

Read First: Customization Notes

Introduction

Solution customization primarily refers to any change to a solution object that can be moved within a custom solution to another Power Platform environment. These changes are typically done in the Make area of Power Apps.

While there are many customization options available within a Microsoft 365 Power Platform environment, there are guidelines that are recommended when working with a managed solution such as BrightWork 365, mainly to prevent issues when upgrading. Our guidelines will help you understand the recommended approach to take if you decide to make changes to objects in the out of the box solution. You also have the option to reach out to your assigned Customer Success Partner or support365@brightwork.com with upgrade concerns you might have.

Caution

- We strongly recommend working alongside a BrightWork Customer Success Partner to customize components within BrightWork 365. This is especially necessary if you intend to customize the same components that BrightWork consultants are customizing for your organization. See the [Customer Success](#) section for more information.
- BrightWork consulting assistance for remediating issues caused by customer made customizations will be billable.

Managed and Unmanaged Solutions

The Microsoft Power Platform uses solutions to implement an application lifecycle management process. There are two types of solutions: unmanaged and managed.

Unmanaged solutions are primarily used in development environments when changes are still being made to an application. With unmanaged solutions you can:

- Add and remove components.
- Export the solution.

Managed solutions such as BrightWork 365 are fully developed and are intended to be distributed, installed and used for production purposes. The following are attributes of managed solutions:

- Components cannot be added or removed.
- Managed solutions cannot be exported.

Although you can make certain *configuration* changes in a managed solution as noted in the [Configuration](#) Knowledge Base category, component *customization* must be done in

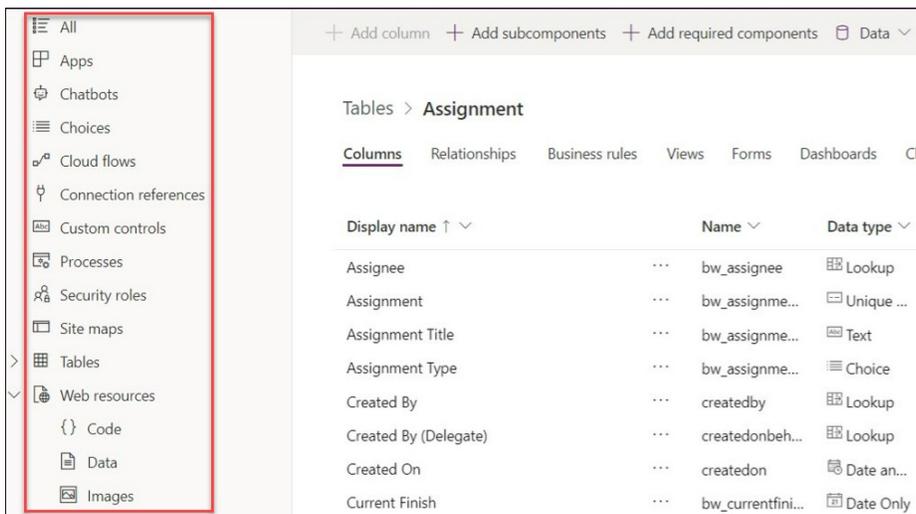
an unmanaged solution.

Caution Customizations should only be made in an unmanaged solution, not in a managed solution. Updating values of choices and configuring Project forms using the [Form Configurator](#), can be done in a managed solution. For additional information contact your Customer Success Partner.

For more information from Microsoft see [Solution Concepts](#).

BrightWork 365 Solution Objects

The solution editor screen displays a list of available solution objects.



Recommended Process for Object Customization

Note

- You will need to be at least a Power Platform System Administrator to be able to perform object customization.
- Content data is not copied into environments when importing solutions.

Caution

- We advise that you follow Microsoft's recommendation to have separate Dev and Test Power Platform environments, in addition to your Production environment. See Microsoft article [Create Environment](#).
- If your solution has a customized component (e.g., form) and a BrightWork 365 upgrade contains changes to the original out of the box version of that component, the new changes

will need to be manually applied to your custom component.

- It is important to be aware of the implications of deleting key fields and the effects this can have on other areas of the app, for example the effects of deleting the Issue Status column on various views, charts and Power BI. Contact your Customer Success Partner for more information.
- We recommend not making any changes to the "Default" solution in your BrightWork 365 environment as this will likely cause technical issues.

First Time Setup Process for Object Customization

1. Install the same version of BrightWork 365 that is installed in your Power Platform Production environment as a managed solution in your **Dev and Test environments**.
2. In the **Dev environment**, create a clean unmanaged second solution. See Microsoft article [Create Solution](#). This unmanaged solution is necessary because objects should not be modified in a managed solution. It is also not recommended to create an unmanaged solution in a Production environment. See Microsoft article [Understand How Managed Solutions are Merged](#).

Ongoing Process for Object Customization

In your Dev environment, in the clean unmanaged solution previously created:

1. Add new objects (i.e., a Form) and any specific existing BrightWork 365 objects requiring modification - do not choose **All Components** when adding components and add only those specific elements needed for your customization in order to keep the unmanaged solution as clean as possible.
2. Modify the added components as necessary - see the various Customization Knowledge Base articles.
3. Export your modified solution as a managed solution. See <https://learn.microsoft.com/en-us/power-apps/maker/data-platform/export-solutions>.

Import into your Test environment:

1. Back up the current BrightWork 365 solution.
2. Import the managed solution that contains your modifications using the same account that was used to install BrightWork 365; this new imported managed solution will be layered with the original installed BrightWork 365 managed solution.
Note: Only users with a Power Apps Premium/Power Apps per user license should perform a solution import.
3. Import any new custom Forms and Templates. See section "Import Forms and Templates" in the [BrightWork 365 Install Guide.pdf](#) 
4. Test the functionality of the BrightWork 365 app with the modified objects before proceeding to your Production environment.

Import into your Production environment:

1. Back up the current BrightWork 365 solution.
2. Import the managed solution that contains your modifications using the same account that was

used to install BrightWork 365. This new imported managed solution will be layered with the original installed BrightWork 365 managed solution.

Note: Only users with a Power Apps Premium/Power Apps per user license should perform a solution import.

3. Import any new custom forms and templates. See section "Import Forms and Templates" in the [BrightWork 365 Install Guide.pdf](#) 
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