


Release Preview Guide

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

- [Overview of Release Preview](#)
 - [Requesting a Release Preview Account](#)
 - [Release Preview URLs](#)
- [Preparing for Testing](#)
 - [Accessing Your Release Preview Account](#)
 - [Features Available for Testing](#)
 - [Data That Is Not Copied from Production to Release Preview](#)
 - [How to Report Release Preview Issues](#)
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 - [Test Business Workflows](#)
 - [Test Custom Reports, Queries, and Forms](#)
 - [Test Installed SuiteApps \(Bundles\)](#)
 - [Test SOAP Web Services Integrations](#)
 - [Test SuiteAnalytics Connect](#)
 - [Test SuiteScript](#)
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 **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 as you repeat the process or task through several iterations of testing. Release Preview is intended for testing the functionality of new features, not as a performance measurement tool for the new version. The tests performed in Release Preview are not transferred to your production account.

Test Plan Template Available for Download

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.

Click the following link to download the template: [ReleasePreviewTestPlan_Template.xls](#).

Overview of Release Preview

You should use Release Preview to verify that your existing business workflows function as expected before your production account is upgraded to the new NetSuite release.

The goal is to provide a smooth and seamless transition to a new release. By following the guidelines that are presented here, you can avoid any major problems or surprises when your production account is upgraded.

Requesting a Release Preview Account

If you would like to receive a 2023.1 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 URLs

You can access your Release Preview account from the same URL as your production account:

<https://system.netsuite.com>

Log in to your NetSuite account, and then select Release Preview from either the Change Roles list or the My Roles page to access the Release Preview account.


You may need to update data center-specific URLs used in your Release Preview account. Use the Traffic Health tool to generate a Traffic Health report to identify data center-specific URLs. Change these URLs to use the account-specific domain of your Release Preview account. Go to Setup > Company > Traffic Health and generate a Traffic Health report to help you identify required updates. For details, see the help topic [Traffic Health](#).

Preparing for Testing

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. [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 [Accessing Release Preview 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.
-  [NetSuite 2023.1 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 changes in this release.
- [Features Available for Testing](#) 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.

Accessing Your Release Preview Account

Users with the Administrator role for your account receive several notifications (by email, and upon login) in the weeks before the scheduled Release Preview start date. These notifications contain details about the Release Preview and NetSuite Upgrade dates, and they announce the date when the Release Preview account is 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. See [Accessing Release Preview from the New Release Portlet](#). If you do not see the portlet on your dashboard, see the help topic [Adding a Portlet to a Dashboard](#).

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 on 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.

ORACLE NETSUITE Search [] Help Feedback J M Muller Example.com - Administrator

Activities Transactions **Lists** Reports Analytics Documents Setup

My Roles

Example.com Production Show All

ROLE	LAST LOGIN
Administrator	✓ Logged in
Employee Center	3/3/2021 2:33 pm
OIDC Accountant	2/10/2021 12:14 pm

Or switch to another account

ACCOUNT NAME	ACCOUNT TYPE
Example.com (Dev Account 1)	DEVELOPMENT
Example.com (Dev Account 0)	DEVELOPMENT
Example.com (Dev. Account 2)	DEVELOPMENT
Example.com_(SB_1)	SANDBOX
Wolfe Electronics - 01 4472135	PRODUCTION
Wolfe Electronics - 01 4472135_RP	RELEASE PREVIEW
Wolfe Electronics - 01 4472135_-SB2	SANDBOX
DB96 Test Account for Tech Pubs 1	PRODUCTION
DB96 Test Account for Tech Pubs 2	PRODUCTION
DB96 Test Account for Tech Pubs 3	PRODUCTION
DB96 Test Account for Tech Pubs 4	PRODUCTION
DOC OneWorld All Access Test Acct - db96	PRODUCTION
Example.com (Dev Account 1)	DEVELOPMENT

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

Help Feedback J M Muller Example.com Administrator

- Log Out
- View My Roles
- EXAMPLE.COM - PRODUCTION
- Administrator ✓
- Employee Center
- Marketing Manager
- OIDC Accountant
- SWITCH TO ANOTHER ACCOUNT
- Example.com Development
- Example.com_RP (RP)

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 your home page dashboard in your production account. If you do not see the portlet, see [Add the New Release Portlet to Your Dashboard](#).

3. Click **Release Preview Login** (the key-shaped icon).
4. Log in using your NetSuite email address and password.

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. Sneak Peeks will give you a preview of what to expect of the new features and enhancements.
-  [2023.1 Release Notes](#)

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**.

 **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.

The isolation of Release Preview from other accounts means that there is a difference in which bundles can be installed and how bundles behave. See [Behavior of Bundles in Different Account Types](#).

Features Available for Testing


The following tables describe features 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.

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 (8x8, 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: You must set up DKIM in each Release Preview account. For more information, see the help topic DomainKeys Identified Mail (DKIM) .
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 .
Intellesync	
Memorized Transactions	This task begins running only after a user has logged in to the Release Preview account for the first time.
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.

Feature	Testing Notes
	<p> 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.</p> <p>For more information, see the help topics Manual Certificates and Set Up Domains for Web Stores.</p>
Server SuiteScript	
Client SuiteScript	
SuiteFlow (Workflows)	
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 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
ACH Vendor Payments	No actions taken (no payments sent).
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. <div style="border: 1px solid #ccc; background-color: #fff9c4; padding: 5px;"> <p> Important: For more information, see Credit Card Processing in Release Preview.</p> </div>
Direct Deposit	No actions taken.
Electronic Funds Transfer	No actions taken (no funds transferred).
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 .

Feature	Testing Notes
Schedules SuiteScripts	Scripts do not automatically execute in Release Preview accounts, but they can be executed 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 SuiteAnalytics Connect .
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. 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
- Online Bill Pay
- 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:

- **Domain Keys Identified Mail (DKIM) Keys**

Domain keys are not copied from your production account to your Release Preview account. Before using email in your Release Preview, you need to set up domain keys for a domain that is separate from the email domain set up in your production account. See [Setting Preferences for Release Preview Email](#).

- **Websites and web store domains**

Domains are not copied from your production account to your Release Preview account. 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 details, 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. For more information, see the help topics [SuiteFlow Overview](#) and [Workflow History Subtab](#). Workflow instances are not copied from your production account to your Release Preview account either.

- **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 information about creating tokens, see the help topic [Manage TBA Tokens in the NetSuite UI](#).

Setting Preferences for Release Preview Email

Domains are not copied from your production account to your Release Preview account. Before using email in Release Preview, you need to set up domain keys for a domain that is separate from the email domain set up in your production account. If you try to set up the same domain you use in your production account, you will receive an error message indicating that the domain is already taken.

The following procedures contain instructions for setting up domain keys in your Release Preview account and with your domain provider.

Setting Up DKIM for the Release Preview Account

These procedures should be performed by someone with DNS experience.

Note: If you do not complete the following procedures, by default, the From header on email you send from NetSuite is rewritten. If this is acceptable for your testing purposes, then it is not necessary to set up DKIM in Release Preview. When the From header is rewritten, the original email address is moved to the display string, and the SMTP-related email address refers to netsuite.com. For example, an email from `jsmith@example.com` would be rewritten to `jsmith@example.com <system@sent-via.netsuite.com>`.

What your recipients see as the sender of the email depends on the email client in use at the recipient's site. Some recipients see the original email address with the modified `<system@sent-via.netsuite.com>` From header. Some recipients may not see the original email address at all. If this is not acceptable for your testing purposes, then you need to perform the following procedures to set up domain keys for a domain that is separate from the email domain set up in your production account.

To enter domain keys in your NetSuite account:

1. In your Release Preview account, go to Setup > Company > Email > Email Preferences.
2. Click the **Domain Keys** subtab.
3. In the **Domain Selector** field, enter the first domain selector. You can name the selector anything you want, but you should incorporate the current date in the selector name so that you know the age of each key.

Note: When you set up your domain name with your domain provider, enter the same domain selector along with the `._domainkey` suffix.

For example, if you enter **selector1** in this field in NetSuite, you would enter **selector1._domainkey** as the domain selector with your domain provider. If you set up a domain for sandbox or Release Preview, you may want to consider indicating the account type in your domain name as well.

4. In the **Domain Name** field, enter the domain name you are using to send DKIM-signed email from NetSuite. For example, if the email address from which you are sending DKIM-signed email is `jwolfe@wolfeelectronics.com`, the domain is `wolfeelectronics.com`. An email address from this domain can appear in the From header.
5. Enter the **Private** and **Public** domain keys used for signing in one of the following ways:
 - If you use the same domain keys with another application, enter the domain keys manually, and then click **Add**.
 - If you have not generated a domain key for this domain previously, click the **Generate Key Pairs** link to have NetSuite generate them for you, and then click **Add**.

You need the public domain key to set up your domain with a domain hosting service.
6. After entering the domain keys, click **Generated DNS Entry**. Your complete, properly formatted DNS entry is shown in a popup window. Copy this DNS entry. Do not close the browser window.
7. Complete the following procedure to set up a DNS text record with your domain provider.

Important: Complete the following procedure within 14 days after completing the previous procedure in NetSuite. If this procedure is not completed within 14 days, the From header of email sent from that particular domain will continue to be rewritten.

To set up a DNS text record with your domain provider:

1. Open another browser window, and log in to your domain provider.
2. Add a text record with a name in the following format:
selector1._domainkey
That is, use the selector name you entered in NetSuite, followed by the **._domainkey** suffix.
3. Paste or enter the value you copied after clicking the DNS Entry link in your NetSuite account.
4. Save the text record.

Note: Create a separate text record for each domain you plan to create domain keys for. With different domain selectors, each text record can be used to create multiple keys but only for a single domain. Only one domain key pair can be set up for an account on a domain.

5. Complete the following procedure to activate the keys you set up in NetSuite.

To activate DKIM keys in your NetSuite account:

1. In your NetSuite account, on the Email Preferences page, check the **Active** box for each key you have set up.
2. Click **Save**. All outgoing email messages sent from NetSuite using the entered domain or its subdomain will have a DKIM header.

This code header contains the domain key information but does not add any text to your messages.

3. Complete the following procedure to verify your DKIM setup.

To verify your DKIM setup:

1. Go to Setup > Company > Email > Email Preferences.
2. On the **Domain Keys** subtab, select the domain key you want to verify and click **Verify DNS Entry**.

NetSuite verifies that the public domain key in the DNS record matches the public domain key entered in NetSuite. The results of the test are displayed in a popup window.

The following table describes the possible results from this test.

Result	Details
Your DNS entry for DKIM has successfully been verified.	The DNS entry has been validated. You can use this domain name in an email campaign or email merge operation.
You need to enter a valid selector, domain name, and public key to perform this operation.	Make sure you have entered the selector, domain name, and public key properly in your NetSuite account.
There are errors in your DNS entry for DKIM.	This error is followed by specific details about why the test failed. For example, if the public key in your domain settings does not match the public key in your NetSuite account, the test result presents the erroneous key as well as the correct key. Update the public key in the DNS entry in your domain settings to correct this problem.
Your DNS DKIM entry could not be read.	Your DNS entry has not been entered correctly. Make sure the DNS entry has been properly set up with your domain provider.

3. After you receive a message that your DNS entry for DKIM has been verified, click **Send Test Email to DKIM Reflector** to send a test email message.

Note: A DKIM reflector is a service set up to receive and analyze email. This reflector then sends a report on your domain key setup. The report is sent to the address shown in the **Email Address to Receive Test Response** field.

After DKIM is set up correctly for your Release Preview account, you can set up your preferences for email messages sent from that account.

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

For example, during testing you might not want customers to receive email messages from the Release Preview account. In this case, you might 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.

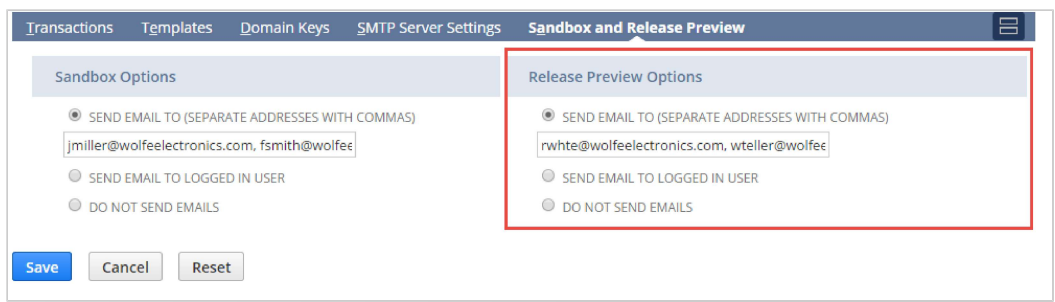
Examples of security-sensitive email include:

- 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 (recommended)	<p>Choose this option to ensure email messages are delivered to specific addresses.</p> <ul style="list-style-type: none"> ■ Enter the email addresses to receive email messages. Separate each email address entered with a comma.


Option	Description
	<ul style="list-style-type: none"> 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)	<p>Choose this option to send email messages to the user currently logged in to the NetSuite UI.</p> <p>If you select this option, be aware of the following behavior:</p> <ul style="list-style-type: none"> 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.

- Access your Release Preview account. For more information, see [Accessing Your Release Preview Account](#).
- Go to Setup > Company > Email Preferences.
- On the **Sandbox and Release Preview** 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 account 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:

- In an Administrator role, access your Release Preview account. (See [Accessing Your Release Preview Account](#) if needed.)
- Go to Setup > Accounting > Financial Statements > Payment Processing Profiles.
- Click **Edit** next to the credit card processing profile you want to use in Release Preview.
- 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 a country that is not the United States or Canada, include the appropriate exit code for your country.


Region	Phone Number
All Locations	1.877.774.4271
U.S. - 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:
 - Under Support, select the **Go to SuiteAnswers** menu item.
 - On the **Support** tab, in the SuiteAnswers portlet, click **Go to SuiteAnswers**.
 - In the NetSuite Help Center, click the **SuiteAnswers** link on the toolbar.
2. Click the **Contact Support Online** link and provide details of your issue.
A case is created in the NetSuite Support system under your Release Preview account that is flagged as a problem.

Recommended Test Plan

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[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 Business Workflows](#)
- [Test Custom Reports, Queries, and Forms](#)
- [Test Other Customizations](#)
- [Test SuiteScript](#)
- [Test SOAP Web Services Integrations](#)
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Test 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. [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 Custom Reports, Queries, and Forms

 **Important:** During the testing of your business workflows, you might have thoroughly tested your custom reports, workbooks, and forms. If you think there are areas that might 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 custom reports, queries, and forms:

1. Create checklists for 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 they behave 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 any custom fields or 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 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 Business Workflows](#).
6. Test 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 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 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 record type customizations:

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

- 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 segment customizations:

- Go to Customization > Lists, Records & Fields > Custom Segments.
- 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 transaction customizations:

- Go to Customization > Lists, Records & Fields > Transaction Types.
- 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 field customizations:

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



Note: Most of these lists are visible when testing your forms, but make note of them for reference.

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

- Go to Customization > Lists, Records & Fields > Item Fields.
Export this list to CSV or XLS. Save this list as your checklist for testing.
- Go to Customization > Lists, Records & Fields > CRM Fields.
Export this list to CSV or XLS. Save this list as your checklist for testing.
- Go to Customization > Lists, Records & Fields > Transaction Body Fields.
Export this list to CSV or XLS. Save this list as your checklist for testing.
- Go to Customization > Lists, Records & Fields > Transaction Line Fields.
Export this list to CSV or XLS. Save this list as your checklist for testing.
- Go to Customization > Lists, Records & Fields > Transaction Item Options.
Export this list to CSV or XLS. Save this list as your checklist for testing.
- Go to Customization > Lists, Records & Fields > Item Number Fields.
Export this list to CSV or XLS. Save this list as your checklist for testing.
- Go to Customization > Lists, Records & Fields > Other Record Fields.
Export this list to CSV or XLS. Save this list as your checklist for testing.
- 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 report and saved search customizations:


- 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 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 Other Customizations

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

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


For 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 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 Installed SuiteApps (Bundles)

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

If you have SuiteApps installed in your account, make sure you test these applications 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 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

Bundles can be installed from a production account, from a sandbox account, or from a development account into a Release Preview account.

- 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](#).

Test 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](#).

Use Release Preview as an opportunity to identify data-center specific URLs in your SOAP web services code. Modify your production code to use data center-agnostic auto-discovery operations such as [getDataCenterUrls](#).

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 SuiteAnalytics Connect

Important: During the testing of your business workflows, you might have thoroughly tested SuiteAnalytics Connect. If you think there are areas that might 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 SuiteScript

 **Important:** During the testing of your business workflows, you might have thoroughly tested your SuiteScripts. If you think there are areas that might 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 release notes for details on API changes.

To test SuiteScript:

1. Go to Customization > Scripting > Script Deployments.
List all 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 might have thoroughly tested your web store. If you think there are areas that might 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.