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Copy to Account Overview

**Warning:** Copy to Account is a beta feature. The contents of this feature are preliminary and may be changed or discontinued without prior notice. Any change may impact the feature's operation with the NetSuite application. Warranties and product service levels do not apply to this feature or the impact of the feature on other portions of the NetSuite application. We may review and monitor the performance and use of this feature. The documentation for this feature is also considered a beta version and is subject to revision.

Copy to Account is an administrator tool that can copy a custom record (custom object) between your accounts. From the NetSuite application, you can select a target account, choose dependencies, select to include record instances, then preview and deploy the 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 that is supported by SDF provided that it is not locked, hidden, or part of another SuiteApp. 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.

![Copy to Account Diagram](image)

From the custom record that you want to copy, you can click a link to launch Copy to Account. The Copy to Account tool goes through four steps: Account, Dependencies, Preview, Deployment.

![Copy to Account Steps Diagram](image)

For logging information, you can view a live status of the deployment during the preview and deployment steps. Audit trails for completed deployments are saved in the target account.
Important: In some cases, object support is only partial and a subset of the fields can not be copied. For more information, see the help topic The SDF XML Reference. If an object field is not listed in SDF XML reference, it is not supported by SDF and cannot be copied with Copy to Account. See Handling Dependency Errors for information about other limits.

For more information, see the following topics:

- Setting Up Copy to Account
- Using Copy to Account

Watch the Copy to Account video.
Setting Up Copy to Account

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

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SDF enabled</td>
<td>Make sure that SDF is enabled in the NetSuite account. Copy to Account is powered by the SuiteCloud Development Framework. See the help topic Enabling SDF in Your NetSuite Account (Admin Only).</td>
</tr>
<tr>
<td>Copy to Account enabled</td>
<td>Make sure the Copy to Account feature is enabled in the target NetSuite account. Turning on this feature indicates that the administrator of the account explicitly accepts new and updated customizations from another account via Copy to Account. See Enabling Copy to Account in Your NetSuite Account (Admin Only).</td>
</tr>
<tr>
<td>Matching NetSuite account versions</td>
<td>Your target NetSuite account must match the version of the NetSuite account you copy from.</td>
</tr>
<tr>
<td>Administrator role access</td>
<td>Copy to Account is available to administrator roles only. For more information about administrator roles, see the help topic The NetSuite Account Administrator.</td>
</tr>
</tbody>
</table>

If administer an account that is missing other Copy to Account requirements, the account appears in target account list but cannot be selected.

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

To copy a custom object to your target account, the Copy to Account feature must be enabled in the target account by an account administrator. For information about enabling features, 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.
4. If you have not already enabled the SDF feature, you will be prompted to enable it for Copy to Account to be used.

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

**Warning:** Copy to Account is a beta feature. The contents of this feature are preliminary and may be changed or discontinued without prior notice. Any change may impact the feature's operation with the NetSuite application. Warranties and product service levels do not apply to this feature or the impact of the feature on other portions of the NetSuite application. We may review and monitor the performance and use of this feature. The documentation for this feature is also considered a beta version and is subject to revision.

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 to Copy To
3. Viewing and Selecting Dependencies of the Custom Object to Copy
4. Previewing with Copy to Account
5. Deploying a Custom Object with Copy to Account

After a deployment, you can go to the target account to download the log. See Viewing the Copy to Account Log.

Copying a Custom Record to another Account via Copy to Account

Starting Copy to Account on a Custom Record

From the source account, on a custom record, click **Copy to Account (Beta)**.

**Note:** The Copy to Account (Beta) 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 to Copy To

After you click the Copy to Account link, you can choose the target account you want to copy your custom object to. The SDF and Copy to Account features must be enabled in the target account, and you must also have administrator access.

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.

Completing the Account Page

Complete the two fields on the Account Page to move on to the next step of Copy to Account.

1. Click the list to choose Target Account.

   **Note:** If the target account that you want to select is grayed out or not in the list, review the requirements for using Copy to Account. See Setting Up Copy to Account.

2. Specify the Deployment Audit Trail Name.

3. Click Next.

Viewing and Selecting Dependencies of the Custom Object to Copy

Copy to Account calculates the dependencies, references, and instances related to the custom record. A table is generated to help you select which dependencies to include in your copy. The grid shows the objects upon which this record is dependent and cannot function correctly without. Using a tree structure, it shows the required and optional items, parent and child components, target account status, and other information.

The Present in Account status is used for objects that already exist in the target account. By default, these existing dependencies are not included in the copy process. You can include them as part of the copy, for example if you updated those objects and want the target account to get the change.
Objects with a Absent from Account status are required. You cannot clear the box for Absent in Account dependencies in the Select dependencies table.

**Select Dependencies**

> **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](#).

Required dependencies are automatically checked. You can select more components and include instances.

If the status of the dependency is Present in Target Account, including it in the copy is optional.

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

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

3. Click **Next**.

### Previewing with Copy to Account

Preview includes a validation phase against the target account. When the preview is complete, the log shows you the expected modifications on the target account. For example, the custkpiscorecard1 object will be created.

Object creations and updates that happen during deployment are noted. If preview is unsuccessful, you can go back to the Dependencies step and find the problematic component by the script ID that appears in the preview log.

**Preview your Copy to Account Deployment**

1. On the Preview page, click Preview.
2. If preview is successful, click Deploy,
Copying a Custom Record to another Account via Copy to Account

Deploying a Custom Object with Copy to Account

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

Deploying to your target account

   
   To access a live log of the deployment, keep this page open.

2. 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 in Excel file format.

View a Copy to Account Log

1. From the target account, go to at Customization > SuiteCloud Development > Deployment Audit Trail.
The name of your log is identified by the deployment name you specified in the first Copy to Account step. For more information, see Selecting a Target Account to Copy To.

2. Click Download Log.

Handling Dependency Errors

If an icon appears beside the 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 grid, or remove the dependency from the object itself.

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="icon" alt="Locked or Hidden" /></td>
<td>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.</td>
</tr>
<tr>
<td><img src="icon" alt="Circular" /></td>
<td>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.</td>
</tr>
</tbody>
</table>

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**

Choose object dependencies to include:

<table>
<thead>
<tr>
<th>OBJECT NAME</th>
<th>SCRIPT ID</th>
<th>OBJECT TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entity Value</td>
<td>cust_rec_entity_value</td>
<td>Custom Record</td>
</tr>
<tr>
<td>Custom Entities List</td>
<td>cust_list_entities_list</td>
<td>Custom List</td>
</tr>
<tr>
<td>Customer Rating</td>
<td>cust_rec_customer_rating</td>
<td>Custom Record</td>
</tr>
<tr>
<td>Top Customers</td>
<td>cust_search_top_customers</td>
<td>Saved Search</td>
</tr>
<tr>
<td>Customer Review</td>
<td>cust_rec_customer_review</td>
<td>Custom Record</td>
</tr>
<tr>
<td>Customer Rating</td>
<td>cust_script_customer_review_approval</td>
<td>Script</td>
</tr>
</tbody>
</table>
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, it already exists in the target account and Copy to Account may skip it.