Release Preview Test Plan

- Overview of Release Preview Information
- Preparing for Testing
- Recommended Test Plan

Overview of Release Preview Information

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

Our goal is to provide a smooth and seamless transition to a new release. We hope that by making this information available, working with you to ensure you perform the recommended tests, and providing other needed guidance, we will avoid any major problems or surprises when you go live with the new version.

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

- Preparing for Testing includes the following sections:
 - New Visual Design for Version 2014 Release 2
 - Setting Preferences for Release Preview Email
 - Accessing Your Release Preview Account
 - Functionality Available for Testing
 - How to Report Issues
- Recommended Test Plan includes the following sections:
 - Test Business Workflows
 - Additional Tests

Note: Performance in your Release Preview account is not always on par with your production account. You can expect that the first few times you complete a process or task, such as entering a sales order, performance will be a bit slow. You should experience faster performance as you repeat the process or task through several iterations of testing. Release Preview is intended for testing the functionality of new features, not as a performance measurement tool for the new version.

Preparing for Testing

Important: As you prepare for testing in Release Preview, make a note of the various scheduled events that run in your production environment. These scheduled events should be disabled before the account is upgraded to the new release, and enabled after the upgrade is complete.

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

- New Visual Design for Version 2014 Release 2 describes changes in the user interface that should be evaluated for any effects in your environment.
- Setting Preferences for Release Preview Email provides instructions for controlling email generation from the Release Preview environment.
- Accessing Your Release Preview Account details how to access your Release Preview account so that you can familiarize yourself with the new features and changes in this release.
- Functionality Available for Testing contains a table of the features that can be tested in Release Preview.
- How to Report Issues explains what to do if you encounter an issue.

New Visual Design for Version 2014 Release 2

In addition to the regular testing you do before every release, you need to prepare for the changes introduced with NetSuite's updated user interface. Be sure to take a look at the new design in the Release Preview environment, so you can provide information to your users, and re-optimize custom forms as needed.

It is especially important that you prepare for possible SuiteScript impact of user interface changes. These changes have the potential to affect results for existing SuiteScripts. It is strongly recommended that you thoroughly test all of your customizations in the Release Preview environment, particularly client scripts, portlet scripts, and Suitelets. If you discover problems, contact your account manager or file a support case. For more details, see the Version 2014 Release 2 Release Note SuiteScript Impact of Updated NetSuite User Interface.

For general information about the updated user interface, see the following:

• Preview Document: Prepare for the New UI in Release 2014.2

- Version 2014 Release 2 Release Note: New Visual Design for User Interface
- Help Topic: New User Interface for Version 2014 Release 2

Setting Preferences for Release Preview Email

Account administrators can set a preference for delivery of email messages for the Release Preview environment in the production account, and also set your preferences directly in the Release Preview environment on the Printing, Fax & Email Preferences page, on the Email tab.

For example, during testing you might not want customers to receive email messages from the Release Preview account. In this case, you may want email from your Release Preview account delivered only to yourself, or to the people in your organization who are responsible for testing.

To set email delivery preferences for Release Preview:

- Log in to your NetSuite production account.
- 2. Go to Setup > Company > Printing, Fax & Email Preferences.
- 3. Click the **Email** tab.
- Choose your preference in the Sandbox and Release Preview section. Under Release Preview Options, choose from the following:
 - **Send Email To** Enter the address where email messages should be delivered. You can enter multiple email addresses separated by commas. This preference is recommended, as it enables you to specify each email address for routing email messages from Release Preview.
 - Send Email to Logged in User Choose this option to route all email messages only to the person logged in to the Release Preview account.
 - Do Not Send Email Choose this option if you do not want email messages sent from the Release Preview account.
- 5. Click Save.
- Your email delivery preferences will be applied to your Release Preview account.
 - **Important:** Release Preview is a copy of your production account as of a certain date, so the data in Release Preview may not be the same as in your production account. If you recently changed your Release Preview email preferences in your production account, they may not be reflected in the snapshot used to generate your Release Preview environment. Complete the following steps to verify the email preferences in the Release Preview environment.
- Log in to your NetSuite Release Preview account.

- 8. Go to Setup > Company > Printing, Fax & Email Preferences.
- Click the Email tab.
- 10. Verify your email preferences in the Sandbox and Release Preview section, and if necessary, modify them appropriately.

Accessing Your Release Preview Account

The Primary Contact and the Product Update contacts for your account receive several notifications (by email, and upon login) in the weeks before the scheduled Release Preview start date. These notifications contain details on the Release Preview and Upgrade dates, and announce the day the Release Preview environment is available for testing to begin.

To access your Release Preview account:

- Go to https://system.na1.beta.netsuite.com.
- Log in using your usual email address and password.
- Read the NetSuite Release Preview Agreement and click Continue to accept the terms and access the Release Preview software.
- Read the Version 2014 Release 2 Sneak Peeks and Release Notes 2014.2. documents so that you have time to review new or changed functionality well before the release.
 - **Note:** These documents are also available in the **New Release** portlet.
- Review Test Business Workflows and test your normal, day-to-day tasks as suggested in the following sections to make sure there's nothing unexpected in the new version.

Note: The Release Preview environment is separate from your NetSuite production environment. Use Release Preview only for testing. Be sure your are logged in to your NetSuite production account when you are performing your daily business activities.

Functionality Available for Testing

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

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

Feature	Availability	Limitations
Integrations		
CSV	Yes	

Feature	Availability	Limitations
SuiteAnalytics Connect (formerly ODBC)	Yes	
Web Services	Yes	
Customizations		
Client SuiteScript	Yes	
Custom Records	Yes	
Scheduled SuiteScripts	Available	Scripts will not execute as scheduled, but can be executed manually
Server SuiteScript	Yes	
Partner Integrations		
ACH Vendor Payments	Available	No actions taken
Credit Card Processing	Test-mode only	No actions taken
CTI Integration (Contactual, Five9)	Yes	
Direct Deposit	Available	No actions taken
eBay Integration	Available	No actions taken
Electronic Funds Transfer	Test-mode only	No actions taken
Intellesync	Yes	
Online Bill Pay	No	Automatically disabled in Release Preview
Outlook Integration	No	
Payroll	Available	No actions taken
PayPal Integration	Test-mode only	No actions taken
Perquest	Available	No actions taken
Telephony Integration (Basic)	Yes	
UPS/FedEx Integration for Shipping labels	Test-mode only	No actions taken
UPS/FedEx Integration for Rate querying	Yes	
Miscellaneous Product Areas		
Bulk Merge	No	No actions taken
Email Campaigns	No	No actions taken
Email Case Capture	Yes	
Email Notifications	No	No actions taken
Fax	No	
Memorized Transactions	No	No actions taken
Offline Client	No	Edit the Offline Client config file to point to a different environment, if desired.

Feature	Availability	Limitations
Scheduled Saved Searches	Available	Set to inactive status
Secure Domains	No	Automatically disabled in Release Preview
SuiteFlow workflows	No	Automatically disabled in Release Preview
Web Site	Yes	
Web Store	Yes	

How to Report Issues

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

To submit a case:

- Go to the Support tab of your Release Preview account.
- 2. Click the **Visit the SuiteAnswers Site** link.
- Click the **Contact Support Online** link and provide details of your issue.

A case will be created in the NetSuite Support system under your accounts that will be flagged as a problem in the Release Preview environment.

Recommended Test Plan

Important: As you test in Release Preview, make a note of the various scheduled events that run in your production environment. These scheduled events should be disabled before the account is upgraded to the new release, and enabled after the upgrade is complete.

The following sections provide a plan for thoroughly testing your account in Release Preview:

- Test Business Workflows explains how to document daily workflows, and provides a link to a sample test plan.
- Additional Tests lists areas you should test if the workflow testing has not tested them already, and outlines testing steps.

Test Business Workflows

In order to test successfully in Release Preview you should identify, document, and test the key business workflows (not to be confused with SuiteFlow workflows) in your production account. Testing your workflows is the most important aspect of Release Preview. Compile

a list of the critical task paths your employees follow to get their jobs done and create a document for each process. We recommend that you use a spreadsheet application and create a separate worksheet for each common daily task. Use this spreadsheet as your checklist during testing. The following link provides access to a Microsoft Excel worksheet, a template for testing that includes a Testing Matrix, Workflow worksheets, and examples: ReleasePreviewTestPlan_Template.xls. After downloading the file, you can modify it as needed to suit your testing needs.

At minimum, each business workflow documented should contain the following components:

- **Business Workflow Name:** Provide a unique name
- **Role:** Specify the role to use when testing the process
- **Email:** Specify the email address to use for testing
- Steps: Provide the detailed navigation required to accomplish the desired task
- **Results:** List expected results

Additional Tests

If the business workflow testing did not exercise all the areas of your account, you may need to perform additional tests. The areas to verify are described in the following sections:

- Test Custom Reports and Forms
- Test Custom Centers
- Test Other Customizations
 - Test SuiteScript
 - Test SuiteTalk (Web Services) Integrations
 - Test Installed SuiteApps
- Test Your Web Store
- Test ODBC

Test Custom Reports and Forms

Pay particular attention to any Customized Reports, Customized Forms, Custom Record Types, Custom Searches, or bulk operations such as billing, shipping, and fulfillments. Compile checklists of reports, forms, record types, and other customizations from your production account.

Important: Your custom forms should work as expected in Version 2014 Release 2, but the new visual design will cause the layout change, especially on longer vertical pages. You might need to optimize some of your forms for the new visual design, for example, when there are many custom fields all in the clustered in the main body section. Administrators should take the time look at the most commonly used custom forms. Recommendation: set the browser zoom mode to 75% if there are issues with viewing some forms.

To test custom reports and forms:

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

- Create checklists for various customized reports, forms, record types, and searches. See the following sections for specific procedures for creating checklists.
- Test each form, each script, and each report that uses a formula to ensure they behave as expected. If any customized form, script, or report uses a formula, ensure the formula results are the same as in your production account. For example, run the identical report in your production account and in the Release Preview account. Compare formula columns from the two reports to verify that the results are the same. Check off each item in your checklists after testing.

Important: Release Preview is a copy of your production account as of a certain date, so the data in it may not be the same as in your production account. We recommend that you generate reports using date ranges that can be compared between both accounts.

- Verify that any custom fields or custom record types function as expected. For example, for each custom record, ensure that:
 - Add and Delete behavior is the same as in the production account
 - A record is linked appropriately to a parent record
 - Formulas and forms function as expected
- Check Dashboard functionality: KPIs, KPI Scorecards, Report Snapshots, and other customizations.
- Test your custom business workflows from start to finish. See Test Business Workflows for more information.
- Test Suitelets and custom dashboard portlets. If these customizations do not use SuiteScript UI Objects, and if you have written custom HTML, verify they work as expected in the Release Preview environment.

To create a checklist for testing Transaction Forms customizations:

- 1. Go to Customization > Forms > Transaction Forms.
- 2. Export this list to CSV or .xls.
- Review the list, and remove any items labeled **Customize** in the **Edit** column, as those are NetSuite defaults.
- Save this modified list as your checklist for testing.

To create a checklist for testing Entry Forms customizations:

- 1. Go to Customization > Forms > Entry Forms.
- 2. Export this list to CSV or .xls.
- 3. Review the list, and remove any items labeled **Customize** in the **Edit** column, as those are NetSuite defaults.
- Save this modified list as your checklist for testing. Make a note of any form that is linked to SuiteScript and Script Libraries, and ensure you test these forms.

Note: It is not necessary to test custom forms that you no longer use.

To create a checklist for testing Record Types customizations:

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

To create a checklist for testing Lists, Records, and Fields customizations:

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

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

- If desired, export this list to CSV or .xls. Save this list as your checklist for testing.
- Go to Customization > Lists, Records & Fields > Transaction Body Fields. If desired, export this list to CSV or .xls. Save this list as your checklist for testing.
- 6. Go to Customization > Lists, Records & Fields > Transaction Column Fields. If desired, export this list to CSV or .xls. Save this list as your checklist for testing.
- 7. Go to Customization > Lists, Records & Fields > Transaction Item Options. If desired, export this list to CSV or .xls. Save this list as your checklist for testing.
- Go to Customization > Lists, Records & Fields > Item Number Fields. If desired, export this list to CSV or .xls. Save this list as your checklist for testing.
- 9. Go to Customization > Lists, Records & Fields > Other Custom Fields. If desired, export this list to CSV or .xls. Save this list as your checklist for testing.

To create a checklist for testing Reports and Saved Search customizations:

- 1. Go to Reports > Saved Reports > All Saved Reports.
- 2. This data cannot be exported. Make a list of all your customized reports in an Excel spreadsheet to use as a checklist.
- Go to Reports > Saved Searches > All Saved Searches
- This data cannot be exported. Make a list of all your customized searches in an Excel spreadsheet to use as a checklist.

Test Custom Centers

In the Release Preview, Custom Center links are hard-coded from your production account, for example, the links do not include nal.beta. in the domain name as found in the Release Preview URL. Therefore, when you click custom center links in Release Preview, those links will load pages from your production account instead of the pages from Release Preview.

In order to test pages available from Custom Center links in Release Preview, add nal.beta to each link as follows:

Change: https://system.netsuite.com/pages/customerlogin.jsp?country=US

to: https://system.na1.beta.netsuite.com/pages/customerlogin.jsp?country=US

Test Other Customizations

Areas to test in this section include:

- Test SuiteScript
- Test SuiteTalk (Web Services) Integrations
- Test Installed SuiteApps

How you test other customizations depends on who implemented the customization and whether you are still engaged with that company.

For NetSuite Professional Services Customizations:

- If you are still engaged with NetSuite Professional Services on this work, please contact them or inform NetSuite Support. Support will make Professional Services aware of your Release Preview dates so that they can coordinate testing with you.
- If the custom work has been signed off by you and you use it in your day-to-day routine, engage your internal person who maintains the customization to test it out in Release Preview.

For Third-party (Independent Software Vendor) Customizations:

- If you are still engaged with the third-party on this work, we recommend you make them aware of your Release Preview dates and request their assistance in testing the custom work.
- If the custom work has been signed off by you and you use it in your day-to-day routine, engage your internal person who maintains the customization to test it out in Release Preview.

Test SuiteScript

Read the SuiteScript release notes for details on API changes.

For Version 2014 Release 2, you should be aware of the following changes related to the new visual design:

- SuiteScript has never officially supported direct access to the DOM. If your scripts are accessing the DOM, they may no longer work as expected.
- Quirks mode has been turned off. Quirks mode allowed backward compatibility with older browsers, instead of enforcing compliance with W3C and IETF standards. Validate your custom HTML and scripts' compatibility with HTML5 standards.

For more details, see the Version 2014 Release 2 Release Note SuiteScript Impact of Updated NetSuite User Interface.

To test SuiteScript:

Go to Customization > Scripting > Scripts.

List all scripts in an Excel spreadsheet to use as a checklist to ensure that you test each one.

2. Go to Customization > Scripting > Script Deployments.

List all script deployments in an Excel spreadsheet to use as a checklist to ensure that you test each one.

Go to Customization > Scripting > Scripted Records.

List all scripted records in an Excel spreadsheet to use as a checklist to ensure that you test each one.

- Test all of your operational SuiteScripts for compatibility and to ensure they are working as expected.
- If you find any issues with your Server SuiteScripts you can put the script deployment in testing mode and use the debugger on the nal.beta domain to investigate the problem.

The SuiteScript Debugger URL for your Release Preview account is https:// debugger.na1.beta.netsuite.com

Important: Changes you make to your account while in the debugger.na1.beta domain will affect your Release Preview account only and will NOT affect your production account.

Test SuiteTalk (Web Services) Integrations

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

To test your Web Services application in the Release Preview account, change the version number and add .na1.beta. to your endpoint URL.

For example, change the URL from:

https://webservices.netsuite.com/services/NetSuitePort_2014_1

to:

https://webservices.na1.beta.netsuite.com/services/NetSuitePort_2014_2

The currently supported Web Services versions are:

- https://webservices.na1.beta.netsuite.com/wsdl/v2014_1_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2013_2_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2013_1_0/netsuite.wsdl

- https://webservices.na1.beta.netsuite.com/wsdl/v2012_2_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2012_1_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2011_2_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2011_1_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2010_2_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2010_1_0/netsuite.wsdl

The following Web Services versions are considered to be deprecated:

- https://webservices.na1.beta.netsuite.com/wsdl/v2009_2_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2009_1_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2008_2_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2008_1_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2_6_0/netsuite.wsdl
- https://webservices.na1.beta.netsuite.com/wsdl/v2_5_0/netsuite.wsdl

Test Installed SuiteApps

If you have SuiteApps installed in your account, make sure you test these applications in Release Preview. For third-party applications installed in your account, please contact the solution provider and inform them of your Release Preview dates. Make sure you test all critical business workflows that rely on the third-party solution and inform the solution provider of any issues you may find.

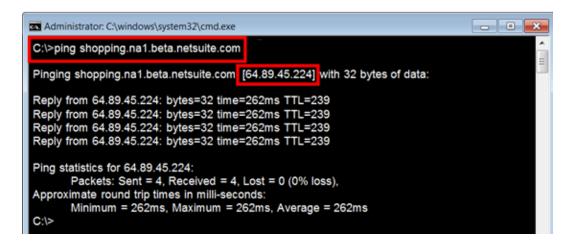
Test Your Web Store

Perform the following configuration procedures to test your web store in Release Preview.

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

To test your web store:

- Open a command window.
- Type ping shopping.nal.beta.netsuite.com and press Enter to obtain the IP address for Shopping.na1.beta.netsuite.com



- Edit the hosts file on your C drive:
 - At the prompt in the command window, type cd Windows/system32/drivers/etc/ and press Enter.
 - b. Edit the hosts file by typing edit hosts and press **Enter**.
 - Add a line to hosts file using the IP Address you obtained from the ping shopping.na1.beta.netsuite.com command. For example:

64.89.45.224 mydomain.com



- Select **File** > **Save**.
- Select **File** > **Exit**.

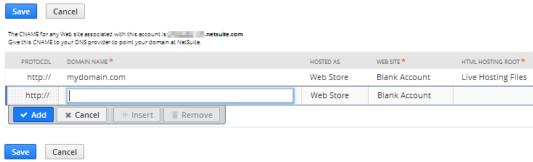


- Log in to your NetSuite account and go to Setup > Site Builder > Domains and specify the following properties:
 - a. Domain name = < *mydomain.com*>
 - b. Hosted as = Web Store
 - c. HTML Hosting Root = Live Hosting Files

The site or page should populate with the company name.

5. Click Save.

Set Up Domains



Go to Setup > Site Builder > Set Up Web Site. Verify that the URL for your custom domain is indicated as Primary.



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

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

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



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

Test ODBC

Perform the following configuration procedures to test your ODBC connection in Release Preview.

Important: To prepare for ODBC testing, in the following procedure you will switch the Service Host entry to connect to the Release Preview environment. Be sure to switch the Service Host entry back to your production account after you finish testing ODBC in Release Preview.

To test ODBC access in your Release Preview account:

- 1. Log out of your current ODBC connection.
- In the Windows Control Panel, double-click Administrative Tools, and double-click Data Source (ODBC).
- In the ODBC Data Source Administrator dialog, select the User DSN for the NetSuite ODBC driver, and click **Configure**.
- In the Driver Setup dialog, change the Service Host entry from odbcserver.netsuite.com to odbcserver.na1.beta.netsuite.com.
- 5. Click **OK** in both dialogs.
- 6. Reconnect your ODBC connection.
- 7. Perform your ODBC tests.

Important: Be sure to switch the Service Host entry back to odbcserver.netsuite.com in order to connect to your production

account.