Release Preview Test Plan

The Release Preview Test Plan includes the following sections:

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

The Release Preview account enables you to become familiar with the new features in an upcoming release. You can verify that your existing business workflows function as expected before your production account is upgraded to the new NetSuite release. You can also use the Release Preview account to test and ensure your NetSuite account and any associated applications are not dependent on a specific data center to store data. You can evaluate your applications for any data center-specific identifiers, and replace them with data center agnostic information.

The goal is to provide a smooth and seamless transition to a new release. By making this information available, and providing other needed guidance, you will avoid any major problems or surprises when you go live with the new version.

Requesting a Release Preview Account

If you used a Release Preview account last release, you will receive a 2019.2 Release Preview account by default. If you do not fall into this category, and would like to receive a 2019.2 Release Preview account please opt in so you can test the new release before your production upgrade date. Opt-in will be available starting July 19, 2019.

To opt-in to Release Preview:

1. From your production 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. You will 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 the production account, and then select the Release Preview role from either the Change Role list or the Choose Role page to access the Release Preview account.

The URLs you use to access Release Preview in ways other than through the UI may also require updating. To see your account-specific domain URLs for web services, REST, and other services, in your Release Preview account go to Setup > Company Information and click the Company URLs subtab. For details, see the help topic Understanding NetSuite URLs and Data Centers.

Getting the Most Out of Release Preview

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

- Preparing for Testing includes the following sections:
  - Setting Preferences for Release Preview Email
  - Accessing Your Release Preview Account
  - Functionality Available for Testing
  - How to Report Release Preview Issues
- Recommended Test Plan includes the following sections:
  - Test Business Workflows
  - Test Custom Reports and Forms
  - Test SuiteScript
  - Test SOAP Web Services Integrations
  - Test Installed SuiteApps
  - Test Your Web Store
  - Test SuiteAnalytics Connect

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.

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:

- 2019.2 Sneak Peeks
- NetSuite 2019.2 Release Notes

> **Note:** Links to the Sneak Peeks and Release Notes are also available from the New Release portlet.

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

- Setting Preferences for Release Preview Email provides instructions for controlling email generation from the Release Preview account.
- Accessing Your Release Preview Account details how to access your Release Preview account so that you can familiarize yourself with the new features and changes in this release.
- Functionality Available for Testing contains a table of the features that can be tested in Release Preview.
- How to Report Release Preview Issues explains what to do if you encounter an issue.
- Test Business Workflows explains how to document your critical daily workflows to help you create tests that ensure you will not encounter anything unexpected when your account is upgraded to the new version.

Setting Preferences for Release Preview Email

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. 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 will be rewritten. 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 <sent-via.netsuite.com>`. What your recipients will see as the sender of the email depends on the email client in use at the recipient's site. Some recipients will see the original email address with the modified <sent-via.netsuite.com> From header. Some recipients may not see the original email address at all.

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 it is recommended that you 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, you will 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 emails 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 have used 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.

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.

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 on creating 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. Back 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**.

> **Note:** NetSuite checks to make sure 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.

Possible results from this test include the following:

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. Please make sure the DNS entry has been properly set up with your domain provider.

3. Once 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 forwards a report on your domain key setup. The report is sent to the address shown in the **Email Address to Receive Test Response** field.

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

Account administrators can set a preference for delivery of email messages for the Release Preview account in the production account, and 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.

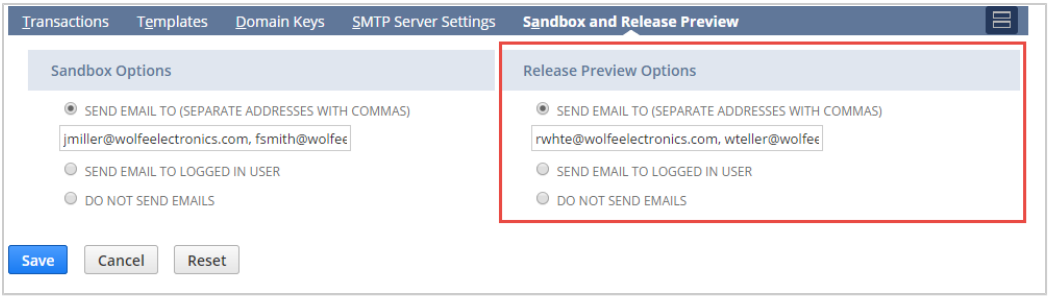
Examples of security-sensitive email include:

- 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. Choose your preference in the Sandbox and Release Preview subtab. Make a selection under **Release Preview Options**.

> **Important:** We recommend that you choose the **Send Email To** option.



Option	Description
Send Email To (recommended)	Choose this option to ensure email messages are delivered to specific addresses. ▪ Enter the email address or email addresses to which to deliver email messages. Separate each email address entered with a comma. ▪ 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 route email messages to the user currently logged in to the NetSuite UI. If you select this option, be aware of the following behaviors: ▪ 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**.
5. 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.

6. Access your Release Preview account. (See Accessing Your Release Preview Account if needed.)
7. Go to Setup > Company > Email Preferences.
8. Verify your email preferences in the Sandbox and Release Preview section, and if necessary, modify them appropriately.

> **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 deactivating and activating a saved search, see the help topic Marking a Search Inactive.

Accessing Your Release Preview Account

The Account Administrators 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 Upgrade dates, and 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 Access from the New Release Portlet. If you do not see the portlet on your dashboard, see Add the New Release Portlet to Your Dashboard.

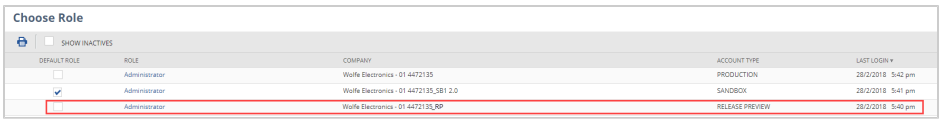
Pay attention to the specific URLs listed in each section of the test plan for accessing your Release Preview account through SOAP web services, RESTlets, external forms, and ODBC. For more information, see the help topic Understanding NetSuite URLs and Data Centers.

Only users with an Administrator role initially have access to the Release Preview account. An Administrator can give Release Preview access to other users as needed for testing.

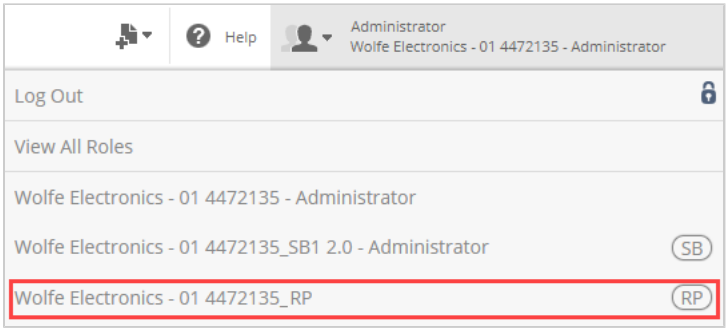
> **Note:** Release Preview access ends on the date your production account is upgraded to the new release. This date is listed on your New Release Portlet.

To access the Release Preview account from the URL:

1. A user with an Administrator role must go to `https://system.netsuite.com` to log in to NetSuite.
2. Change roles to the Release Preview Administrator role.
   - On the Choose Role page, the Administrator role is labeled Release Preview in the Account Type column.



- On the Change Role list, the Administrator role for Release Preview is indicated with an RP symbol.



3. Read the **NetSuite Release Preview Agreement** and click **Continue** to accept the terms and access the Release Preview software.

The Administrator 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 in 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 Choose Role page, the role is labeled Release Preview in the Account Type column.
   - In the Change Role list, the role for Release Preview is indicated by an RP symbol.

The Administrator 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:

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.
   1. Go to Setup > Import/Export > Import CSV Records.

2. Set the Import Type to **Employees**.
3. Set the Record Type to **Employees**.
4. Select the CSV file you want to import, and click **Next**.
5. Set Data Handling to **Update**, and click **Next**.
6. Make sure you map the following fields (your field and the NetSuite field must match), and then click **Next**:
   - Internal ID
   - Give Access
7. Click **Save & Run**.

> **Note:** For more information, see the help topic Importing CSV Files with the Import Assistant.

To remove Release Preview access from individual users:

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

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

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

Access from the New Release Portlet

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

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.

1. Log in to your production account (`https://system.netsuite.com`).
2. Locate the New Release portlet on your home page.
3. Click **Release Preview Login** (the key-shaped icon).
4. Log in using your NetSuite email address and password.
5. Read the **NetSuite Release Preview Agreement** and click **Continue** to accept the terms and access the Release Preview software.

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

- NetSuite 2019.2 Sneak Peeks
- 2019.2 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 a 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. Be 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.

Functionality Available for Testing

The following table describes functionality available for testing in the Release Preview. Only modules that you have purchased and enabled in your production account are available in your Release Preview. Be sure you understand the limitations of the Release Preview account.

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

Feature	Availability	Notes
Integrations		
CSV Import	Yes	This task only begins running after a user has logged in to the Release Preview account for the first time.
SuiteAnalytics Connect (formerly ODBC)	Yes	
SOAP Web Services	Yes	This task only begins running after a user has logged in to the Release Preview account for the first time. When testing SOAP web services functionality, you can use a method to dynamically discover the correct URL. For information about the available methods, see the help topic Dynamic Discovery of URLs for SOAP Web Services and RESTlet Clients. If you do not receive the correct URL, either use your account-specific domain for your request for the data center URL, or use the c parameter in your request to specify your account ID. Using either your account-specific domain, or using the c parameter in your request, ensures that you receive the correct response. **Note:** The routing depends on the version of your NetSuite account, and not the version of the WSDL you use.
Customizations		
Client SuiteScript	Yes	
Custom Records	Yes	
Scheduled SuiteScripts	Yes	Scripts scheduled in production do not automatically execute as scheduled in Release Preview accounts. You must initiate the first execution of the task before a scheduled script will run as scheduled. For details, see the help topic SuiteScript 2.0 Scheduled Script Execution.
Server SuiteScript	Yes	
Partner Integrations		

Feature	Availability	Notes
ACH Vendor Payments	Yes	No actions taken
Alternative Payment Methods	Test-mode only	No actions taken (No payment sent). The test mode is turned on for all payment processing profiles.
Credit Card Processing	Test-mode only	No actions taken **Important:** To process credit card information in NetSuite, an account administrator is required to enter and save the authentication credentials on your credit card processing profiles before credit card transactions can be processed in Release Preview. See Credit Card Processing in Release Preview for more information.
CTI Integration (8x8, Five9)	Yes	
Direct Deposit	Yes	No actions taken
Electronic Funds Transfer	Test-mode only	No actions taken
Intellesync	Yes	
Online Bill Pay	No	Automatically disabled in Release Preview.
Outlook Integration	No	
Payroll	No	**Note:** Updating payroll information is not supported in Release Preview accounts.
PayPal Integration	Test-mode only	No actions taken
Perquest	Yes	No actions taken
Telephony Integration (Basic)	Yes	
UPS/FedEx Integration for Shipping labels	Test-mode only	No actions taken
UPS/FedEx Integration for Rate querying	Yes	
Miscellaneous Product Areas		
Bulk Merge	Yes	This task only begins running after a user has logged in to the Release Preview account for the first time.
Email Campaigns	Yes	This task only begins running after a user has logged in to the Release Preview account for the first time.
Email Case Capture	Yes	
Email Notifications	Yes	Saved searches are automatically set to inactive in Release Preview. For email routing options, see Setting Preferences for Release Preview Email.

Feature	Availability	Notes
Fax	No	
Memorized Transactions	Yes	This task only begins running after a user has logged in to the Release Preview account for the first time.
Reports	Yes	Automatically set to inactive status in the Release Preview, including scheduled reports. For email routing options, see Setting Preferences for Release Preview Email. This task only begins running after a user has logged in to the Release Preview account for the first time.
Saved Searches	Yes	Automatically set to inactive status in Release Preview, including scheduled saved searches. For email routing options, see Setting Preferences for Release Preview Email. This task only begins running after a user has logged in to the Release Preview account for the first time.
Secure Domains	Yes	Customers can deploy custom secure domains. Even after a refresh, you no longer encounter errors that the domain already exists. You can test and verify a custom secure domain from the user's perspective, before deploying one in your production environment. **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. See the help topic Prerequisites for Setting Up Secure Domains for more information.
SuiteFlow	Yes	Workflows scheduled in production do not automatically execute as scheduled in Release Preview accounts. You must initiate the first execution of the task before a scheduled workflow will run as scheduled. For details, see the help topic Testing Scheduled Workflows.
Token-based Authentication	Yes	Tokens created using the NetSuite Token-based Authentication feature in the production account are not copied to Release Preview. To test this feature, you must create new tokens in the Release Preview account.
Two-Factor Authentication	Yes	2FA Settings are shared between a production account and the Release Preview accounts on the NetSuite domain that are associated with that production account. However, mobile phone numbers are not copied. Users must set up their mobile phone numbers in the Release Preview account the same way they did in the production account.
Web Site and Web Store	Yes	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 will be able to set passwords and check the Give Access box for customer users.

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:

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.

Data That is Not Copied from Production to Release Preview

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

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

  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. See Test Your Web Store.

- **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 will be able to set passwords and check the Give Access box for customer users.

  For more information, see the help topic CSV Imports.

- **Inbound single sign-on mappings**

  The mappings between users' external credentials and their NetSuite user credentials that are used for inbound single sign-on access to NetSuite, are not copied from production accounts to Release Preview accounts. These mappings must be recreated in Release Preview for any users who require inbound single sign-on access to these accounts. The mapping can be recreated either through the SOAP web services `mapSso` operation or upon user login. For more information, see the help topic Inbound Single Sign-on. See also Creating the Initial Mapping of the Administrator Role for Inbound Single Sign-on and Mapping Users and Roles for Inbound Single Sign-on Access to NetSuite.

- **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 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 Managing TBA Tokens.

How to Report Release Preview Issues

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

Call NetSuite Support

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

> **Note:** These phone numbers are in the United States. If your are calling from a country that is not part of the North American Numbering Plan, 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:
     - 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 accounts that is flagged as a problem in the Release Preview account.

Recommended 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. 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 and Forms
- Test Other Customizations
- Test SuiteScript
- Test SOAP Web Services Integrations
- Test Installed SuiteApps
- Test Your Web Store
- Test SuiteAnalytics Connect

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. We recommend that you 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 and Forms

Important: During the testing of your business workflows, you might have thoroughly tested your custom reports 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 as needed to your plan.

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

To test custom reports and forms:

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

1. Create checklists for various customized reports, forms, record types, and searches. See the following sections for specific procedures for creating checklists.
2. Test each form, each script, and each report that uses a formula to ensure they behave as expected. If any customized form, script, 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. We recommend that you generate reports using date ranges that can be compared between both accounts.

3. Verify 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. See Test Business Workflows for more information.
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 forms 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, as those are NetSuite defaults.
4. Save this modified list as your checklist for testing.

To create a checklist for testing entry forms 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, as 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 types customizations:

1. Go to Customization > Lists, Records & Fields > Record Types.
2. Record types cannot be exported, so we recommend that you make a list of them in an Excel spreadsheet to use as a checklist to ensure that you test each record type.

To create a checklist for testing fields customizations:

> **Note:** Most of these lists will be visible when testing your forms, but make note of them for reference.

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

   If desired, export this list to .csv or .xls. Save this list as your checklist for testing.
2. Go to Customization > Lists, Records & Fields > Entity Fields.

   If desired, export this list to .csv or .xls. Save this list as your checklist for testing.
3. Go to Customization > Lists, Records & Fields > Item Fields.

   If desired, export this list to .csv or .xls. Save this list as your checklist for testing.
4. Go to Customization > Lists, Records & Fields > CRM Fields.

   If desired, 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.

   If desired, 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.

   If desired, 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.

   If desired, 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.

   If desired, 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.

   If desired, 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.

    If desired, export this list to .csv or .xls. Save this list as your checklist for testing.

To create a checklist for testing reports 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.

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 as needed to your plan.

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, please contact them or inform NetSuite 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, we recommend that you 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 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 as needed to your plan.

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 > Scripts.

   List all scripts in an Excel spreadsheet to use as a checklist to ensure that you test each one.
2. 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.
3. Go to Customization > Scripting > Scripted Records.

   List all scripted records in an Excel spreadsheet to use as a checklist to ensure that you test each one.
4. Test all of your operational SuiteScripts for compatibility and ensure they are working as expected.
5. If you find any issues with your Server SuiteScripts you can put the script deployment in testing mode and use the debugger to investigate the problem.

Test SOAP Web Services Integrations

Important: During the testing of your business workflows, you might have thoroughly tested your SOAP web services 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 as needed to your plan.

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

Test any operational SOAP web services integration processes for compatibility with the new release. If you are engaged with a partner for any of your SOAP web services integrations, please contact them and inform them of your Release Preview dates so that they can provide a time and test plan to test the integration.

Testing URLs for SOAP Web Services

If you have already made changes to ensure your account is data center agnostic, for example, your SOAP web services are using the `getDataCenterUrls` operation, you do not need to make any other changes to test in Release Preview.

Warning: If your production SOAP web services calls fail in Release Preview, this indicates that they may contain hard-coded URLs. Hard-coding URLs prevents the data center from being discovered dynamically.

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 details, see the help topic Understanding NetSuite URLs and Data Centers.

Test Installed SuiteApps

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 as needed to your plan.

If you have SuiteApps (bundles) installed in your account, make sure you test these applications in Release Preview. For third-party applications installed in your account, please 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, from a development account, or from the repository into a Release Preview account.

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

For more information, see the help topic Bundle Support Across Account Types.

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 as needed to your plan.

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

Test Web Store by Editing the Hosts File

If you have administrator access to the command window, and permission to edit the host file on your computer, you can perform the following configuration procedures to test your web store in Release Preview. First, locate the CNAME (Alias) for your domain, and then edit the hosts file to map your domain to the IP address of the hosting server in the Release Preview account. Finally, open a new browser window and test your web store in the Release Preview account.

Important: To prepare for web store testing in Release Preview, in the following procedure, add a line to the hosts file. Be sure to remove this line after you finish testing.

To locate the CNAME (Alias) and set up a domain name:

1. Log in to your NetSuite account and select your Release Preview role.
2. Go to Setup > Site Builder > Domains.
3. Set the following values:
   - **Domain Name** – Enter the domain name you want to use for release preview testing.
   - **Hosted As** – Select Web Store
   - **HTML Hosting Root** – Select the root folder where all of the assets for your web site are stored.
4. Click **Save**.
5. Go back to the Domains page, Setup > Site Builder > Domains.
6. The CNAME (Alias) assigned to your web site on Release Preview is displayed on the page. Remember the CNAME (Alias). The format should look like the following example:
   - `www.yourdomain.com.hosting.netsuite.com`

To edit the hosts file:

1. Find the IP address for the hosting server associated with your website on Release Preview:
   a. Use a Command prompt. To do this, navigate to the start menu, and then type **cmd**.

   b. Use the **nslookup** command to query the Google DNS server to find the IP address. Use your CNAME (Alias) in the query, similar to the following example:
      - `nslookup www.yourdomain.com.hosting.netsuite.com 8.8.8.8`
   c. Press Enter. The IP address is displayed on the screen. Remember the IP address.
2. On your computer, navigate to **C:\Windows\system32\drivers\etc\hosts**.
3. Edit this file. Add a line that contains the IP address and the domain of your site. Do not use the CNAME (Alias) here. The format is: <IP address><space><DOMAIN>. For example:

```
123.456.789.01   www.yourdomain.com
```

> **Note:** You need administrator permission to edit the hosts file.

4. Save the hosts file.

To test your web site in the Release Preview account:

1. Open a browser window. Visit the web store on your custom domain.

> **Note:** If you visited this domain recently, you may have to clear the browser cookies.

2. Confirm you are viewing your site on the Release Preview shopping server.
   a. In your browser, right-click and select View Page Source.
   b. At the bottom of the source code page, you should see the new version number for the NetSuite release.
3. Test your web store.

> **Important:** Be sure to remove the line you added to the hosts file after you complete web store testing.

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 as needed to your plan.

Testing Your ODBC Connection

To test your ODBC connection in Release Preview, you must change the Connect Service host name.

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**.

To test ODBC access in Release Preview:

1. Log out of your current ODBC connection.
2. In the Windows Control Panel, click **Administrative Tools**, and double-click **Data Source (ODBC)**.
3. In the ODBC Data Source Administrator dialog, select the User DSN for the NetSuite ODBC driver, and click **Configure**.

4. In the Driver Setup dialog, change the Service Host entry as appropriate for the location of your account.
   - The host name you should use for your connection is displayed in the **Host Service** field on the SuiteAnalytics Connect Driver Download page, under **Your Configuration**.
5. Click **OK** in both dialogs.
6. Reconnect your ODBC connection.
7. Perform your ODBC tests.

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