
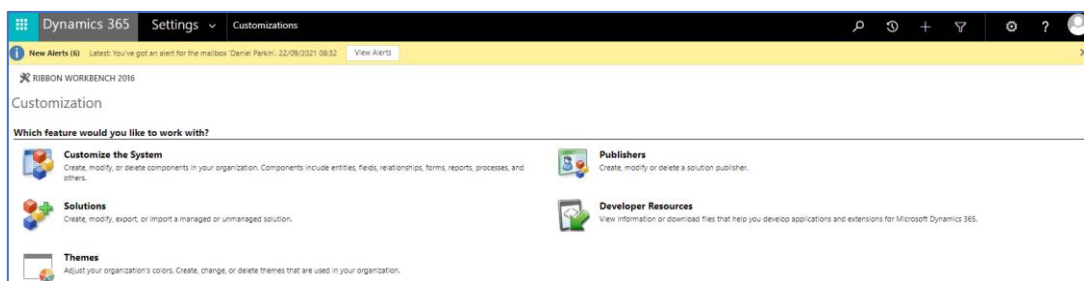


Creating an Editable “Quick View” Form

In this example, we will be adding an editable Contact Form Component Control to the parent Account record, with the aim of making the Primary Contact Quick View Form editable from within the Company record.

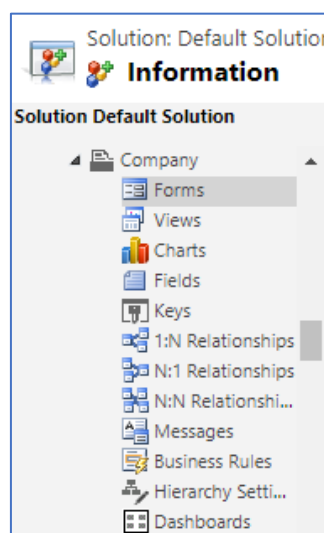
It is only possible to add custom controls via the “Classic” Solutions Editor currently. You can access this by:

- 1) From Power Apps (make.powerapps.com) or a model-driven app, select Settings on the command bar , and then select Advanced Settings.
- 2) Select Settings > Customizations > Customize the System, and then select the customization area that you want. For this example, we will simply choose “Customise the System”.

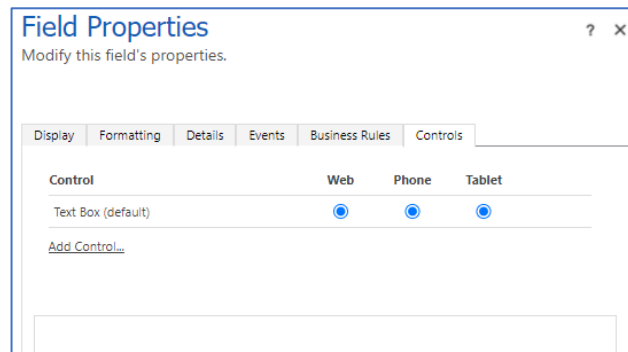


Adding the Form Component Control to the Main Form:

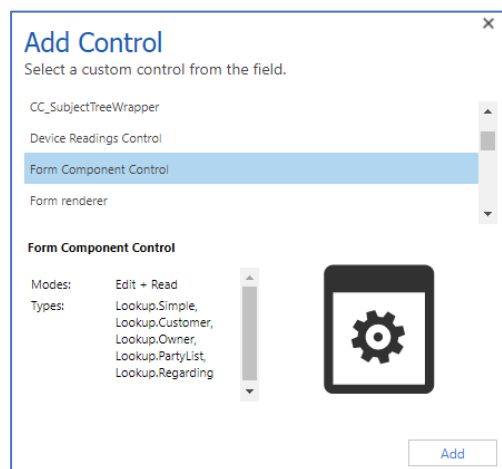
- 1) Open the Company Main Form (be careful to select a Form Type of **Main**) that you wish to add the Custom Control to by expanding the **Entities** option under Components, and selecting **Forms** for the relevant table, in this example Company.



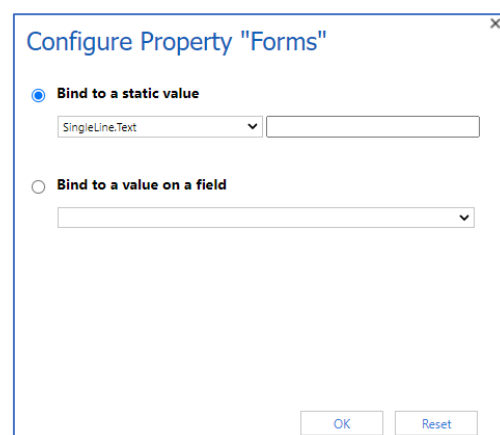
- 2) Once you have opened the Main form you wish to edit, double click on a lookup field (we will be editing the **Primary Contact** field) and then click **Controls** from the resulting **Field Properties** page.



- 3) Then click **Add Control**, selecting the **Form Component Control** and clicking **Add**.



- 4) Select **Web**, **Tablet** and **Phone** for the Component. This ensures the custom control will work on all devices.
- 5) Now for the only slightly fiddly bit, but it is easy once you have done it once... we promise! Select **Edit** (the pencil icon) and on the **Configure Property** dialog box select **Bind to a static value**.



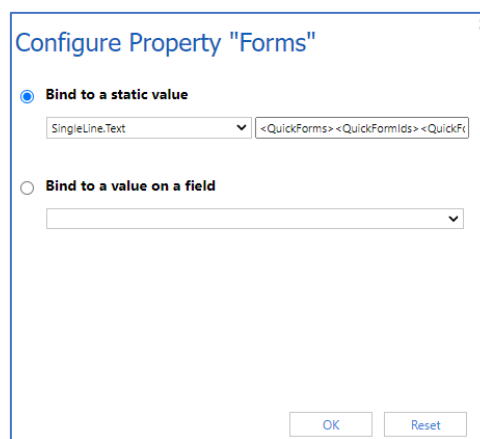
- 6) Here we need to tell the Custom Control which Contact form we want to display on the parent Company record.

Add an XML entry like the following where **TableName** is the table unique name (in this example **contact**) and **FormID** is the form ID for the main form:

```
<QuickForms><QuickFormIds><QuickFormId
entityname="TableName">FormID</QuickFormId></QuickFormIds></QuickForms>.
```

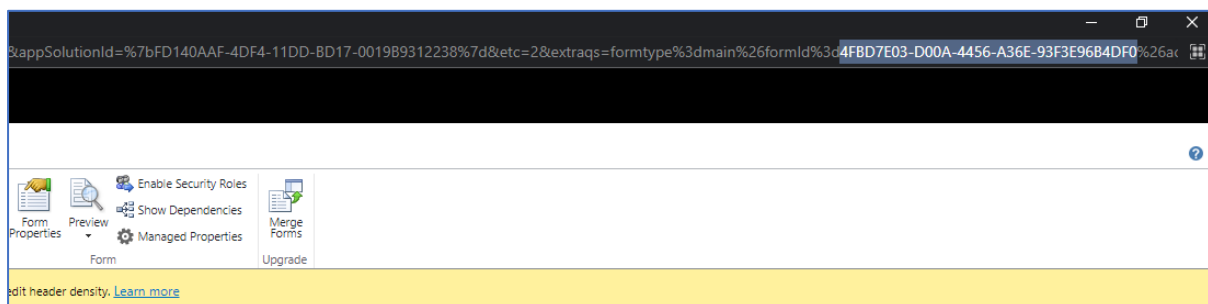
For example, to render a **Contact** main form on the account form, use:

```
<QuickForms><QuickFormIds><QuickFormId entityname="contact">1fed44d1-ae68-4a41-
bd2b-f13acac4acfa</QuickFormId></QuickFormIds></QuickForms>
```



To find the unique name for a table, select the table in Power Apps and then select Settings. The **Name** appears on the **Edit** table pane. The form ID can be found in the browser URL when you edit a form. The ID follows the **/edit/** portion of the URL. Form ID can be found in the browser URL when you open a form in the modern form designer.

In the **classic form designer**, the **form ID** follows the **formId%3d** portion of the URL.



KMS have created a new **Contact** form of type **Main** to use in this example, with a reduced number of fields we wish our users to be able to interact with from the **Company** page.



- 7) Select **OK** and then **OK** again. Then simply **save** and **publish** the form you have added the custom control to.
- 8) Now when viewing **Primary Contact** information from the **Company** form, we can edit the **Contact** details from within this form. If the custom control is not displaying the form you expect to see, ensure this is added to the application you are accessing and that security roles are enabled correctly.

