Power Platform: Building Model-Driven Power Apps and Customizing Dynamics 365 Apps

Module 2: Solutions and Sitemap Lab

Student Lab Manual

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# Lab 1: Export Partner Tracking Solution

#### Introduction

In this lab, you will export the customizations performed in the previous lab for version control and import it in another environment. You will practice some of the common actions in Partner Tracking Solution such as export, import, and create patch. You will also enhance the model-driven app to make it more accessible to users.

**Note:** During this lab you will practice some of the skills from the previous lab as well, so you’ll notice that some of the steps are intentionally not exact step by step.

#### Objectives

After completing this lab, you will be able to:

* Manage Solutions within D365
* Configure model-driven applications

#### Prerequisites

1. Having a Second Environment ready from the Pre-Requisites Document
2. The Partner Tracking solution created in the previous lab

#### Estimated time to complete this lab

20 minutes

#### Scenario

The initial 1.0.0.0 version of the Partner Tracking solution is ready to be deployed in a test environment. Customizations made in the development environment need to be moved to a test environment. In addition, there are more customizations to be created to meet the new requirements in the Partner Tracking solution that will become available in the future 2.0.0.0 version.

## Exercise 1: Export Solutions: Unmanaged and Managed

#### Objectives

After completing this exercise, you will be able to:

* Export solutions from one environment to another

#### Prerequisites

None

#### Scenario

You have been asked to move the customizations made in version 1.0.0.0 of the solution into another environment. Keep a copy of the previous customizations for version control.

Task 1: Get a backup of Partner Tracking Solution version 1.0.0.0

1. Navigate to the **Solutions** page of the current working environment
   1. Recap: <https://make.powerapps.com> > **Solutions**
   2. **Note**: Make sure the correct environment is selected.

A screenshot of a cell phone

Description automatically generated

1. Select the checkbox to the left of the **Partner Application Solution** and select on **Export**.
2. Publish all changes when prompted, and then select **Next**.
3. Change the version to 1.0.0.0 again, select the option of **Unmanaged Solution,** and select **Export**. This will automatically download into your **Downloads** folder.
   1. **Note:** This process has moved to an Async process and will happen in the background to help avoid solution export timeout issues. It may take a minute or two before the download appears.

Task 2: Export managed solution and import into target environment

1. Following the same steps as the task above, export the Partner Application as a **Managed Solution** and save it in the desired location.
2. A screenshot of a cell phone

   Description automatically generatedFrom the same page, <https://make.powerapps.com>, change the environment to your test environment or any other target environment, such as QA, Staging, or Production, to which you want the solution to be deployed.
3. In the target environment, navigate to **Solutions** and select on **Import** in the header.
4. In the import wizard, import the downloaded **Managed Solution**.
5. After the import completes, navigate to the **Apps** area within <https://make.powerapps.com>.
6. Select on the **Partner Application**.
7. Verify that the customizations match the work done earlier.

## Exercise 2: New development for Partner Tracking Version 1.0.0.0

#### Objectives

After completing this exercise, you will be able to:

* Understand the basics of patching and cloning solution
* Apply patches to a deployed solution

#### Prerequisites

None

#### Scenario

You are being asked to create a lookup column on the Partner table to be able to associate a Primary Contact. Details about the primary contact should appear on the Partner record.

Task 1: Add Contact Table to Solution and Create Quick View Form

1. Open the 1.0.0.0 unmanaged Partner Tracking Solution, select on **Add Existing** and Select **Table**.
2. Graphical user interface, text, application

   Description automatically generated with medium confidenceSearch and select the **Contact** Table and select **Next** and then select **Add**.
3. Open the **Contact** table. Navigate to **Forms**. And select **Add Form** and select **Quick View Form**.
4. On the right-hand side pane, set the display name to **Primary Contact Quick View Form**.
5. Add the following columns to the form: **Full Name, Email**, **Mobile Phone**.
6. Select **Save** and then **Back.**

Task 2: Add a new column, Primary Contact, to Partner Table

1. On the **Partner** table, create a **Lookup** column called **Primary Contact** with the related table being the **Contact** table.
2. Navigate to **Forms** and open the **Main Form**.
3. Add a new section called **Contact Information** and add the **Primary Contact** column created.
4. On the left-hand side, select **Components** and add a **Quick view** component from the related data area.
5. For the lookup option, select **Primary Contact** and for the contact option select **Contact Quick Form**. Select **Save** and **Back**.
6. **Publish All Customizations** and test out the changes. You will have an option to associate and/or create a new Primary Contact for the Partner record and see its details from the Partner record.
7. **Export** the Partner Tracking Solution as managed and version 1.1.0.0. And **Import** into the target environment.
8. **Verify** that the solution was imported successfully and new changes reflect accurately.

## Exercise 3: Apply Hotfixes using Patches

#### Objectives

After completing this exercise, you will be able to:

* Understand the basics of patching and cloning solution
* Perform solution management in Dynamics 365

#### Prerequisites

None

#### Scenario

The Partner Tracking application evolved and started tracking a more diverse group of partners. The requirement is to expand the industry column to include the following two options: **Education** and **Non-Profit**.

Task 1: Create a patch to include Hotfixes

1. Navigate to the list of solutions in the development environment.
2. Select the **Partner Tracking Application** solution, select on **Clone** in the command bar and then select on **Clone a Patch.**
3. Change the display name to **Partner Application Solution\_Industry Hotfix** and the version to 1.1.1.0. Select **Save**.
4. Navigate back to the solutions page and open the patch previously created.
5. In the command bar, select **+Add Existing > Other > Choice**.
6. Find the I**ndustry** choice column created previously, select it and select **Add**.

Task 2: Add the extra options to the Industry column

1. Open the **Industry** option set column in the solution component and add the two new options: **Education** and **Non-Profit**.
2. Select **Save** and then select **Publish all customizations**.

Task 4: Deploy the Hotfix Patch Solution

1. In the solutions page, **Export** the **Partner Application Patch** as Managed while keeping the version 1.1.1.0.
2. Navigate to the second environment that contains the 1.1.0.0 **Managed Partner Application Solution** and import the managed 1.1.1.0 patch.
3. Open the Partner Tracking application in the second environment to verify the newly imported changes from the patch.

Task 5: Condense patches with parent solution

1. Navigate back to the development environment that contains the unmanaged solutions and navigate to the solutions page.
2. Select the parent Partner Application Solution (version 1.1.0.0), and select **Clone** in the command bar and then select **Clone Solution**.
3. Keep the same **Display name** and change the **Version** to 1.2.0.0.
4. Verify that the 1.1.1.0 patch has been deleted, and the 1.2.0.0 version is on the parent solution.