

patch.

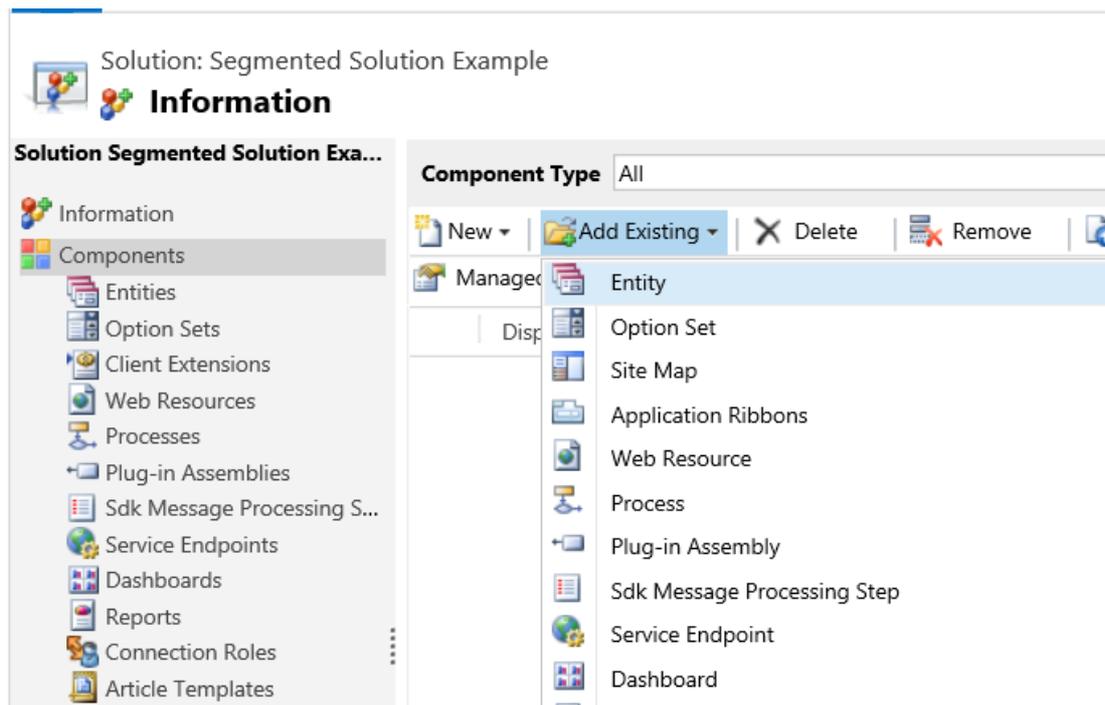
Create a segmented solution with the entity assets you want

To create a segmented solution, start with creating an unmanaged solution and adding the existing resources. You can add multiple system or custom entities, and for each entity, choose the assets you want to include in the solution. The wizard-like setup takes you step-by-step through the process of adding entity assets.

1. Go to **Settings > Solutions**.
2. Select **New** and create a solution. Enter information in the required fields. Select **Save & Close**.
3. Open the solution you just created. In the **Add Existing** drop-down list, select **Entity**.
4. In the **Select solution components** dialog box, select one or more entities you want to add to the solution. Select **OK**.
5. The wizard opens. Follow the wizard to add assets for each selected entity to the solution.
6. Select **Publish** for changes to take effect.

The following illustrations provide an example of creating a segmented solution by choosing entity assets from the `Account`, `Case`, and `Contact` entities.

Start by choosing the **Entity** component.



Then, select the solution components.

Select solution components

Select one or more solution components

Component Type: Entity View: Customizable

✓	Display Name ↑	Name	Type	State	Customizable	Desc
	Channel Access Profile Rule Item	channelaccessprofileruleite...	Entity	Managed	True	Define:
	Competitor	competitor	Entity	Managed	True	Busine
	Competitor Address	competitoraddress	Entity	Managed	True	Additic
	Connection	connection	Entity	Managed	True	Relatio
	Connection Role	connectionrole	Entity	Managed	True	Role d
✓	Contact	contact	Entity	Managed	True	Person
	Contract	contract	Entity	Managed	True	Agreer
	Contract Line	contractdetail	Entity	Managed	True	Line ite
	Contract Template	contracttemplate	Entity	Managed	True	Templ

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OK Cancel

Follow the wizard. In Step 1, starting in alphabetical order, select the assets for the first entity, the **Account** entity, as shown here.

Account - 1 of 3

Select Entity Assets to Include in the solution Include entity metadata Add All Assets

Forms Views Charts Fields Keys 1:N N:1 N:N Messages Business Rules Hierarchy Settings

System Forms **Active Forms**

✓	Name	Form State	Form Type ↑	State	Customizable	Version
	Account Card form	Active	Card	Managed	True	8.0.0.0
	Account	Active	Main	Managed	True	5.0.0.0
	Account MainInteractionCentric	Active	Main Interaction...	Managed	True	8.0.0.0
	Information	Active	Mobile - Express	Managed	True	5.0.0.0
	Account Quick Create	Active	Quick Create	Managed	True	6.0.0.0
	Account Hierarchy Tile Form	Active	Quick View Form	Managed	True	7.0.0.0
	Social Profiles	Active	Quick View Form	Managed	True	6.1.0.0
	Account Reference Panel	Active	Quick View Form	Managed	True	8.0.0.0
	Recent Cases and Entitlements	Active	Quick View Form	Managed	True	8.0.0.0

1 - 10 of 10 (0 selected) Next Cancel

Open the **Fields** tab and select the **Account Number** field.

Account - 1 of 3

Select Entity Assets to Include in the solution Include entity metadata Add All Assets

Forms Views Charts Fields Keys 1:N N:1 N:N Messages Business Rules Hierarchy Settings

View: All

✓	Name	Schema Name ↑	Display Name	Type	Field Type	State
	accountcategorycode	AccountCategoryCode	Category	Option Set	Simple	Managed
	accountclassificationcode	AccountClassificationCode	Classification	Option Set	Simple	Managed
	accountid	AccountId	Account	Primary Key	Simple	Managed
✓	accountnumber	AccountNumber	Account Number	Single Line of Text	Simple	Managed
	accountratingcode	AccountRatingCode	Account Rating	Option Set	Simple	Managed
	address1_addressid	Address1_AddressId	Address 1: ID	Primary Key	Simple	Managed
	address1_addresstypecode	Address1_AddressTypeCode	Address 1: Addr...	Option Set	Simple	Managed
	address1_city	Address1_City	Address 1: City	Single Line of Text	Simple	Managed
	address1_composite	Address1_Composite	Address 1	Multiple Lines of...	Simple	Managed

1 - 143 of 143 (1 selected)

Next Cancel

In Step 2, for the **Case** entity, add all assets.

Case - 2 of 3

Select Entity Assets to Include in the solution Include entity metadata Add All Assets

Forms Views Charts Fields Keys 1:N N:1 N:N Messages Business Rules Hierarchy Settings

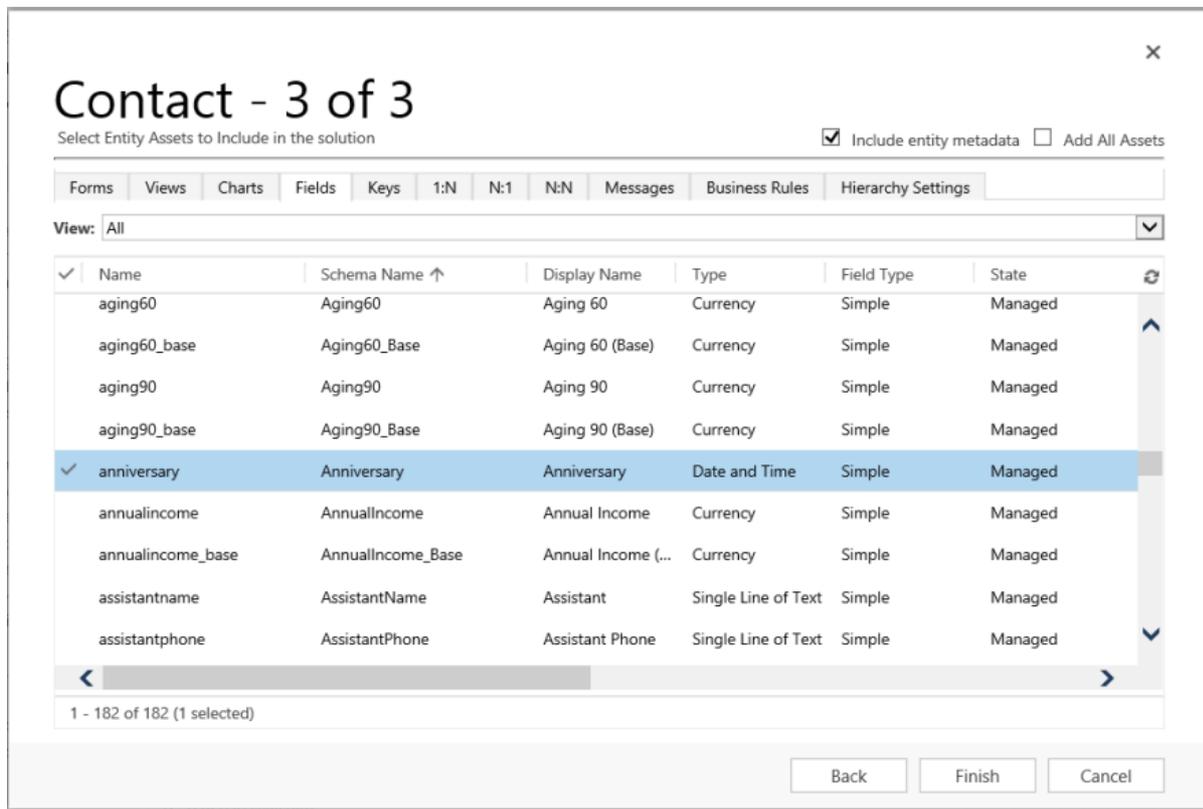
System Forms Active Forms ▾

✓	Name	Form State	Form Type ↑	State	Customizable	Version
	Case Card	Active	Card	Managed	True	8.0.0.0
	Case	Active	Main	Managed	True	5.0.0.0
	Case MainInteractionCentric	Active	Main Interaction...	Managed	True	8.0.0.0
	Information	Active	Mobile - Express	Managed	True	5.0.0.0
	Case Quick Create	Active	Quick Create	Managed	True	6.0.0.0
	Case Reference Panel	Active	Quick View Form	Managed	True	8.0.0.0

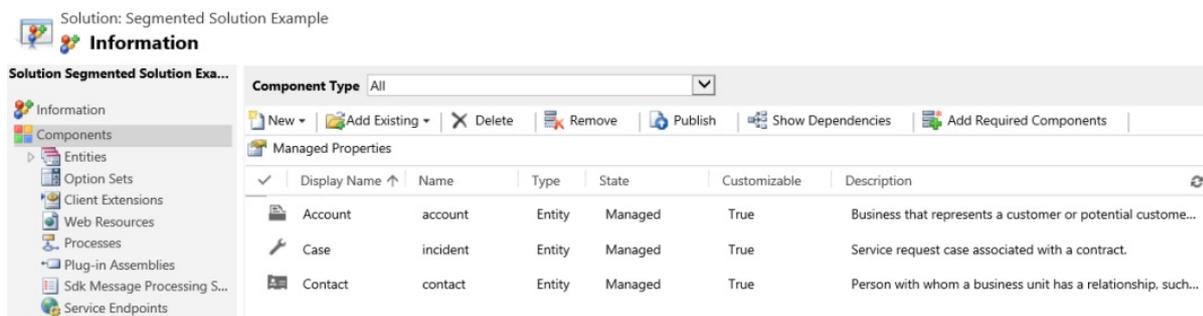
1 - 6 of 6 (0 selected)

Back Next Cancel

In Step 3, add the **Anniversary** field for the **Contact** entity.



As a result, the segmented solution that's created contains three entities, `Account`, `Case`, and `Contact`. Each entity contains only the assets that were chosen.



Create a solution patch

A patch contains changes to the parent solution, such as adding or editing components and assets. You don't have to include the parent's components unless you plan to edit them.

Create a patch for an unmanaged solution

1. Go to **Settings > Solutions**.
2. In the grid, select an unmanaged solution to create a patch for. Select **Clone a Patch**. The dialog box that opens contains the base solution's name and the patch version number. Select **Save**.
3. In the grid, find and open the newly created patch. Just like with the base solution, follow the wizard to add the components and assets you want.
4. Select **Publish** for your changes to take effect.

The following illustrations provide an example of creating a patch for an existing solution. Start by selecting **Clone a Patch** (in the compressed view, the **Clone a Patch** icon is depicted as two small squares, as shown below).

All Solutions ▾				
Name	Display Name	Version	Installed On ↑	Package Typ...
✓ SegmentedSolutionExample	Segmented Solution Exam...	1.0.1	10/19/2015	Unmanaged

In the **Clone To Patch** dialog box you see that the version number for the patch is based on the parent solution version number, but the build number is incremented by one. Each subsequent patch has a higher build or revision number than the preceding patch.

Clone To Patch ✕

Create a patch for the selected unmanaged solution. A patch contains changes to the existing solution.

Base Solution Name: SegmentedSolutionExample

Display Name:

Version Number: 1.0.

The following screenshot shows the base solution **SegmentedSolutionExample**, version **1.0.1.0** and the patch **SegmentedSolutionExample_Patch**, version **1.0.2.0**.

All Solutions ▾		
Name	Display Name	Version
✓ SegmentedSolutionExample_Patch_c630693b	Segmented Solution Exam...	1.0.2.0
SegmentedSolutionExample	Segmented Solution Exam...	1.0.1

In the patch we added a new custom entity called , and included all assets of the entity in the patch.