

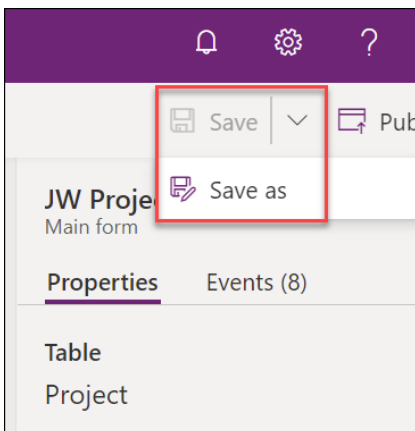
Add a New Form Tab

Caution

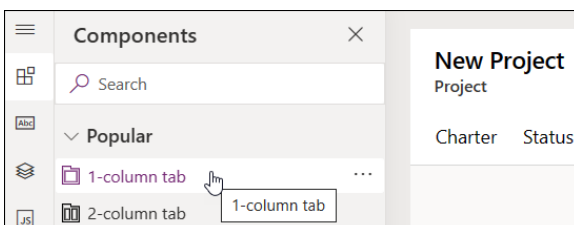
- Be sure to first read the [Customization Notes](#) article.
- If your solution has a custom form and a BrightWork 365 upgrade contains changes to the original out of the box version of that form, the new upgrade changes will need to be manually applied to your custom form.
- These instructions are assuming a first-time customization of a form. If you are now editing a previously customized form, alter these instructions as necessary.

Add a New Form Tab

1. Navigate to the **unmanaged solution in your dev environment** that you use for customizations.
2. In the Power Apps solution editor add the existing table that contains the form to be modified, e.g., Project.
3. Add the relevant original out of the box form that will be used as the basis for your new form.
4. Load the original form.
5. Using **Save as**, save the original form as a new form that will be used for modification; do not edit the original form.



6. Copy the GUID of your modified form. The form GUID can be obtained from the URL of the Power Platform edit page of the form. See this example of the form GUID (the highlighted portion only): https://make.preview.powerapps.com/e/123456abcd/entity/bw_request/form/edit/65432gfiul-00987fi?source=powerappsportal.
7. Click **Component**.
8. Click on the existing tab that you would like to be to the left of your new tab.
9. On the **Components** list select the tab style you'd like to add to your form.



10. Click on the new tab you just created and edit the tab's **Label** value and **Name** value.

The screenshot shows a form editor for a tab named 'Acme'. The 'Properties' tab is selected. Under 'Display options', the 'Label' field contains 'Acme' and the 'Name' field contains 'tab_acme1'. There is an information icon next to the 'Name' field.

11. Modify the new tab's content as needed, e.g., add fields, add sections, etc.

12. In **Form settings** at the top of the editor, change the **Security roles** of the form to include at least the roles of **BrightWork Team Member**, **System Administrator**, and **System Customizer**. Click **Save and publish**.

The screenshot shows the 'Form settings' panel for 'JW Project Standard form'. The 'Security roles' section is expanded, showing options for 'Everyone' and 'Specific security roles'. The 'Specific security roles' option is selected, and 'BrightWork Team Member' is checked. 'BrightWork Template Editor' is also listed as a role.

13. **Save** the form, **Publish** the form, and exit to the solution screen.

14. Remove the original form that was previously copied to your custom unmanaged solution (the unmanaged solution should be as clean as possible) and exit to the environment screen.

15. Export your customized unmanaged solution; be sure to **Publish** the form as part of the export process.





The screenshot shows the 'Solutions' screen with a toolbar at the top containing 'New solution', 'Edit', 'Delete', and 'Export solution'. The 'Export solution' button is highlighted with a red box. Below the toolbar, the 'Solutions' list shows 'BrightWork 365' and 'JW BrightWork 365', with the latter selected.

16. Import the managed solution into the relevant environment as described in the [Customization Notes](#) article.

Note: We generally recommend skipping the check for issues during export since you will be presented with many non-problematic issues that can be ignored.

17. In the BrightWork 365 app, use the Area switcher at the bottom left of the screen to switch to the **Templates area** (for BrightWork versions earlier than v1.6, switch to **Admin area > Forms**). In the **Form Templates** list add a new row by clicking **+ New** at the top of the page and add all required fields including the previously copied Form GUID.

The newly created form can then be chosen in a template's **Details** tab. The associated Form GUID will automatically populate after a short wait.

Details		Projects
Name	*	Project Standard-9:25 AM
Description		---
Request BPF	*	 Project Request 2 Stage
Request Form	*	 Project Request 2 Stage
Project BPF	*	 BrightWork Project
Project Form	*	 Project Standard