Release Preview Guide

To help you get the most out of your Release Preview account, review the following topics:

Test Plan Template Available for Download

Download the Release Preview Test Plan Template to create and modify a test plan for each of your business workflows. This Microsoft Excel worksheet includes a testing matrix, workflow worksheets, and examples.

Click the following link to download the template: `ReleasePreviewTestPlan_Template.xls`.

Overview of Release Preview

You should request a Release Preview account to verify that your existing business workflows function as expected in the new release. This helps to ensure a smooth and seamless upgrade of your production account(s) to the new NetSuite release.

Release Preview account data is taken from a backup copy of your production account from the night before you request a Release Preview. It will take approximately 3-5 business days to create your Release Preview after you submit your request. Notifications with details about Release Preview availability are sent to administrators and Release Preview availability information is posted on the New Release portlet.

> **Note:** The New Release portlet is located on your home page dashboard in your production account. If you do not see the portlet, see Add the New Release Portlet to Your Dashboard.

When your production account is upgraded to 2024.2, your Release Preview account will be purged.

Requesting a Release Preview Account

If you would like to receive a 2024.2 Release Preview account, a user with the Administrator role should opt in to Release Preview.

> **Note:** You can request a Release Preview account using either your production or sandbox account. If you would like to use a specific sandbox to test the new release, request your Release Preview from that sandbox account.

To opt in to Release Preview:

1. From your production or sandbox account, go to Setup > Company > Release Preview.
2. Click **Request Release Preview**.

   > **Note:** After a request has been made, you can monitor the progress of your request in the Account Status and Account Notifications fields. Users with the Administrator role receive an email notification when your Release Preview account is ready to use.

Release Preview Notifications

Release Preview email notifications are sent to users with the Administrator role.

In addition to the Release Preview reminder and the Upgrade reminder email messages, in–account notifications are also sent to administrators and others. You can ask your administrator to set you up to receive in-account Service Release Notifications. For more information, see the help topic Configuring Administrative Notifications.

> **Note:** You are responsible for keeping the names of your administrators up-to-date. To make changes to these positions, please contact your account manager about updating the contact records. Be aware that if these contacts have “opted out”, they will not receive these important notifications. To opt back in, see the help topic Subscription Management.

Preparing for Testing

Download the Release Preview Test Plan Template to create and modify a test plan for each of your business workflows. This Microsoft Excel worksheet includes a testing matrix, workflow worksheets, and examples. You can find the Release Preview Test Plan Template here: `ReleasePreviewTestPlan_Template.xls`

> **Important:** As you prepare for testing in Release Preview, make a note of the various scheduled events that run in your production account. These scheduled events should be disabled before the production account is upgraded to the new release, and enabled after the upgrade is complete.

Refer to the following for more information about the new features in this release so that you have time to review new or changed functionality well before the release:

- Review the Sneak Peeks available from the New Release portlet, or use the link found on the Help home page. Sneak Peeks will give you a preview of what to expect of the new features and enhancements.
- Review the NetSuite 2024.2 Release Notes.

To prepare for testing in Release Preview, review the following sections:

- Accessing Your Release Preview Account explains how to access your Release Preview account so that you can familiarize yourself with the new features and test them with your business workflows.
- Features Available for Testing in Release Preview contains a table of the features that can be tested in Release Preview.
- Data That Is Not Copied from Production to Release Preview contains a list of features that are not copied from the production account and features that require setup to work in Release Preview.
- How to Report Release Preview Issues explains what to do if you encounter an issue.

> **Note:** Performance in your Release Preview account is not always the same as your production account. You can expect that the first few times you complete a process or task, such as entering a sales order, performance will be a bit slow. You should experience faster performance after you repeat the process or task several times.
>
> Actions you perform in your Release Preview account do not affect and are not copied to your NetSuite production account.

Accessing Your Release Preview Account

Users with the Administrator role in your account receive several notifications (by email, and upon login) containing details about your Release Preview and NetSuite upgrade dates, and announcing the date when the Release Preview account will be available for testing to begin.

URL for Release Preview Access

The URL for accessing your Release Preview account is the same URL you use to access your production account: `https://system.netsuite.com`

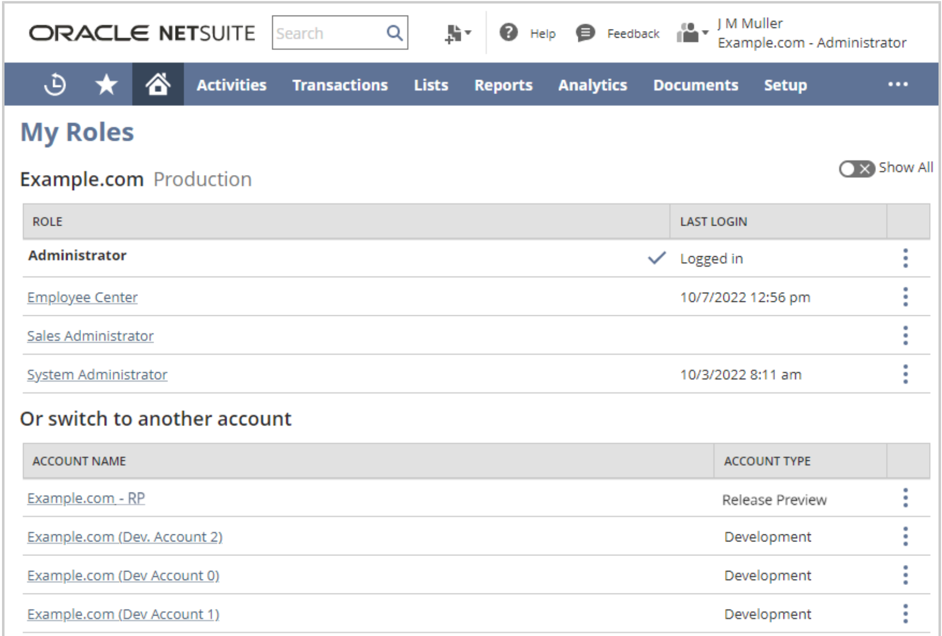
You can also access Release Preview from the New Release portlet. For more information, see Accessing Release Preview from the New Release Portlet.

Initially, only users with an Administrator role have access to the Release Preview account. A user with the Administrator role can give Release Preview access to other users as needed for testing.

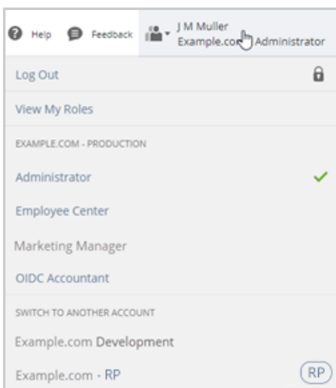
> **Note:** Release Preview access ends on the date your production account is upgraded to the new release. This date is listed in your New Release portlet.

To access the Release Preview account from the URL:

1. Go to `https://system.netsuite.com` to log in to NetSuite.
2. Change roles to the Release Preview Administrator role.
   - On the My Roles page, the account is labeled Release Preview in the Account Type column.



- On the Change Roles list, Release Preview is indicated with an RP symbol.



Users with the Administrator role can give Release Preview access to other users.

To give a user access to the Release Preview account:

1. In the Release Preview account, go to Lists > Employees > Employees (Administrator) and click **Edit** next to the name of the employee.
2. On the **Access** subtab on the employee record, clear the **Give Access** box.

   > **Note:** Make note of the roles assigned to the user for later.

3. Click **Save**.
4. Edit the same employee record.
5. On the **Access** subtab, check the **Give Access** box again and enter any required information.
6. Reassign the appropriate roles to the user.
7. Click **Save**.
8. Advise the user to log out of their account and then log back in to access the Release Preview account.

- On the My Roles page, the account is labeled Release Preview in the Account Type column.
- In the Change Roles list, Release Preview is indicated by an RP symbol.

Users with the Administrator role can give Release Preview access to multiple users using the CSV Import Assistant.

To give multiple users access to the Release Preview account using CSV Import Assistant:

1. From your Release Preview account, create a search for **Employee** with the following results:
   - Internal ID (of the Employee)
   - Give Access
2. Export the search results to a CSV file.
3. Update the employee record in Release Preview using the CSV Import Assistant.
   a. Go to Setup > Import/Export > Import CSV Records.
   b. In the Import Type field, select **Employees**.
   c. In the Record Type field, select **Employees**.
   d. Select the CSV file you want to import, and click **Next**.
   e. In the Data Handling field, select **Update**, and click **Next**.
   f. Make sure you map the following fields (your field and the NetSuite field must match), and then click **Next**:
      - Internal ID
      - Give Access
   g. Click **Save & Run**.

> **Note:** For more information, see the help topic Importing CSV Files with the Import Assistant.
>
> If you need to import roles for these users, see the help topics Employees Import and Sublist Data Import.

To remove Release Preview access from individual users:

1. Log in to your Release Preview account in an Administrator role.

   For more information, see Accessing Your Release Preview Account.
2. Go to Lists > Employees > Employees and select the employee record.
3. On the **Access** subtab on the employee record, clear the **Give Access** box.
4. Click **Save**.

   The employee from whom you have removed access can no longer log in to your Release Preview account.

Accessing Release Preview from the New Release Portlet

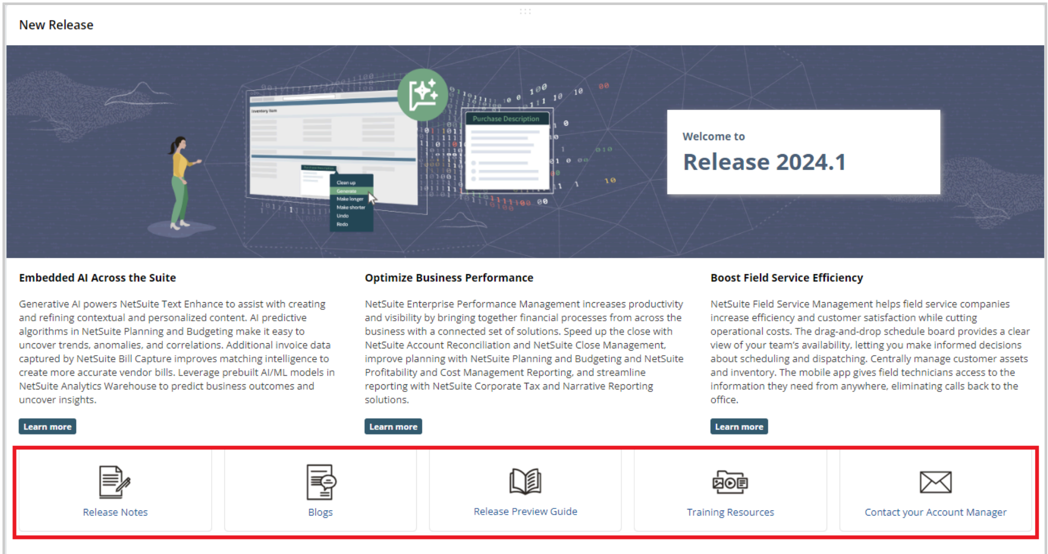
You can access your Release Preview account from the New Release portlet.

To access the Release Preview account from the New Release portlet:

1. Log in to your production account (`https://system.netsuite.com`).

2. Locate the New Release portlet on your home page.

> **Note:** The New Release portlet is located on the home page of your production account. If you do not see the portlet, see Add the New Release Portlet to Your Dashboard.



3. Click **Release Preview Login**.

> **Note:** This icon does not appear in the New Release portlet until it is available for login.

4. Log in using your NetSuite email address and password.

Add the New Release Portlet to Your Dashboard

If you do not see the New Release portlet on your dashboard, you can add it.

To add the New Release portlet to your dashboard:

1. Click **Personalize** on your home page.
2. On the **Standard Content** tab, select **New Release**.

Refer to the following for more information about the new features in this release:

- Review the Sneak Peeks available from the New Release portlet, or use the link found on the Help home page. They will give you a preview of what to expect of the new features and enhancements.
- Click **Release Preview Guide** for a printable version of the Release Preview Guide in the NetSuite Help Center. Follow the suggestions in the plan to avoid problems and surprises when you go live with the upcoming release. The test plan provides:
  - Instructions for using the Release Preview account and for testing and verifying your production account activities with the new release.
  - Steps to test your customizations, SuiteScripts, web services integrations, web store, and SuiteAnalytics Connect access.
  - A list of the features and enhancements that can be tested in the Release Preview account and those that cannot.
  - In addition, you can download a ReleasePreviewTestPlan_Template.xls and modify it to suit your needs, with your specific information and testing procedures.

Note: Your Release Preview account is separate from your NetSuite production account. Release Preview is a temporary and isolated test account that is running the new version of NetSuite software. Use Release Preview only for testing. Make sure you are working in your NetSuite production account when you are performing your daily business activities.

- Click **Release Notes** for details about the new features in this release. You can also access the Release Notes here: NetSuite 2024.2 Release Notes.
- Click **Training Resources** to watch presentations and demonstrations on key new features and enhancements in SuiteAnswers. You can also access training resources using the following procedure:

To access New Feature Training in SuiteAnswers:

1. Log in to your NetSuite production account and click the **Support** tab.
2. Click **Go to SuiteAnswers**.
3. On the SuiteAnswers page, scroll down to the Videos section and click **View All Videos**.
4. Review the **New Feature Preview** videos.

Features Available for Testing in Release Preview

The following tables describe features that are available for testing in Release Preview. Only modules that you have purchased and enabled in your production account are available in your Release Preview. Make sure you understand the limitations of the Release Preview account when you use it to test features with your business workflows.

Note: "No actions taken" in the Testing Notes column indicates the feature is available, but no email is sent, no campaigns are executed, and no payments are processed.

Features Available for Full Testing in Release Preview Accounts

The following table lists features that you can fully test in Release Preview accounts.

Feature	Testing Notes
Bulk Merge	
CTI Integration	Partners are Contivio and Five9.
CSV Import	
Custom Records	Security-sensitive fields on custom records will display the same values displayed in the production account.
Email Campaigns	Email campaigns must have fewer than 25 recipients. **Note:** The From header on email you send from your sandbox account will be rewritten to use the SMTP-related email address (netsuite.com). For more information, see the help topic FROM Headers in Email Can Be Rewritten.
Email Case Capture	
Email Notifications and Outgoing Email	Saved searches are automatically set to inactive in Release Preview. For email routing options, see Setting Preferences for Release Preview Email.

ORACLE NETSUITE

Feature	Testing Notes
Intellesync	
Memorized Transactions	This task begins running only after a user has logged in to the Release Preview account for the first time.
OpenID Connect (OIDC)	For instructions, see the help topic OpenID Connect (OIDC) Single Sign-on.
Reports Scheduled Reports	Scheduled Reports do not send emails. Alert Me When Ready reports do send emails (assuming a user initiates this action). **Note:** The company preference for Release Preview email is evaluated after the report is executed and prepares to send email. Depending on the preference specified, the email is sent to a specific user or not sent at all. For more information, see Setting Preferences for Release Preview Email.
Saved Searches Scheduled Saved Searches	Scheduled Searches and Email Alerts behave as they do in the production account. **Note:** The company preference for Release Preview email is evaluated after the report is executed and prepares to send email. Depending on the preference specified, the email is sent to a specific user or not sent at all. For more information, see Setting Preferences for Release Preview Email.
Secure Domains	You can test and verify a custom secure domain from the user's perspective in a Release Preview account, before the secure domain is deployed to a production account. **Note:** Do not attempt to reuse domains that are already deployed in your production account. You must set up a unique domain for each of your accounts: production, sandbox, and Release Preview. For more information, see the help topics Manual Certificates and Set Up Domains for Web Stores.
Server SuiteScript	
Client SuiteScript	
SuiteFlow (Workflows)	SuiteFlow can be fully tested. **Note:** Scheduled SuiteFlow (workflows) are not run automatically in Release Preview, but can be tested manually.
Telephony Integration (Basic)	
Two-Factor Authentication	Two-factor authentication (2FA) settings are shared between a production account and the Release Preview accounts that are associated with that production account. Users do not need to re-create their 2FA settings for Release Preview accounts.
SOAP Web Services	You can view the SOAP requests and responses for each job in the SOAP Web Services Usage Log. In Release Preview accounts, requests and responses are accessible for one day. For more information, see the help topic Using the SOAP Web Services Usage Log.

Features Available for Limited Testing in Release Preview Accounts

The following table lists features that are available in only a limited form in Release Preview accounts.

Feature	Testing Notes
Alternative Payment Methods	No actions taken (no payment sent). Test mode is on for all payment processing profiles.
Credit Card Processing	No actions taken. To test your billing processes or credit card processing, use only test credit card numbers and a valid expiration date. **Important:** For more information, see Credit Card Processing in Release Preview.
Direct Deposit	No actions taken.
NetSuite Connector	You cannot connect multiple NetSuite accounts (production, sandbox, Release Preview) to the same NetSuite Connector account. You can only connect one NetSuite account to a NetSuite Connector account at a time. For more information, see the help topics General NetSuite Connector FAQ and Checking Accounts for NetSuite Connector Deployment.
PayPal Integration	No actions taken.
Perquest	No actions taken.
SAML Single Sign-on	SAML configuration is not copied from the production account to the Release Preview. You must configure SAML in your Release Preview account. For more information, see the help topic SAML SSO in Multiple NetSuite Account Types.
Scheduled SuiteScripts	Scripts do not automatically run in Release Preview accounts, but they can be run manually. Automated scheduled scripts can only be tested in sandbox accounts.
SSN or TIN (Social Security Number or Tax Information Number)	Real numbers are not copied. Use only test numbers.
SuiteAnalytics Connect	When testing SuiteAnalytics Connect, you must change the Connect Service host name and ensure that you are logged in to a Release Preview account. The host name of Release Preview accounts contains “rp” as part of the name. For more information, see Test Your SuiteAnalytics Connect Connection.
Token-based Authentication	Tokens created using the Token-based Authentication feature in your production account are not copied to your Release Preview account. To test this feature, you must create tokens in that Release Preview account. For more information, see the help topic Manage TBA Tokens in the NetSuite UI.
UPS/FedEx Integration for Shipping Labels	No actions taken.
Website and Web Store	Domains are not copied from your production account to your Release Preview account. You must set up domains in the Release Preview account.

Feature	Testing Notes
	For more information, see the help topics Manual Certificates and Set Up Domains for Web Stores. **Note:** If you have multiple Release Preview accounts, ensure that the domains are unique across all of your Release Preview accounts. An error message is generated if there are duplicate domains.

Features Not Available for Testing in Release Preview Accounts

The following features are not available for testing in Release Preview accounts:

- Fax
- Intelligent Recommendations
- Outlook Integration
- Payroll

Data That Is Not Copied from Production to Release Preview

The following items are not copied from production to Release Preview accounts:

- **Websites and web store domains**

  Domains are not copied from your production account to your Release Preview account. If you would like to test your websites or web store, you must set up domains in the Release Preview. For more information, see the help topics Manual Certificates and Set Up Domains for Web Stores.
- **Customer Center roles**

  Customer Center roles are not copied from your production account to your Release Preview account. Due to this limitation, customer login functionality does not work in Release Preview, even if it has been working in the production account. If you want to set up this functionality to work in Release Preview, you can do a CSV import of customer records into the Release Preview account. Then you can set passwords and check the Give Access box for customer users.

  For more information, see the help topic CSV Imports.
- **SAML configuration**

  SAML configuration is not copied from your production account to your Release Preview account. For more information, see the help topic SAML SSO in Multiple NetSuite Account Types.
- **System notes on records**

  System notes are not copied from your production account to your Release Preview account. For more information about system notes, see the help topic System Notes Overview.
- **SuiteFlow (workflow) history logs**

  SuiteFlow (workflow) history logs are not copied from your production account to your Release Preview account.

  Workflow instances are not copied from your production account to your Release Preview account either.

  For more information, see the help topics SuiteFlow Overview and Workflow History Subtab.
- **Token-based Authentication (TBA) tokens**

Tokens created in your production account are not copied to your Release Preview account. To test token-based authentication in your Release Preview, you must create tokens in your Release Preview account. For more information, see the help topic Manage TBA Tokens in the NetSuite UI.

Setting Preferences for Release Preview Email

Users with the Administrator role can set a preference for delivery of email messages for the Release Preview account. This is done in the production account. Users with the Administrator role can also set preferences directly in the Release Preview account on the Email Preferences page.

For example, during testing you may not want customers to receive email messages from the Release Preview account. In this case, you may want email from your Release Preview account delivered only to yourself, or to the people in your organization who are responsible for testing.

There are exceptions to the email routing rules you specify. Security-sensitive email is always sent to the owner of the email address. For example, password reset email does not obey preferences that override routing rules.

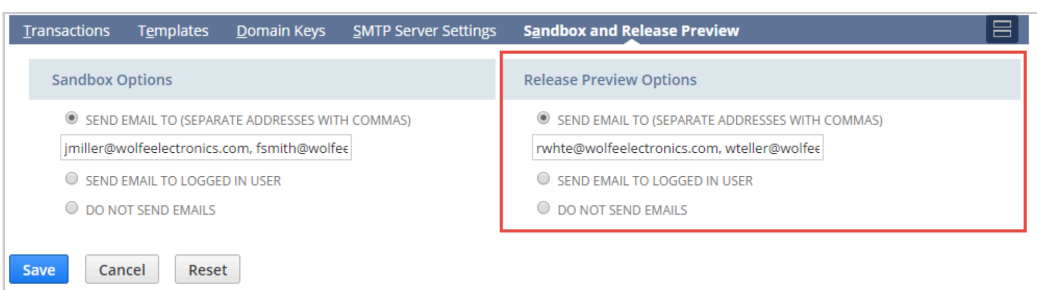
Examples of security-sensitive email include:

- Reset Password
- Change Password
- Change Email Address
- Security Questions (Setup or Update)
- Two-Factor Authentication Setup (one-time password)

To set email delivery preferences for Release Preview:

1. Log in to your NetSuite production account.
2. Go to Setup > Company > Email > Email Preferences.
3. On the **Sandbox and Release Preview** subtab, select your preference under **Release Preview Options**.

   Important: Choose the **Send Email To** option to have the most control over who receives these email messages.



Option	Description
Send Email To (suggested)	Choose this option to ensure email messages are delivered to specific addresses. - Enter the email addresses to receive email messages. Separate each email address entered with a comma.

Option	Description
	■ Choose this option when testing your web store in your Release Preview account. This option ensures web store generated email messages are routed to the desired recipient.
Send Email to Logged In User (default)	Choose this option to send email messages to the user currently logged in to the NetSuite UI. If you select this option, be aware of the following behavior: ■ Email messages initiated by an error in a scheduled script follow the notification settings in the script record. ■ Email messages generated from web stores are not sent to the user logged in to the NetSuite UI. For example, an order notification email message is sent to the shopper's email address, not to the logged in user's email address. To prevent this, choose the **Send Email To** option instead.
Do Not Send Emails	Choose this option if you do not want any email messages sent.

4. Click **Save**.

   The email delivery preferences you set in your production account are applied to your Release Preview account.

   Important: Release Preview is a copy of your production account as of a certain date, so the data in Release Preview may not be the same as data in your production account. If you recently changed Release Preview email preferences in your production account, they may not be reflected in the data snapshot used to generate your Release Preview account. Complete the following steps to verify the email preferences in the Release Preview account.

5. Access your Release Preview account. For more information, see Accessing Your Release Preview Account.
6. Go to Setup > Company > Email Preferences.
7. On the **Email Options** subtab, verify your email preferences and modify them if necessary.

Note: To decrease the number of automatic email notifications, all saved searches in the Release Preview account are set to inactive by default. If you want to enable email notifications for a specific saved search, you can activate it. To learn more about inactivating and activating a saved search, see the help topic Marking a Search Inactive.

Credit Card Processing in Release Preview

Security enhancements in NetSuite require that an administrator complete the following procedure to process credit card transactions in your Release Preview account.

To enable credit card processing profiles for use in Release Preview:

1. In an Administrator role, access your Release Preview account. (See Accessing Your Release Preview Account if needed.)
2. Go to Setup > Accounting > Financial Statements > Payment Processing Profiles.
3. Click **Edit** next to the credit card processing profile you want to use in Release Preview.
4. On the credit card processing profile, under **Authentication Credentials**, enter the credentials required for this processor.
5. Click **Save**.

6. Repeat these steps for each credit card processing profile you want to use in your Release Preview account.

How to Report Release Preview Issues

Report any issues you encounter during testing by calling NetSuite Customer Support or by submitting a case online.

Call NetSuite Customer Support

Use one of the phone numbers in the following table to call NetSuite Customer Support:

> **Note:** These phone numbers are valid for customers in the United States and Canada. If you are calling from another country, include the appropriate exit code for your country.

Region	Phone Number
All locations	1.877.774.4271
US - local	1.925.948.1084

To submit a case:

1. Go to SuiteAnswers in your Release Preview account. You can access SuiteAnswers in the following ways:
   - In the NetSuite user interface:
     - Click **Support > Go to SuiteAnswers**.
     - Click **Support > Support Overview**, and in the SuiteAnswers portlet, click **Explore SuiteAnswers**.
   - In the NetSuite Help Center, click the **SuiteAnswers** link on the toolbar.
2. Click the **Contact Support** link.
3. Under Online Support, click **Create Support Case** and provide details of your issue.

   A case is created in the NetSuite Support system under your Release Preview account and is flagged as a problem.

Suggested Test Plan

Download the Release Preview Test Plan Template to create a test plan for each of your business workflows. This Microsoft Excel worksheet includes a testing matrix, workflow worksheets, and examples. After you have downloaded the file, modify it to suit your testing needs. You can find the Release Preview Test Plan Template here: `ReleasePreviewTestPlan_Template.xls`

> **Important:** As you test in Release Preview, make a note of the various scheduled events that run in your production account. These scheduled events should be disabled before the account is upgraded to the new release, and enabled after the upgrade is complete.

The following sections provide a plan for thoroughly testing your account in Release Preview:

- Test Your Business Workflows

- Test Your Custom Reports, Queries, and Forms
- Test Your Other Customizations
- Test Your SuiteScript Deployments
- Test Your SOAP Web Services Integrations
- Test Your Installed SuiteApps (Bundles)
- Test Your Web Store
- Test Your SuiteAnalytics Connect Connection

Test Your Business Workflows

To successfully test in the Release Preview account, you should identify, document, and test the key business workflows (not to be confused with SuiteFlow workflows) in your production account. Testing your workflows is the most important aspect of Release Preview. Compile a list of the critical task paths your employees follow to get their jobs done and create a document for each process. You should use a spreadsheet application and create a separate worksheet for each common daily task. Use this spreadsheet as your checklist during testing.

Download the Release Preview Test Plan Template to create your workflow test plan. This Microsoft Excel worksheet includes a testing matrix, workflow worksheets, and examples. After you have downloaded the file, modify it to suit your testing needs. You can find the Release Preview Test Plan Template here: `ReleasePreviewTestPlan_Template.xls`

At minimum, each business workflow documented should contain the following components:

- **Business Workflow Name** – Provide a unique name.
- **Role** – Specify the role to use when testing the process.
- **Email** – Specify the email address to use for testing.
- **Steps** – Provide the detailed navigation required to accomplish the desired task.
- **Results** – List expected results.

Test Your Custom Reports, Queries, and Forms

> **Important:** During the testing of your business workflows, you may have thoroughly tested your custom reports, workbooks, and forms. If you think there are areas that may have been overlooked in the workflow testing effort, review the information in this section. Add tests to your plan as needed.

Pay particular attention to any customized reports, customized workbooks and datasets, customized forms, custom record types, custom searches, or bulk operations such as billing, shipping, and fulfillments. Compile checklists of reports, workbooks, datasets, forms, record types, and other customizations from your production account.

> **Note:** Performance in the Release Preview account may differ from your production account because it runs on different hardware. If your reports or queries run more slowly in Release Preview, reduce the date ranges for those queries and reports. Your testing goal is to ensure that everything functions as expected: the filtering, formulas, and the sorting of each report, query, or search.

To test your custom reports, queries, and forms:

1. Create checklists for your various customized reports, workbooks, datasets, forms, record types, and searches. For instructions to create specific checklists, see the procedures that follow this procedure.
2. Test each form, script, dataset, and report that uses a formula to ensure it behaves as expected. If any customized form, script, dataset, or report uses a formula, ensure the formula results are the same as in your production account. For example, run the identical report in your production account and in the Release Preview account. Compare formula columns from the two reports to verify that the results are the same. Check off each item in your checklists after testing.

   > **Important:** Release Preview is a copy of your production account as of a certain date, so the data in it may not be the same as in your production account. You should generate reports and queries using date ranges that can be compared between both accounts.

3. Ensure that your custom fields and custom record types function as expected. For example, for each custom record, ensure that:
   - Add and Delete behavior is the same as in the production account.
   - A record is linked appropriately to a parent record.
   - Formulas and forms function as expected.
4. Check your dashboard functionality, including KPIs, KPI scorecards, report snapshots, and other customizations.
5. Test your custom business workflows from start to finish. For more information, see Test Your Business Workflows.
6. Test your Suitelets and custom dashboard portlets. If these customizations do not use SuiteScript UI objects, and if you have written custom HTML, verify they work as expected in the Release Preview account.

To create a checklist for testing your transaction form customizations:

1. Go to Customization > Forms > Transaction Forms.
2. Export this list to a CSV or XLS file.
3. Review the list, and remove any items labeled **Customize** in the **Edit** column, because those are NetSuite defaults.
4. Save this modified list as your checklist for testing.

To create a checklist for testing your entry form customizations:

1. Go to Customization > Forms > Entry Forms.
2. Export this list to CSV or XLS.
3. Review the list, and remove any items labeled **Customize** in the **Edit** column, because those are NetSuite defaults.
4. Save this modified list as your checklist for testing. Make a note of any form that is linked to SuiteScript and script libraries, and ensure you test these forms.

   > **Note:** It is not necessary to test custom forms that you no longer use.

To create a checklist for testing your record type customizations:

1. Go to Customization > Lists, Records & Fields > Record Types.
2. Record types cannot be exported. Make a list of record types to use as a checklist to ensure that you test each one.

To create a checklist for testing your segment customizations:

1. Go to Customization > Lists, Records & Fields > Custom Segments.
2. Export this list to CSV or XLS. Save this list as your checklist for testing. Make a note of any segments that are balancing segments, and ensure you test these segments.

To create a checklist for testing your transaction customizations:

1. Go to Customization > Lists, Records & Fields > Transaction Types.
2. Transaction types cannot be exported. Make a list of transaction types to use as a checklist to ensure that you test each one. Make a note of any transaction types that have associated plug-ins (for example, Custom GL Lines Plug-in), and ensure you test these transactions.

To create a checklist for testing your field customizations:

1. Go to Customization > Lists, Records & Fields > Lists.

   Export this list to CSV or XLS. Save this list as your checklist for testing.
2. Go to Customization > Lists, Records & Fields > Entity Fields.

   Export this list to CSV or XLS. Save this list as your checklist for testing.
3. Go to Customization > Lists, Records & Fields > Item Fields.

   Export this list to CSV or XLS. Save this list as your checklist for testing.
4. Go to Customization > Lists, Records & Fields > CRM Fields.

   Export this list to CSV or XLS. Save this list as your checklist for testing.
5. Go to Customization > Lists, Records & Fields > Transaction Body Fields.

   Export this list to CSV or XLS. Save this list as your checklist for testing.
6. Go to Customization > Lists, Records & Fields > Transaction Line Fields.

   Export this list to CSV or XLS. Save this list as your checklist for testing.
7. Go to Customization > Lists, Records & Fields > Transaction Item Options.

   Export this list to CSV or XLS. Save this list as your checklist for testing.
8. Go to Customization > Lists, Records & Fields > Item Number Fields.

   Export this list to CSV or XLS. Save this list as your checklist for testing.
9. Go to Customization > Lists, Records & Fields > Other Record Fields.

   Export this list to CSV or XLS. Save this list as your checklist for testing.
10. Go to Customization > Lists, Records & Fields > Other Sublist Fields.

    Export this list to CSV or XLS. Save this list as your checklist for testing.

To create a checklist for testing your report and saved search customizations:

1. Go to Reports > Saved Reports > All Saved Reports.
2. This data cannot be exported. Make a list of all your customized reports in an Excel spreadsheet to use as a checklist.
3. Go to Reports > Saved Searches > All Saved Searches.
4. This data cannot be exported. Make a list of all your customized searches in an Excel spreadsheet to use as a checklist.

To create a checklist for testing your workbook and dataset customizations:

1. Go to Analytics.
2. Click the Workbooks tab. This data cannot be exported. Make a list of all your customized workbooks in an Excel spreadsheet to use as a checklist.
3. Click the Datasets tab. This data cannot be exported. Make a list of all your customized datasets in an Excel spreadsheet to use as a checklist.

Test Your Other Customizations

> **Important:** During the testing of your business workflows, you may have thoroughly tested all of your customizations. If you think there are areas that may have been overlooked in the workflow testing effort, review the information in this section. Add tests to your plan as needed.

How you test your other customizations depends on who implemented the customization and whether you are still engaged with that company.

For your NetSuite Professional Services customizations:

- If you are still engaged with NetSuite Professional Services on this work, contact them or inform NetSuite Customer Support. Support can inform Professional Services of your Release Preview dates so that they can coordinate testing with you.
- If the custom work has been signed off by you, and you use it in your day-to-day routine, engage the internal person who maintains the customization to test it in Release Preview.

For your third-party (Independent Software Vendor) customizations:

- If you are still engaged with the third party on this work, you should make them aware of your Release Preview dates and request their assistance in testing the custom work.
- If the custom work has been signed off by you and you use it in your day-to-day routine, engage the internal person who maintains the customization to test it out in Release Preview.

Test Your Installed SuiteApps (Bundles)

> **Important:** During the testing of your business workflows, you may have thoroughly tested your SuiteApps integrations. If you think there are areas that may have been overlooked in the workflow testing effort, review the information in this section. Add tests to your plan as needed.

SuiteApps may be built and installed as bundles, or built with SuiteCloud Development Framework (SDF) and installed as files. You should test both types of SuiteApps in Release Preview.

If you have SuiteApps installed in your account, make sure you test them in Release Preview. For third-party applications installed in your account, contact the solution provider and inform them of your Release Preview dates. Make sure you test all of your critical business workflows that rely on the third-party solution and inform the solution provider of any issues you may find.

Behavior of Bundles in Different Account Types

The isolation of Release Preview from other accounts means that there is a difference in which bundles can be installed and how bundles behave. Bundles can be installed from a production account, from a sandbox account, or from a development account into a Release Preview account.

Note: Copy to Account is not supported for Release Preview accounts.

- Bundles can be installed from one Release Preview account to another Release Preview account.
- Bundles cannot be installed from a Release Preview account to a production account, sandbox account, or development account.

Note: Managed bundle upgrades cannot be pushed to a Release Preview account. If you want to upgrade a managed bundle in a Release Preview account, you must install the bundle upgrade manually. For more information, see the Support for Managed Bundle Upgrade Across Account Types section of Bundle Support Across Account Types.

The above limitations do not apply to SuiteApps built with SDF and installed as files.

Test Your SOAP Web Services Integrations

For information about accessing your Release Preview account through SOAP web services, see the help topic URLs for Account-Specific Domains.

Note: NetSuite officially supports SOAP web services versions for three years. For details, see the help topic Support for Existing WSDL Versions.

For more information, see the help topic Understanding NetSuite URLs.

Test Your SuiteAnalytics Connect Connection

Important: During the testing of your business workflows, you may have thoroughly tested SuiteAnalytics Connect. If you think there are areas that may have been overlooked in the workflow testing effort, review the information in this section. Add tests to your plan as needed.

Testing Your Connection

To test your connection in Release Preview, you must change the Connect Service host name. After you change the host name, perform your SuiteAnalytics Connect tests.

The host name you should use for your connection is displayed in the **Service Host** field on the SuiteAnalytics Connect Driver Download page, under **Your Configuration**.

Note: Ensure that you are logged in to a Release Preview account. The host name of Release Preview accounts contains “rp” as part of the name.

You can connect to SuiteAnalytics Connect using ODBC, JDBC, and ADO.NET drivers. For more information about how to change the Connect Service host name depending on the driver that you are using, see the following topics:

- ODBC driver, see the help topic Connection Attributes.
- JDBC driver, see the help topic JDBC Connection Properties.
- ADO.NET driver, see the help topic ADO.NET Connection Options.

> **Important:** Be sure to switch the Service Host entry back to the original entry when it is time to connect to your production account.

Test Your SuiteScript Deployments

> **Important:** During the testing of your business workflows, you may have thoroughly tested your SuiteScripts. If you think there are areas that may have been overlooked in the workflow testing effort, review the information in this section. Add tests to your plan as needed.

For information about accessing your Release Preview account through RESTlets, and to access the SuiteScript debugger, see the help topic URLs for Account-Specific Domains.

Read the SuiteScript section of the release notes for details on API changes.

- Suggested Test Plan

To test your SuiteScript deployments:

1. Go to Customization > Scripting > Script Deployments.

   List all your script deployments in an Excel spreadsheet to use as a checklist to ensure that you test each one.
2. Test all of your operational SuiteScripts for compatibility and ensure they are working as expected.

   If you find any issues with your Server SuiteScripts you can place the script deployment in testing mode and use the debugger to investigate the problem.

   > **Note:** Make sure you review the description of the script and script deployment, or review the code itself to see what the script is designed to do so that you can properly test it.

Test Your Web Store

> **Important:** This information applies to both Site Builder and SuiteCommerce Advanced. During the testing of your business workflows, you may have thoroughly tested your web store. If you think there are areas that may have been overlooked in the workflow testing effort, review the information in this section. Add tests to your plan as needed.

For information about accessing your Release Preview account for shopping, see the help topic URLs for Account-Specific Domains.

Domains are not copied from your production account to your Release Preview account. Because Release Preview uses the same infrastructure as a production account, you must create a new unique domain to use in Release Preview. An error message is generated if there are duplicate domains. For example, if you use `https://checkout.example.com` in your production account, you could use `https://test.checkout.releasepreview.example.com` in Release Preview.

> **Important:** These procedures should be performed by someone with DNS experience.

Testing Your Web Store

To test your web store in Release Preview, you must create a new unique domain to use in Release Preview. After you have set up a new domain, you can start testing.

To set up a unique domain in your Release Preview, complete the following tasks:

1. Set up your web store by following the instructions in Set Up Domains for Web Stores.
2. Test your web store in your Release Preview account using the following steps:
    a. Open a browser window and visit the web store on your newly created custom domain.
    b. Test your web store.