should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Sample Code

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided “as is” and “as available”, for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at www.netsuite.com/tos.

Oracle may modify or remove sample code at any time without notice.

No Excessive Use of the Service

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer's use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle's other customers, Oracle may slow down or throttle Customer's excess use until such time that Customer's use stays within reasonable limits. If Customer's particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer's actual usage pattern.

Beta Features

Oracle may make available to Customer certain features that are labeled “beta” that are not yet generally available. To use such features, Customer acknowledges and agrees that such beta features are subject to the terms and conditions accepted by Customer upon activation of the feature, or in the absence of such terms, subject to the limitations for the feature described in the User Guide and as follows: The beta feature is a prototype or beta version only and is not error or bug free and Customer agrees that it will use the beta feature carefully and will not use it in any way which might result in any loss, corruption or unauthorized access of or to its or any third party's property or information. Customer must promptly report to Oracle any defects, errors or other problems in beta features to support@netsuite.com or other designated contact for the specific beta feature. Oracle cannot guarantee the continued availability of such beta features and may substantially modify or cease providing such beta features without entitled Customer to any refund, credit, or other compensation. Oracle makes no representations or warranties regarding functionality or use of beta features and Oracle shall have no liability for any lost data, incomplete data, re-run time, inaccurate input, work delay, lost profits or adverse effect on the performance of the Service resulting from the use of beta features. Oracle's standard service levels, warranties and related commitments regarding the Service shall not apply to beta features and they may not be fully supported by Oracle's customer support. These limitations and exclusions shall apply until the date that Oracle at its sole option makes a beta feature generally available to its customers and partners as part of the Service without a “beta” label.
Send Us Your Feedback

We'd like to hear your feedback on this document.
Answering the following questions will help us improve our help content:

- Did you find the information you needed? If not, what was missing?
- Did you find any errors?
- Is the information clear?
- Are the examples correct?
- Do you need more examples?
- What did you like most about this document?

Click [here](#) to send us your comments. If possible, please provide a page number or section title to identify the content you're describing.

To report software issues, contact NetSuite Customer Support.
# Table of Contents

Copy to Account Overview ................................................................. 1
Setting Up Copy to Account ............................................................ 3
    Enabling Copy to Account in Your NetSuite Account (Admin Only) .................................................. 3
Using Copy to Account ................................................................... 5
    Copying a Custom Record to another Account via Copy to Account .................................................... 5
    Handling Dependency Errors ....................................................... 9
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.

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.

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

**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 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 Copy to Account, 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 an 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**.

![Select Dependencies Table](image)

**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="image" alt="Locked or Hidden" /></td>
<td>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="image" alt="Circular dependency" /></td>
<td>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
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.