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NETSUITE

NetSuite Account Types Guide

2022.2

March 22, 2023

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NetSuite Account Types Overview

The Understanding NetSuite Account Types section provides summary-level descriptions of the different types of NetSuite accounts.

More in-depth descriptions are available for specialized accounts used by account administrators and developers to build and test customizations. See the following:

- NetSuite Sandbox
- NetSuite Development Accounts
- Release Preview Guide

Understanding NetSuite Account Types

In addition to the live production account, NetSuite provides customers with various types of accounts to use to run their business. An account is simply a place to work.

Types of NetSuite accounts include:

- The Production Account
- The Release Preview Account
- The Sandbox Account
- The Development Account

The Production Account

The production (or live) account is where you do the daily work necessary to run your business. Most users will spend most of their time working in the production account.

Users access their production account by opening a browser window and going to `system.netsuite.com`, and entering their email address and password. For more information, see the help topic Understanding NetSuite URLs.

The Release Preview Account

All customers with a NetSuite production account can get access to a Release Preview account when it is available. Release Preview is available twice a year, right before each NetSuite release. This account lets you test your daily business processes with the new features available in the upcoming release.

Initially, only users with an Administrator role have access to the Release Preview account.

A user with an Administrator role must log in to NetSuite at `system.netsuite.com`, and change roles to the Release Preview Administrator role. An Administrator can grant access to Release Preview to other users as needed for testing.

Users can also access their Release Preview account from the New Release portlet.

See the help topics The New Release Process and the Release Preview Test Plan for more information.

The Sandbox Account

A NetSuite sandbox is a safe and isolated account where you can develop new processes and applications. You can use a sandbox to test and train your employees in existing integrations and processes without affecting your production data. The data in the sandbox is a copy of your production data. The sandbox can be refreshed from production, bringing in new data and customizations. Each refresh overwrites the previous sandbox. You can purchase one sandbox or several sandboxes to allow for development and testing teams to have their own accounts in which to experiment.

Production and sandbox roles are clearly labeled in the Account Type column on the My Roles page. Account administrators and system administrators can modify the sandbox account name by adding a suffix to help distinguish it from other accounts.

See NetSuite Sandbox for more information.

The Development Account

The NetSuite development account is a place that is isolated from your production account in which teams can develop solutions. The development account provides an improved experience for developing NetSuite customizations. NetSuite development accounts never contain production data. This separation of development accounts prevents in-progress customizations from being overwritten by refreshes, as can happen in sandbox accounts, and enables controlled access to sensitive, restricted, and financial data. These lightweight accounts support rapid deployment and testing processes.

> **Warning:** The development account is isolated from the production account, but not in the same way as a sandbox account. For example, invoices will be created and email will be sent from this account, so ensure that you use only test data in this account. You should not add real customer information, such as contact information, to a development account.

The development account can be selected from the My Roles page.

The best time to begin using development accounts is at the start of a new project. It can be difficult to migrate to a development account if you are already in the middle of a development project in your sandbox. You should you finish your existing projects in your sandbox before starting new projects in your development account.

> **Note:** You need multiple development accounts if you have multiple large projects which need distinct accounts for User Acceptance Testing (UAT).

For more information about development accounts, see NetSuite Development Accounts.

NetSuite Sandbox

A NetSuite sandbox is a safe and isolated test account in which you can develop and test new applications and customizations without worrying about affecting your production account. You can have one or more sandboxes provisioned for each production account. Each sandbox account has the same configuration, data, and customizations as your company's production account.

Sandbox accounts provide ideal places for:

- Testing customization elements before deployment.
- Fixing issues with existing customizations.
- Trying out third-party integration features.
- Training employees in existing and new business practices in an account identical to your production account.

Actions you take in sandbox accounts, such as transaction entries, record deletions, and form customizations, have no effect on your NetSuite production account. You can feel free to make changes in a sandbox account without altering your production data.

To help users distinguish between production roles and sandbox roles, see Logging in to Your Sandbox Account.

> **Note:** For more information about acquiring one or more sandbox accounts, contact your account representative.

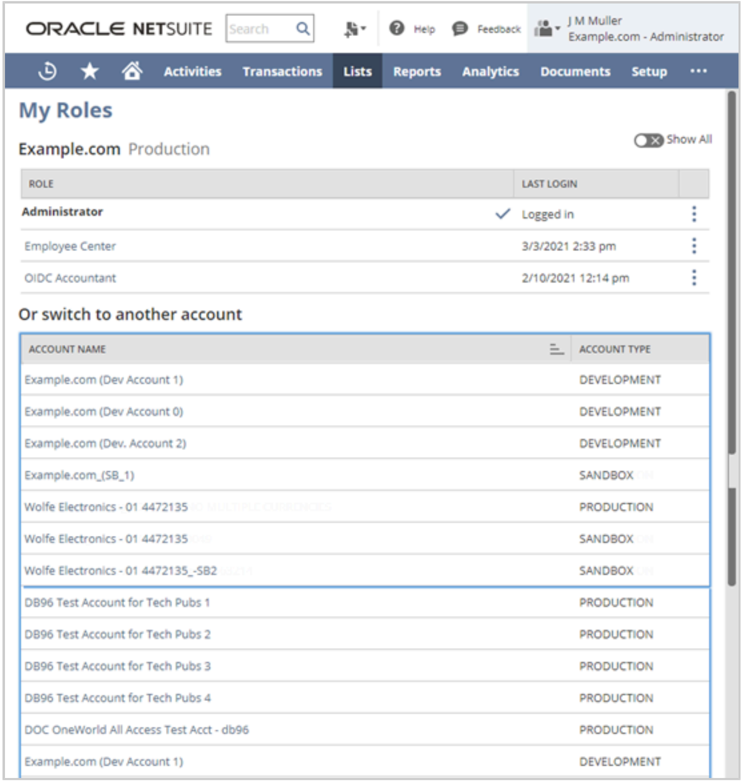
Review the following for more details about sandboxes:

- Some features are not fully available for testing in a sandbox account. For details, see Features Available for Testing in a Sandbox.
- For information about how to log in to your sandbox, see Logging in to Your Sandbox Account.
- For information about providing user access to a sandbox, see Granting Access to Your Sandbox Account.
- For information about using more than one sandbox, see Working with Multiple Sandbox Accounts.
- Account administrators and users with the System Administrator role can review details about the sandbox account(s) associated with a production account, and initiate the first copy of production data into newly provisioned sandbox accounts. See Using the Sandbox Accounts Page.
- Sandbox accounts can be periodically refreshed from production, upon your request. See Refreshing Sandbox Accounts. This task is managed through the Sandbox Accounts page in your production account.
- For details about what happens when a sandbox account expires, see When a Sandbox Account Expires.
- For instructions on setting preferences for email messages coming from your sandbox account, see Setting Preferences for Sandbox Email.

About Sandbox Accounts

Sandbox users access the sandbox account from the same URL that they use to access their production account (https://system.netsuite.com). They can use the My Roles page, or the Change Roles list, to select a sandbox role.

On the My Roles page, users will see their roles labeled in the Account Type column.



In the Change Roles list, all sandbox roles are identified by an SB icon.

See Logging in to Your Sandbox Account for more information.

Administrators have the ability to add a suffix to the sandbox Account Name for identification purposes. For details, see Account Name Suffix: Labeling Your Sandbox Account.

There are a few features where testing in sandboxes is limited. Review the Notes column in the Features Available for Testing in a Sandbox tables for details.

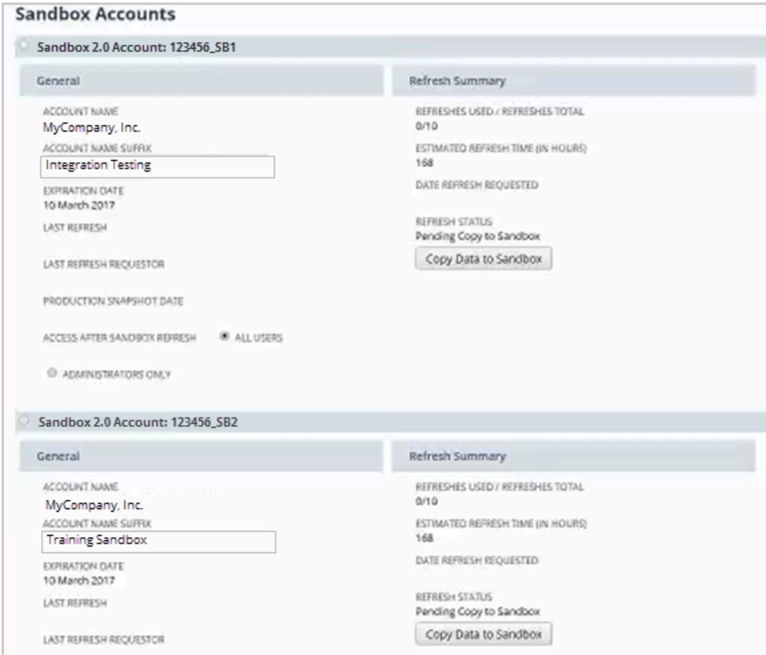
Account ID Numbering Conventions for Sandbox Accounts

Sandbox account IDs are always the same as the account ID for your production account, appended with _SB1, _SB2, _SB3, and so on, like this:

- Production account ID: 345678
- Sandbox account ID: 345678_SB1
- Sandbox account ID: 345678_SB2
- Sandbox account ID: 345678_SB3

Account Name Suffix: Labeling Your Sandbox Account

Administrators have the option to add a suffix to the sandbox account name before every refresh or copy data to sandbox and before every activation. This option helps users differentiate between multiple accounts. After entering the desired text for the suffix, to submit the request for a sandbox refresh, click **Copy Data to Sandbox** or **Refresh Sandbox**. The option appears again when the account is ready for activation. Enter the desired text for the suffix, then click **Activate Sandbox**. The suffix is appended to the account name and appears in the Account Name field after the refresh is complete and the account is activated.



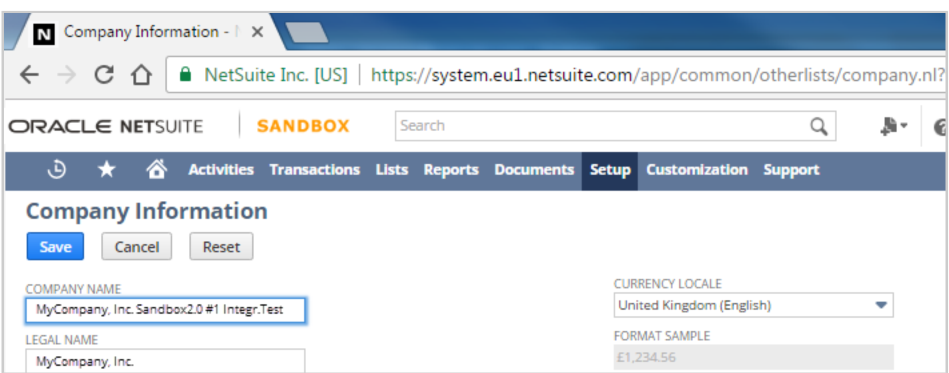
In this example, after submitting the refresh request and activating the refreshed account, the account names would change as follows:

- Sandbox account ID: 123456_SB1

  Account Name: MyCompany, Inc._Integration Testing
- Sandbox account ID: 123456_SB2

  Account Name: MyCompany, Inc._Training Sandbox

You can also modify the Account Name of your sandbox by going to Setup > Company > Company Information and editing the Company Name field.



Features Available for Testing in a Sandbox

A sandbox account is a copy of your production account, as of a specific date and time. As a sandbox is only a copy of the information from your production account, the actions you perform in the sandbox do not affect the information in your production account.

Many NetSuite features are available for testing in sandbox accounts. Some features are only available in a limited form in sandbox accounts, and a few behind-the-scenes tasks that run in your production account do not run in your sandbox. For example, billable components information is not calculated for the sandbox. To view your Total Storage Size (MB) information, go to Setup > Company > View Billing Information in your production account. The billing information page in a sandbox account displays the billing information copied from production. Therefore, the Total Storage Size (MB) information displayed in the sandbox is not changed by tasks completed in the sandbox account, such as deletion of custom records.

During sandbox refreshes, certain objects are not copied from your production account. For more information, see Data That is Not Copied from Production to Sandbox.

See the following for details about features in sandbox accounts:

- Features Available for Full Testing in Sandbox Accounts
- Features Available for Limited Testing in Sandbox Accounts
- Features Not Available for Testing in Sandbox Accounts

Features Available for Full Testing in Sandbox Accounts

Features in the following table can be fully tested in sandbox accounts.

Feature	Testing Notes
Bulk Merge	
CTI Integration	Partners are Contivio and Five9
CSV Import	
Custom Records	Security-sensitive fields on custom records will display the same values displayed in the production account.
Email Campaigns	Email campaigns must have fewer than 25 recipients. **Note:** You must set up DKIM in each sandbox account. Follow the Procedures to Set Up DKIM in Setting Preferences for Sandbox Email.
Email Case Capture	
Email Notifications and Outgoing Email	Saved searches are automatically set to inactive in sandbox accounts. For email routing options, see Setting Preferences for Sandbox Email.
Intellesync	
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 sandbox 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. See Setting Preferences for Sandbox Email for more information.
Saved Searches	Scheduled Searches and Email Alerts behave as they do in the production account.

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Feature	Testing Notes
Scheduled Saved Searches	**Note:** The company preference for sandbox 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. See Setting Preferences for Sandbox Email for more information.
Secure Domains	It is possible to test and verify a custom secure domain from the user's perspective in a sandbox account. **Note:** Do not attempt to reuse domains that are already deployed in your production account. You must set up a unique domain for each of your accounts: production, sandbox, and Release Preview. See the help topics Manual Certificates and Set Up Domains for Web Stores for more information.
Server SuiteScript	
Client SuiteScript	
SuiteAnalytics Connect (formerly ODBC)	
SuiteFlow (Workflows)	
Telephony Integration (Basic)	
Two-Factor Authentication	2FA Settings are shared between a production account and the sandbox accounts that are associated with that production account. Users do not need to recreate their 2FA Settings for sandbox accounts.
SOAP Web Services	The SOAP requests and responses for each job can be viewed in the SOAP Web Services Usage Log. In sandbox 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 Sandbox Accounts

The following features are only available in a limited form in sandbox 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. **Important:** See Credit Card Processing in Your Sandbox After a Refresh for more information.
Direct Deposit	No actions taken.

Feature	Testing Notes
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 sandbox account. You must configure SAML in your sandbox account after each refresh.
Scheduled SuiteScripts	Scripts scheduled in production do not automatically run as scheduled in sandbox accounts, but you can set up and test scheduled SuiteScripts in sandbox accounts. For details, see the help topic Scheduled Script Execution.
SSN or TIN (Social Security Number or Tax Identification Number)	Real numbers not copied. Use only test numbers.
Token-based Authentication	Tokens created using the Token-based Authentication feature in your NetSuite production account are not copied to your sandbox account. To test this feature, you must create tokens in that sandbox account. Each time your sandbox is refreshed, you must create new tokens in that sandbox account.
UPS/FedEx Integration for Shipping Labels	No actions taken.
Website and Web Store	Websites that exist in your production account are copied to your sandbox, but you must set up domains after a refresh. Domains are not copied from your production account to your sandbox account. After a sandbox refresh, you must set up domains in the sandbox account. See the help topics Automatic and Manual Certificates and Set Up Domains for Web Stores for more information. **Note:** If you have multiple sandbox accounts, ensure that the domains are unique across all of your accounts. An error message is generated if there are duplicate domains. Websites created only in your sandbox account are lost after a sandbox refresh, and need to be recreated. For more information, see the help topic Getting Started.

Features Not Available for Testing in Sandbox Accounts

The following features are not available for testing in sandbox accounts:

- Fax
- Memorized Transactions
- NetSuite for Outlook
- Online Bill Pay
- Outlook Integration
- Payroll

Requesting a Sandbox Account for the First Time

If you want to purchase a sandbox account, contact your NetSuite account manager. After a license is created for your sandbox account, a user with the Administrator role in your production account should complete these steps.

> **Note:** These steps also apply if you are requesting a new sandbox account after a previous sandbox expired or was deleted.

To complete your new sandbox account request:

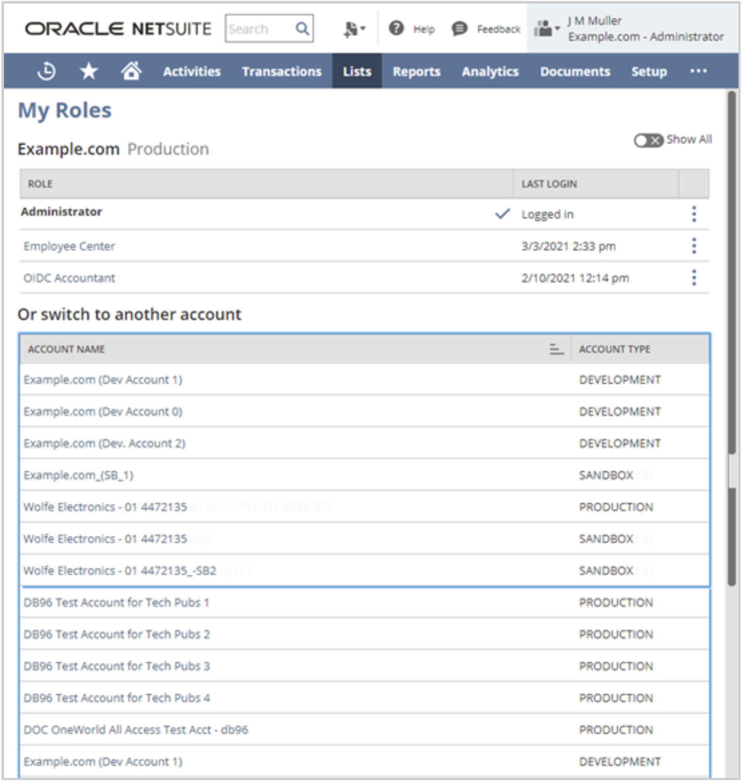
1. Log in to the production account that is associated with the sandbox account you purchased.
2. Go to Setup > Company > Company Management > Sandbox Accounts (Administrator).
3. Click **Copy Data to Sandbox** for your new sandbox account.
4. Wait until users with the Administrator role receive a notification email that your sandbox account is ready for use.
5. Log in to the production account that is associated with your new sandbox, and from the Change Roles list, select your new sandbox account.

For more information, see Refreshing Sandbox Accounts and When a Sandbox Account Expires.

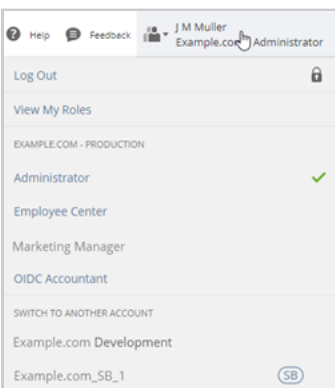
Logging in to Your Sandbox Account

By default, new sandbox accounts are accessible only to NetSuite account administrators. If you are not an administrator and do not have access to your sandbox account, contact your NetSuite account administrator for access.

All of your roles can be found on the My Roles page. You can identify each account by viewing the Account Type column.



You can also determine which role is a sandbox role by looking for the SB icon in the Change Roles list.



If you are prompted to update or set up your security questions, see the help topic Setting Up Security Questions.

Simultaneous Access to More than One NetSuite Account Type

Most users log in to their production account to perform tasks in NetSuite. Some users may also want simultaneous access to another NetSuite account type, for example, a sandbox account or a Release Preview account.

Watch this video to see how you can have two or more NetSuite account types open at the same time:

Running Simultaneous NetSuite Sessions

The following procedure describes accessing a sandbox account, but also applies to accessing other account types (Release Preview or development accounts, for example).

To access more than one account type at the same time:

1. Open your browser and log in to your NetSuite production account.
2. From the Change Roles list, select a sandbox account, right-click, and select open in a different tab. (The wording varies slightly depending on the browser you are using.)

   The selected sandbox account opens in a new tab. If you do not have a default role indicated in the sandbox account, your browser history is used to automatically log you in to your last used role.

   For more information, see the help topic Roles and Accounts
3. Click the first tab, the tab with your production account role.
4. Click Login and log in to NetSuite again.

   Now both accounts have active sessions: one tab with your production account role, and one tab with your sandbox role.

Granting Access to Your Sandbox Account

On the Sandbox Accounts page, account administrators can select who can access the sandbox: only users with an administrator role, or all users.

Preference for Access After Sandbox Refresh

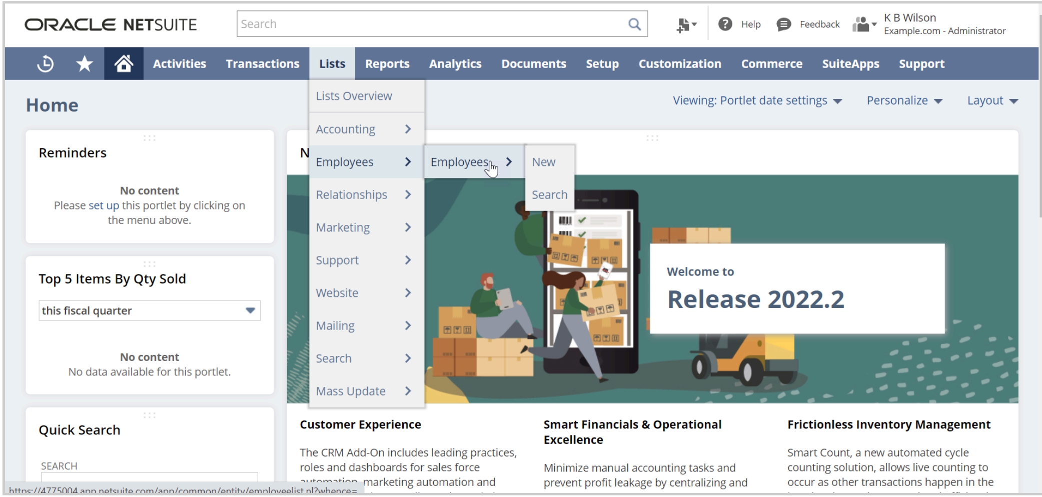
A preference is provided on the Sandbox Accounts page to indicate who should have access to a sandbox account after it is refreshed: either administrators only or all users. If the Administrators only option is selected, only the Administrator role is copied to the sandbox. That is, for a user with multiple roles, only the administrator role for that user is copied to the sandbox. For more information, see Refreshing Sandbox Accounts.

Giving Sandbox Access to Individual Users

After a refresh of a sandbox account is complete, access can be added or removed as necessary for individual users in that account.

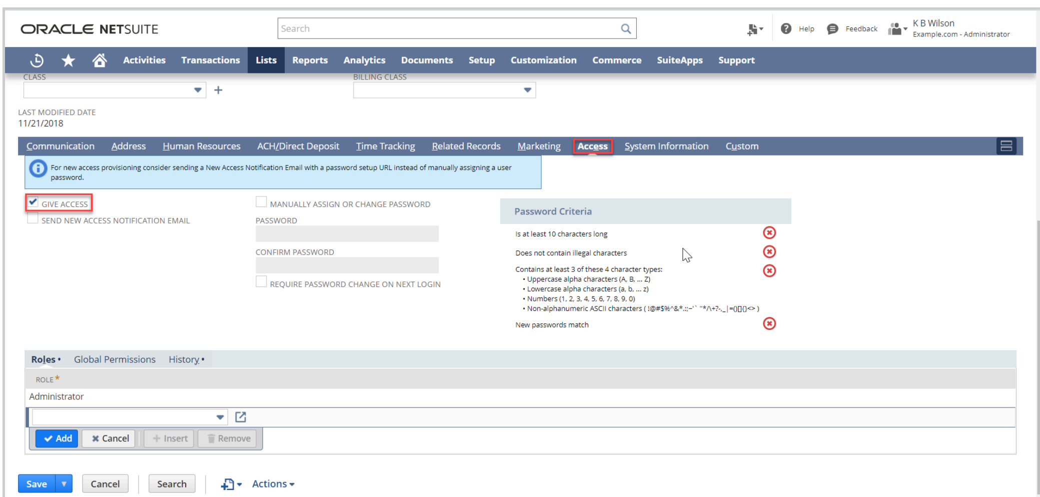
To give sandbox access to individual users:

1. In the sandbox account, go to Lists > Employees > Employees (Administrator) and click **Edit** next to the name of the employee.



> ⚠ **Important:** Customer Center and Partner Center roles are never allowed access to sandbox accounts.

2. On the **Access** subtab in the employee record, clear the **Give Access** checkbox.



> ⓘ **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 sandbox account.
   - On the My Roles page, the role is labeled Sandbox in the Account Type column.
   - In the Change Roles list, the sandbox role is indicated by an SB symbol.

To give sandbox access to all users of your production account, you must go to the Sandbox Accounts page in your production account, select the **All Users** option for **Access After Sandbox Refresh**, and click **Refresh Sandbox** to request a refresh of your sandbox account.

Giving Sandbox Access to Multiple Users

The Administrator can give sandbox access to multiple users using the CSV Import Assistant.

To give multiple users access to the sandbox account using CSV import:

1. From your sandbox account, create a search for **Employee** with the following results:
   - Internal ID (of the Employee)
   - Give Access
2. Export the search results as a CSV file.
3. Add the non-administrator employees that you want to have sandbox access to the CSV file.
4. Update the employee record in sandbox 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.

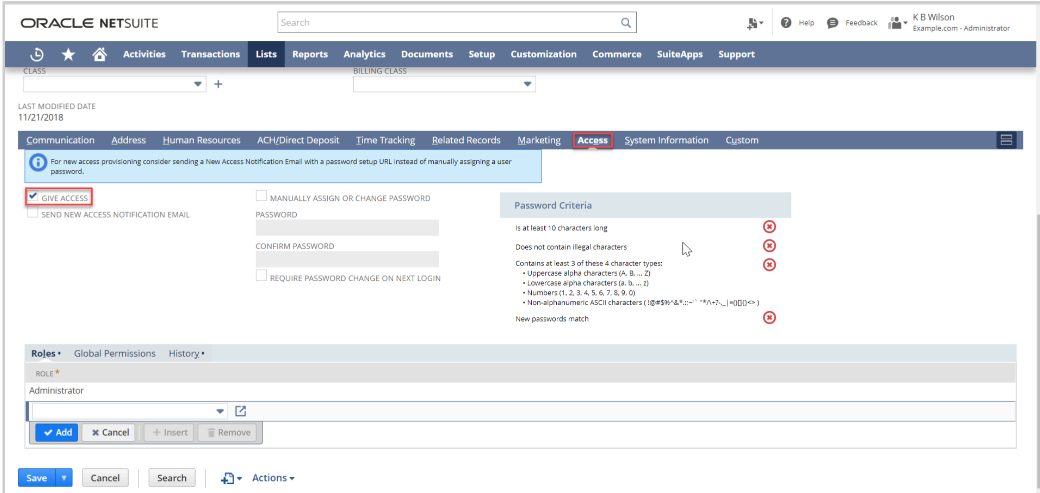
Removing Sandbox Access from Individual Users

Access can also be removed as necessary for individual users in that account.

To remove sandbox access from individual users:

1. Log in to your sandbox account in an Administrator role.

   See Logging in to Your Sandbox Account for more information.
2. Go to Lists > Employees > Employees and select the employee record on sandbox.
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 sandbox account.

> **Note:** To ensure the user will not have access to the sandbox account after the next refresh, make sure these changes are reflected in your production account as well.

> **Important:** During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins. See Scheduled Version Upgrade Dates and Refresh Requests.

Working with Multiple Sandbox Accounts

You can use sandbox accounts to test bundles that you create or test SuiteApps from third-party sources such as independent software vendors (ISVs). You can use a single sandbox account to develop and test bundles or use multiple sandbox accounts for additional flexibility. For example, you could use one sandbox account for development and one for testing.

> **Note:** When you request a sandbox refresh, the bundle definition in a sandbox is completely overwritten so that it mirrors that in the production account.

For more information, see the help topic SuiteApps and Sandbox Accounts.

> **Important:** If you have multiple sandboxes, for websites and web stores, ensure that across all of your sandboxes, the domains are unique. An error message is generated if there are duplicate domains.

About Multiple Sandbox Accounts

Review the following for more details about working with multiple sandbox accounts:

- If multiple sandbox accounts are associated with a single production account, users and their assigned roles are duplicated across these accounts.

- Each user has a separate role for each sandbox account on the My Roles page and in the Change Roles list.
- Each sandbox account has its own unique ID. To locate your sandbox account ID, go to **Setup > Company > Company Information**. The account ID field is located near the bottom of the right column.
- To distinguish between multiple sandboxes, an administrator could change the company name (Setup > Company > Company Information) to identify each sandbox, however, this name change will be overwritten when the sandboxes are refreshed.

Refreshing Sandbox Accounts

Each of your sandbox accounts can be refreshed from your production account upon your request.

> **Note:** If you are on a Premium, Enterprise, or Ultimate service tier, you can refresh each of your sandbox accounts from either your production account or another sandbox account.

The account where the data is copied from is referred to as the source account. Refreshing a sandbox account copies all configurations, data, user passwords, and customizations from the source account into the target sandbox account. Any changes you have made to the target sandbox account are overwritten.

Accounts are not taken offline when a refresh is requested.

Users can use the sandbox account while a new copy is being prepared. Before you activate the new sandbox, make sure you save any sandbox customization changes that have occurred since the refresh request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Administrators receive an email notification that the refreshed sandbox is available to be activated. An administrator can activate this new sandbox by clicking a button on the Sandbox Accounts page. When the new copy of the sandbox account is activated, the previous version is deleted. All old data is replaced with new account data copied from the source account.

For more details, see Requesting a Refresh.

Preserving Sandbox Changes

You need to ensure that users of your sandbox account understand that any changes they make to a sandbox account after a refresh request is made are not included in the new sandbox. When a new sandbox is activated, these changes, including any edits to custom objects, are overwritten with the data from the chosen source account.

SDF users can save all sandbox customization changes to SuiteCloud projects before the activation of the new sandbox. After activation, the updated SuiteCloud project can be deployed to the new sandbox.

If SDF is not in use, users must save sandbox customization changes in another manner so that these changes are available to be added to the new sandbox account after activation.

For more details, see the help topic Sandbox Refresh Impact on Bundles.

Requesting a Refresh

A refresh of your sandbox account copies a snapshot of all configurations, data, user passwords, and customizations from your source account into your target sandbox account. Submit a sandbox refresh request if you would like to perform this action.

To submit a sandbox refresh request:

1. Log in to the production account that is associated with the sandbox account(s) you want to refresh.

   > **Important:** During the upgrade period for a new release of NetSuite, you should pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins. See Scheduled Version Upgrade Dates and Refresh Requests.

2. Go to Setup > Company > Sandbox Accounts.
3. For each sandbox account you want to refresh, do the following:
   a. Indicate which users should have access after the refresh occurs:
      - To only allow access to the account administrator, select the **Administrators Only** option.

        (You can give access to additional users after the refresh as needed. See Granting Access to Your Sandbox Account.)
      - To allow access to all existing production account users (except Customer Center users), select the **All Users** option.

   b. Select the account you would like to copy data from for this sandbox refresh.

      > **Note:** This field only appears if you are on a Premium, Enterprise, or Ultimate service tier. If you are on the Standard service tier, your source account is always your production account for sandbox refreshes.

   c. Click **Refresh Sandbox**.

      > **Note:** If all of your existing sandbox refreshes have been used, contact your Account Manager to purchase more.

      Your existing sandbox will remain online so you can continue working during the refresh process.

   d. Click **OK** on the Confirmation popup.

      > **Note:** Your sandbox refresh may not contain all data in your source account at the moment you select Refresh Sandbox. To check what data will be present, see the Snapshot Date field on the Sandbox Accounts page.

      Use your current sandbox account during the refresh process. You will receive an email notification when the new sandbox is ready to be activated.

   e. When the new copy of the sandbox is ready, go to the Sandbox Accounts page and click **Activate Sandbox**.

> **Warning:** When you activate a refreshed sandbox, the new sandbox completely replaces the previous sandbox. The new sandbox contains a copy of account data that is a snapshot taken from your chosen source account at the time of the sandbox refresh request. Any changes to the target sandbox account during the refresh process are not included in the newly activated sandbox. Before you activate the new sandbox, you must save any sandbox customization changes that occurred after the refresh request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Account administrators should formulate a strategy to save these changes and add them to the new sandbox, and inform users of the processes to be used. For more information, see Refreshing Sandbox Accounts.

f. To acknowledge that the current sandbox data and configuration will be completely replaced with a new copy from your chosen source account, click **OK** on the Confirmation popup.

> **Note:** Once your sandbox is ready for activation, you have two weeks to click **Activate Sandbox**. If you do not activate your new copy within the 14 days, it will be deleted.

You can monitor the **Refresh Status** and view the **Estimated Refresh Time (In Hours)** on the Sandbox Accounts page

For more information, see More About Sandbox Refresh Statuses and Requesting a Sandbox Account for the First Time.

Using the Sandbox Accounts Page

The Sandbox Accounts page is available in production accounts, at Setup > Company > Sandbox Accounts, It is available to users logged in with the System Administrator role. This page is not available to any other roles. You can use this page to review details about your sandbox accounts and to request refreshes of these accounts.

For more information about the Sandbox Accounts page, see:

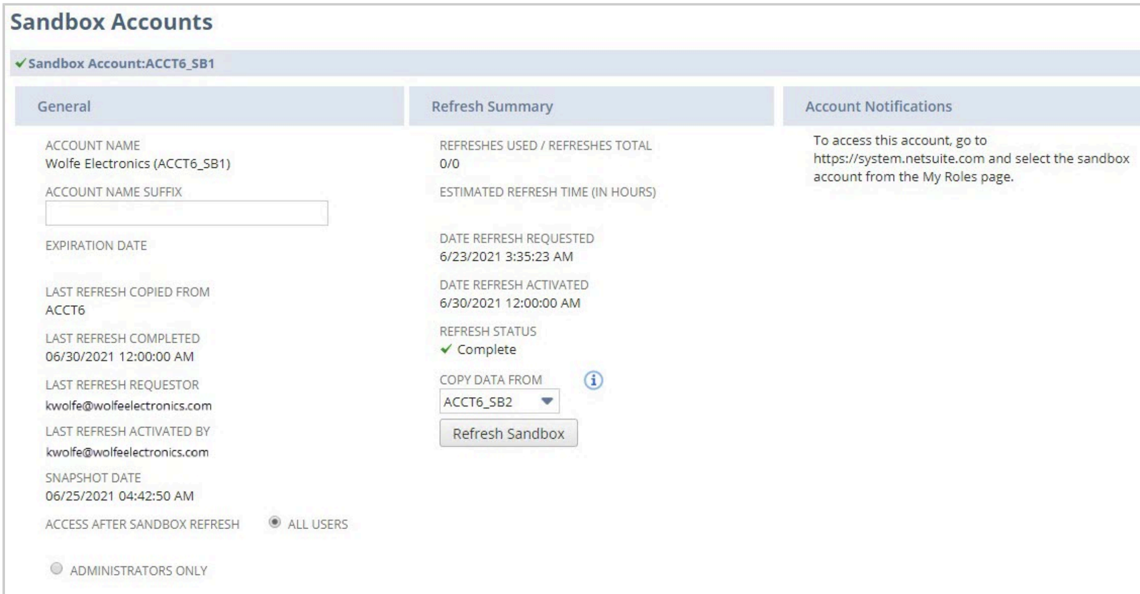
- Sandbox Accounts Page Overview
- General
- Refresh Summary
- More About Sandbox Refresh Statuses
- Account Notifications
- Scheduled Version Upgrade Dates and Refresh Requests
- Sandbox Refresh Notifications

> **Important:** Log in to your production account to see the Sandbox Accounts page. This page displays details about all sandbox accounts associated with the production account to which you are logged in.

Sandbox Accounts Page Overview

On the Sandbox Accounts page, each sandbox account is listed by the NetSuite account ID. Account status is displayed to the left of the Sandbox Account heading. Account status options include:

- Online: A green check mark.
- Offline: An empty circle. The account is not available for use.
- Expired: A red X. The account was not renewed as of the expiration date and is no longer available for use.



The Sandbox Accounts page is broken down into three main sections for each sandbox account listed:

- General
- Refresh Summary
- Account Notifications

General

The general section includes account information such as the name and suffix of the sandbox account and the date on which the sandbox is scheduled to expire. It also includes some details about the last time the sandbox account was refreshed, including:

- Last Refresh Copied From: Account that data was copied from for the last refresh.

  > **Note:** This field only appears if you are on a Premium, Enterprise, or Ultimate service tier. If you are on the Standard service tier, your source account is always your production account for sandbox refreshes.

- Last Refresh Completed: Date when the most recent refresh of the account was completed.

> **Note:** You have 14 days from this date to activate the new copy of your sandbox account.

- Last Refresh Requestor: User who requested the most recent refresh.
- Last Refresh Activated By: User who activated the most recent refresh.
- Snapshot Date: Date and time of the snapshot used for the most recent refresh. (Note that the time is formatted according to the current user’s Time Format preference, set at Home > Set Preferences.)
- Access After Sandbox Refresh: You can choose to provide default account access to all users or only to administrators after the refresh. The selection you make remains in effect for subsequent refreshes unless you change it.

- All Users: If you select this option, after the refresh you can remove access from users as needed.

> **Important:** Customer Center roles are not copied during sandbox refreshes. Even if you select the option to give all users access after the refresh, users assigned the Customer Center role are excluded from this access. Because of this limitation, customer login functionality does not work in a sandbox account after a refresh, even if it has been working in the production account. If you want to set up this functionality to work in a sandbox account, you can do a CSV import of customer records into the sandbox account, to set passwords and Give Access to True for customer users.

- Administrators Only: If you select this option, after the refresh you can add access to users as needed.

> **Important:** Only the Administrator role is copied to the sandbox. That is, for a user with multiple roles, only the administrator role for that user is copied to the sandbox.

Refresh Summary

The Refresh Summary section includes current details about the number of refreshes available and the current status of any refresh in progress.

> **Note:** For all Date fields, the time is formatted according to the current user's Time Format preference, set at Home > Set Preferences.

Details include:

- Refreshes Used / Refreshes Total: Number of refreshes used out of the total number of refreshes available. If you have multiple sandbox accounts, the refresh count is shared between all of the sandbox accounts. If you have questions about this number, contact your Account Manager.
- Estimated Refresh Time: Estimated number of hours required for the current refresh to complete. (Note that this estimate is not exact.)
- Date Refresh Requested: Date and time when the most recent refresh was requested.
- Date Refresh Activated: Date and time when the most recent refresh was activated.
- Copy Data From: Account that data is copied from for the refresh.

  > **Note:** This field only appears if you are on a Premium, Enterprise, or Ultimate service tier. If you are on the Standard service tier, your source account is always your production account for sandbox refreshes.

  You cannot copy data from the following types of accounts:

  - The sandbox account you are trying to refresh
  - Sandbox accounts not associated with your production account
  - Sandbox accounts with expired licenses
  - Sandbox accounts that are inactive

    > **Note:** Source accounts that are actively being used as a refresh source will be disabled until the refresh completes.

- Refresh Status: Status of the most recent refresh.
  - When a refresh fails, a popup error message displays. This message includes an error ticket number that you can provide to Customer Support to help them resolve the issue.

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- For more information, see More About Sandbox Refresh Statuses.

More About Sandbox Refresh Statuses

The following section lists the various refresh statuses that are displayed and describes what each status means.

> **Note:** If the Refresh Status field is blank, the sandbox refresh is taking longer than usual. However, it is still in progress and should complete soon.

- Awaiting Processing: The refresh request has been submitted and will be processed in the order received.
- Pending Copy to Sandbox: This notice only appears for newly provisioned sandboxes. Administrators can choose when to initiate the copy of data from the chosen source account to the sandbox.
  - Copy Data to Sandbox: This button only appears on the Sandbox Accounts page of newly provisioned sandboxes. Click Copy Data to Sandbox to initiate the copy of data from the associated source account. The sandbox status will not change to online until the copy of data is completed. (After the initial data copy to the sandbox has completed, the Refresh Sandbox button is displayed on the Sandbox Accounts page.)
- Delayed: On the Sandbox Accounts page, when the refresh status field displays Delayed, it indicates the refresh progress has stalled for some reason. When a sandbox refresh status is changed to Delayed, the Estimated Refresh Time field is blank. When the refresh resumes, the estimated refresh time is recalculated, and the new value is displayed in the Estimated Refresh Time field.
- Refresh In Progress: The sandbox refresh is ongoing.
- Refresh Failed: An error occurred during the refresh process. NetSuite Customer Support will intervene to help resolve the problem.
  - When a refresh fails, a popup error message displays. This message includes an error ticket number that you can provide to NetSuite Customer Support to help them resolve the issue.
- Pending Sandbox Activation: This status appears on the Sandbox Accounts page when a new sandbox copy is ready to be activated by the account administrator. To activate the new copy of the sandbox account, click Activate Sandbox.

  > **Warning:** When you activate a refreshed sandbox, the new sandbox completely replaces the previous sandbox. The new sandbox contains a copy of account data that is a snapshot taken from your chosen source account at the time of the sandbox refresh request. Any changes to the target sandbox account made during the refresh process are not included in the newly activated sandbox. Before you activate the new sandbox, you must save any sandbox customization changes that occurred after the refresh request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Account administrators should formulate a strategy to save these changes and add them to the new sandbox, and inform users of the processes to be used. For more information, see Refreshing Sandbox Accounts.

- Complete: The sandbox refresh process is complete.

> **Important:** During the upgrade period for a new release of NetSuite, you should pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins. See Scheduled Version Upgrade Dates and Refresh Requests.

For details on how to request a refresh, see Refreshing Sandbox Accounts and Requesting a Refresh.

Account Notifications

This section contains notifications related to each of your accounts. Notifications will alert you to required action items or status updates for each account, along with any applicable instructions.

Scheduled Version Upgrade Dates and Refresh Requests

During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A sandbox refresh request will fail if it does not complete before your scheduled version upgrade begins.

Use your best judgement to decide when to request a sandbox refresh during the version upgrade period for a new NetSuite release. For example, if it usually takes approximately two days for your sandbox refresh to complete, and:

- if your scheduled version upgrade date is 72 hours (three days) away, defer your refresh request until your production and sandbox upgrades are complete.
- if your scheduled version upgrade date is a week away, you might decide to go ahead and refresh your sandbox.

> **Important:** All sandbox accounts are targeted to be taken offline for upgrade at the time and date mentioned on the New Release portlet. The time to complete a sandbox upgrade can vary depending on the amount of data in the account. Average time is about an hour and most complete within 8 hours, but times can vary.

You can request a refresh and monitor its status on the Sandbox Accounts page. This page is available to users with the Administrator or System Administrator roles. Go to Setup > Company > Sandbox Accounts.

When your account is ready to be activated, you will receive an email notification asking you to select the **Activate Sandbox** button on the Sandbox Accounts page.

> **Important:** During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins.

> **Warning:** When you activate a refreshed sandbox, the new sandbox completely replaces the previous sandbox. The new sandbox contains a copy of your chosen source account data that is a snapshot taken at the time of the sandbox refresh request. Any changes to the target sandbox account during the refresh process are not included in the newly activated sandbox. Before you activate the new sandbox, you must save any sandbox customization changes that occurred after the refresh request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Account administrators should formulate a strategy for saving these changes and adding them to the new sandbox, and inform users of the processes to be used. Change management across your sandbox accounts is your responsibility. For more information, see Refreshing Sandbox Accounts.

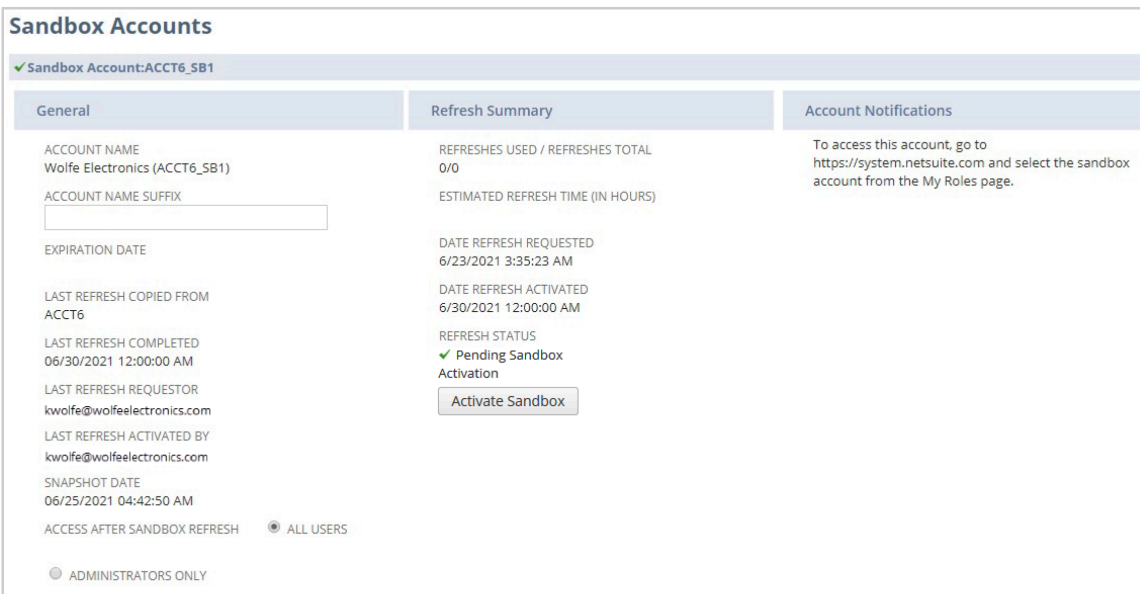
Sandbox Refresh Notifications

An email notification is sent each time a sandbox refresh is ready for activation. This email is sent to all account administrators. It includes the sandbox account name and ID, the date the refresh was requested, the user who requested the refresh, the date of the production data used to refresh the sandbox, the number of refreshes used and remaining, and instructions on how to activate that sandbox account with the new copy.

You have 14 days to activate the new copy of your sandbox. You will receive a second notification after 12 days if you have not yet activated the account. If you do not activate the new copy of your sandbox account within the 14 days, it will be deleted and you will need to go through the sandbox refresh process again.

To activate the new copy of your sandbox, go to Setup > Company > Sandbox Accounts and select the **Activate Sandbox** button.

Warning: When you activate a refreshed sandbox, the new sandbox completely replaces the previous sandbox. The new sandbox contains a copy of your chosen source account data that is a snapshot taken at the time of the sandbox refresh request. Any changes to the target sandbox account during the refresh process are not included in the newly activated sandbox. Before you activate the new sandbox, you must save any sandbox customization changes that occurred after the refresh request. These changes must be saved outside of the sandbox account so that they are available to be added to the new sandbox after activation. Account administrators should formulate a strategy for saving these changes and adding them to the new sandbox, and inform users of the processes to be used. For more information, see Refreshing Sandbox Accounts.



Important: If you do not activate the new copy of your sandbox and it is deleted, that refresh will still count against your total refreshes used.

Also be aware of the following information about sandbox refreshes:

- **You do not need to refresh a sandbox to update it to the latest NetSuite version.**

  Sandbox accounts are automatically updated to the same release level as the associated production account when the production account is updated. A refresh is not required for this type of update.

- **Sandbox refreshes cannot be done when a sandbox account is running a different version of NetSuite than the associated production account is running.**

  During the release of a new version of NetSuite, there may be a period of time when your production account has been updated to the latest version but your sandbox account has not yet been updated, or vice versa. A refresh cannot occur in this case. If you request a refresh, it is delayed until both sandbox and production accounts have both been updated to the latest version. During this period, the Sandbox Refresh page displays a red X in the Refresh Status page with a popup version mismatch error.

Note: This indicator only appears if you are on a Premium, Enterprise, or Ultimate service tier.

Data That is Not Copied from Production to Sandbox

During sandbox refreshes, the following things are not copied from production:

- **DomainKeys Identified Mail (DKIM)**

  Domains are not copied from your production account to your sandbox. Before using email in your sandbox, you need to set up Domain Keys for a domain that is separate from the email domain set up in your production account. This needs to be set up after each refresh. See Setting Preferences for Sandbox Email.

- **Websites and web store domains**

  Domains are not copied from your production account to your sandbox. After a sandbox refresh, you must set up domains in the sandbox. If you have multiple sandboxes, ensure that across all of your sandboxes, the domains are unique. An error message is generated if there are duplicate domains. See the help topics Manual Certificates and Set Up Domains for Web Stores for more information.

- **Customer Center role assignments for customer users**

  Customer Center role assignments for customer users are not copied from production accounts to sandboxes during refreshes. Due to this limitation, customer login functionality does not work in sandbox after a refresh, even if it has been working in the production account. If you want to set up this functionality to work in sandbox, you can do a CSV import of customer records into the sandbox, to set passwords and Give Access to True for customer users.

  For more information, see the help topic CSV Imports.

- **SAML configuration**

  SAML configuration is not copied from the production account to the sandbox. For details, see the help topic SAML SSO in Multiple NetSuite Account Types.

- **System notes on records**

  System notes are not copied from the production account to the sandbox. 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 the production account to the sandbox. For more information, see the help topics SuiteFlow Overview and Workflow History Subtab. Workflow instances are not copied from the production account to the sandbox either.

- **Token-based Authentication (TBA)**

  Tokens created in your production account are not copied to your sandbox during a refresh. To test token-based authentication in your sandbox, you must create tokens in that sandbox. Each time your sandbox is refreshed, you will need to create new tokens in the sandbox. For information about creating tokens, see the help topic Manage TBA Tokens in the NetSuite UI.

- **OAuth 2.0**

  Applications authorized using the OAuth 2.0 feature in your NetSuite production account are not copied to your Release Preview or to your sandbox accounts. Users must authorize applications explicitly in Release Preview or in a sandbox to test OAuth 2.0 feature in these accounts. Each time the sandbox is refreshed, users must authorize applications explicitly in the sandbox. For more information about OAuth 2.0 Authorized Applications, see the help topic Managing OAuth 2.0 Authorized Applications.

- **Eliminate Intercompany Transactions**

  The Eliminate Intercompany Transaction tasks are not copied from production to sandbox accounts. This means the Eliminate Intercompany Transactions task status results only appear in the account in which the tasks are run, and may not be the same in your production and sandbox accounts. For more information, see the help topic Viewing Intercompany Elimination Results.

Credit Card Processing in Your Sandbox After a Refresh

An account administrator must complete the following procedure to process credit card transactions in your sandbox account after a refresh.

To enable credit card profiles for use in sandbox:

1. In your sandbox account, go to Setup > Accounting > Financial Statements > Payment Processing Profiles.
2. Click **Edit** next to the payment processing profile you want to use in your sandbox account.
3. On the payment processing profile, under **Authentication Credentials**, re-enter the credentials required for this profile.
4. Click **Save**.
5. Repeat these steps for each payment processing profile you want to use in your sandbox account.

> **Important:** Each time you refresh your sandbox account, you must repeat this procedure to process credit card transactions in your sandbox. No change is required in your production NetSuite account.

When a Sandbox Account Expires

Sandbox accounts come with expiration dates. When a sandbox account is not renewed and expires, the status of the sandbox is set to inactive. Users are no longer able to log in to an inactive sandbox account. Administrators can view the sandbox expiration date on the Sandbox Account page.

Administrators of sandbox accounts receive email notifications before a sandbox account expires, so they can renew the account without experiencing an interruption of sandbox availability or potential data loss.

Administrators are notified by email several times before the expiration date, giving them plenty of time to renew the sandbox account. The first notification email is automatically generated one month before the sandbox expires. Notifications continue on a weekly basis until the sandbox account is renewed. If the sandbox account is not renewed, a final notification email arrives on the expiration date.

> **Note:** Contact your NetSuite account representative to renew your account before it expires.

There is a 30–day grace period after expiration during which an inactive sandbox account can be re-activated and the data retained. If you do not renew the sandbox account before this grace period ends, the sandbox is deleted and the data is purged. If your account has expired, contact your NetSuite account representative for more information.

> **Warning:** Data from expired sandbox accounts is purged after 30 days and cannot be recovered.

Setting Preferences for Sandbox Email

Domains are not copied from your production account to your sandbox account. Before using email in your sandbox, 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.

> **Note:** It has never been possible to use the outbound email domain of your production account for your sandbox account or your Release Preview account.

The following procedures contain instructions for setting up Domain Keys in your sandbox account and with your domain provider.

Setting Up DKIM for the Sandbox Account

The following 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. If this is acceptable for your testing purposes, then it is not necessary to set up DKIM in your sandbox account. 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 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 <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.

- Entering Domain Keys in Your NetSuite Account
- Setting Up a DNS Text Record
- Activating DKIM Keys in your NetSuite Account
- Verifying Your DKIM Setup

Once DKIM is set up correctly for your sandbox account, you can set up your preferences for email messages sent from the sandbox account.

When you use a sandbox account, anyone with the Administrator role can set a preference for delivery of email messages from the sandbox account. You should choose the **Send Email To** option. You can enter specific email addresses (separated by commas) giving you complete control over exactly who receives email messages from your sandbox.

For example, if you are testing marketing campaigns in your sandbox account, you might not want customers to receive email messages generated by those campaigns until they have been finalized and rolled out in your production account. You might want email messages from your sandbox account delivered only to yourself, or to the people in your organization who are responsible for designing the new campaigns. You might want to ensure email messages generated from sandbox web stores are not delivered to recipients outside your organization. In all these cases, choose the **Send Email To** option.

> **Important:** Email messages generated from sandbox web stores will not be sent to the user logged in to the NetSuite UI. For example, an order notification email message would be sent to the shopper's email address, not the logged in user's email address. To prevent this, choose the **Send Email To** option.

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

Examples of security-sensitive emails include:

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

Set preferences for sandbox email delivery in your production account on the Email Preferences page.

To set email delivery preferences for all sandbox accounts:

1. Log in to your NetSuite production account.
2. Go to Setup > Company > Email > Email Preferences.
3. Choose your preference on the **Sandbox and Release Preview** subtab. Under **Sandbox Options**, choose from the following:

Option	Description
Send Email To (This is the recommended option.)	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 sandbox. This option ensures web store generated email messages are routed to the desired recipient.
Send Email to Logged In User	Choose this option to route email messages to the user 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 will not be sent to the user logged in to the NetSuite UI. For example, an order notification email message would be sent to the shopper's email address, not the logged in user's email address. To prevent this, choose the **Send Email To** option instead. - Email messages sent from an external email client will not be sent to the user logged in to the NetSuite UI. For example, a reply email message would not

Option	Description
	be sent 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. On the Sandbox Accounts page, click **Copy Data to Sandbox** (or **Refresh Sandbox**). Your email delivery preferences are applied to all your sandbox accounts.

> **Important:** During the upgrade period for a new release of NetSuite, please pay attention to your scheduled upgrade date. Do not request a sandbox refresh when the upgrade date is near. A refresh will fail if it does not complete before your scheduled upgrade begins. See Scheduled Version Upgrade Dates and Refresh Requests.

After your sandbox account has been refreshed, you can log in to modify your email preferences directly on the sandbox account. This way, if you use multiple sandbox accounts, you can set different preferences for email delivery in each account. For more details, see Features Available for Testing in a Sandbox.

> **Note:** Upon refresh, the settings in your sandbox accounts always revert to the sandbox email preferences you set in your production account.

Entering Domain Keys in Your NetSuite Account

To set up DKIM for your sandbox account, you must first enter Domain Keys in your NetSuite account.

To enter Domain Keys in your NetSuite account:

1. In your sandbox 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, 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 **Generate Key Pairs** 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 Setting Up a DNS Text Record procedure to set up a DNS text record with your domain provider.

> **Important:** Complete this 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.

Setting Up a DNS Text Record

To set up DKIM for your sandbox account, you must set up a DNS text record with your domain provider.

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 **DNS Entry** 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 Activating DKIM Keys in your NetSuite Account procedure to activate the keys you set up in NetSuite.

Activating DKIM Keys in your NetSuite Account

To set up DKIM for your sandbox account, you must activate DKIM keys in your NetSuite account.

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 Verifying Your DKIM Setup procedure to verify your DKIM setup.

Verifying Your DKIM Setup

Make sure you 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.

NetSuite Sandbox FAQ

See the following for answers to common questions about NetSuite sandboxes.

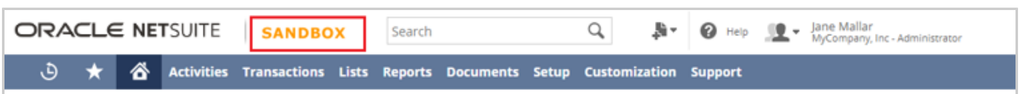
I do not see my new sandbox when I log in. Why not?

When you are notified that your new sandbox has been provisioned, the initial account status of the sandbox is **Offline** and the refresh status is **Pending Copy to Sandbox**. Your company's NetSuite account administrator must log in to your production account, go to the Sandbox Accounts page, and click the **Copy Data to Sandbox** button. Clicking the button initiates the copy of production data to the sandbox. When the data copy is complete, on the Sandbox Accounts page, the sandbox account status displays a green check (#) indicating the sandbox is online and available.

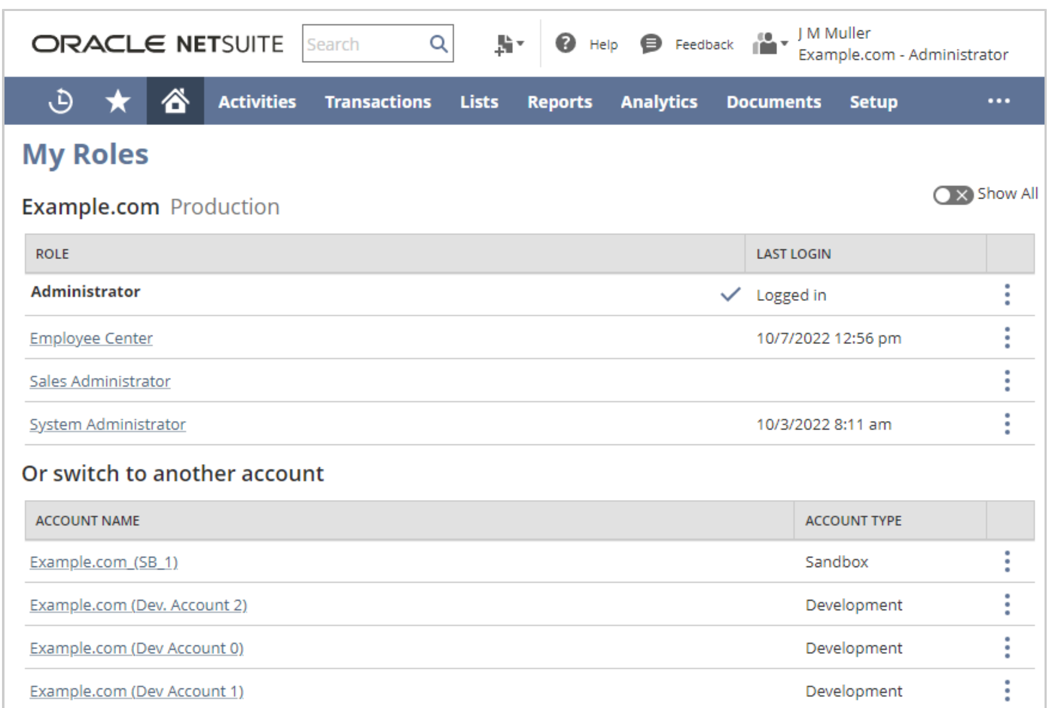
For more information, see Using the Sandbox Accounts Page.

How can I tell if I am in my sandbox?

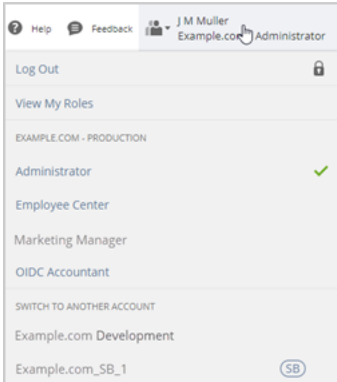
- As always, a sandbox logo is shown in the header.



- There is also an Account Type column on the My Roles page so you can distinguish between your production and sandbox accounts. Sandbox accounts have the account type **SANDBOX**.



- From the Change Roles list it is indicated by an **SB** logo beside any sandbox accounts.



How can I differentiate between my production and sandbox accounts?

To help differentiate between account types, administrators can change the name of each account to include the type by going to **Setup** > **Company** > **Company Information** and changing the **Company Name**. Users can go to the Set Preferences page and color code their accounts by changing the **Color Theme** under **Appearance**.

Can I access my production and sandbox accounts simultaneously?

Yes. For details, see Simultaneous Access to More than One NetSuite Account Type.

What is the difference between a sandbox account and a development account?

Sandboxes are intended for full end-to-end testing, using your production data. Development accounts are intended for unit testing, and should only contain test data.

For more information, see NetSuite Development Accounts, Understanding NetSuite Account Types, and NetSuite Sandbox.

For information about working in these different types of accounts with SuiteApps, see the help topics SuiteApps and Sandbox Accounts and SuiteApp Development Process with SuiteBundler.

What features can I test in a sandbox?

Many NetSuite features can be tested in sandbox accounts. For more information, see Features Available for Testing in a Sandbox. The **Testing Notes** column in the **Testing Features in a Sandbox** table contains details about differences that might affect how you test the feature.

Can I test secure domains in my sandbox account?

Yes. For more details on what can be tested, see Features Available for Testing in a Sandbox.

I do not see all my production data in my sandbox. Why not?

For various reasons, not all data from your production account is copied to your sandbox account. See Data That is Not Copied from Production to Sandbox for more information.

My account has more than one sandbox. How do I switch between sandboxes?

If multiple sandbox accounts are associated with a single production account, users and their assigned roles are duplicated across these accounts.

Each user has a separate role for each sandbox account on the My Roles page and in the Change Roles list. Sandboxes are identified by the SB icon in the Change Roles list and by the label SANDBOX in the Account Type column on the My Roles page.

> **Note:** To help distinguish between multiple accounts, you can change the name of each account by going to **Setup** > **Company** > **Company Information** and changing the **Company Name**. Users could also color code accounts by changing the **Color Theme** under **Settings** > **Set Preferences** > **Appearance**. These measures will need to be reset after each refresh.

Will Two-Factor Authentication work?

Yes. Two-factor authentication using your phone or an Authenticator app is shared between your production and sandbox accounts. For details, see the help topic 2FA in the NetSuite Application.

Will all users who have access to my production account see a sandbox role when they log in to the production account?

As the administrator, you decide who has access to the sandbox account. Go to the Sandbox Accounts page and under the Access After Sandbox Refresh preference, select either administrators only or all users. If the administrators only option is selected, only the administrator role is copied to the sandbox account.

How do I add (or remove) individual users access to a sandbox?

After a sandbox has been refreshed, account administrators can grant individual users access to this sandbox. See Granting Access to Your Sandbox Account for information on adding and removing access for individual users to your sandbox account.

About Sandbox Refreshes

The following questions and answers are specific to refreshing your sandbox.

What determines the Snapshot Date?

The **Snapshot Date** field on the Sandbox Accounts page displays the date and time of the snapshot taken of the account that was used for the most recent refresh. The snapshot is copied from the database backup from the night before the sandbox refresh actually begins. This date is not necessarily the same as the date the refresh was requested. It depends on the date when your refresh request starts processing.

The snapshot of the account is usually taken from the backup that occurred the night before the actual refresh starts. However, there are occasions when a backup is not suitable for creating the snapshot. In these rare cases, the snapshot is taken from the most recent suitable backup of the production database.

It is not possible to guarantee a specific date or time to be used for the snapshot.

Why is the Refresh Sandbox button missing from the Sandbox Accounts page?

You will not see the Refresh Sandbox button or the Copy Data to Sandbox button on the Sandbox Accounts page in the following circumstances:

- When a refresh request is already in progress.
- When the sandbox has been taken offline for a NetSuite version upgrade.

- During NetSuite version upgrades, except in cases where the sandbox account and its associated production account are running the same version of NetSuite.

> **Note:** When they are not running the same version, the Refresh Status field will display a popup with a **version mismatch** error message.

How long does it take for my sandbox to be refreshed?

Various factors determine how long it takes to refresh your sandbox, including the size of your production account (the amount of data), the number of integrations in your production account, and the number of customers requesting a sandbox refresh during the same time period as your request was submitted.

Can I cancel my sandbox refresh request?

It is not possible to cancel a refresh request.

A refresh completely replaces the content of the sandbox account with the content of the production account. After your sandbox account has been refreshed from production, it cannot be restored to its prior state. Before submitting a request to refresh a sandbox account, please ensure that your company is fully notified and ready for the refresh from production. Your refresh request cannot be canceled or otherwise modified in any way after it has been accepted.

I have a question about the number of sandbox refreshes used. Who should I contact?

For questions about the **Refreshes Used/Refreshes Total** field, please contact NetSuite Customer Support.

I have some important data I want to keep in my sandbox. Can my data be saved during the next refresh?

A sandbox is not intended for storage of data. A refresh completely replaces the content of the sandbox account with the content of the production account snapshot. Any data that exists in a sandbox before a refresh is requested is overwritten by the refresh.

What happens to my sandbox during a NetSuite version upgrade?

All sandbox accounts are taken offline for upgrade at the same time the production account is taken offline for upgrade. For more information, see Data That is Not Copied from Production to Sandbox.

My NetSuite version upgrade date is near, should I refresh my sandbox?

Do not request a sandbox refresh when the upgrade date is near. A sandbox refresh request will fail if it does not complete before your scheduled version upgrade begins.

Use your best judgment to decide when to request a sandbox refresh during the version upgrade period for a NetSuite release. For guidelines, see Scheduled Version Upgrade Dates and Refresh Requests.

What does the refresh status Delayed mean?

On the Sandbox Accounts page, when the refresh status field displays **Delayed**, it indicates the refresh progress has stalled for some reason. When a sandbox refresh status is changed to Delayed, the Estimated Refresh Time field is blank. When the refresh resumes, the estimated refresh time is recalculated, and the new value is displayed in the Estimated Refresh Time field.

NetSuite Development Accounts

NetSuite development accounts are isolated from your production account, in which you can develop and test new applications and customizations without worrying about affecting your production account.

The best time to begin using development accounts is at the start of a new project. It can be difficult to migrate to a development account if you are already in the middle of a development project in your sandbox. You should finish existing projects in your sandbox, and start new projects in a development account.

> **Note:** You need multiple sandbox accounts if you have multiple large projects which need distinct accounts for User Acceptance Testing (UAT).

Development accounts have the same features and NetSuite-provisioned SuiteApps as your company's production account, but do not contain any production data. You can populate the account with only the data you need for development and testing purposes.

Because development accounts do not contain any production data, you can let outside partners develop something for you. For this reason, you should enter only non-sensitive test data in development accounts.

> **Warning:** Do not enter sensitive information or any real customer data, such as contact information or credit card numbers, in development accounts. Transactions will be processed and invoices will be generated.

> **Note:** Email messages sent from development accounts are delivered to the logged-in user.

Benefits of Development Accounts

Development accounts provide ideal places for:

- Creating new applications and customizations.
- Testing customization elements before deployment.
- Fixing issues with existing customizations.
- Trying out third-party integration features.

Actions you take in development accounts, such as transaction entries, record deletions, and form customizations, have no effect on your NetSuite production account. However, development accounts are not guarded from external touch points in the same way as sandbox and Release Preview accounts can be. For example, in sandbox and Release Preview, you can specify how you want email to be handled in these accounts. You cannot configure email delivery from a development account in a similar manner. Email messages sent from development accounts are delivered to the logged-in user.

Development accounts are never refreshed, unlike sandbox accounts, so you never have to worry about your work in progress being accidentally overwritten by a refresh.

- For information on acquiring one or more development accounts, contact your NetSuite account representative.

Administrators can change the name of each development account at Setup > Company > Company Information to make it easier to distinguish among these accounts. Development accounts are not refreshed, unlike sandbox accounts, so these changes will not be overwritten.

Features Available in Development Accounts

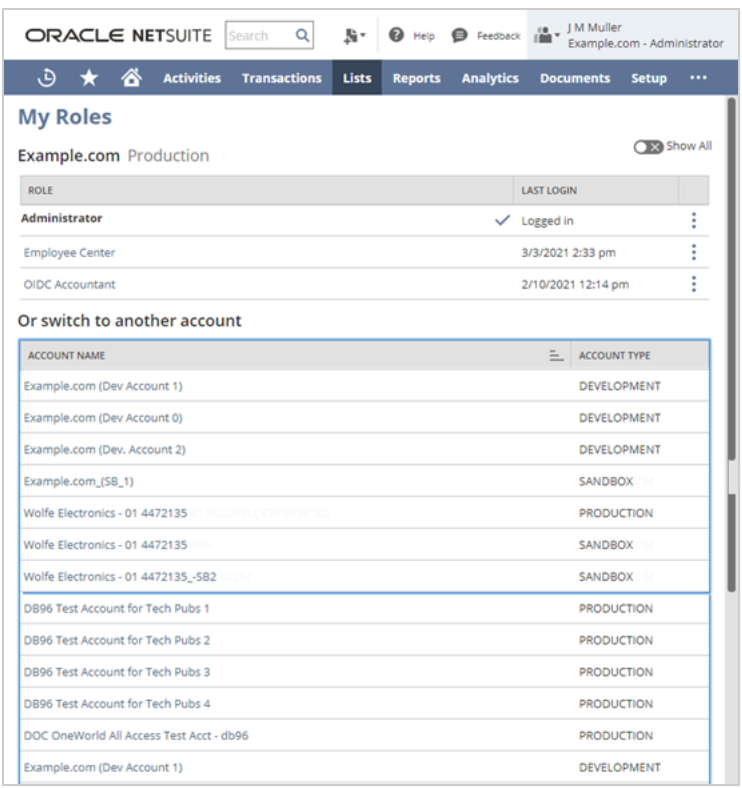
The development account is different from a sandbox account, in that the development account does not contain a copy of your production data. When the development account is provisioned, NetSuite makes available the same features and NetSuite-provisioned SuiteApps that are available in your production account. SuiteApps created by third parties are not included in development accounts when they are provisioned.

Warning: Do not enter sensitive information or any real customer data, such as contact information or credit card numbers, in development accounts. Transactions will be processed and invoices will be generated.

Note: Email messages sent from development accounts are delivered to the logged-in user.

Logging in to Development Accounts

Users access development accounts in the same way that they access their production account. They can open a browser window and go to `system.netsuite.com` and enter their email address and password on the login page. Their role in a development account can be selected from the My Roles page or the Change Roles list.



By default, new development accounts are only accessible to the administrator for whom the account was provisioned. This administrator can create up to 10 users for each account. See Granting Access to Development Accounts. Users who need access to development accounts should contact this administrator.

Granting Access to Development Accounts

Account administrators can select 10 users who can access each development account. Users must be created separately in each development account.

To grant development account access to a user:

1. Log in to a development account. See Logging in to Development Accounts.
2. Go to Lists > Employees > Employees > New and create an employee record for the user.

   If this user is an employee in your production account, you can enter the username, email address, assign a role, and check the **Give Access** box on the **Access** tab. For more information about creating an employee record, see the help topic Adding an Employee.
3. Click **Save**.

   If prompted whether the user should inherit the password from the production account, click OK. The employee to whom you have granted access can now log in to this development account.

Contacting Support for Development Account Issues

To report problems with your development account in this release, create a support case. You will need to provide your account ID when creating a case. From your development account, go to Setup > Company > Company Information to view the Account ID field, located below the Time Zone field in the right column.

> **Important:** The way you contact NetSuite Customer Support, and the way you create a case varies depending on the level of support purchased with your account.

You can submit a question or issue online to NetSuite Support professionals. You can send questions or comments 24 hours a day. You will receive a response as soon as possible. Response times vary depending on the level of support you have purchased and the support team's current case load. To improve response times, please provide lots of information (more is better), and if applicable, include steps to reproduce the problem.

Contact Support by Phone is available to customers with Premium support, and to eligible NetSuite Partners, 24 hour a day, seven days a week. Call the number provided by your account manager. Please have your account number ready when you call for quicker assistance.