding expenses. See Viewing an Expense Report.
  - Tap New Expense Report to enter a new Expense Report. See Tracking Expenses.

- **Recent Calls** — Displays the last 3 calls initiated from your NetSuite for iPhone application.

> **Note:** This portlet is only available if you have enabled Phone Call logging. See Configuring Phone Call Logging.

- Tap View List to see your full list of recent calls.
- Tap on any call in the list to log the call. See To Log a Phone Call on your Mobile Device.

RECENT CALLS	View list
Star Software Solutions Dana Terrie	05:02pm
Brown Consulting 650-210-9700	03:14pm
Acme Control 519-541-7600	10/01/2014

Using NetSuite for iPhone

- Logging in to NetSuite for iPhone
- Logging out of NetSuite for iPhone
- Changing Roles in NetSuite for iPhone
- Searching
- Managing your Calendar
- Tracking Time
- Tracking Expenses
- Tracking Calls with Phone Call Logging
- Working with Lists
- Working with Records
- Viewing Lists and Saved Searches
- Push Notifications in NetSuite for iOS

Logging in to NetSuite for iPhone

> **ℹ Note:** Logging in to NetSuite for iPhone does not terminate any open NetSuite web application sessions and logging in to the web application does not terminate a NetSuite for iPhone session.

Enable Remember Me if you want NetSuite for iPhone to remember your password and log in automatically. See Saving your login details.

> **ℹ Note:** Your iPhone stores the password securely using Apple's Keychain security functionality. For more information see Data Security.

To log in to NetSuite for iPhone:

1. Enter the email address and password that you use to log in to your NetSuite account.
2. Tap **Log In**.
3. The first time you log in you will be required to answer one of your 3 security questions. See Security Questions on Your iPhone.
4. After logging in for the first time you will be prompted to select a role for your session. Note that selecting a role for your iPhone session does not change your default role in the NetSuite web application. On subsequent log in NetSuite for iPhone will remember the role from your previous session. When logged in you can change roles. See Changing Roles in NetSuite for iPhone.

Log in using Face and Touch ID

NetSuite for iPhone supports Face and Touch ID. To log in using these features, enable Touch ID and Face ID in your system settings. No further setup is required.

Using Single Sign-on Login

To use SSO with the app, first check with your administrator that SAML has been enabled for your company. See the help topic SAML Single Sign-on for complete setup instructions. You should then request your administrator does the following:

- Assigns you a (customized) role which has **Mobile Device Access** and **SAML Single Sign-on** permissions.
- Forwards you the NetSuite Account id. Administrators can find this at Setup > Company Information > Account ID.

> (i) **Note:** If testing SSO in a Release Preview or Sandbox account, make sure that the entire alphanumeric Account ID is supplied — for example, 2000201_RP

To use SSO to log in to the app:

1. Launch the app and tap on the **Company SSO** link.
2. Enter your NetSuite Account ID. You will only be asked for this information once.

Login	Company SSO
ORACLE NETSUITE	
Account ID	0012345_SB (i)
Continue	

> ✔ **Tip:** Tapping the "i" icon provides a reminder of how to obtain your NetSuite Account ID

3. Tap **Continue**.
4. Log in from the third party authentication screen using your SAML credentials.

Forgotten password

It is possible to reset your forgotten password from the login screen. Upon requesting a password reset, further instructions will be sent to your email address.

To reset your forgotten password

1. Tap **Forgot?** link in the Password field
2. Tap **Request Reset Link** on the Reset Password screen with your prefilled email address.
3. Tap the back button after reading the information and follow the instructions sent to your email adress.

Logging out of NetSuite for iPhone

> (i) **Note:** Logging out of NetSuite for iPhone does not affect any open NetSuite web application sessions.

To log out of NetSuite for iPhone:

1. Tap the Global Actions button on the Menu Bar. See Using the Menu Bar.
2. Tap the Log out icon.

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Changing Roles in NetSuite for iPhone

To change your current role:

1. Tap the Global Actions button on the Menu Bar. See Using the Menu Bar.
2. Tap the Choose Role icon.
3. Select a role from the list.

> **ⓘ Note:** You cannot select a role that does not have the Mobile Device Access permission enabled. See To add the mobile device access permission to a role:.

Searching

NetSuite for iPhone provides a version of Global Search. Use it to search any of the supported record types and your Saved Searches. See Supported Record Types.

Searching for records with NetSuite for iPhone

1. Tap the **Global Search** button on the Menu Bar. See Using the Menu Bar.
2. You can filter your search by tapping the required **Quick Filter** button from the list. The following Quick Filters are available: lead, prospect, customer, contact, item, and sales order.

   Alternatively, you can enter a search prefix to filter the search by any supported record type. A search prefix is made up of all or some of the letters of a record type, plus a colon.
3. Enter your search term to begin the search.
4. Tap the Cancel button to the right of the search box to clear your results, search keywords, and filter. Then enter a new search.
5. Tap the Cancel button on the Menu Bar to return to your previous screen.

Managing your Calendar

The time zone settings for your calendar are taken from your NetSuite web application. See Setting the Time Zone.

> **ⓘ Note:** There is no prompt or warning that your mobile device and the NetSuite for iPhone app are using different time zones.

Configuring the Calendar View

The Calendar bar offers options for viewing and configuring your calendar.

- **Today** – shortcut to return to today's date. The day's activity list will be displayed underneath the currently selected date view.
- **1. Daily** – displays a list view of daily activities.
  - Events are grouped into days. You can scroll down the list to find the event you require.

- In Daily view your calendar will only display all events from today onwards. Events from past days are not displayed.

- **2. Weekly** – display events for the selected week.
  - Use the left and right arrows to move between weeks.
  - Select any day of the week to view the events for that day.

- **3. Monthly** – displays events for the selected month.
  - Use the left and right arrows to move between months.
  - Select any day of the month to view the events for that day.

- **4. Customize** - Customize your calendar. Tap to access the following options:
  - **Calendar** — Select an active calendar from the list. The screen will display up to 4 most recently used calendars, plus your own calendar (which remains at the top of the list). To add another calendar to the list see Viewing an unlisted calendar.

    > (i) **Note:** You can only view one calendar at a time.

  - **Activities** – select the types of activities to display in the calendar: **Event**, **Phone Call**, or **Task**. By default all are selected.

    > (i) **Note:** If you'd like phone calls and tasks that do not reserve time to show on your calendar, you must configure the following calendar preferences in your NetSuite account: Display Non-blocking Phone Calls in Calendar, and Display Non-blocking Tasks in Calendar. See the help topic Setting Calendar Preferences.

Tap Done to save changes to your calendar customizations, or Cancel to return to the calendar view.

Viewing an unlisted calendar

1. On the **Navigation** Tab Bar tap the **calendar** icon. If the icon is not available — on the **Navigation** Tab Bar tap **More**, then tap **Calendar**.
2. Tap the **Customize** button.
3. Tap **Add**.
4. From the **Calendar** Type Bar select the type of calendar.
5. Select the calendar you wish to view.
6. The calendar will be added to your calendar list and will be selected as the active calendar.

Editing a Calendar Event

To edit a calendar event:

1. Open Calendar.
2. **Using Quick Actions**: Swipe across the required event to reveal Quick Actions then tap **Edit**.

   Alternatively: Tap the required event to open and view the event then tap **Edit**.
3. Tap the **Record Navigator** button to view the full list of screens for the event based on your preferred form as set up in NetSuite.
4. Edit the event details: set up Status of the event (confirmed, completed etc.), change the Time or Organizer of this event or edit Recurrence.
5. Tap the **Save** button.

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Tracking Expenses

The ability to track expenses is available to all users who have the necessary permission to create Expense Reports. From the My Expenses portlet you can create a new Expense Report and attach expense receipts directly from your iPhone. See

- Creating a New Expense Detail
- Converting Expense Details into an Expense Report
- Viewing an Expense Report
- Editing an Expense Report
- Creating a New Expense Report

> ⚠ **Important:** Creating Expense Reports requires File Cabinet to be enabled. Setup > Company > Enable Features; Data Management.

Creating a New Expense Detail

Expense Details are the building blocks from which you create Expense Reports. They comprise an image of the physical receipt, and accompanying description of what the expense relates to. You can attach up to 4 images to an individual Expense Detail, making it easy to organize multiple expensible items under a single category. For example car parking tickets, taxi fares or evening meals. It's also particularly useful for recording multi-page invoices, such as hotel bills. Saved Expense Details are stored in the Expense Log. Expense logs are considered work in progress files, and therefore only saved locally on the device. In comparison, expense reports are posted to NetSuite desktop accounts when created.

To create an Expense Detail:

1. Tap **New Expense** on the Home Dashboard.
2. Tap the **camera** image icon.
3. Choose an existing image or capture a new image.
   a. Tap the **camera** image icon again to add multiple images as required (max 4).
4. Complete the **description** fields.
5. Tap **Done** to save the Expense Detail.

Converting Expense Details into an Expense Report

After you have captured individual Expense Details and saved them to the Expense Log (see Creating a New Expense Detail), you can convert Details into an Expense Report. Multiple Details can be added to a single report, making it particularly useful for submitting trip-related expenses such as air fares, accommodation, meals etc. as well as multi-page hotel bills.

To create an Expense Report:

1. From the Home Dashboard, tap **Expense Log**.
2. Tap **Select Expenses to Report**.
3. Select Expense Details to include in the Expense Report.
4. Tap **Create Expense Report**.
5. The generated report will be displayed for review.

> ⚠ **Important:** make edits / amendments at this stage, as submitted reports can only be edited by Administrator and Accountant roles within the app afterwards.

6. Add additional information to fields as required.
7. Tap **Add** to complete the review process for that Expense Detail / Row.

> **ⓘ Note:** Each Expense Detail that makes up the Expense Report must be reviewed individually.

8. Complete report creation.

   a. Tap **Save** to save the Expense Report **and** submit Report for approval. "All Expenses Successfully Added" is displayed.

   b. Tap **Complete Later** to save the Expense Report to NetSuite.

9. **Optional**. Go to Home Dashboard and refresh screen. The value in Pending Approval in the My Expenses portlet is updated.

> **ⓘ Note:** The submitted Expense Report will appear in the NetSuite web app. Go to Transactions > Employees > Enter Expense Reports > List

Viewing an Expense Report

The Expense Reports screen provides a summary of currently pending reports. From here you can check the approval stage and totals for each Report. You can customize what information is displayed. Tapping an Expense Report will open the selected Report. See Working with Lists.

1. From the My Expenses portlet on the Home Dashboard, tap **View List**.

2. Alternatively: from the **Navigation** Tab Bar, select More > Expense Reports.

   After the list is displayed you can sort, filter and configure the list. See Working with Lists.

3. Tap the required report to open and view the report.

For more information on working with Expense Reports see Editing an Expense Report, Attaching a File to an Existing Expense Report, and Working with Records.

Creating and Editing Expense Reports

Creating a New Expense Report

1. From the My Expenses portlet on the Home Dashboard, tap View List.

   a. Alternatively, Tap **More** on the menu bar > Expense Reports.

2. Tap + and fill in any relevant fields.

3. Tap the Record Navigator button ≡ then tap Expenses.

4. Tap the add button + to add a new expense to the selected report.

5. Select from the available options:

   a. Row(s) from Expense Log

   b. Row using Camera Photo

   c. Blank row

6. An expenses form will appear. Complete the fields as required.

7. Tap **Add** to complete the process. A confirmation dialog confirms the item was added to the report.

8. Tap **Submit** to submit the report to the NetSuite Web app, or **Complete Later** to save the report in progress.

> **ⓘ Note:** The **Complete Later** quick button is only available in the Employee Center role. See the help topic To assign one or more roles to an employee:

After the report has been submitted to NetSuite, any image attachments will automatically be added to the **Attach File** column in the **Expenses** subtab.

> ⓘ **Note:** The fields available are dependant on your current role and your preferred form as set up in NetSuite

Editing an Expense Report

> ⓘ **Note:** The ability to edit Expense Reports is User and Role dependent. Not all will have the required edit permissions.

1. Open the Expense report. See Viewing an Expense Report
2. Tap **Edit**
3. The following options are displayed:
   - **Cancel** — return to the Expense Reports list.
   - **Save** — save changes.
   - **Record Navigator** — Tap to reveal additional record categories. ☰ to view the full list of screens for the current expense report — based upon your preferred form as set up in NetSuite.
   - **Delete** — deletes record. Note you cannot delete a report if there are other transactions linked to it.

Using Multiple Currencies

If you are traveling to different countries where various currencies are used, you can include all those multi currency expense logs into one report. To do so, you need to check **Use Multi Currency** box. In that case, the entire expense report will be reimbursed in the base currency (or a chosen currency).

If the **Use Multi Currency** box is not available, you should enable it on the web application. For more information, see the help topic Entering an Expense Report.

In case you cannot find the required currency, you need to add more currencies in your UI on the web application. For more information, see the help topic Foreign Currency Expense Reports.

Attaching a File to an Existing Expense Report

The simplest way of attaching a receipt image to an expense report is by using the iPhone camera app when creating a new Expense detail. See Creating a New Expense Detail. It is possible, however, to attach an existing image from your iPhone's camera roll if you prefer.

> ⓘ **Note:** Edit permissions are role dependent. Your current role may not allow you to edit Expense Reports.

1. Open the Expense report. See Viewing an Expense Report.
2. Tap **Edit**.
3. Open the Record Navigator by tapping ☰
4. Tap **Expenses**.
5. Tap ✚
6. Select **Blank row**.
7. Select **Attach File**.
8. Select the Folder in NetSuite you wish to save the image in.
9. Tap **Done**.

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10. Tap **Select File**.

11. Select **Photo Library** or **More** to access cloud storage folders.

12. Tap on the required image to select.

13. Tap Save.

> ⓘ **Note:** You need to first enable and log in to the appropriate cloud storage service before accessing the required image folder.

The Approvals Portlet

The approvals portlet provides an at-a-glance reminder of any outstanding expense reports or purchase order requests awaiting your authorisation. The portlet is available on the home dashboard of any user with expense report and purchase order approval permissions on their role, and who have subordinates reporting to them.

Tapping the arrow to the right of the relevant approval type will display a list of items awaiting your approval.
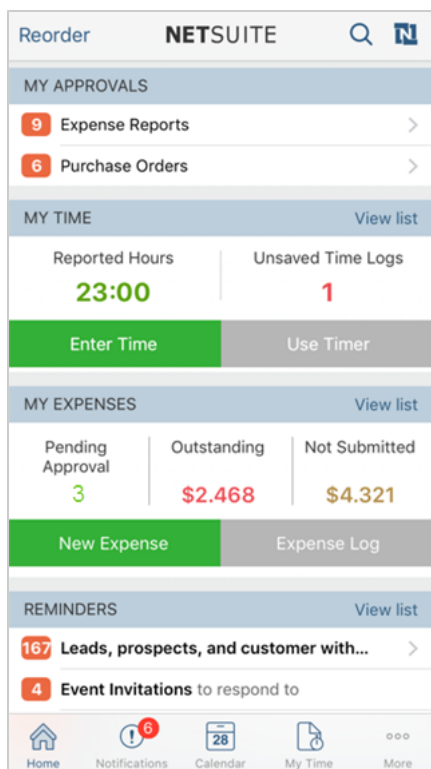
> ✔ **Tip:** The My Approvals portlet removes the need for users to set up separate Purchase Orders or Expense Reports to approve reminders on their Reminders portlet. If you still wish to see these reminders on your desktop application, simply reorder them so that purchase orders and expense reports do not appear in the first three items on the list (the current maximum number of displayed reminders in the app).

From this screen you can approve individual requests, or by tapping the circular "tick" icon, enable the multi-select function for bulk approvals. Tap the **Approve** button to complete the action.

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> **ⓘ** **Note:** Bulk approve action is not available when the Approval Routing feature is enabled on your account. See the help topic Approval Routing.

You can approve individual expense reports or purchase requests by swiping right to left alongside the entry. This will expose the option to approve or view the full record. The Full Record option will request the complete record from NetSuite and display it within the app.

> **Note:** If required, you can reject a request from the full record. Tap the double arrow icon to the right of the Approve button to display the Reject button.

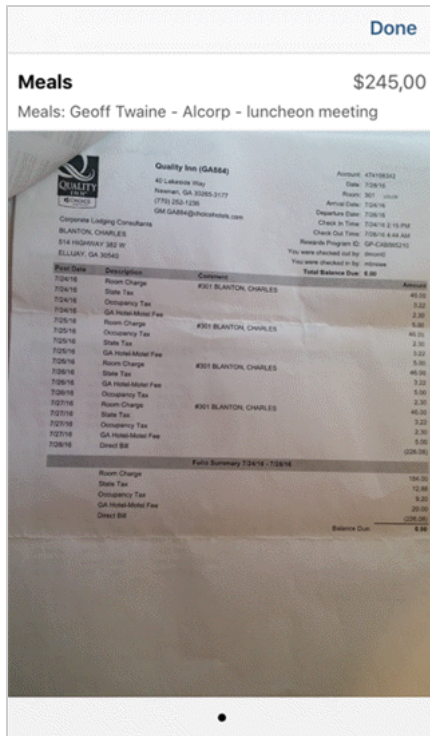If you don't need to dig into the detail provided in the full record, tapping the entry will display a summary page for that request. Here, you will be able to view the individual line entries that made up the report along with any text which was entered in the Memo field.

If the entry has any receipts attached to it, you can also access the image preview screen by tapping the arrow icon alongside the line entry.

> **ⓘ Note:** Image previews will automatically load up to 5mb on WIFI connections, and 2mb on cellular connections. You will receive a prompt to continue, for files larger than these thresholds.

Tracking Time

NetSuite for iPhone lets you record billable time and post time entries directly to NetSuite using the **Enter Time** feature. These entries are then posted to time transactions in NetSuite.

This feature requires the ability to track time in NetSuite. For more information see: Managing Time Tracking.

- Managing Your Time Using the My Time Feature — view a list of all time entries for a specific day. Cycle through time transactions week-by-week using the familiar weekly calendar view and quickly view the details of individual time entries.
- Creating and Editing Time Entries — create time entries from anywhere.
- Using the Timer — keep a log of your hours using the timer (stopwatch) function, and convert those time logs into time entries.

Managing Your Time Using the My Time Feature

NetSuite for iPhone lets you record billable time and post time entries directly to NetSuite using the time transactions.

> **ⓘ Note:** This feature requires the ability to track time in NetSuite. For more information see the help topic Managing Time Tracking.

The My Time screen is accessible directly from the Navigation Tab Bar by tapping the My Time icon. See Using the Navigation Tab Bar.

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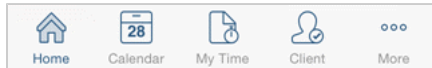
The My Time screen offers the following options:

- **Add** — tap the **add** button ⊕ on the Menu Bar to add a new time entry. See Creating a New Time Entry.

- **Today** — view a list of all time entries for today.

- **Go To** — select a specific date to view.

- **Next / previous week** — use the arrow icons to view the next / previous week.
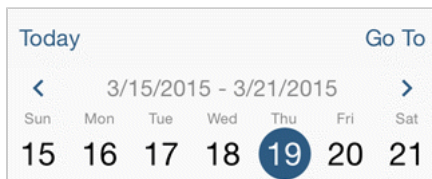
- **Select day** — tap the number of the day you want to view.

- **Summary** — the bottom of the timesheet shows a summary of total hours entered for the selected day and week.
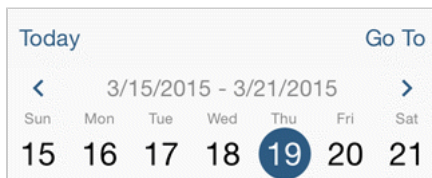
- **open/edit** — tap/swipe a record to open/edit.

Creating and Editing Time Entries

Creating a New Time Entry

1. Access the New Time screen via one of the following routes:

   a. From the My Time portlet in the Home Dashboard, tap **Enter Time**. See Dashboard Portlets.

   b. Alternatively, from the **Navigation** Tab Bar, tap the **My Time** icon, then tap the **add** icon ⊕ on the Menu Bar. See Using the Navigation Tab Bar and Using the Menu Bar.

   c. Alternatively, create a Time Entry directly from an existing Time Log. See Converting a Time Log into a Time Entry.

2. The following options are displayed:

   - **Cancel** — returns to the previous screen.

   - **Save** — saves the new time entry.

   - **Record Navigator** — tap the Record Navigator button ☰ to view the full list of screens available (based upon your preferred form as set up in NetSuite).

   - **Reset** — resets all fields to the last saved data.

3. Fill in any relevant fields.

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> **Note:** The fields available are dependant on your current role and your preferred form as set up in NetSuite

4. Tap **Save**.

Editing a Time Entry

1. From the **Navigation** Tab Bar, tap the **My Time** icon. See Using the Navigation Tab Bar.
2. Tap or swipe the required time entry.
3. Edit the required fields.
4. Tap **Save**.

Using the Timer

The timer (stopwatch) function enables you to track the time you spend on tasks or with clients. Using the timer function you can time events and create time logs of your activities. Time logs are stored securely on your device, ready to be converted into time entries.

> **Note:** When the timer is started it will continue to run until paused or stopped.
>
> If you navigate away from the timer it will continue running in the background. Running other apps or making/receiving phone calls will not affect the timer.
>
> A paused timer will remain paused when you navigate to another screen.

The Timer is accessible via one of the following routes:

- From the My Time portlet in the Home Dashboard, tap **Use Timer**. See Dashboard Portlets.
- Alternatively, from the Menu Bar, tap the **Global Actions** button then tap the **Timer** icon. See Using the Menu Bar.

The following actions are supported:

- Creating a Time Log
- Editing a Time Log
- Converting a Time Log into a Time Entry

Creating a Time Log

1. From the Timer screen (See Using the Timer), the following actions are available:
2. - **Start** — tap the start icon to begin/resume timing.
    - **Pause** — tap the pause icon to pause timing.
    - **Stop & Save** — stops the timer and saves the time log.
    - **Reset** — stops the timer, if running, and zeroes the time.
    - **Edit Memo** — tap to begin editing the memo field. The timer will continue running.
    - **Save Memo** — tap to save the memo.

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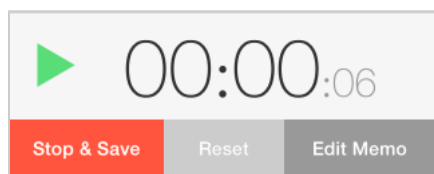
Editing a Time Log

1. From the Timer screen (See Using the Timer):
2. Tap the required time log in the list.
3. The following options are available:
   - **Timer** — save any changes and return to the Timer screen.
   - **Use for Time Entry** — opens a New Time screen with the Duration and Memo fields pre-filled. See Creating and Editing Time Entries.
   - **Delete this Time Log** — deletes the time log (without warning).
   - **Duration** — tap to edit the duration.
   - **Memo** — tap to edit the memo field.
4. Tap **Timer** to save any changes and return to the Timer screen.

Converting a Time Log into a Time Entry

1. From the Timer screen (See Using the Timer):
2. Tap the required time log in the list, then tap the Use for Time Entry button.

   Alternatively: swipe across the required time log to reveal Quick Actions then select Use for Time Entry.

Tracking Calls with Phone Call Logging

Phone Call Logging lets you track all phone calls initiated from your NetSuite for iPhone application. This feature is turned on by default. Phone Call logging can also remind you to log your last call. As soon as a call has ended, a popup alert reminds you to log the call. To enable or disable phone call logging and enable the Show Alert feature see Configuring Phone Call Logging.

When Phone Call Logging is enabled the Recent Calls portlet will be displayed on your dashboard. This portlet lists your most recent outbound calls and provides a simple route to accessing all unlogged calls. See Dashboard Portlets.

To Log a Phone Call on your Mobile Device

1. Tap on the call in the Recent Calls portlet. See Dashboard Portlets.
2. In the New Log Phone Call screen, enter relevant details about the call. Note that the following fields are pre-filled but can also be edited if required: Phone Number, Status, Organizer, Date Completed, Start Time and End Time. Also, where relevant, company and contact details are also auto-completed.

   > ⓘ **Note:** The selection of fields available, and which fields are mandatory, is controlled by your administrator.

3. After you have filled in the call details tap Save to log the record. The call will now be removed from the list of unlogged calls in the Recent Calls portlet.

   > ⓘ **Note:** Logged calls are displayed in the Phone Calls list. If a call you recently logged is not showing in the list, refresh the screen data and check the filters you have set for that list. See Viewing the List of Logged Phone Calls.

Viewing the List of Recent Calls

1. In the Recent Calls portlet on the Dashboard, tap View List. See Dashboard Portlets
2. The Recent Calls screen offers the following options:

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- **All / Unlogged** — toggle between viewing all recent calls and viewing only those that have not been logged.
- **Clear** — you can clear all calls or clear only logged calls.

Viewing the List of Logged Phone Calls

1. On the Navigation Tab Bar tap **More**.
2. Tap **Phone Calls**.

   At the top of the list 3 buttons are displayed for ordering and filtering the list. See Viewing a list of records. If a specific phone call is not listed, check the filter settings for the list.

Working with Lists

Using NetSuite for iPhone you can view and edit supported record types. See Supported Record Types.

Viewing a list of records

1. On the **Navigation** Tab Bar tap **More**.
2. Tap the required record type from the list.

   Each list displays 3 buttons for ordering and filtering the list. If the buttons are not displayed refresh the screen.

- **Quick Sort**— Select a sorting option to order the list. The list of available options is defined by the record type you are viewing.
- **Filter** — Select a filter. The filters listed are determined by the Available Filters configured for the List View. See the help topic Customizing List Views.

  > **Note:** Filters are only available for data types that support select or multi-select values. Data types that require text input are not supported.

- **Customize** — Customize the list view using the following options:
  - View – Select from the list of views that are available for the current record type. This list includes standard views and any customized views that you have defined. See the help topic Customizing List Views. For a Saved Search to appear in this list it must have the Available as List View option selected. See the help topic Using a Saved Search as a View.

    > **Note:** Views that have Summaries defined will not function, thus should be run as a Saved Search. See Working with Saved Searches.

  - Display – Customize the list display layout. The field positions are illustrated in the layout section at the bottom of the screen. Any unassigned fields will be left blank.
  - Layout - illustration of the layout of fields for a record.

To set a record filter:

1. Tap the **Filter** button.
2. Select one of the listed filters.

   The choice of filters listed is determined by the Available Filters configured for the List View. See the help topic Customizing List Views.

To order the list of records:

1. Tap the **Quick Sort** button.
2. Select one of the listed order criteria and then tap **Done**. The criteria available is determined by the record type.

To set up the list record layout:

1. Tap the **Customize** button.
2. Tap the required field in the **Display** fields section.
3. Select one of the fields to display.
4. The selected field will be marked.
5. Tap **Done** to save your changes.

Working with Records

- Viewing a Record
- Creating a Record
- Editing a Record
- Attaching Files to a Record
- Working with Sub-lists
- Viewing a Sublist Item
- Adding an Item to a Sublist

Viewing a Record

1. From the list of records. See Viewing a list of records.
2. Tap the required record to open and view the record.
3. The record will be displayed in Summary view. This view is defined as a QuickView in the NetSuite web application. See the help topic Configuring QuickViews.
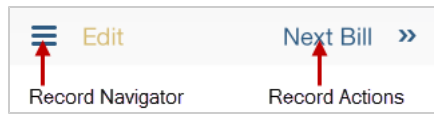
> **ⓘ Note:** A summary view will only be displayed for appropriate record types and only when those record types have a QuickView defined.

Figure 1. Example Record Summary View

In Summary view the record will display the following options:

- **Record Navigator** — Tap the Record Navigator button ☰ to view the full list of screens for the record based upon your preferred form as set up in NetSuite.
- **Edit** — Tap the Edit button to begin editing the record.
- **Record Actions** — Record Action buttons will be displayed according to the record type and the state of the current record. See Supported Record Types for a list of all supported record types and their available actions.
- **More Record Actions** — Tap the arrow button ≫ to view more available actions for the record.

4. A predefined selection of Record sublists are displayed below the summary view. See Working with Sub-lists. Other sub-lists can be found on appropriate screens — accessible via the Record Navigator button. See Viewing a Sublist Item.

Figure 2. Example Summary View Sub-list

Creating and Editing Records

Creating a Record

1. From the required list of records (see Viewing a list of records):
2. Tap the **add** button + in the Menu Bar.
3. Edit the record details.
4. Tap the **Save** button.

Editing a Record

1. Locate the required record. See Viewing a Record.
2. Tap the record to open and view the record then tap **Edit**.
3. Tap the **Record Navigator** button ☰ to view the full list of screens for the record based upon your preferred form as set up in NetSuite.
4. Edit the record details.
5. Tap the **Save** button.

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Adding a Task to a Record

1. Locate the required record. See Viewing a Record.
2. Tap the record to open and view the record then tap the **Record Navigator** button ≡
3. Navigate to the activities screen. Communication > Activities.
4. Tap the **add** button ➕ to add a new task to the selected record.

Attaching Files to a Record

1. Open the required record for editing, or create a new record. See Editing a Record and Creating a Record.
2. Tap the **Record Navigator** button ≡ to view the full list of screens for the record based upon your preferred form as set up in NetSuite.
3. Navigate to the required screen. E.g. Communication > Files.
4. Tap the **add** button ➕ to add a new file to the selected record.
5. Fill in any relevant fields.

> ⓘ **Note:** The fields available are dependant on your current role and your preferred form as set up in NetSuite.

6. Tap **Folder** to change the location where the uploaded file will be stored.
7. Tap **Select File**, then choose from the following options:
   - Take Photo — open the built-in camera app to take a photo of the receipt/invoice etc.
   - Choose Existing — choose an existing image already stored in the phone's memory.

> ⓘ **Note:** Images are automatically resized to ensure smaller file size and faster uploading. Images are reduced to a maximum resolution of 1024x1024 pixels, maintaining aspect ratio.

Working with Sub-lists

> ⓘ **Note:** In NetSuite for iPhone sub-lists on records (e.g. Items on a Sales Order) are limited to a maximum of 300 lines/rows. You can still view and edit such records but you will not be able to access rows beyond this limit. For example, when working with a Sales Order that contains 400 line items you will not be able to view/edit any of the line items beyond the first 300.

When viewing a record, a predefined selection of sublists are displayed below the summary view. Other sub-lists can be found on appropriate screens — accessible via the Record Navigator button. Each sub-list below the summary view displays up to 3 list items and each item displays 3 columns of data. For most record types the first 3 columns are displayed.

> ⓘ **Note:** A summary view will only be displayed for appropriate record types and only when those record types have a QuickView defined.

Viewing a Sublist Item

1. View the required record. See Viewing a Record.

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2. Tap the **Record Navigator** button ≡ to view the full list of screens for the record based upon your preferred form as set up in NetSuite.

3. Scroll down to the required screen and tap to select.

4. Scroll down to the required list item and tap to view the item details.
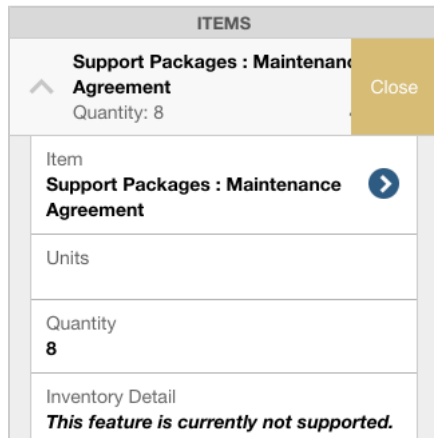
Adding an Item to a Sublist

1. View the required record. See Viewing a Record.

2. Tap **Edit**.

3. Tap the **Record Navigator** button ≡ to view the full list of screens for the record based upon your preferred form as set up in NetSuite.

4. Scroll down to the required screen and tap to select.

5. Scroll down to the sublist and tap the **add** button ➕.

6. Enter the item data.

7. Tap **Save**, at the top of the screen, to save the new item.

Working with Saved Searches

Using NetSuite for iPhone you can view all of your Saved Searches that you have created in the NetSuite web application. See the help topic Defining a Saved Search.

To access a saved search using NetSuite for iPhone:

Saved Searches are accessible directly from your Home Dashboard by tapping the View List button on the Saved Searches portlet. You can also use Global Search to find a Saved Search. See Searching.

Alternatively:

1. On the **Navigation** Tab Bar tap **More**.

2. Tap **Saved Searches**.

3. Scroll down the list to locate the required Saved Search. If you scroll to the bottom of the list an additional 50 searches will be loaded. See Viewing Lists and Saved Searches.

4. Tap the required Saved Search.

Push Notifications in NetSuite for iOS

Push notifications work like instant messages sent to your device, reminding you of important information from your NetSuite account. When enabled, you do not need to have the app running, or even be logged into your NetSuite account from the app. They can be easily customized and numerous record types are supported.

Minimum Supported App Version	Required Version of NetSuite
NetSuite for iOS version 5.0	NetSuite Version 2016, Release 1

View the Setting Up Push Notifications in NetSuite for iPhone video.

> ⓘ **Note:** Push Notification in version 9.0 will become available on March 22. After this date, the push notification feature will no longer be available on version 8.0 and older.

Prerequisites for using Push Notifications with iOS

Administrators:

- enable the **Mobile Push Notification** feature in NetSuite. See Setup > Company > Enable Features > Mobile > Mobile Push Notification

Enabling Push Notifications on your iOS devices

Providing an administrator has enabled push notifications for your company, see Prerequisites for using Push Notifications with iOS, users manage their individual push notification settings from within the app.

How to enable push notifications on iOS devices

1. Tap the Global Actions button on the Menu Bar.
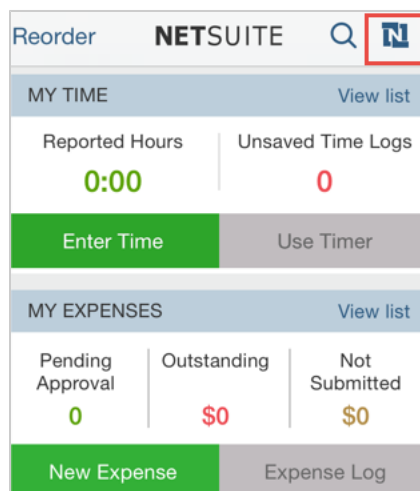
2. Tap the **Settings** icon.

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3. Slide the Enable Push Notifications slider to on.
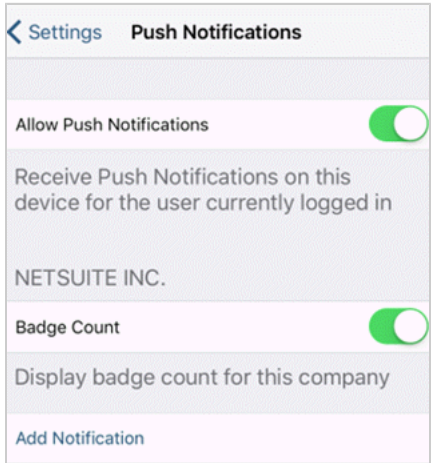
> **(i) Note:** Depending on which role you are logged in as, there may be a short delay while notifications are being enabled. This is due to the supported notification types for that role being loaded in the background.

The **Badge Count** switch controls whether to display the number of unread notifications (all roles), next to the app icon on the iOS home screen. By default the badge count is switched on when push notifications are enabled.

Default notification set for iOS push notifications

The following set of notifications are switched on by default when you enable push notifications on your app.

Activities	Calendar Event	Canceled, Updated, Invited
	Phone Call*	Created, Updated
	Task*	Created, Updated
Approvals	Expense Report	Approval required
	Purchase Order	Approval required
Support	Support Case*	Created, Updated

* These notification types are based on saved searches (depicted by a magnifying glass icon in the app). Some setup might be required. See Adding Push Notifications based on Saved Searches

> **(i) Note:** Push notifications work for all standard record types and custom record types. However, they are currently not supported by custom transaction record types.

What are push notifications?

Push notifications are like instant messages sent to your device. They use iOS to pop-up an announcement on your screen whenever a notification is generated in NetSuite, regardless of what app

you are using at the time. The push notification itself is a one-off announcement, that after being viewed is deleted. However it refers to an actual NetSuite notification which can be viewed and actioned from the Notifications Center in the app. See The NetSuite for iOS Notification Center.

Who benefits from using push notifications?

Any user who is frequently away from their desk and who needs regular information updates benefit from using push notifications. CEOs receive a push notification the moment a new client comes onboard. Sales Managers receive instant notifications when one of their team closes the latest deal. Credit controllers can be notified whenever an account passes a set due date. Line managers can approve their staff's holiday requests and expense claims. Since push notifications leverage saved searches, a whole spectrum of business uses can be served by push notifications. See Setting up push notifications based on saved searches in NetSuite for iOS.

How do I turn on/off push notifications on my iPhone

In the app, tap the NetSuite logo > Settings > Push Notifications. Slide the toggle switch. See Enabling Push Notifications on your iOS devices.

Who can receive push notifications?

Any user who has a role where the mobile access device permission is enabled, and the Mobile Push Notification feature has been enabled, can receive push notifications. See Prerequisites for using Push Notifications with iOS.

Do I have to do much set up to get push notifications working?

No. In most cases, the default set of notifications will cover most users needs. For example events, tasks, phone calls, support cases and expense approvals, all work straight away. Notifications based on saved search results, require that the email notifications setting is enabled on the record. See Setting up push notifications based on saved searches in NetSuite for iOS.

I didn't receive a notification for a recently created event

Event updates are automatically enabled. Check with the event organizer that they have the **Notify Attendees by Email** box checked on the **Attendees** subtab in the event record in NetSuite. See the help topic Sending Event Invitations.

Are push notifications supported on Apple Watch

Yes. No further configuration is required to receive push notifications from your NetSuite app on Apple Watch.

The NetSuite for iOS Notification Center

The Notification Center is like your inbox for all NetSuite-generated notifications. Unlike push notifications which provide a one-off announcement, the Notification Center stores your NetSuite notifications so that you can easily refer back to them at a later date. Tapping on any notification will bring up the Actions menu. The badge count displays the number of unread notifications.

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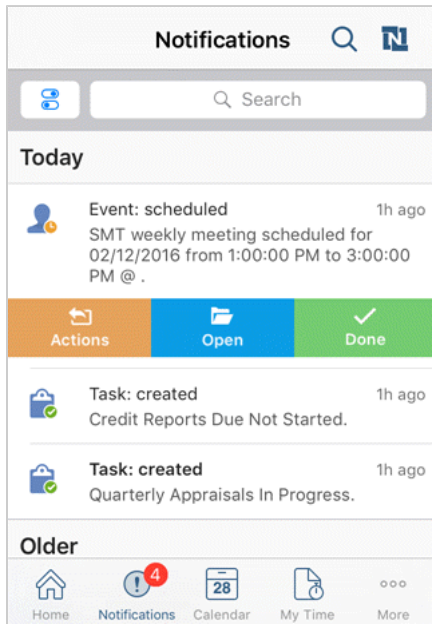
The iOS Notification Center Options Screen

The Notification Center has an options screen where you can set viewing preferences for displayed items. Tap the slider icon in the top left of the Notification Center screen to access it:
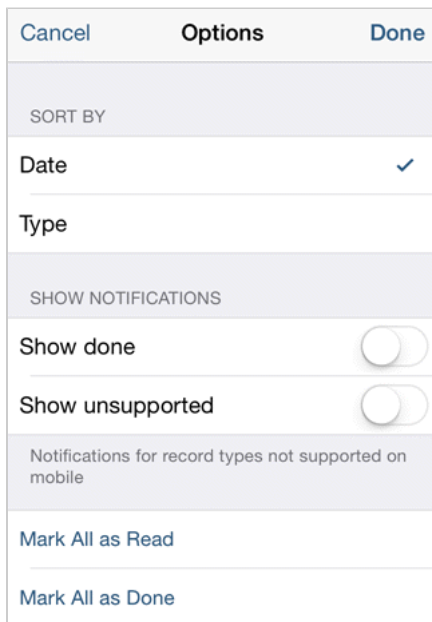
What do the Options do?	
Date	Orders notifications from newest to oldest
Type	Orders notification type alphabetically (A-Z)
Show done*	Displays items which have been marked done as well as items requiring action

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What do the Options do?	
Show unsupported*	Displays all notification types from NetSuite including those which are not currently available as a push notification.
Mark All as Read	Bulk select option — marks all notifications in the center as read.
Mark All as Done	Bulk select option — marks all notifications in the center as done.
* These options are session-based. They will revert to off when you log out of the app.	

NetSuite for iPhone Troubleshooting

Before contacting support it might be useful to read through the following troubleshooting tips.

No Data Returned

If you experience an unexpected error where no data is returned, this could be due to a loss of internet connection. When the data connection is lost the bottom of the screen displays a scrolling warning message.

To clear a connection error:

1. Reposition the device to restore the internet signal.
2. When connectivity is restored, refresh the screen to reload the data.

Cannot Log In

If you cannot log in it could be due to any of the following:

- Connection error — see To clear a connection error:
- Invalid email address or password — check your log in details and try again. If you are sure that you are entering the correct details, contact your account administrator.

Contacting Support About Your iPhone App

If you cannot find the answer to your question here, you can contact support. The contact telephone number and your account support level can be found by tapping the NetSuite icon > Help > Contact Support on the app.

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> **ⓘ** **Note:** Before contacting customer support, try logging out of the app and back in again. This will renew your session. If the error persists, please contact NetSuite Customer Support.

Having the following information available will greatly assist the Support Representative.

- NetSuite Account number. In the app, tap the NetSuite icon > Help > Contact Support
- App version, Server version and user role. Tap the NetSuite icon > Settings > About
- If you receive an error dialog on the screen, note this down. It may be useful to take a screenshot of the error dialog.
- Make a note of the sequence of actions that caused the error.

NetSuite for iPhone FAQ

Click one of the questions below for more information.

What actions are available using Quick Actions?

NetSuite for iPhone supports the swipe gesture to access these additional actions:

All record types	Edit
Contacts, Customers, Leads and Prospects	Call, Map, Email, Text, Edit
Phone Calls	Complete, Call, Text, Edit
Tasks	Complete, Edit

For more information see: Using Quick Actions

Can I manage the image resolution of uploaded receipts?

Yes. From the settings menu, select one of three options:

- 960 X 960 (default)
- 1280 X 1280
- 2048 X 2048

Please note, uploading multiple images at the highest resolution may cause issues when using a slow data connection.

My Saved Search is not showing up as a view?

Make sure that you have checked Available as List view when configuring the Saved Search. See the help topic Using a Saved Search as a View.

How do I add more filters for a specific list?

Only Filters which have been exposed as Available Filters on the Saved Search/View are available on NetSuite for iPhone. Check that the Saved Search/View is configured with the required filters. See the help topic Customizing List Views.

Do you support Touch ID and Face ID?

Yes. Versions 8.0 and above support Touch and Face ID. No setup is required within the app.

Do you support Single Sign-on login?

Yes. Your role should have SAML Single Sign-on and Mobile Device Access permissions added. And the first time you log in with SSO on the app you will also need to enter your NetSuite company Account ID. See Using Single Sign-on Login.

When trying to log in with certain roles I get the following error "You do not have permission to login using this role on a mobile device. Please contact your NetSuite administrator".

Those roles do not have the Mobile Device Access permission enabled. Only standard roles are enabled by default. Customized roles require the Mobile Device Access permission to be added. See To add the mobile device access permission to a role:.

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How do I change which fields are displayed on the Summary screen of a record?

Modify the QuickView fields for your preferred view. See the help topic Configuring QuickViews.

Why can't I log in with my Administrator role?

If you require NetSuite access from a mobile device, using a non-standard role, you will need to add the Mobile Device Access permission to the role. This permission can be added to the System Administrator and customized roles. This permission cannot be added to the Administrator role.

If you are the Administrator and you require mobile access for the Administrator role, you can add the Mobile Device Access permission to yourself as a user. See To add the mobile device access permission to a user:.

> ⚠ **Important:** We do not recommend accessing your NetSuite account on a mobile device using roles which have full access to your data.

For further information on roles see To add the mobile device access permission to a role: and Supported Roles.

I would like to modify the entry form used for Customer records. How do I change the entry form for a specific record type?

NetSuite for iPhone uses the preferred form defined for your role. To change the entry form for a specific record type you need to define it as your preferred form. See the help topic Defining Preferred Forms.

How do I change the fields that appear in Quick Add?

Define your Quick Add fields for your preferred form. See Configuring Quick Add in NetSuite for iPhone.

How can I filter the results of a Saved Search?

Filters are not available when running a Saved Search on NetSuite for iPhone. Set the Saved Search to be Available as a List View and then select the view from the appropriate list type. See the help topic Using a Saved Search as a View.

Why is my dashboard empty?

No supported portlets have been configured on your web application dashboard. See Arranging the Home Dashboard and Dashboard Portlets.

How can I change the first (default) screen?

The Home Dashboard screen has many configuration options. You can configure any of the following:

- Reorder the portlets. See Rearranging the Home Dashboard portlets.
- Define which portlets are displayed. See Home Dashboard.
- Reorganize which shortcuts are displayed on the Navigation Tab Bar at the bottom of the screen. See Configuring the Navigation Tab Bar.

What record types are supported?

See Supported Record Types for a full list of supported records.

Is the Remember Me function secure?

If you choose to enable the Remember Me feature you must review and accept the legal statement. See Saving or Removing Your Login Details. Your login details will be stored securely using Apple's Keychain security functionality. Apple has published an iOS Security white paper available here: http://images.apple.com/iphone/business/docs/iOS_Security_Oct12.pdf.

In addition, Touch or Face ID, which provides additional security, must be enabled on your device.

Do I need to be online to use the app?

Yes, your device needs an active Internet connection to function. The performance of the app may be dependant on the speed of the Internet Connection (e.g. WiFi vs Edge).

How much data (per month) will the app use?

All communication is encrypted and compressed. Therefore, under normal usage conditions, the app should consume less than 10MB of data per month.

Is any of my confidential information being stored on my mobile device?

None of your NetSuite data is stored on your mobile device unless you choose to enable Remember Me — in which case your login details will be encrypted and stored using Apple's Keychain security functionality. See Data Security and Saving or Removing Your Login Details. Apple has published an iOS Security white paper available here: http://images.apple.com/iphone/business/docs/iOS_Security_Oct12.pdf.

How can I sync my NetSuite contacts with my mobile device?

NetSuite for iPhone does not provide this functionality. Such synchronization may be possible using other integrations such as Outlook Integration, see the help topic NetSuite for Outlook.

What record actions are supported?

Record actions are dependant on a number of factors including the type of record, your permissions and other customizations. For a full list of possible record actions, see Supported Record Types.

Why aren't my custom actions supported?

Custom record actions are not currently supported in NetSuite for iPhone.

Are iPads supported?

NetSuite for iPhone will function on any iOS device. Because the app is intended for the iPhone, the app will display in 2x mode on any iPad device.

I received a server error (e.g. 10100110) what does it mean?

If you receive a similar error, try refreshing the screen or re-try the action that caused the error. If the error persists please contact support with the appropriate information on hand. See Contacting Support About Your iPhone App.

I cannot access some of my custom records. How do I make all custom records visible on my iPhone?

To be accessible from a mobile device, custom record types must have both the Allow UI Access and the Allow Mobile Access boxes checked. See the help topics Creating Custom Record Types and Prevent Access through the User Interface.

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Does NetSuite for iPhone support custom records?

NetSuite for iPhone provides complete access (including view, edit, create and delete) to any custom records already accessible via the NetSuite web application—this includes user event and client scripts. In the majority of cases pre-existing scripts will also work out-of-the-box. See Support for Custom Record Types and Creating Custom Record Types.

What record types support push notification in NetSuite for iPhone?

Push notifications work for all standard record types and custom record types. However, they are currently not supported by custom transaction record (form) types. See Setting up push notifications based on saved searches in NetSuite for iOS.

As an admin, can I reset my users' passwords using NetSuite for iPhone?

Yes, you have the same access to Employee records as you have with the NetSuite web application. See Editing a Record and Changing a User's NetSuite Password.

Can I use NetSuite for iPhone with a VPN connection?

Yes, no configuration is required and it adds an extra layer of security when using the app.

How secure is data transfer between the NetSuite Mobile app and NetSuite?

Data transfer between the NetSuite Mobile app and NetSuite is secured by SSL encryption by default and valid certificates with strong keys are required.

NetSuite for iPhone conforms to Apple ATS, which means that every connection from the mobile app has to be HTTPS (using SSL) only. In addition there are specific requirements for TLS protocol. More information can be found in Apple documentation https://developer.apple.com/security/

NetSuite for iPhone Version History

Version	Release Date	Features
9.3	Feb 10, 2020	■ WKWebview re-implementation ⓘ **Note:** Minimum supported iOS version 12.4 (due to lower versions incompatibility with WKWebview)
9.2.1	Oct 30, 2019	■ Global Navigation UI update ■ Recent Records in Global Search
9.1.0	Jul 10, 2019	■ Log expenses and time offline ■ Simplified global navigation ■ Call logging from Dashboard ■ Reset forgotten password
9.0.0	Mar 12, 2019	Release on the App Store under Oracle America, Inc.
8.0.0	Aug 23, 2018	■ Improved security with Biometric Authentication ■ Touch ID & Face ID support ⓘ **Note:** Minimum supported iOS version 11
7.2.1	May 2, 2018	■ Performance improvements
7.2.0	Apr 3, 2018	■ SAML Single Sign-On
7.1.0	Apr 3, 2018	■ Time entry approvals – managers can approve or reject time submissions ■ Time entry submissions – employees can submit time entries for approval
7.0.0	Dec 8, 2017	■ Streamlined login flow ■ Applied Oracle	NetSuite branding ■ Fixed several performance issues
6.0	Nov 30, 2016	■ Dedicated My Approvals portlet ■ Streamlined expense report approvals ■ Streamlined purchase order approvals
5.0	Feb 2, 2016	■ Supports Push Notifications ■ Access records and quick actions from the Notification center ■ Time Tracking support from Time Bill records ■ Landscape view supported across whole app ■ Built for iOS 9
4.0	Apr 28, 2015	■ Access to Customer Deposit, Deposit, Item Fulfillment, Requisition and Return Authorization records ■ Support for buttons/actions added through Custom Workflows including Approvals ■ Reminders work in-app (Custom and Standard Reminders based on Saved Searches) ■ Performance improvements when loading records (view and edit)

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Version	Release Date	Features
		- iPhone 6 and 6 plus support - New icon set
3.1	Jan 26, 2015	Expense Logging - Quickly capture expense details inc. photos of receipts - Manage your expenses using the new Expense Log - Create and submit an Expense Report with multiple expenses in just a few taps - Uploaded images are automatically optimized
3.0.4	Nov 10, 2014	Automatic Phone Call Logging - Let the app track your outbound Phone Calls - Quickly capture information by Logging outbound Phone Calls that are associated with the contacted Entity Activity Logging - Create or Log Activities directly from any Entity Record - Supports Events, Phone Calls, Messages, Tasks and User Notes - Automatically associates with relevant Entity Record (Customer, Contact, etc.) Summary type Saved Search support - Run any Saved Search with a Summary defined and drill-down to specific results Time zone Synchronization - Travel a lot? Get alerted when your Time Zone settings don't match and update your NetSuite Time Zone setting instantly
2.5.9	Sep 25, 2014	Includes fix for devices running iOS 8.
2.5.2	Apr 28, 2014	Track your time quickly by - Creating NetSuite Time Entries from anywhere - Using the built-in Timer (stopwatch) to keep a log of your hours - Managing your Timesheets using the My Time feature Manage your expenses easily by - Uploading photos of receipts on the spot - Creating Expense Reports straight from your Home dashboard Experience expanded record support with full - Employee, Partner, Vendor, Purchase Order and Bill record exposure - Custom record support including server/client-side SuiteScript - File upload support for all records Other features including - Dashboard improvements including My Time and My Expenses portlets - Full local data encryption - Saved Search improvements

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Version	Release Date	Features
		ⓘ Note: Time tracking related features require the Time Sheets feature to be enabled on your NetSuite account.
2.1.2	Nov 21, 2013	■ Completely revamped UI ■ iOS 7 only ■ Several translation fixes ■ Minor bug fixes
2.0.4	Oct 2, 2013	Rebuilt from the ground up, with over 150 new features, enhancements and fixes including: Completely revamped and sleek new UI ■ Improved navigation structure ■ Vast performance improvements ■ Global Actions ■ Mobile optimized views (records, dashboard, calendar, etc.) Revolutionized Record support ■ Create, Edit and Delete records ■ Additional supported record types including Expense Reports, Invoices, Issues, Items, and Phone Calls ■ Record customization support including custom fields, preferred forms, and SuiteScript ■ Perform business actions from records such as Accept Customer Payments, Convert Estimates, Approve Sales Orders and Expense Reports, and Bill Sales Orders ■ Full Quick View and Quick Add support ■ Record navigator for easier record navigation ■ Landscape mode Locate records faster and easier ■ Customizable list views with quick sort, enhanced filter support, swipe actions and landscape mode ■ Access to Saved Searches with the ability to sort by any column ■ Better search capabilities with new Global Search ■ Recent Records Overhauled dashboard ■ New graphing capabilities ■ Portlet content displayed inline ■ New portlets including KPI meters and Custom Searches ■ Ability to reorder portlets New Calendar functions ■ Week and month views ■ View phone calls and tasks inline with events ■ Additional swipe actions ■ Ability to view other calendars (employees, groups and resources)

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Version	Release Date	Features
		Localized
		■ Translated into over 18 languages including Chinese, Japanese, French, German, Spanish and Portuguese
		■ Automatically picks up your NetSuite language preference
		Enhanced security
		■ Two factor authentication
		■ Mobile Device Access permission
		■ Security question support
		Additional role support
		■ Employee Center, Advanced Partner Center and Custom Center roles are now supported
1.5	Dec 21, 2011	■ iOS multitasking - When you relaunch NetSuite for iPhone after you quit or switch to another app, it will automatically load the most recent page/record you were viewing
		■ iOS5 compatibility
		■ NetSuite passwords that include non-alphanumeric characters are now supported
		■ Cancelled events no longer appear on your calendar
		■ Some issues with spelling and field placement on records have been resolved
1.0	Sep 2, 2009	Release

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