

Xerox® Connect App for NetSuite

Quick Start Guide

QUICK START GUIDE



ORACLE®
NETSUITE

DESCRIPTION

Xerox® Connect App for NetSuite (Connect for NetSuite) is a Xerox Gallery App that allows users to connect to their NetSuite File Cabinet, right on the device. Xerox® Workplace Solutions (Xerox® Workplace Suite and Xerox® Workplace Cloud) works as the Single Sign-On mechanism, making sign in fast and easy. Once signed in, the app provides a user the ability to scan a document into their File Cabinet folder of choice, preview and print pre-existing documents, and search for documents based on their file name and description.

Xerox® Connect App for NetSuite can be installed on all supported Xerox devices and is readily available to anyone with a Xerox App Gallery account.

Xerox® Connect App for NetSuite is for use with Xerox® ConnectKey® Technology enabled Multifunction Printers, Xerox® AltaLink®, and Xerox® VersaLink® devices.

DEVICE REQUIREMENTS

Throughout this guide, the word “device” is used synonymously and is interchangeable with Multifunction Printer and Printer.

All devices require the following:

- Xerox Extensible Interface Platform® (EIP) must be enabled to allow the app to be installed.
 - Devices must support EIP 3.5 or higher.
- ConnectKey App Installation (Weblet Install Policy) must be enabled to allow installation of the app.
- Ensure the device is able to communicate with the Internet.

Note:

- Some networks require a proxy to communicate with the Internet.
- If Verification of SSL is enabled on the device, ensure the security certificates are loaded on the device.
- By default, the Xerox Solutions Certificates are preloaded on all 2019 Xerox® ConnectKey Technology-enabled i-Series, Xerox® AltaLink®, and Xerox® VersaLink® devices.

For more information on the settings above, refer to the Xerox App Gallery Online Support at <https://www.support.xerox.com/support/xerox-app-gallery>.

INSTALLING CONNECT FOR NETSUITE

The following procedure assumes you have created a Xerox App Gallery account. If you do not have access to a Xerox App Gallery account, refer to the Xerox App Gallery Quick Start Guide for instructions on creating an account.

Note: For detailed instructions on adding a device and adding or installing apps to your Xerox App Gallery account, see the documentation links at the end of this guide.

INSTALL GALLERY APPS FROM THE XEROX APP GALLERY WEB PORTAL (PAID APP)

1. Go to the Xerox App Gallery URL: <https://appgallery.services.xerox.com>
2. Select **Log In**.
3. Enter a valid Email and Password.
4. On the devices tab, add a Multifunction Printer or Printer, if necessary.
5. On the All Apps tab, select the desired app.
6. Select the **Buy** button.
7. Accept the End User License Agreement (EULA).
8. Select the devices that you would like to buy the app for and then select **Checkout**.
9. Fill out the Billing information and select **Place Order**. Select **Done**.

INSTALL GALLERY APPS FROM THE XEROX APP GALLERY WEB PORTAL (TRIAL APP)

1. Go to the Xerox App Gallery URL:
<https://appgallery.services.xerox.com>
2. Select **Log In**.
3. Enter a valid Email and Password.
4. On the devices tab, add a Multifunction Printer or Printer, if necessary.
5. On the All Apps tab, select the desired app.
6. Select the **Try It** button.
7. Select the devices that you would like to trial the app on and then select **Install**.

CONFIGURING PURCHASED GALLERY APPS FOR SINGLE SIGN-ON: APP IS LISTED IN XEROX WORKPLACE SUITE

Important: Xerox® Workplace Suite administrators should perform the following procedures. If you do not have Xerox Workplace Suite administrator permissions, contact the appropriate administrator to perform the following Admin Configuration steps:

1. Launch **Xerox® Workplace Suite**.
2. Click **Settings**.
3. Select **Single Sign-On**.
4. If your newly purchased app displays in the list, click it and select **Exchange Keys**.
5. This will send an email request to Xerox SSO Apps.
6. The administrator of the SSO Apps will then email the Xerox Workplace Suite Administrator the required key.
7. The Xerox® Workplace Suite Administrator will enter the public key for the app.

SSO is enabled for the app. Users may now opt to use Single Sign-On at their first log-in attempt.

CONFIGURING PURCHASED GALLERY APPS FOR SINGLE SIGN-ON: APP IS NOT LISTED IN XEROX WORKPLACE SUITE

Important: Xerox® Workplace Suite administrators should perform the following procedures. If you do not have Xerox Workplace Suite administrator permissions, contact the appropriate administrator to perform the following Admin Configuration steps:

1. Launch **Xerox® Workplace Suite**.
2. Click **Settings**.
3. Select **Single Sign-On**.

4. If your newly purchased app does not display in the list, click **Action** -> **New**.
5. Fill in the Description, Publisher, and Publisher Email address, App ID and Redirect URL.

This information should be part of the description on the App Details screen in the App Gallery. If this information is not available, contact the app creator.

6. Select **Send**.
7. Click on the app and select **Exchange Keys**.
8. This will send an email request to Xerox SSO Apps.
9. The administrator of the SSO Apps will then email the Xerox Workplace Suite Administrator the required key.
10. The Xerox Workplace Suite Administrator will enter the public key for the app.

SSO is enabled for the app. Users may now opt to use Single Sign-On at their first log-in attempt.

CONFIGURE NETSUITE

Important: Before you can sign in and use Connect for NetSuite, you must configure your NetSuite account using the instructions in the link below. Please contact your NetSuite administrator for assistance. The instructions can be found here:

<https://www.xeroxfilecabinet.com/configure>

HOW TO SCAN A DOCUMENT

1. From the device home screen, touch **Connect for NetSuite**.
2. When the app opens, you will be asked to sign into your NetSuite account. Enter your email and password and then select **OK**.
3. Once you are on the switchboard of the app, select **Scan**.
4. Browse through the list of folders and sub-folders. Once you've navigated to the folder you wish to scan your document into, select **OK**.
5. You will now be on the Document Meta Data screen. Here, you can enter a description for the file. This description will be associated with your scanned document when it's saved in File Cabinet. A description is optional. When you're done making changes, touch **OK**.

6. Once you're on the Scan screen, you can set PDF settings and a file name. You can also adjust the document meta data and change the folder you are scanning in to. Adjust these values by selecting their fields.
7. Adjust your scan settings and select **Scan**. If you toggled Preview on the Scan page, you will be shown a preview of your scan. If you're happy with what you see, touch **Send**. Your document will be uploaded to File Cabinet.

HOW TO PRINT A DOCUMENT

1. From the device home screen, touch **Connect for NetSuite**.
2. When the app opens, you will be asked to sign into your NetSuite account. Enter your email and password and then select **OK**.
3. Once you are on the switchboard of the app, select **Print**.
4. Browse through the list of folders and sub-folders. You will notice that each file has a checkbox and an eye icon. Touch the checkbox to select the file you wish to print or touch the eye icon to see a one-page preview. Alternatively, touch the search button to search for a file based on its name or description. You can select and print more than one file at a time. Once you've selected a file(s), touch **OK**.
5. You'll be taken to the Print screen. You can change the files you are about to print by selecting the **Change/Change Document** button. Otherwise, adjust the print settings and touch **Print**.

SUPPORT

Xerox App Gallery Knowledge Base

<https://www.support.xerox.com/support/xerox-app-gallery/support/enus.html>

Xerox App Gallery Documentation

<https://www.support.xerox.com/support/xerox-appgallery/documentation/enus.html>

Xerox Connect App for NetSuite Support

<https://www.xeroxfilecabinet.com>

Supported Multifunction Printers (MFPs) and Printers

<https://www.xerox.com/en-us/connectkey/apps>