

Tips & Tricks

Copy to Account

What is it?

Allows you to copy objects and their dependencies between accounts (production, sandbox, release preview). Will copy and create some of those dependencies.

What can you copy?

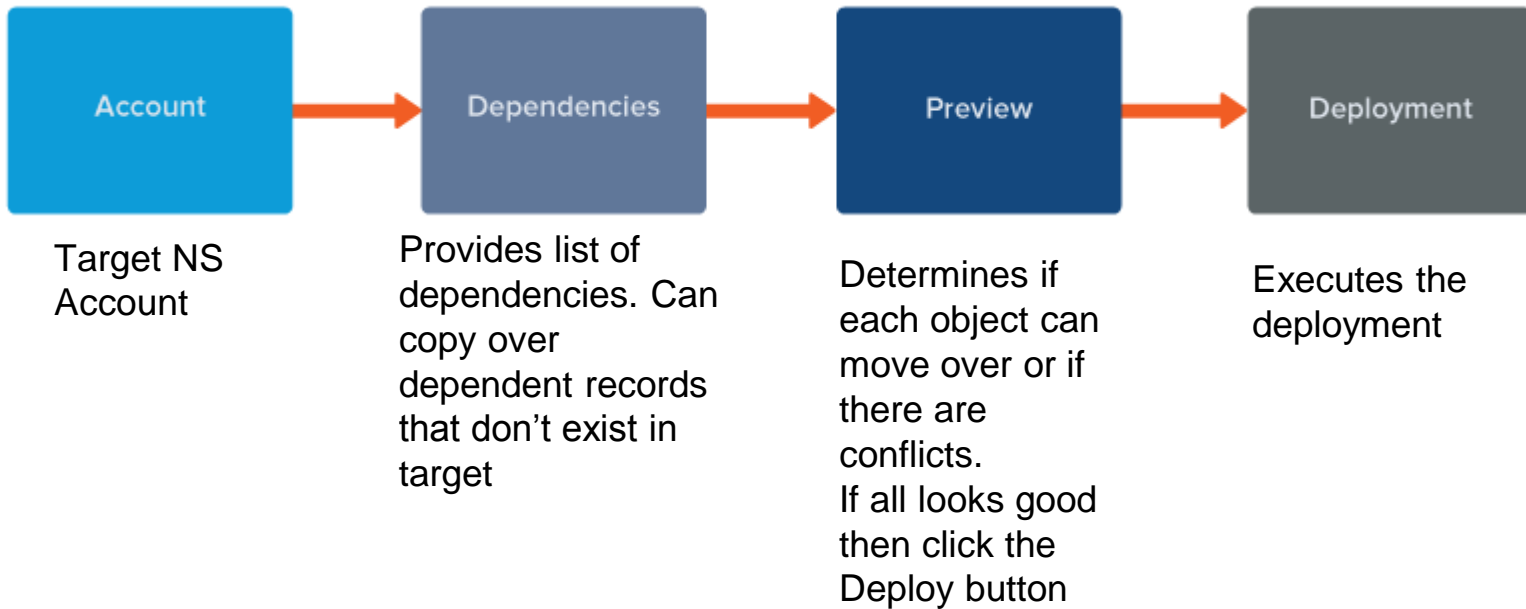
Saved Searches, workflows, custom record definitions, users/roles, email templates, custom lists, custom fields, saved mass updates and csv imports, scripts, and more.

Note: Currently does not seem to work with custom forms, reports or SuiteAnalytics

Why use it?

- Avoid mistakes due to “hand creating” objects
- MUCH quicker than “re-creating” objects by hand.

Wizard: Four Steps to Copy



Page: Enable Features

SuiteCloud Development Framework

SUITECLOUD DEVELOPMENT FRAMEWORK

CREATE SUITECLOUD PROJECTS CONTAINING CUSTOMIZATIONS FOR INTERNAL USE WITHIN YOUR ORGANIZATION OR FOR COMMERCIAL DISTRIBUTION. BY ENABLING THIS FEATURE, YOU AGREE TO THE [SUITECLOUD TERMS OF SERVICE](#).

COPY TO ACCOUNT (BETA)

COPY CUSTOMIZATIONS FROM OTHER ACCOUNTS INTO THIS ACCOUNT. BY ENABLING THIS FEATURE, YOU AGREE TO THE [SUITECLOUD TERMS OF SERVICE](#).

SUITECLOUD CONTROL CENTER (BETA)

In **all accounts** (sandbox, RP, production accounts) you want to copy from and to, check the following boxes:

- SuiteCloud Development Framework (SDF)
 - Need to accept terms and conditions
- Copy to Account (beta)

Copy to Account

ORACLE NETSUITE

SANDBOX  Vertafore

Search



Help



Feedback



Mike Kachline
(SB2) Vertafore, Inc (2019-08-01) - Administrator



Activities

Payments

Transactions

Lists

Reports

Analytics

Documents

Setup

Customization

Fixed Assets

AvidXchange

Cash Application Manager



Custom Transaction Form

List **Copy to Account (Beta)**

Save

Cancel

Reset

Move Elements Between Subtabs

Change ID

Actions

NAME *

Vertafore Customer Invoice



ID

custform_vf_customerinvoice

TYPE

Invoice

DISCLAIMER

LOGO

vertafore_logo_200x33.png



COLUMNS WIDTH LAYOUT SPACE

13.75

ALLOW ADD MULTIPLE

INACTIVE

Example: Copying a Workflow

ORACLE NETSUITE Vertafore Search Help Feedback Mike Kachline Vertafore, Inc - Administrator

Activities Payments Transactions Lists Reports Analytics Documents Setup Customization AvidXchange Fixed Assets Cash Application Manager

Workflow: Hide Void button View

Workspace

+ New State

START

State 1

Copy to Account (Beta) List More...

Workflow

Workflow: Hide Void button

Summary Fields (0)





Record Type
Transaction (Credit Memo)

Description

Edit the Workflow, in the upper right corner, you should see “Copy to Account (Beta)”. Click that.

Example: Step 1

The screenshot shows the Oracle NetSuite interface. At the top, there are logos for ORACLE NETSUITE and Vertafore, a search bar, and user information for Mike Kachline, Administrator. A navigation bar contains various menu items, with 'Customization' highlighted. The main content area is titled 'Copy Object to Account' and shows a breadcrumb trail: Account > Dependencies > Preview > Deployment. The current step is 'Account'. Below the breadcrumb, there is a prompt: 'Specify a target account and audit trail name:'. Two input fields are visible: 'TARGET ACCOUNT' with a dropdown menu showing '(SB2) Vertafore, Inc (2019-08-01)' and 'DEPLOYMENT AUDIT TRAIL NAME' with a text input field containing 'Test CopyToAccount'. A warning icon is present at the bottom left of the form area.

ORACLE NETSUITE  Vertafore  Help  Feedback  Mike Kachline
Vertafore, Inc - Administrator

Activities Payments Transactions Lists Reports Analytics Documents Setup **Customization** AvidXchange Fixed Assets Cash Application Manager

Copy Object to Account


Object:Hide Void button Account:(SB2) Vertafore, Inc (2019-08-01)

Account > Dependencies > Preview > Deployment

Specify a target account and audit trail name:

TARGET ACCOUNT * ⓘ

DEPLOYMENT AUDIT TRAIL NAME *



Pick the account you want to copy into.
Give a “name” for this deployment.

Example: Dependencies

The screenshot shows the Oracle NetSuite interface. At the top, there are logos for ORACLE NETSUITE and Vertafore, a search bar, and user information for Mike Kachline, Vertafore, Inc - Administrator. The navigation menu includes: Activities, Payments, Transactions, Lists, Reports, Analytics, Documents, Setup, Customization, AvidXchange, Fixed Assets, and Cash Application Manager. The current page is titled 'Copy Object to Account' and shows a breadcrumb trail: Account > Dependencies > Preview > Deployment. The object being copied is 'Hide Void button' in account '(SB2) Vertafore, Inc (2019-08-01)'. Below the breadcrumb, there is a section 'Select dependencies:' with a link 'Learn more about dependencies'. A table lists the dependencies:

<input type="checkbox"/>	NAME	SCRIPT ID	TYPE	STATUS	INCLUDE INSTANCES
<input checked="" type="checkbox"/>	Hide Void button	customworkflow47	Workflow	Present in Target Account	

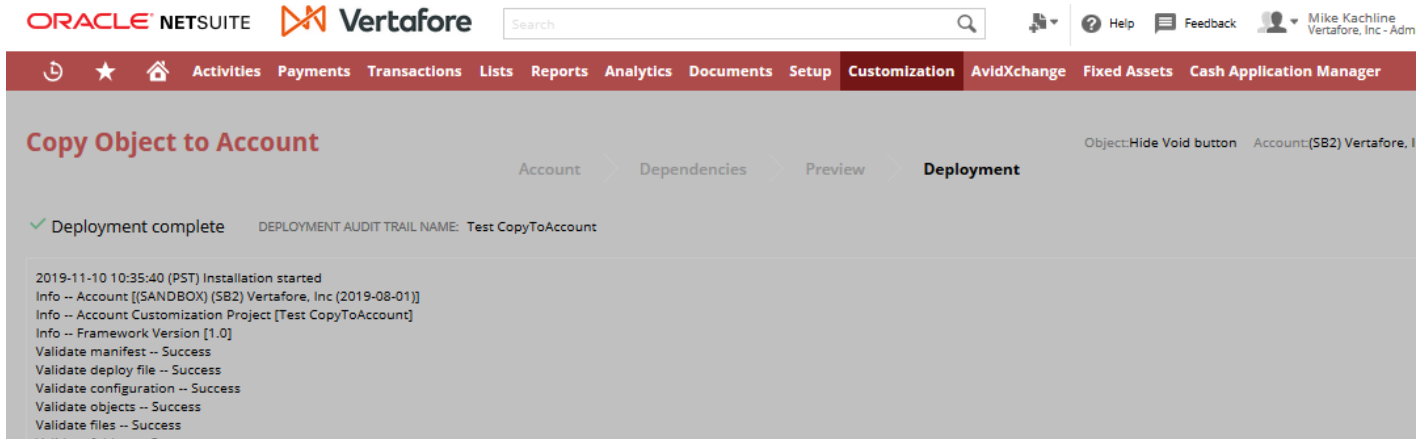
This shows you what you will be deploying. If your “to be deployed” object depends on other objects (eg: a new form which has new fields in it), you’ll see those dependencies here.

Example: Preview

The screenshot displays the Oracle NetSuite user interface. At the top, the Oracle NetSuite and Vertafore logos are visible, along with a search bar and user information for Mike Kachline, Vertafore, Inc. Administrator. The navigation menu includes various modules such as Activities, Payments, Transactions, Lists, Reports, Analytics, Documents, Setup, Customization, AvidXchange, Fixed Assets, and Cash Application Manager. The main content area is titled 'Copy Object to Account' and shows a breadcrumb trail: Account > Dependencies > **Preview** > Deployment. A success message states: '✓ Preview is complete. Ready to deploy.' Below this, a list of validation steps is shown, all marked as successful: 'Validate manifest -- Success', 'Validate deploy file -- Success', 'Validate configuration -- Success', 'Validate objects -- Success', 'Validate files -- Success', 'Validate folders -- Success', 'Validate translation imports -- Success', and 'Validate preferences -- Success'.

Basically an “Are you sure?” screen.

Example Deployment: “Deployment Complete”



Basically a screen which says “it worked”, or not.

Page: Deployment Audit Trail

ORACLE NETSUITE | SANDBOX Vertafore

page:deployment audit

Page: Deployment Audit Trail

Cash Application Manager

Deployment Audit Trail

Refresh

PUBLISHER ID	APP ID	NAME	VERSION	ACTION	STATUS	START DATE	END DATE	USER	ERROR REFERENCE	LOG
		Test CopyToAccount		INSTALL	COMPLETE	11/10/2019 10:35 am	11/10/2019 10:35 am	Mike Kachline		Download Log
		STRY0028729		INSTALL	COMPLETE	11/5/2019 11:16 am	11/5/2019 11:16 am	David Orozco		Download Log
		STRY0028706		INSTALL	COMPLETE	10/29/2019 10:50 am	10/29/2019 10:50 am	David Orozco		Download Log

Here, you can see what has been copied into this account, when, by who, and if any errors occurred.

You can download the log and open in any text editor (e.g. MS Word)

Help: Setting Up Copy to Account

The screenshot shows the Oracle NetSuite Help Center interface. The top navigation bar includes 'ORACLE NETSUITE HELP CENTER' and a search box. Below this is a secondary navigation bar with links for 'SuiteAnswers', 'Developers', 'Videos', 'Training', 'SuiteApps', 'User Guides', and 'New Release'. A left-hand sidebar lists various help topics, with 'SuiteCloud Platform' expanded to show 'SuiteCloud Platform Introduction'. The main content area is titled 'Setting Up Copy to Account' and features a red warning box stating that 'Copy to Account' is a beta feature. Below the warning, there is a table of requirements for using the feature.

Warning: Copy to Account is a beta feature. The contents of this feature are preliminary and may be apply to this feature or the impact of the feature on other portions of the NetSuite application. We may

To use Copy to Account, check that the NetSuite accounts you want to copy to and from meet these

Requirement	Description
SDF enabled	Make sure that SDF is enabled in the NetSuite i
Copy to Account enabled	Make sure the Copy to Account feature is enab Account. See Enabling Copy to Account in Your
Matching NetSuite account versions	Your target NetSuite account must match the v
Administrator role access	Copy to Account is available to administrator r

Netsuite does have documented help for setup and using “Copy to Account.”

In SuiteAnswers search for “Copy to account beta” or SuiteAnswers 82334.

Important to Remember

- Only available for administrators
- Beta
- Don't forget to enable this feature in both your "source" and "target" accounts
- No way to cancel or undo changes
- You cannot copy customizations that are locked, hidden or part of an installed SuiteApp