

patch.

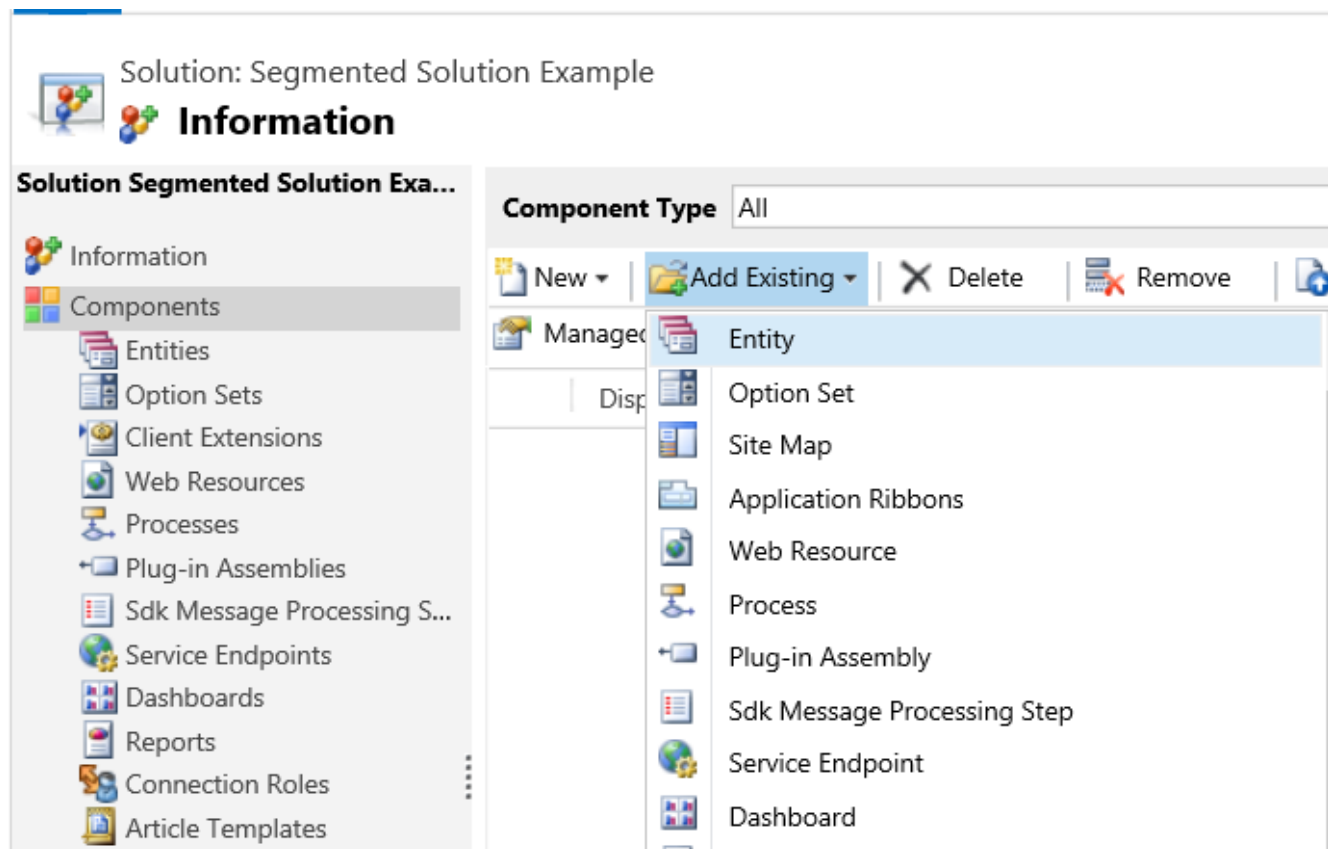
Create a segmented solution with the entity assets you want

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	Additio
	Connection	connection	Entity	Managed	True	Relatio
	Connection Role	connectionrole	Entity	Managed	True	Role de
✓	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	Templa

1 - 50 of 117 (3 selected)

Page 1

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	Def
	Case	Active	Main	Managed	True	5.0.0.0	Upd
	Case MainInteractionCentric	Active	Main Interaction...	Managed	True	8.0.0.0	Def
	Information	Active	Mobile - Express	Managed	True	5.0.0.0	Thi
	Case Quick Create	Active	Quick Create	Managed	True	6.0.0.0	Def
	Case Reference Panel	Active	Quick View Form	Managed	True	8.0.0.0	A f

1 - 6 of 6 (0 selected)

Back

Next

Cancel

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

Contact - 3 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
	aging60	Aging60	Aging 60	Currency	Simple	Managed
	aging60_base	Aging60_Base	Aging 60 (Base)	Currency	Simple	Managed
	aging90	Aging90	Aging 90	Currency	Simple	Managed
	aging90_base	Aging90_Base	Aging 90 (Base)	Currency	Simple	Managed
✓	anniversary	Anniversary	Anniversary	Date and Time	Simple	Managed
	annualincome	AnnualIncome	Annual Income	Currency	Simple	Managed
	annualincome_base	AnnualIncome_Base	Annual Income (...)	Currency	Simple	Managed
	assistantname	AssistantName	Assistant	Single Line of Text	Simple	Managed
	assistantphone	AssistantPhone	Assistant Phone	Single Line of Text	Simple	Managed

1 - 182 of 182 (1 selected)

Back

Finish

Cancel

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.

Solution: Segmented Solution Example

Information

Solution Segmented Solution Exa...

Information

Components

Entities

Option Sets

Client Extensions

Web Resources

Processes

Plug-in Assemblies

Sdk Message Processing S...

Service Endpoints

Component Type All

New Add Existing Delete Remove Publish Show Dependencies Add Required Components

Managed Properties

✓	Display Name ↑	Name	Type	State	Customizable	Description
	Account	account	Entity	Managed	True	Business that represents a customer or potential custome...
	Case	incident	Entity	Managed	True	Service request case associated with a contract.
	Contact	contact	Entity	Managed	True	Person with whom a business unit has a relationship, such...

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

Segmented Solution Example

Version Number

1.0.2.0

Save

Cancel

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 **Book**, and included all assets of the **Book** entity in the patch.