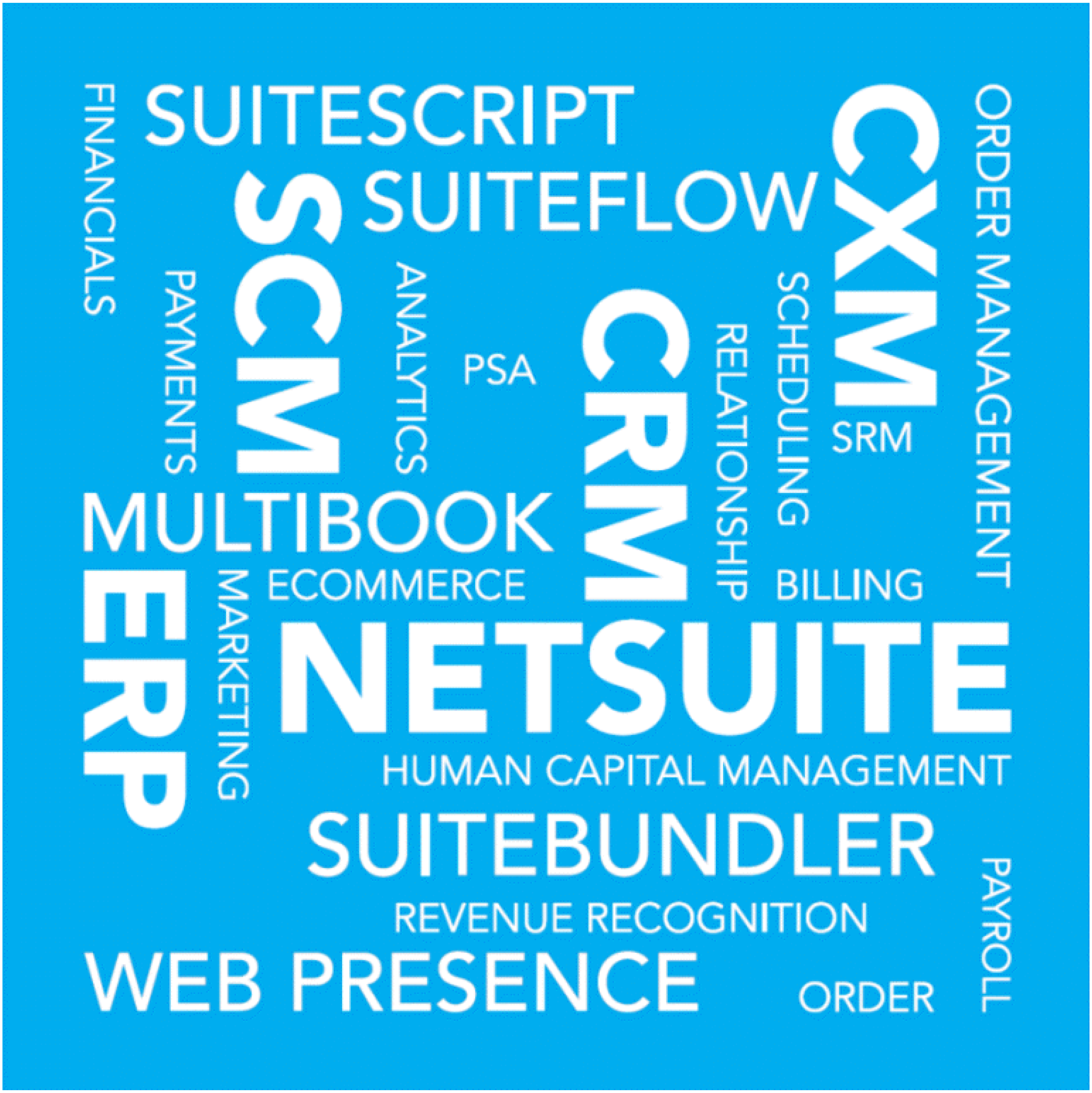
NetSuite for Android



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NetSuite for Android Overview

NetSuite for Android makes it easy to keep track of time, expenses and key business metrics when on the move. The app works offline, making it possible to continue working without a connection (e.g. on a plane) and upload to NetSuite later. The app is available as a free download from the Google Play store to all NetSuite customers, and is ready to use as soon as you log in; configuration is handled by the NetSuite desktop application.

With NetSuite for Android you can:

- Manage expenses and attach copies of receipts. See Tracking Expenses in NetSuite for Android.
- Create and submit expense reports for accounting approval. See Creating and Editing Expense Reports in NetSuite for Android.
- Log and manage billable time effectively. See Tracking Time in NetSuite for Android.
- Manage your NetSuite calendar. See Using the Calendar Feature in NetSuite for Android
- Keep abreast of key business information with complete support for Home and Employee center dashboard portlets. See Dashboard Portlets.
- Log inbound and outbound business calls from your device and assign them to companies and customers. See Logging Calls in NetSuite for Android

NetSuite for Android Supported Roles

All standard roles, including Employee and Advanced Partner Center, are supported and enabled by default. Full Access, Administrator, System Administrator and any custom roles, will need to be customized to allow access.

If you are an administrator and require mobile access for Administrator or Full Access roles, you can assign yourself a custom role which has mobile access enabled. See Mobile Device Access Permission.

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

NetSuite for Android Security

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

- Mobile Device Access Permission
- NetSuite for Android Data Security
- NetSuite for Android Security Questions
- Two-Factor Authentication for NetSuite for Android
- NetSuite for Android IP Address Rules.

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** and **Full Access** roles — you cannot add the Mobile Device Access permission to these roles.

> **Note:** If you are the Administrator and you require mobile access for the Administrator or Full Access roles, you can assign yourself to a custom role that has Mobile Device Access enabled.

To add Mobile Device Access permission to a role:

1. Go to Setup > User/Roles > Manage Roles.
2. Click **Edit** or **Customize** next to the relevant role.
3. On the **Permissions** tab, click the **Setup** subtab.
4. In the dropdown menu, select **Mobile Device Access**.
5. Click **Save**.

> **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.

To add Mobile Device Access permission for a User:

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 **Edit**.
4. On the **Access** tab, click the **Global Permissions** subtab.
5. In the dropdown menu, select **Mobile Device Access**.
6. Click **Save**.

> **Note:** For security reasons we recommend you do not apply the Mobile Device Access permission directly to a user, instead apply the permission to the user's role(s). See the help topic Using the Global Permissions Feature.

> **Note:** Only administrators can add this permission to a user.

NetSuite for Android Data Security

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

The Android app stores a limited amount of encrypted NetSuite data locally, including the Time and Expenses Logs. See Tracking Time in NetSuite for Android.

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 app icon. If you enable this option, your NetSuite password will be encrypted and stored on your Android device.

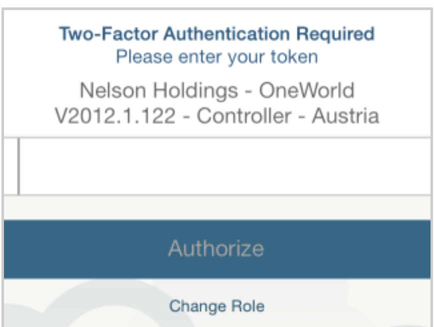
Important: If you enable the Remember Me option, be aware that anyone who has access to your Android device will also be able to access information in your NetSuite account and local data on your phone.

NetSuite for Android Security Questions

Each time you log in to NetSuite for Android using a different device, you need to answer one of the three security questions you set up in your NetSuite account, as well as entering your password. This is also the case when using NetSuite for Android for the first time and after each reset or reinstall of the app.

Two-Factor Authentication for NetSuite for Android

NetSuite for Android supports Two-factor Authentication (2FA) using RSA Tokens. When logging in to a 2FA role designated as **RSA token authentication required**, first enter your credentials and tap Log in. On the separate 2FA screen, enter your token code and tap Authorize. RSA tokens are either generated from a SecurID fob or from a soft token generated by the RSA SecurID Software Token app. You can download this app from the Google Play store. For more information, see the help topic Setting Up an RSA Token on Android.



Note: users are advised to be extra vigilant of device security when using software generated tokens on the same device used to access the NetSuite app.

NetSuite for Android IP Address Rules

If IP address rules have been applied to your NetSuite web account, they will also apply when using NetSuite for Android. Since IP addresses from your mobile operator are dynamically assigned, they cannot be validated against the IP ranges inputted in NetSuite's IP address rules setup. It is advisable not to enable this feature for roles requiring mobile access (e.g. Sales Managers and Sales People).

See the help topic Enabling and Creating IP Address Rules.

NetSuite for Android Supported Record Types

NetSuite for Android supports all of the following record types:

Record Type	Supported Actions
†Basic Actions = Create, Delete, Edit, Reset, Save	

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Record Type	Supported Actions
Bills	Basic Actions †, Autofill, Cancel Bill, Recalc
Cases	Basic Actions†, Grab
Contacts	Basic Actions †
Customers	Basic Actions †, Accept Payment
Custom Records	Basic Actions † See the help topic NetSuite for iPhone Support for Custom Record Types.
Employees	Basic Actions †
Estimates	Basic Actions †, Autofill, Cash Sale, Invoice, Sales Order
Events	Basic Actions †, Accept, Decline, Decline this Date, Quick Accept, Tentative
Expense Reports	Basic Actions †, Approve, Complete Later, Reject, Submit. See the help topic 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 Android 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.
Payment	Basic Actions †	Can only be accessed via one of the fully supported record types listed above.

Record Type	Supported Actions	Limitations
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.

Installing NetSuite for Android

NetSuite for Android is primarily designed for use on smartphones, but will work on any Android device with Android 5.0 Lollipop or higher with an internet connection. On tablet devices, the app will run in 2x mode.

Note: NetSuite for Android is not supported on rooted devices.

Note: Only the latest version of NetSuite for Android is supported. Please ensure you have the latest version installed on your device. See Updating NetSuite for Android. If you are installing NetSuite for Android for the first time see Downloading NetSuite for Android.

Downloading NetSuite for Android

Note: If you already have NetSuite for Android installed, check Updating NetSuite for Android to ensure you have the latest version installed.

To download the application from the Google Play Store you must have an account and be connected to the Internet.

Tip: Open your device's main Settings menu. Under Accounts, tap + Add account. Select Google. Choose Existing (if you already have a Google account) or New. Follow the instructions to add your account.

To download NetSuite for Android from the Google Play Store:

Either use the Google Play Store app on your Android device or visit https://play.google.com/store.

1. Go to the Google Play Store.
2. Search for NetSuite for Android.
3. Tap **INSTALL**.
4. Review and accept the access requirements.
5. The app automatically begins downloading.
6. If you download NetSuite for Android via Google Play on your Mac or PC, NetSuite will automatically be synchronised and installed on your device.

Note: App update notifications are controlled from the settings menu in the Google Play Store app. Notifications are enabled by default. From here you can also set whether to automatically download and install updates, including NetSuite for Android.

After you have downloaded and installed the app, no further setup is required. Most standard roles will be able to access NetSuite without further configuration. See NetSuite for Android Supported Roles.

Updating NetSuite for Android

> **Note:** Only the latest version of NetSuite for Android is supported. Please ensure you have the latest version installed on your device.

To check if updates are available:

App update notifications are enabled by default and appear in the notifications bar. To manually check for updates, follow these steps:

1. Open the Google Play Store app and tap the **Menu** icon
2. Tap **My Apps**.
3. Tap **Update**. The app downloads and installs.

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Configuring NetSuite for Android

NetSuite for Android 4.0 is primarily designed for use on smartphone devices, but will work on any Android device running Android 5.0 Lollipop or higher.

An internet connection is required to access data from NetSuite.

> **Note:** NetSuite for Android is not supported on rooted devices.

- Saving or Removing Your Login Details
- Setting Date, Time, and Number Formatting
- Setting Language
- Configuring Maximum Entries in Dropdowns
- Changing Application Settings

Saving or Removing Your Login Details

NetSuite for Android can store your login details using the Remember Me feature. This is particularly useful for users who frequently switch between open applications as it avoids having to log in each time.

Storing any login information on your device carries some risk. Before using Remember Me for the first time, please read and accept the following legal statement.

> **Important:** The App may store data, including personally identifiable information, locally on your device and encrypted using industry standard security measures. To use the App, you will be required to create a security key (i.e., a pin, passcode, patterned screen lock, or the like) for your device, which as a precaution you should change regularly. Anyone with access to your unlocked device may be able to view, add or edit information on the NetSuite Service or on your device. If you enable the Remember Password option, your NetSuite Service password will be stored on your device. If your device is lost or stolen, you must immediately report the incident to your NetSuite account administrator and change your NetSuite Service password. By using the App, you accept full responsibility for any losses and/or damages that may result from that action and agree not to hold NetSuite liable for any losses or damages resulting from using the App, or saving your password information or other data.

> **Note:** Password and database keys are secured using industry standard encryption and Android's KeyStore function. For more information see NetSuite for Android Data Security.

To save your login details:

1. Go to the main menu by tapping the NetSuite logo (or swipe screen left to right).
2. Tap **Settings**.
3. Tap **Remember Me**.
4. Enter NetSuite user name and password.
5. Tap **Enable**.

6. Agree to the legal statement.
7. The **Enable** button changes to **Disable** confirming Remember Me is enabled.
8. Tap the NetSuite logo to return to main menu.

To remove your login details:

1. Go to **Settings**.
2. Tap **Remember Me**.
3. Tap **Disable**.
4. Tap the NetSuite logo to return to the main menu.

Setting Date, Time, and Number Formatting

NetSuite for Android uses the same date, time, and number formatting as your local device settings. If you intend to change time zones, for example when travelling, you are advised to update your time zone settings in your NetSuite desktop account to match those of your device. See the help topic Setting General Preferences

Setting Language

NetSuite for Android uses the same language settings as your NetSuite account. To change these settings, log in via a web browser. See the help topic Choosing a Language for Your NetSuite User Interface.

Configuring Phone Call Logging

Phone Call Logging allows you to track **both** inbound and outbound calls made using your Android phone, and to log them to your NetSuite account. Outbound calls do not have to be initiated from within the NetSuite app in order for them to be logged. The feature is switched off by default.

To enable phone call logging in NetSuite for Android:

1. Swipe left-to-right to open the navigation drawer.
2. Tap the **Settings** icon.
3. Tap **Phone Call Logging**.
4. Toggle the **Sync Recent Calls** button on.

Once enabled, the app accesses your Android call log and displays it in the Recent Calls list within the app. If a number matches a known entity, the name of that entity is displayed in the call list. For more information see Logging Calls in NetSuite for Android

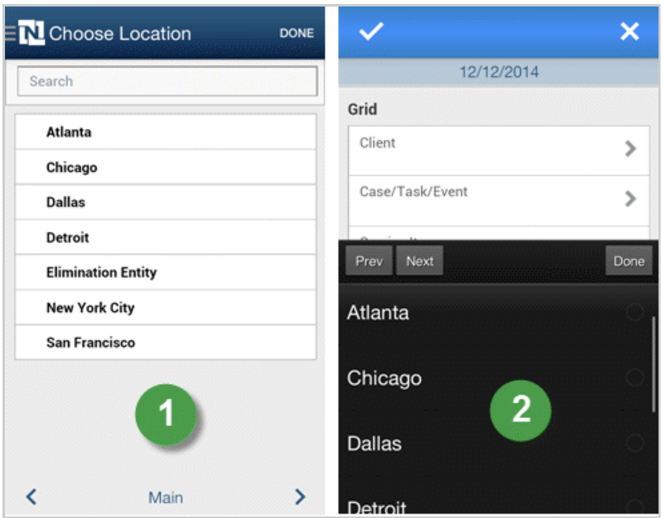
Configuring Maximum Entries in Dropdowns

NetSuite for Android, uses popups or roll selectors to display list items. You can control the type of list used, by setting a threshold value in the **Maximum Entries in Dropdowns** preference in NetSuite. Lists containing more than the specified maximum value, will be displayed as popups.

To set the Maximum Entries in Dropdowns preference:

1. Login to NetSuite, go to Home > Set Preferences.
2. In the **General** subtab under the column **Optimizing NetSuite**, enter a value in the **Maximum Entries in Dropdowns** field.

   If the number of items in a list exceeds this value, a popup list will be displayed 1. Otherwise a roll selector is used 2.



3. Click **Save**.

Changing Application Settings

The Settings screen in NetSuite for Android lets you configure basic settings for the application:

- **Remember Me** – save your login details. See Saving or Removing Your Login Details.
- **Receipt Image Resolution** – controls the size of receipt captures uploaded to NetSuite:

  Smallest 960 x 960 (default setting)

  Medium 1280 x 1280

  Largest 2048 x 2048

  > **Note:** uploading multiple images at larger resolutions may cause issues on older devices.

- **Offline Features** – toggle the switch to enable offline expense and time capture.
- **Favorites** – manage your favorites. Tap and hold to access the context menu.
- **Phone Call Logging** – toggle the switch to add the mobile dashboard and access your recent calls from within the app.
- **About** – provides the following information:
  - App Version
  - Server Version
  - User Login – the user name you are currently logged in with
  - Account – the account you are currently logged in with
  - Role – your current user role

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

- **EULA** – Application End User License Agreement. Tap and hold screen for clipboard functions
- **Reset to defaults** – resets application to factory defaults. After a reset, you will be asked one of the three security questions you have set in your NetSuite account. See NetSuite for Android Security Questions.

To access the Settings screen:

1. Tap the navigation drawer icon (top left on the Menu Bar), or swipe left to right to reveal. See Using the Menu Bar.
2. Tap **Settings**.

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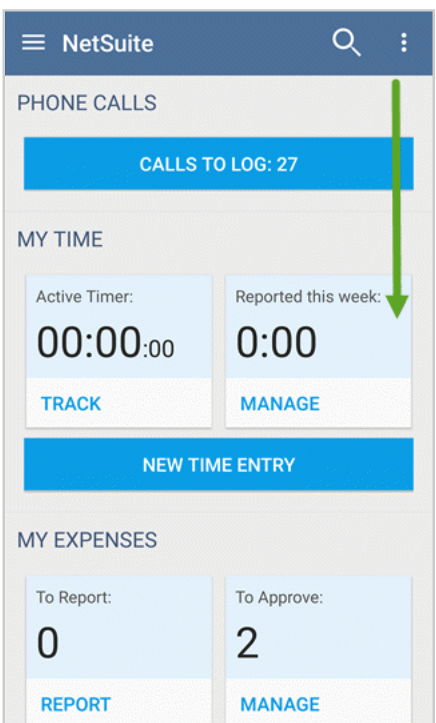
Navigating NetSuite for Android

NetSuite for Android uses navigation and design principles which will instantly be familiar to all users. The following tips will help new users get quickly acquainted with the app.

NetSuite for Android Navigation Tips

Refreshing Screen Data in NetSuite for Android

Drag down on any inactive part of the screen to refresh the displayed data.



Returning to a Previous Screen

Use the Android back button ⮌ on your device to return to a previous screen.

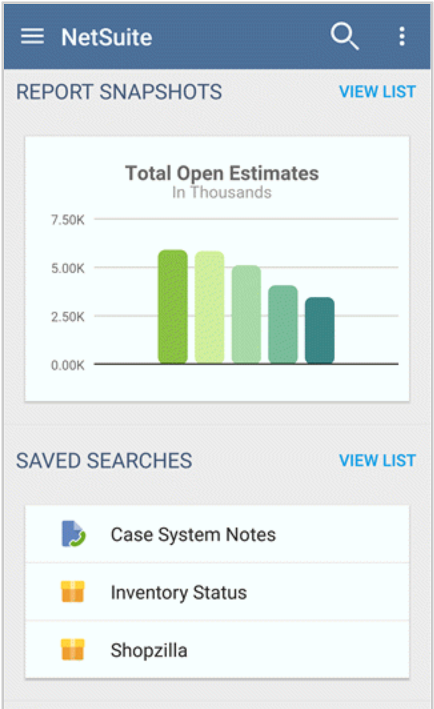
Using the Menu Bar

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
1	**Global Actions** – Tap the Global Actions button to display the following options: ▪ **Choose Role** – change user roles. See Changing Roles in NetSuite for Android. ▪ **Home** – return to the home dashboard. See The NetSuite for Android Home Dashboard. ▪ **Calendar** – view the calendar. See Using the Calendar Feature in NetSuite for Android. ▪ **Records** – access all mobile supported record types. Default screen is the Recents screen, which displays the six most recently viewed records. ▪ **Timer** - begin recording a new time log or edit existing time logs. See Using the Timer in NetSuite for Android. ▪ **Expense Log** - access existing expense items; capture new expenses. See To create a new expense detail:. ▪ **Settings** - configure basic settings for the application. See Changing Application Settings. ▪ **Help** — access documentation; contact Support, or visit SuiteAnswers. ▪ **Log out** — log out of the application. See Logging out of NetSuite for Android.
2	**Global Search** – Tap the Global Search button to search any supported record type. See Searching in NetSuite for Android
3	**More** – Tap the More button to access additional functionality. From the home screen, you can add new records.

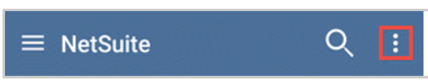
The NetSuite for Android Home Dashboard

The Home Dashboard displays portlets from the Home or Employee center. This turns the home screen into an effective information hub, keeping users informed of key business metrics when on the move. You can arrange the position of the portlets to your own preference.



To reorder the position of Home Screen portlets:

1. Tap the more icon on the top right of the screen.

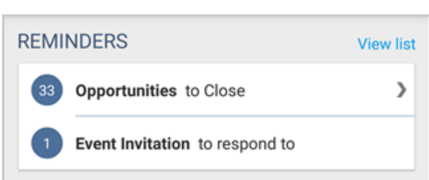


2. Select **Reorder**.
3. Tap and drag individual portlets to the required location.
4. Tap the more menu and select **Finish reorder**.

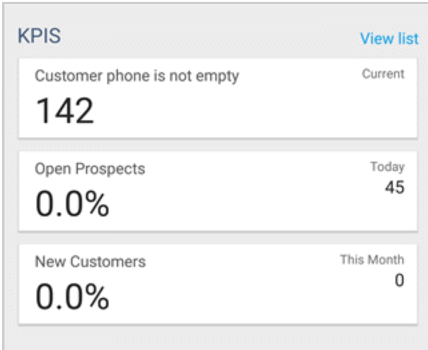
Dashboard Portlets

The Portlets on your app home screen mirror those on your NetSuite desktop account. The following portlets are available:

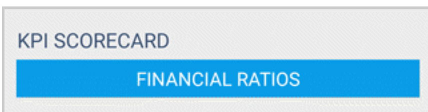
- **Reminder** - displays the first 3 reminders from your NetSuite web application Dashboard. Tap View List to see your full list of dashboard reminders. All reminders based on a saved search are displayed natively within the app. For example, Cases to respond to is an example of a reminder based on a saved search. Reminders with a launch icon alongside them are not natively supported. In such cases, you will be prompted to view the results using the main NetSuite application in a browser. Typically, these are reminders generated by a workflow.



- **Key Performance Indicators** - The default behavior is to display the first 3 KPIs from your NetSuite desktop account 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.

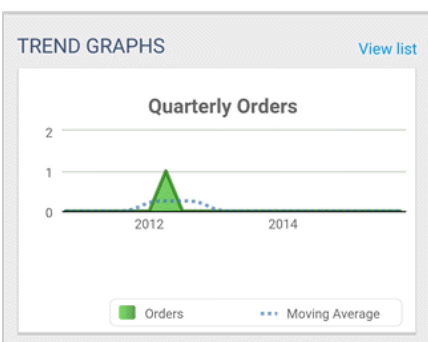


- **KPI Scorecard** - One KPI Scorecard can be displayed as configured in your NetSuite desktop account Dashboard. Tap the scorecard to view the scorecard data. See the help topic Adding a KPI Scorecard Portlet to a Dashboard.

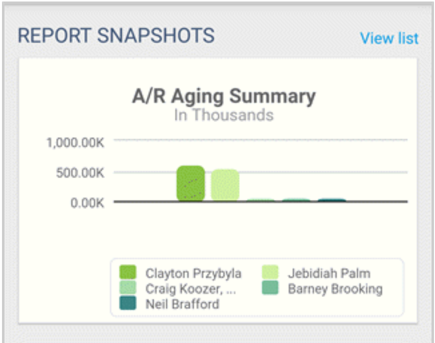


- **KPI Meter** - Displays the first KPI Meter as configured in your NetSuite desktop account. Use the left and right arrows to view other KPI Meters.

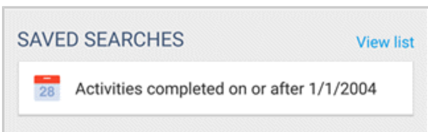
- **Trend Graph** - Displays the first trend graph from your NetSuite desktop account Dashboard. Tap View List to see your full list of dashboard trend graphs. See the help topic Setting Up Trend Graph Portlets.



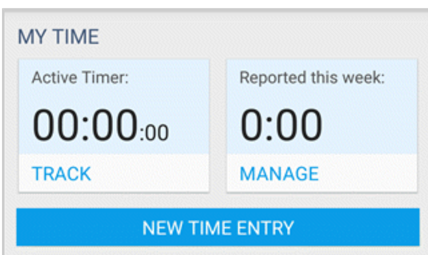
- **Report Snapshot** - Displays the first report snapshot from your NetSuite desktop account Dashboard. Tap View List to see your full list of report snapshots. To display report snapshots on your app, please make sure that the Display Type is set to Graph in the portlet set-up options in your NetSuite desktop account. The app does not support the List view. See the help topic Setting Up a Report Snapshot Portlet.



- **Saved Search** - Displays the first 3 custom search portlets from your NetSuite desktop account Dashboard. Tap View List to see your full list of Saved Searches. See Working with Saved Searches in NetSuite for Android.



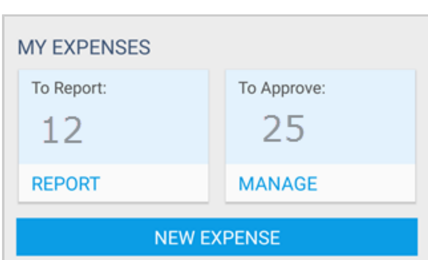
- **My Time** — Displays any currently running timer (Active Timer) and the number of hours reported on currently tracked time transactions.



> **Note:** This portlet is only available to users who have the Track Time permission enabled on their role (Role > Permissions > Transactions), and also either Time Sheet or Time Tracking enabled on their account. The portlet is included on the Home Dashboard by default.

  - Tap the Track icon to access the Timer screen. See Using the Timer in NetSuite for Android.
  - Tap the Manage icon to access the My Time screen. See Using My Time in NetSuite for Android.
  - Tap New Time Entry to enter a new time entry record. See Creating and Editing Time Entries in NetSuite for Android.

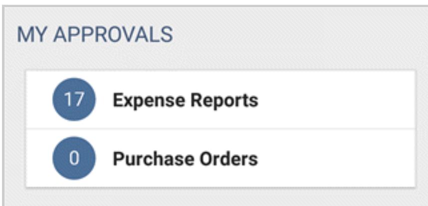
- **My Expenses** — Displays the number of expense records pending approval, the total value of outstanding expenses, and the value of expenses not yet submitted.



> **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 the Report icon to access the Expenses Log screen.
- Tap the Manage icon to view the Expense Reports screen
- Tap New Expense to enter a new Expense Report. See Creating and Editing Expense Reports in NetSuite for Android.

- **My Approvals** — The approvals portlet reminds you of any outstanding expense reports or purchase order requests awaiting your authorisation. For more information see The Approvals Portlet in NetSuite for Android



Using NetSuite for Android

Logging in to NetSuite for Android

> **Note:** Logging into NetSuite for Android does not close any open NetSuite sessions and vice versa.

Enable **Remember Me** if you want NetSuite for Android to remember your password and log in automatically.

> **Note:** Android securely stores your password cryptographically using the KeyStore function. For more information, see NetSuite for Android Data Security.

To log in to NetSuite for Android:

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 NetSuite for Android Security Questions.
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 Android session does not change your default role in NetSuite. On subsequent log ins, NetSuite for Android will remember the role from your previous session. After you have logged in, you can change roles. See Changing Roles in NetSuite for Android.

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.

> **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** tab.

2. Enter your NetSuite Account ID. You will only be asked for this information once.
3. Tap the tick icon to validate the Account ID.
4. Optional: slide the **Remember Me** option on. This option automatically re-directs you to your company SAML login screen each time you open the app.
5. Tap **Continue**.
6. Log in from the third party authentication screen using your SAML credentials.

Logging out of NetSuite for Android

> **Note:** Logging out of NetSuite for Android does not affect any open NetSuite sessions.

To log out of NetSuite for Android:

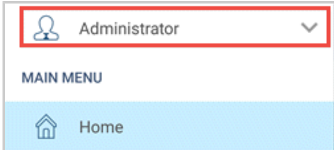
1. Tap the Global Actions button on the Menu Bar. See Using the Menu Bar.
2. Tap the **Log out** icon.

> **Tip:** Double tapping the back button on your Android device displays a log out prompt.

Changing Roles in NetSuite for Android

To change your current role:

1. Tap the Global Actions Button on the Menu Bar.
2. Tap the **Choose Role** icon. The current active role is displayed.



3. Select a role from the drop down list.

> **Note:** Only roles with the Mobile Device Access permission enabled can be selected.

Searching in NetSuite for Android

NetSuite for Android provides a Global Search facility. You can use it to search any supported record type and access your NetSuite Saved Searches.

Searching for records in NetSuite for Android

1. Tap the Global Search button on the Menu Bar. See Using the Menu Bar.
2. Type your search query, or choose an entry from the **Recent Search** list displayed underneath.

   > **Tip:** You can filter searches by applying the same record prefixes used in NetSuite, for example, cus: for customer.

3. Tap enter on your keyboard.
4. Tap the cross icon to clear your results.
5. Tap the looking glass icon to return to your previous screen.

Working with Saved Searches in NetSuite for Android

You can view all Saved Searches created in your NetSuite account by using Global Search or from the Saved Searches portlet on the home screen. For more information on creating saved searches, see the help topic Defining a Saved Search.

To access a saved search using NetSuite for Android:

1. Tap **View List** on the **Saved Searches** home screen portlet.
2. Scroll to the required search and tap.

   > **Note:** If there are more than 50 searches available, scrolling to the bottom of the screen will load the next set of searches.

3. The search is run and results displayed.

Using the Calendar Feature in NetSuite for Android

NetSuite for Android 2.0 has two mobile-optimized calendar views, Week and List. Users can create and accept new activities, as well as customize which calendar to display based on an entity, group, or resource. Users can also filter the type of activity to display based on events, phone calls, and tasks.

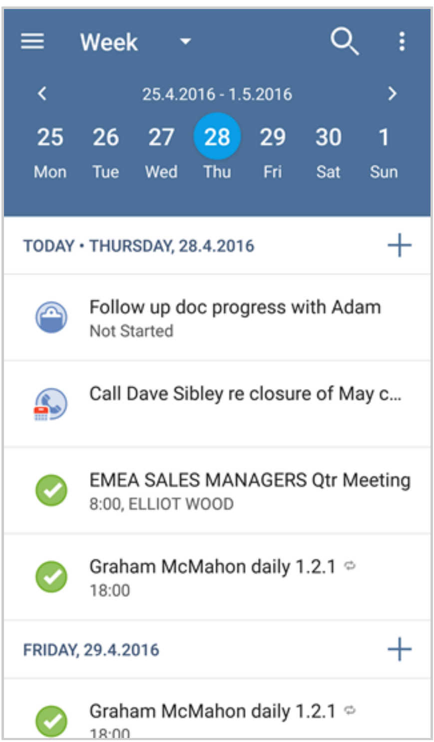
> **Note:** NetSuite for Android uses the same time zone settings for the calendar as those set on your device. Time zone settings can be matched to your device in NetSuite. Go to Home > Set Preferences; Localization.

To access the Calendar in NetSuite for Android:

1. Tap the Global Actions icon on the Menu Bar.
2. Tap the Calendar icon.
3. The Calendar will display the calendar view most recently used.

The Calendar Bar in NetSuite for Android

The calendar bar in NetSuite for Android provides options for selecting the two supported views, **Week** and **List**, a shortcut “today” icon and an action menu from where you can create a new activity, go to a specific date, and access the customize options.



Calendar Views in NetSuite for Android

The **Week** view shows a complete week to view with events grouped into days. All events for the corresponding day are displayed and can be selected by tapping the event. Future events and past events can be viewed by tapping on the relevant arrow icons. Tapping on the Plus icon alongside a date entry brings up a sub menu from which you can create an Event, Phone Call or Task for that specific date.

The **List** view displays a scrollable chronological list starting from today’s date with event details displayed under the corresponding date. This view is particularly useful when you need to quickly scan upcoming events, for instance when arranging meeting dates.

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Note: To display phone calls and tasks in the NetSuite for Android calendar that do not have a specified time against them , first amend your Calendar preference in your NetSuite account. Go to setup on the required calendar portlet, and check non-blocking tasks and show non-blocking phone calls.

Using the Calendar to schedule events

You can schedule three types of activities from within the calendar in NetSuite for Android:

- Events
- Phone Calls
- Tasks

Calendar Icons in NetSuite for Android

The following icons are used to define the user's response to scheduled events as well as the condition of tasks and phone calls.

Event icons

Accepted	
Tentative	
Awaiting Response	

Task icons

Completed	

In progress	

Not started	

Phone Call icons

Completed	

Scheduled	

Note: Cancelled events are not shown in the app.

To schedule a calendar event:

1. Tap the plus icon next to the date you want to create an event on.
2. Select **Event**.
3. Complete the fields as required.
4. To add attendees, resources and set recurrences, tap **Main**.

5. Tap the tick icon in the top left of the screen to save the event.

To action an event in NetSuite for Android

1. Tap on the required event to access the event detail screen.
2. Tap the Action icon.
3. Select from the following options:
   a. **Edit**(event organizer only)
   b. **Quick Accept**
   c. **Accept**
   d. **Decline**
   e. **Tentative**
4. Add a reply to the event organizer.
5. Specify a reminder time and notification method (Browser or Email).
6. The event status is updated, and confirmed by the updated event icon on the calendar view screen.

To delete an event in NetSuite for Android

1. As the event organizer, tap on the required event to access the event detail screen.
2. Select Edit from the Action icon.
3. After the edit screen loads, tap the Action icon again.
4. Select **Delete**.
5. Confirm the action by tapping **OK**.

> **Note:** The same procedure applies to deleting phone calls and tasks.

To select a shared calendar in NetSuite for Android

1. Open the navigation draw by either swiping the screen from left to right.
2. Tap **Calendar**.
3. Tap the Action icon.
4. Tap **Customize**.
5. Tap the Action icon.
6. Tap **Add Calendar** to access shared calendars in your NetSuite account.
7. Select a calendar from the **Entity**, **Group**, or **Resource** subtabs.
8. The selected calendar is added to the **Calendars** list and is the currently selected calendar in the calendar view.

> **Note:** A checked radio button in the **Customize Calendar** screen confirms the currently selected calendar.

Tracking Expenses in NetSuite for Android

From the My Expenses portlet on the home dashboard, you can organize your receipts and expenses into an Expense Log and then use them to create Expense Reports. These reports are then submitted to NetSuite for approval.

Important: Expense logging requires File Cabinet to be enabled at Setup > Company > Enable Features, Data Management.

The expenses 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.

To view an expense report:

1. From the **My Expenses** portlet on the Home dashboard, tap **View**.
2. Tap the required report to view it.
3. To view the report subsections, scroll through the report using the arrows at the bottom of the page, or by tapping **Main**.

For more information on working with Expense Reports see Creating and Editing Expense Reports in NetSuite for Android.

For more information on dashboard portlets, see The NetSuite for Android Home Dashboard

Creating and Editing Expense Reports in NetSuite for Android

Expense Details are the building blocks from which you create Expense Reports. They comprise an image of the physical receipt, and an accompanying description of what the expense relates to. You can attach a number of receipt 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. Multi-page invoices, such as hotel bills, can also be captured in this way. Saved expense details are stored in the Expense Log.

To create a new expense detail:

1. Tap **New Expense** on the Home dashboard.
2. Complete the fields in the Expense Details section.
3. Tap **Take A Photo** to create and attach a picture of a bill or receipt to the expense detail.
4. Tap **Pick a File** to select and attach an existing PDF, JPG or PNG file to the expense detail.
5. To take another image, tap the photo icon. To attach another file, tap the file icon.
6. Tap the tick icon to save the expense detail. The expense detail appears in the Expense Log.

Note: Selection options in the **Category** and **Currency** fields are determined by your NetSuite account. The **amount** field should include the combined expense total if adding multiple receipts.

To create an expense report:

1. From the Home dashboard, tap **Report**.
2. In **Expense Log**, select an expense detail(s) to include in the report.
3. Tap **Create Expense Report**. A dialogue box confirms upload to NetSuite.
4. The generated report is displayed for review.

   Important: We recommend you make edits or amendments at this stage, as submitted reports can only be edited by an Administrator or someone with an Accountant role.

5. Complete any necessary fields and tap the Add icon.

6. Add additional items to the report (for example if you don't have a receipt) by tapping the Plus icon.
7. Tap the save icon to complete the report creation. The confirmation dialogue "All expenses successfully added" is displayed.

To add more receipt images to an expense report:

Receipt images are attached to an expense detail when they are first created, and added to the expense report automatically. However, additional expense images can be added.

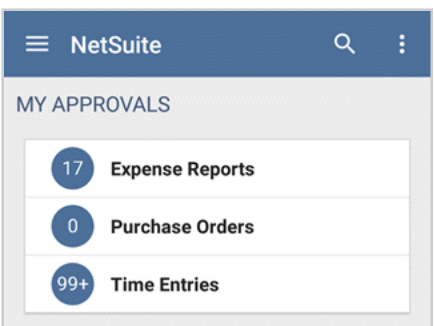
1. Create an expense report. See To create an expense report:.
2. Before submitting the report, tap the Plus icon.
3. Select **Row using Camera Photo**.
4. Complete the remainder of the form and submit the report in the usual way.

> **Note:** The submitted expense report will appear in NetSuite, awaiting approval. Go to Transactions > Employees > Enter Expense Reports > List.

The Approvals Portlet in NetSuite for Android

The approvals portlet provides a reminder of any outstanding expense, purchase order or time entries awaiting your authorisation. It is automatically added to your home dashboard whenever you are logged into a role which has the expense report, purchase order or track time permission added. You also need to have subordinates reporting to you.

Tapping on any of the approval types will display a list containing the items awaiting your approval.



For more information on how to add permissions to a role, see the help topic Set Permissions.

> **Tip:** The My Approvals portlet removes the need for users to set up reminders on their Reminders portlet. If you still wish to see these reminders on your desktop application, reorder your desktop reminders so that expense reports, purchase orders and time entries do not appear in the first three items on the list. This will avoid duplicating the information in your app's reminders portlet, since the app uses the first three items from your desktop reminders to display in the portlet.

From the approval list screen, you can approve individual requests by tapping the overflow menu icon (three dots) alongside each entry. You can also multi-select items to approve by tapping the icon in the top right of the screen. Tap the Approve button to complete the action.

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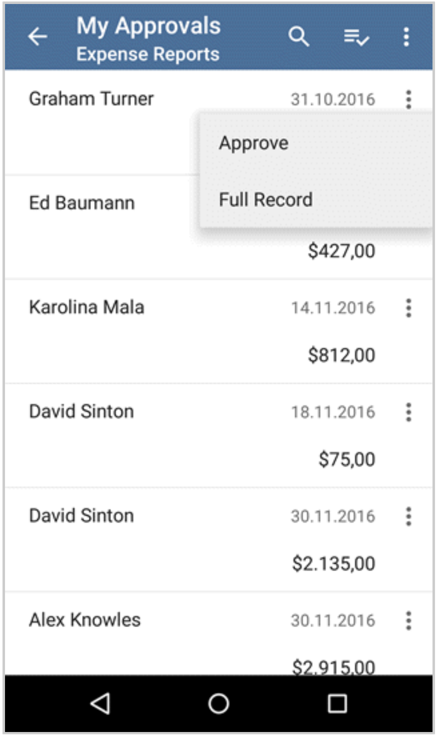
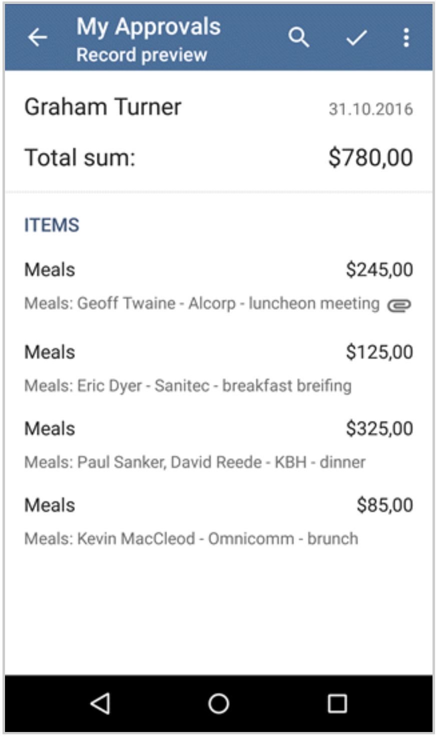


The Full Record option will request the complete record from NetSuite and display it within the app. This option is available on expense reports and purchase orders.

> **Note:** If required, you can reject an expense report or purchase order request by tapping the overflow menu icon (three dots) and selecting Reject.

If you just need a summary, tapping an entry will display a summary page. As well as the total, individual line items are displayed along with any notes or attachments. Tap the paperclip icon to open an image preview. To approve the entry from this screen, tap the tick icon on the header bar.



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.

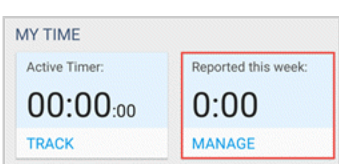
Tracking Time in NetSuite for Android

NetSuite for Android provides several features for managing and tracking billable time, including support for the Time Tracking feature in NetSuite.

- Using My Time in NetSuite for Android — view a list of all time entries for a specific day. Cycle through time transactions week-by-week using the weekly calendar view.
- Creating and Editing Time Entries in NetSuite for Android — create time entries from anywhere.
- Using the Timer in NetSuite for Android — keep a log of your hours using the timer function. Convert these time logs into time entries.

Using My Time in NetSuite for Android

The My Time screen is accessible directly from the Home dashboard by tapping the Manage icon on the My Time portlet.



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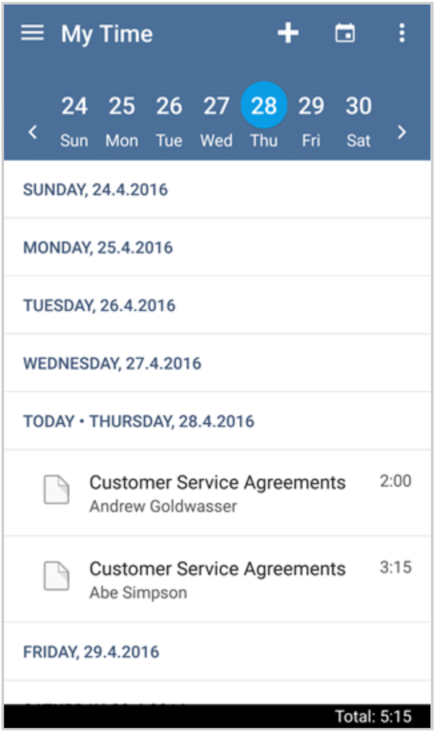
It provides a summary of time entries displayed in a week-to-view format.



The My Time screen offers the following options:

- **Add** — tap on the Menu Bar to add a new time entry.
- **Today** — tap to view a list of all time entries for today.
- **Go To** — select a specific date to view (more menu).
- **Next / previous week** — use the arrow icons to view the next or previous week.

  Select day — tap the day you want to view. The screen will scroll to display the selected day prominently within the week view.
- **Summary** — the bottom of the timesheet shows a summary of total hours entered for the selected day and week. The minimum unit of time displayed is one minute.
- **open/edit** — tap / swipe a record to open / edit.

> **Note:** Approved time entries are displayed with a green tick mark alongside them. These entries cannot be edited.

Creating and Editing Time Entries in NetSuite for Android

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

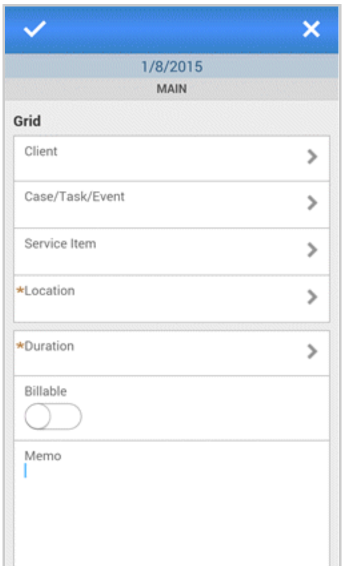
There are three ways of creating a new time entry.

- From the **My Time** portlet in the **Home** dashboard, tap **Enter Time**.
- From the **My Time** page, tap
- Convert an existing time log into a time entry.

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

To create a new time entry:

1. Complete the following fields:



   - — returns to the previous screen.
   - — saves the new time entry.
2. In the Client field, tap **DONE**.
3. Tap to save the completed entry.

   Note: The fields available are determined by your current role and the preferred form as set up in NetSuite.

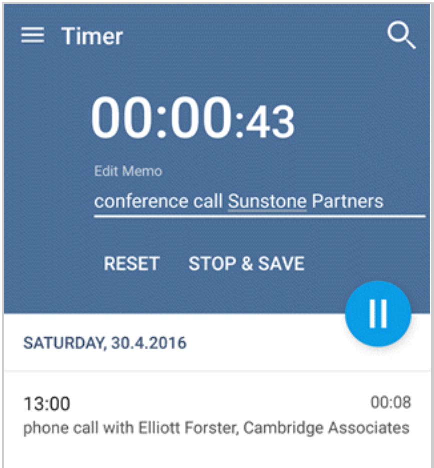
   Use the **Billable** toggle switch to indicate whether the time entry can be billed to the Client.
4. Tap to save Time Entry.

To edit a time entry:

1. From the Home dashboard, tap Manage in the My Time section.
2. Tap the relevant date for the time entry you wish to edit.
3. Tap the time entry.
4. Tap **Edit**.
5. Edit the required fields.
6. Tap to save.

Using the Timer in NetSuite for Android

The timer (stopwatch) function enables you to track time spent on tasks or with clients, and save them as time logs. Time logs are stored securely on your device, ready to be converted into time entries.



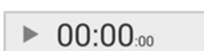
> **Note:** When the timer is started it will continue to run until paused or stopped, including when making or receiving calls.
>
> A NetSuite logo appears in the device's notification area to show an active timer is running in the background.

The Timer is accessible from two locations:

- From the My Time portlet in the Home dashboard, tap Track.
- From the main menu (swipe left to right to open).

To create a time log:

1. From the Home dashboard, tap **Track**.
2. Tap the start icon (next to the timer display) to begin or resume timing

3. Tap **Stop & Save** to complete the time log. The saved log will appear as an entry below the timer display.

   The following additional options are available from the Timer screen:

   - **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.

To edit a time log:

1. Go to the Timer screen, by tapping **Track** from the Home dashboard.
2. Tap the required time log in the list.
3. The following 3 options are available:
   - **Duration** — tap to access the time selector
   - **Edit Memo** — tap to edit the memo field
   - **Create Time Entry** — tap to open the Time Entry Grid. See To create a new time entry:

- **Date** — tap to edit the recorded date for the time log.

4. Tap ☑ to save any changes and return to the Timer screen.

To delete a time log:

1. Go to the Timer screen, by tapping **Track** from the Home dashboard.
2. Tap and hold on the time log entry you want to delete.
3. From the pop-up menu, tap **Delete**.

To convert a time log into a time entry:

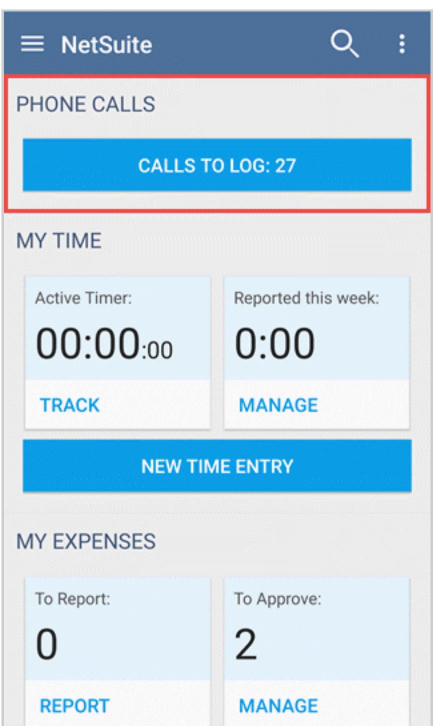
1. Go to the Timer screen, by tapping **Track** from the Home dashboard.
2. Tap the required time log in the list, then tap **Create Time Entry**.
3. Complete the required fields.
4. Tap ☑ to save the time entry.

Tip: Go to Home and do a screen refresh. The **Reported Hours** total in the **My Time** portlet will show updated values, confirming that your time entry has been successfully uploaded to NetSuite.

Logging Calls in NetSuite for Android

Phone call logging lets you track **both** inbound and outbound calls from your Android device, and then append a log of this call to the relevant entity record in NetSuite. The call log is visible in the Communication subtab under Activities. When a call has no relationship to an existing entity record, the call details are recorded under Phone Calls in NetSuite. See Activities > Scheduling > Phone Calls.

When call logging is enabled, a portlet is displayed on your dashboard with a button showing how many calls you have to log.



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Tapping this button opens the Recent Calls screen. From here you manage which calls to log to NetSuite. Outbound calls can be made from any app on your device and NetSuite will still keep track of them.

To enable the feature, see Configuring Phone Call Logging.

To log a phone call from your Android device:

1. Tap the **Calls to Log** button on the Phone Calls dashboard.
2. Tap the call you want to log.
3. Enter the relevant details about the call. Pre-filled fields can be edited.

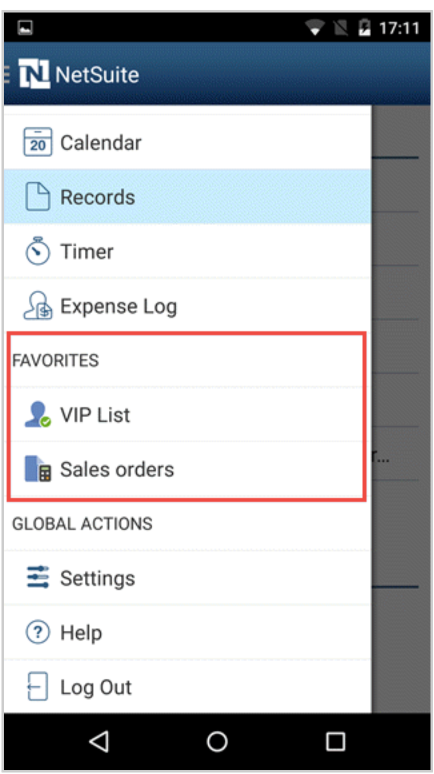
   > **Note:** Toggling the **Private Phone Call** switch to on, prevents anyone with access to your Netsuite desktop account from viewing details of this call.

4. Tap ☑ to log the call to NetSuite.

The logged call is removed from the Recent Calls list. To view a list of logged calls, tap the more icon and Show Logged Calls. If an expected logged call is not included in this list, tap the Resync list option to refresh the view.

Add to Favourites

Creating a Favorite lets you quickly access specific Lists from the navigation drawer. You can create a favorite of any list your role has access to. As well as standard role-based lists, accounts which allow saved searches can create favorites from these too. This is particularly useful for items such as VIP customer lists, or monitoring open Sales orders.

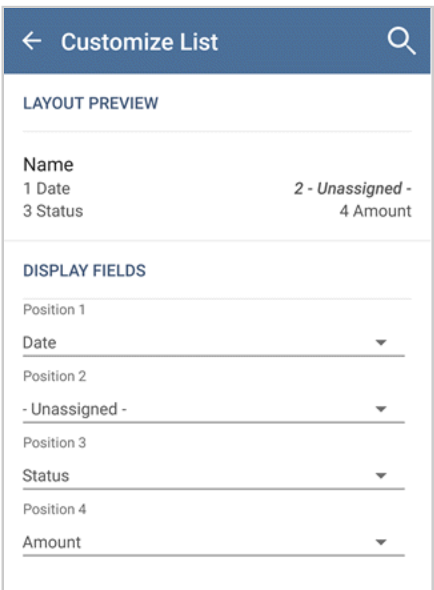


To create a Favorite

1. Open the navigation drawer by swiping the screen left to right.
2. Tap **Records**.
3. Select the required list from the drop down menu in the menu bar.
4. Tap the Action menu icon.
5. Tap **Add to Favorites**.

Customize Lists

You can set how information is displayed in a list using Customize List. The numbers in the Layout Preview below correspond to the Positions listed in the Display Fields.



To Customize a List

1. Tap the Action icon whilst in a record list view.
2. Tap **Customize**.
3. Assign an item to a position by tapping the arrow alongside the relevant **Position** number.

Working with Saved Searches in NetSuite for Android

Users can access saved searches created in NetSuite desktop accounts from either the Global Search or Saved Searches portlet. For more information on creating saved searches, see the help topic Defining a Saved Search.

To access a saved search using NetSuite for Android:

1. On the **Home Screen** portlet, tap **View List**.
2. 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.

3. Tap the required Saved Search.
4. Tap the column headings to order the headings.
5. Tapping phone number, email address, or name field, will load the associated detail record.
6. A list of recently used Saved Searches can be found on the Recents page (tap the Records icon in the navigation drawer).

NetSuite for Android FAQ

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

These 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.

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

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

If you are an administrator and require mobile access for Administrator or Full Access roles, you can assign yourself a custom role which has mobile access enabled. See Mobile Device Access Permission.

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

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.

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

What actions are supported using swipe?

Swiping from left to right accesses the menu screen. See Using the Menu Bar for a list of actions accessible from this menu.

Why is my dashboard empty?

The My Time and My Expenses portlets have not been configured on your web application dashboard. See the help topic Adding a Portlet to a Dashboard.

Is the Remember Me function secure?

Your login details are stored using Android's KeyStore security. See Saving or Removing Your Login Details. More information on KeyStore can be found at: https://source.android.com/devices/tech/security/encryption/index.html.

Is the app available offline?

Yes. You can capture expenses and use the timer without being connected. Enable offline features from the login screen, and accept the terms and conditions. Offline records will be available for upload to NetSuite after you connect.

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

All communication is compressed as well as encrypted. On average, the app consumes 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 in Android's KeyStore. See NetSuite for Android Data Security and Saving or Removing Your Login Details. More information on Android's encryption process can be found at: https://source.android.com/devices/tech/security/encryption/index.html

What are the minimum system requirements to run NetSuite for Android?

- Android 5.0 (Lollipop) or greater
- Minimum screen resolution 800x480
- Minimum 1GB RAM

Is 2FA authentication supported?

Yes, see Two-Factor Authentication for NetSuite for Android for more information about using 2FA with your mobile device.

What records are supported?

The following record types are supported: Entities: Contact, Customer, Employee, Lead, Partner, Prospect, Vendor Transactions: Bills (vendor), Deposit, Estimate, Expense Report, Invoice, Purchase Order, Opportunity, Requisition, Return Authorization, Sales Order, Customer Deposit, Item Fulfilment, Payment CRM/Activities: Case, Event, Issue, Message, Phone Call, Task, User Note Other: CUSTOM RECORDS, Item, Media Item (Files attachment), Time Entry

Are Android tablet devices supported?

NetSuite for Android will function on any device running Android 5.0 Lollipop or higher. See Installing NetSuite for Android. Since the app is primarily intended to run on smartphones, the app will display in 2x mode on a tablet.

How do I shrink large images when uploading through the Android app?

The resolution of receipt images can be managed from the settings menu. There are three options:

- 960 x 960 (default)
- 1280 x 1280
- 2048 x 2048 (note: uploading multiple images at this resolution may cause issues on older devices and slow connections).

The maximum file size for each image upload is 5MB.

What's the maximum PDF file size I can attach to an expense report?

The maximum file size for PDF attachments is 2mb.

Does NetSuite for Android support custom records?

Yes. Users have 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 (including view, edit, create and delete) to any custom records already accessible via the NetSuite desktop application.

How do I get a list of expense reports that are awaiting approval from my manager?

From the **My Expenses** portlet on the Home dashboard, tap **View**. A list of reports pending accounting approval will be displayed.

How do I view expense reports from my subordinates that are awaiting my approval?

From the My Approvals portlet, tap Expense Reports. A list of expense reports submitted by your subordinates requiring your approval is displayed.

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

Currently this feature is unavailable.

Can I attach images to expense reports from the Android Gallery?

Yes. Select Pick A File in the expense report record. Supported file formats include: JPG, PNG and PDF.

How do I enable file uploads in NetSuite for Android?

For the majority of users, file uploads will work without any configuration. You should make sure **File Cabinet** is enabled Setup > Company > Enable Features, Data Management column, and a folder location is already defined in NetSuite for expense reports. NetSuite for Android will use this folder as its default image upload folder. If an expense reports folder has not been set-up, NetSuite for Android will use the Images folder.

Can I use NetSuite for Android with a VPN connection?

Yes, the app requires no configuration to work with a VPN. Using VPN provides a highly secure connection to your NetSuite account.

NetSuite for Android Troubleshooting

Before contacting support, the following troubleshooting tips may help resolve your issue.

No Data Returned

If you experience an unexpected error where no data is returned, this may be due to a connection loss. If this occurs, a warning message is displayed at the bottom of the screen.

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:

- A connection error.
- An 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 Android App

If your cannot find the answer to your problem here, you might need to contact support. The following advice will save you time when speaking to support.

- Depending upon the nature of your issue, the support engineer will require some specific information about your app installation, such as app version, server version and user role. This information is viewable in the Application Settings screen, in About. See Changing Application Settings.
- If you receive an error dialog on the screen, note the error message as this will help the engineer diagnose the issue quicker. It may also be useful to take a screenshot of the error dialog.
- Note down the sequence of actions that caused the error.

To take a screenshot on your Android:

1. Press and hold the Android Home and Power buttons together for 2 seconds.
2. To access your screenshot, go to Gallery > Screenshots folder.