Copy to Account Guide

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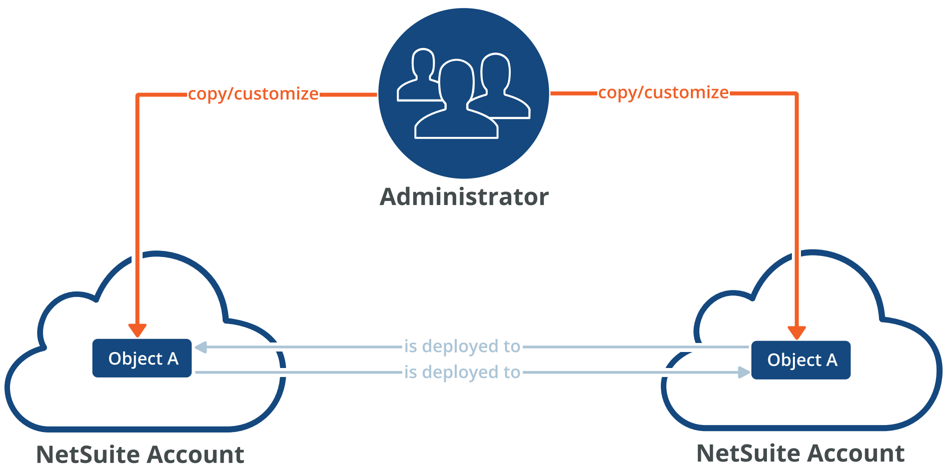
Copy to Account Overview

Copy to Account

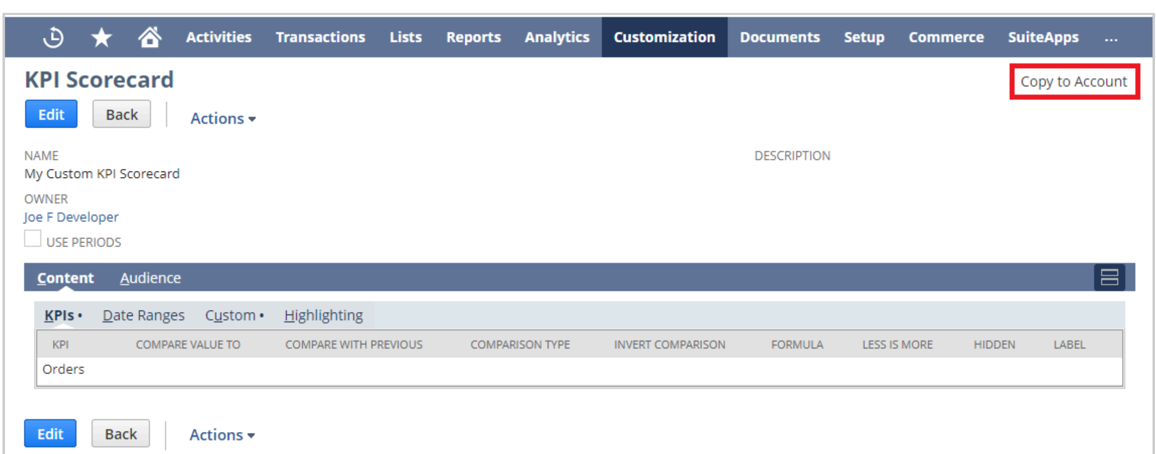
Copy to Account is an administrator tool that copies a custom object between your accounts. Use Copy to Account to select a target account, choose dependencies, select record instances to include, then preview and deploy your custom record. The tool can copy one custom object (including dependencies and instances) at a time.

Copy to Account is powered by SuiteCloud Development Framework (SDF). You can copy any object supported by SDF that is not locked, hidden, or part of another SuiteApp. The **Copy to Account** link only appears on custom record types that are associated with objects supported by SDF. For a list of supported object types, see the help topic Customizations Supported by SuiteCloud Development Framework.

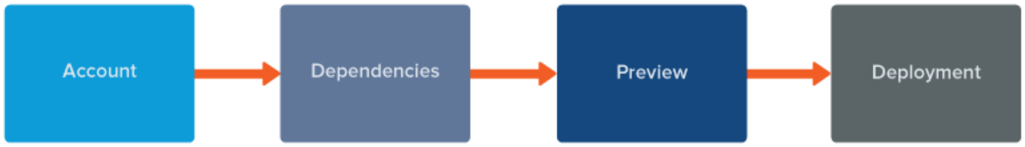
Copy to Account is available from production, development, and sandbox accounts in which you have administrator access.



The Copy to Account tool can be accessed from a custom record. To view your custom records, go to Customization > Lists, Records, & Fields > Record Types. From the list of records, select the custom record you want to copy and click **Copy to Account** to start the process.



The Copy to Account tool goes through four steps: Account, Dependencies, Preview, Deployment.



Logs show the current status of the copy process during the preview and deploy steps. For logging information, you can view audit trails of completed deployments in your target account.

> **Important:** Some custom objects are partially supported and a subset of their fields cannot be copied. For more information, see the help topic The SDF XML Reference. Object fields not listed in the SDF XML reference are not supported by SDF and cannot be copied with Copy to Account. For more information about other limits, see Handling Dependency Errors.

When copying custom forms to another account, translations for field labels are not included. Currently, Copy to Account does not fully support translation collections.

Copy to Account uses plain text only. Entries for translations in the exported XML file contain text values in the preferred company language. There is no reference to translation terms in the translation collection. Optionally, to include the translations with the custom forms, you can use the SDF application to import the custom forms instead of using Copy to Account.

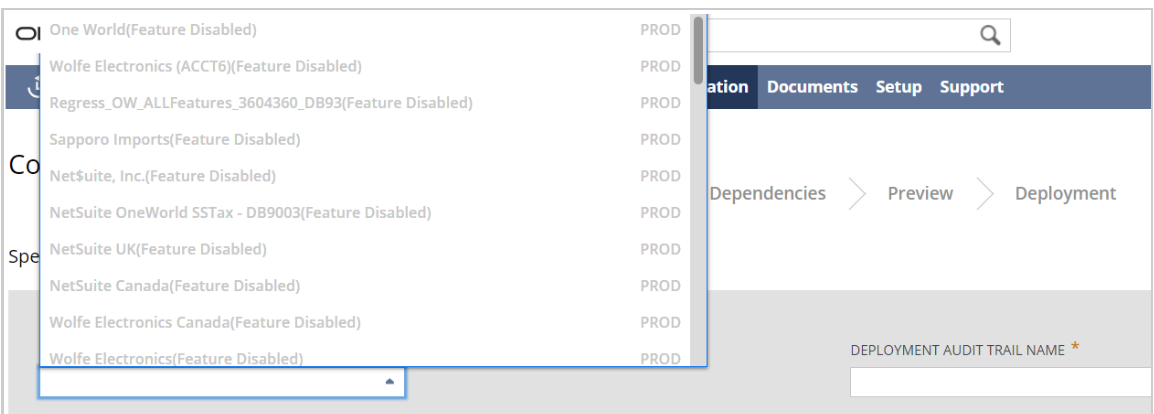
For more information, see Enabling Copy to Account in Your NetSuite Account (Administrator Only).

Setting Up Copy to Account

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

Requirement	Description
SDF enabled	Ensure that SDF is enabled in both NetSuite accounts. For more information, see the help topic Enabling SuiteCloud Development Framework in the Target NetSuite Account (Administrator Only).
Copy to Account enabled	Ensure the Copy to Account feature is enabled in the target NetSuite account. Turning on this feature indicates that the administrator of the account accepts new and updated customizations from another account via Copy to Account. For more information, see Enabling Copy to Account in Your NetSuite Account (Administrator Only).
Matching NetSuite account versions	Your target account must be the same version of NetSuite as the account you copy from.
Administrator role access	Copy to Account is available to users with the Administrator role only. For more information, see the help topic NetSuite Account Administration.

If you are the administrator of an account that is missing any Copy to Account requirements, the account appears in the Target Account list but cannot be selected.



Enabling Copy to Account in Your NetSuite Account (Administrator Only)

To copy a custom object to your target account, the Copy to Account feature must be enabled in the target account. For more information, see the help topics Enabling Features and SuiteCloud Features.

To grant Copy to Account access to your NetSuite account

1. Log in to NetSuite with an administrator role.
2. Go to Setup > Company > Enable Features.
3. On the **SuiteCloud** tab, in the SuiteCloud Development Framework section, check the **Copy to Account** box.

If you have not already enabled the SDF feature, you will be prompted to enable it in order to use Copy to Account.

To view all Copy to Account prerequisites, see Setting Up Copy to Account.

Using Copy to Account

To copy an object into another account, the Copy to Account tool goes through the following steps:

1. Starting Copy to Account on a Custom Record
2. Selecting a Target Account
3. Selecting Dependencies to Copy

> **Tip:** When selecting dependencies to copy, you may see an error that indicates a dependency is not available for copy. For more information, see Handling Dependency Errors.

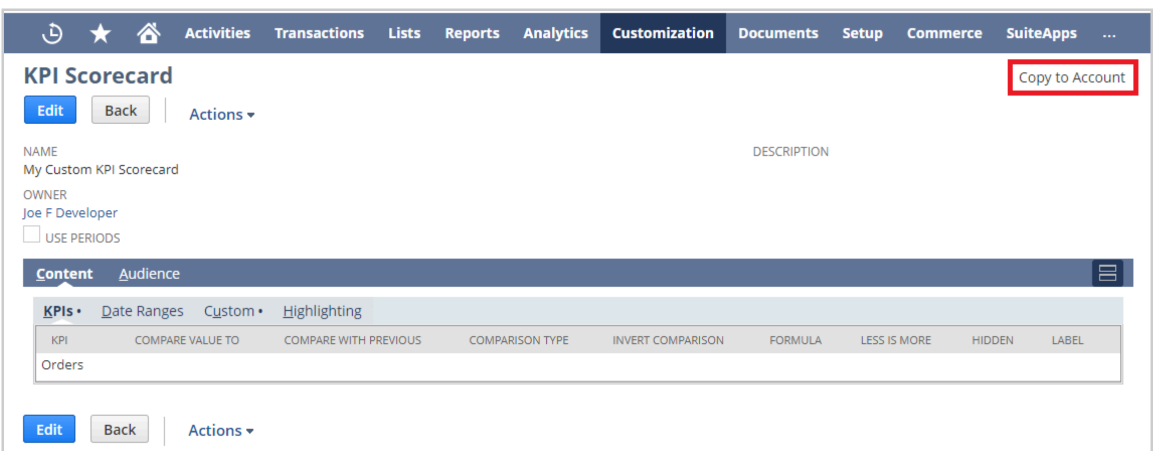
4. Previewing the Copy
5. Deploying a Custom Object

After a deployment, you can go to the target account to download the log. For more information, see Viewing the Copy to Account Log.

Starting Copy to Account on a Custom Record

From a custom record in the source account, click **Copy to Account**.

> **Note:** The **Copy to Account** link appears only on custom record types that are associated with objects supported by SDF. For a list of supported types, see the help topic Customizations Supported by SuiteCloud Development Framework.



Selecting a Target Account

After you click **Copy to Account**, choose the target account where you want to copy your custom object. The SDF and Copy to Account features must be enabled in the target account, and you must also have an Administrator role in the target account.

If you use Copy to Account on a production account, be aware that deployment immediately modifies data in a live environment.

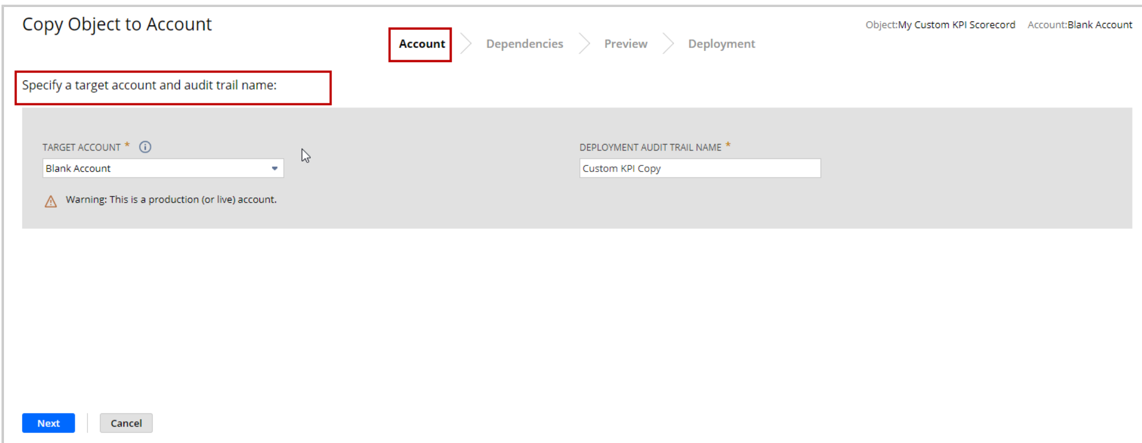
To complete the Account page, specify a Deployment Audit Trail Name. This name is used to identify the log saved in the target account after a completed deployment.

To select a target account:

1. In the **Target Account** field, select the target account.

   Note: If the target account that you want to select is dimmed or not in the list, review the requirements for using Copy to Account. For more information, see Setting Up Copy to Account.

2. In the **Deployment Audit Trail Name** field, enter a name for the copy task. This is the name that will appear in the deployment audit trail.
3. Click **Next**.



Selecting Dependencies to Copy

Copy to Account calculates the dependencies, references, and instances related to your custom record, and organizes them into a table. The table shows you the objects your record depends on and without which your record cannot function correctly. The table also displays the required and optional items, parent and child components, target account status, and other information.

The Present in Target Account status indicates that the object already exists in the target account. By default, these existing dependencies are not included in the copy process, but you can choose to include them to update the object in the target account.

Important: Custom objects in the source NetSuite account always replace the custom objects with the same script ID in the target NetSuite account during the copy operation, regardless of any previous changes made to those objects in the target account. Ensure that is the desired result before choosing to include such custom objects in the update in the target account.

Objects with an Absent from Target Account status are required. You cannot clear the box for Absent in Account dependencies in the Select dependencies table.

Required dependencies are automatically checked. You can select more components and instances to include. If the status of the dependency is Present in Target Account, including it in the copy is optional.

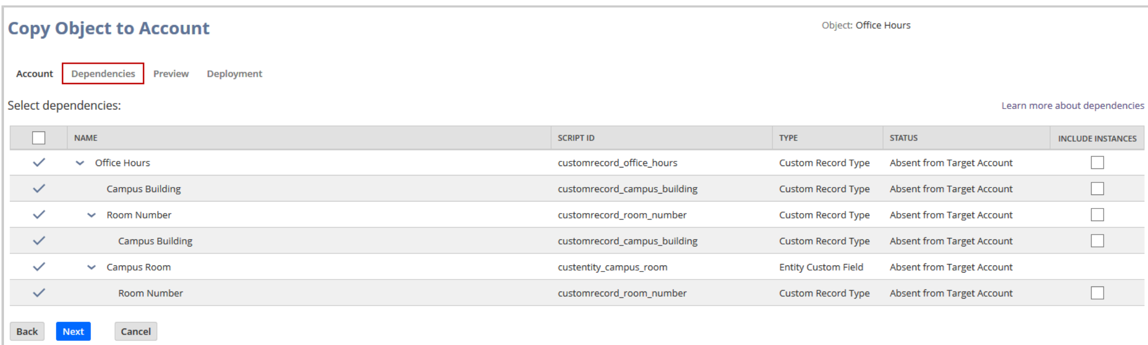
> **Note:** You cannot copy customizations that are locked, part of an installed SuiteApp, or involved in a circular dependency. For more information, see Handling Dependency Errors

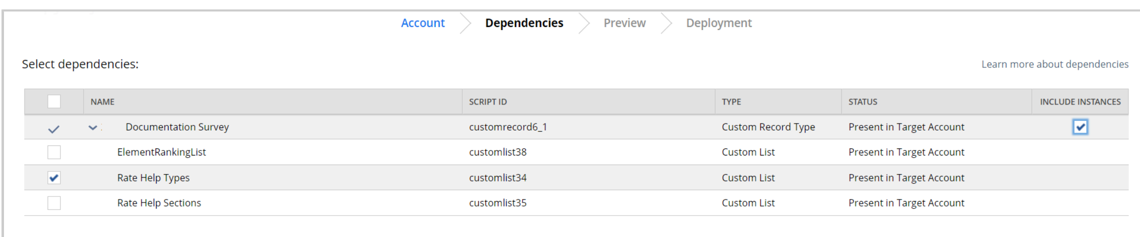
To select dependencies:

1. Select any additional dependencies you want to include.
2. (Optional) If you want to copy instances from a custom record type object, check the box in the **Include Instances** column.

   > **Note:** You can include up to 1000 instances of a custom record dependency into the target account.

3. Click **Next**.





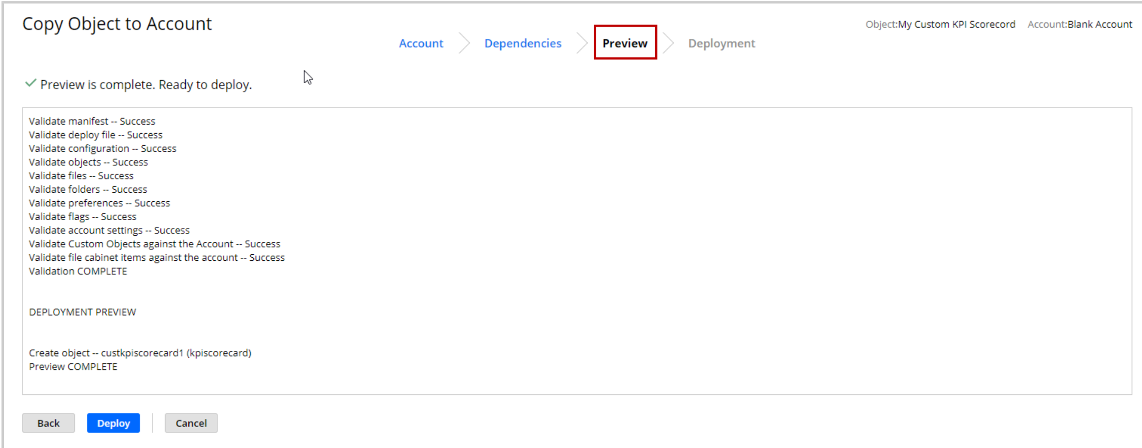
Previewing the Copy

Preview includes a validation phase. When the preview is complete, the log shows you the expected modifications in the target account.

Object creations and updates that happen during deployment are noted at the bottom of the preview. If the preview is unsuccessful, you can find the component that caused the preview to fail by using the script ID that appears in the preview log. You can then go back to the Dependencies step to resolve the problem.

To preview your deployment:

1. Click **Preview**.
2. If preview is successful, click **Deploy**,



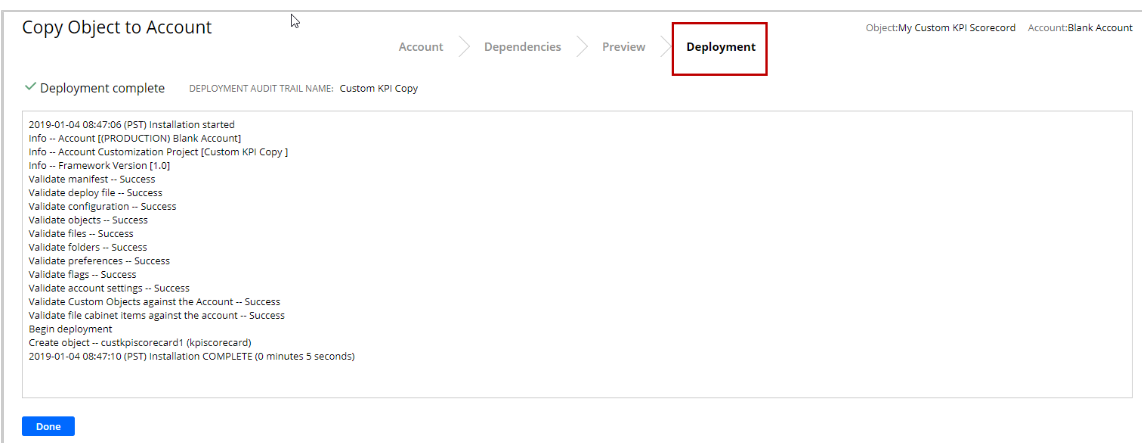
Deploying a Custom Object

If you use Copy to Account on a production account, be aware that deployment immediately modifies data in a live environment. When you click **Deploy**, the object and selected dependencies are deployed to the target account. Deployment cannot be cancelled or reversed.

To deploying to your target account:

1. Click **Deploy**. To access a live log of the deployment, keep this page open.
2. When the deployment is complete, click **Done**.

To view the audit trail of a completed deployment, see Viewing the Copy to Account Log

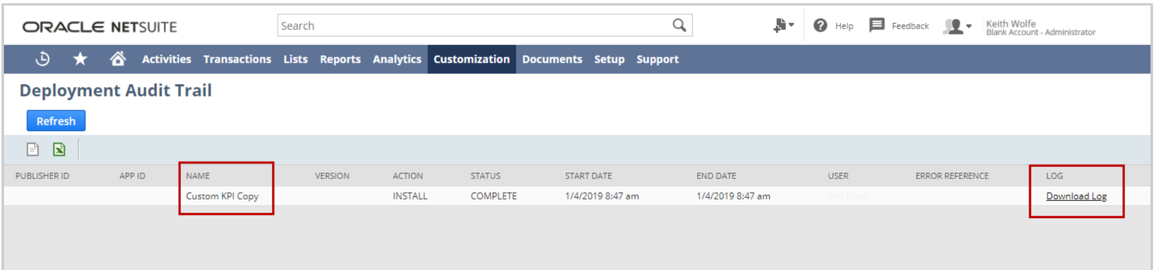


Viewing the Copy to Account Log

You can download a log of the Copy to Account deployment as a text-formatted LOG file.

To view a Copy to Account log:

1. From the target account, go to Customization > SuiteCloud Development > Deployment Audit Trail. You can find the LOG file under the name you entered as the Deployment Audit Trail Name in the Selecting a Target Account step. For more information, see Selecting a Target Account.
2. Click **Download Log**.



Handling Dependency Errors

If an icon listed below appears beside a dependency, a component that the object is dependent on is not available for copy. Dependencies must be in the target account. You can cancel Copy to Account, remove the dependency from the Choose Dependencies table, or remove the dependency from the object itself.

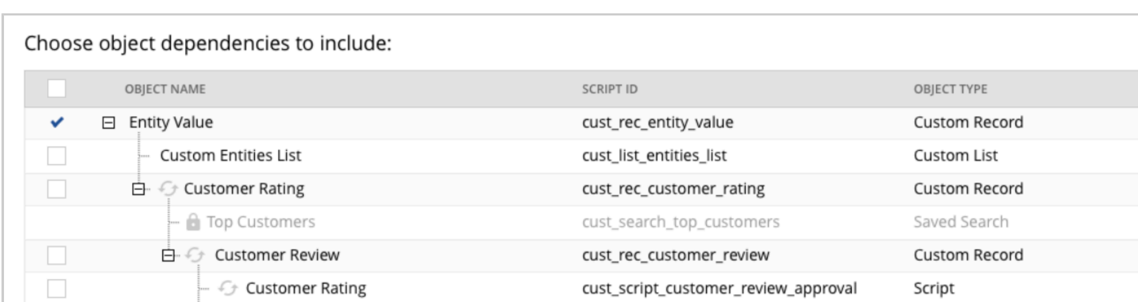
Note: If the icon is gray, the error does not block copying.

Icon	Description
	Locked or Hidden – The component is locked, hidden, or owned by a SuiteApp. Unless you are the owner of the SuiteApp or component, by design the component cannot be unlocked, made visible, or shared with another account.
	Circular dependency – The component is part of an interdependent, non-hierarchical cycle. All components that are part of a circular dependency depend on each other either directly or indirectly. Copy to Account does not support circular dependencies.

If the dependency already exists in the target account it is not required for the copy. You can remove that dependency to proceed.

If the dependency is absent from the target account, the dependency is required but cannot be copied into other accounts. On the Choose Dependencies page, click **Cancel**. If you want to try Copy to Account again, you must modify the custom object to remove the dependency that cannot be copied.

Example



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In the example above, the object being copied is the Entity Value custom record. The Copy to Account tool calculated its dependencies and shows them in hierarchical order. The Custom Entities List and Customer Rating objects are dependencies of Entity Value. The Customer Review custom record and Top Customers saved search are dependencies of the Customer Rating Record and Entity Value. Every dependency listed in the grid is needed on the target account for Entity Value to function properly.

If a dependency is listed as present in the target account, Copy to Account may skip it because it already exists in the target account.