

How do I set up a new user registration form?

Ben Henley - 2023-09-08 - Sylwadau (0) - Deskpro Legacy

Some organizations need new users to complete a form to provide information, agree to network policies etc.

This article explains how you can implement this in Deskpro, so that users can submit a ticket form and have the information added directly to their profiles. We'll also demonstrate how to embed a form to collect the information from new users.

1. Go to **Admin > CRM > Users > Fields**, and under Custom Fields, create fields to store the user information your form will collect. For example, you might need a field to record that the user agreed to your network policy:

Field Type	Toggle (On/Off)
Enabled	<input checked="" type="checkbox"/> Enable this field
Title *	<input type="text" value="I agree to your network policy"/>
Description *	<div>By checking this box, you agree to abide by Acme Corp's network policy, detailed here.</div>
Checkbox Label	<input type="text" value="I agree"/>
Default state	<input type="checkbox"/> Checked by default
User Validation	<div><input type="radio"/> No user validation</div> <div><input checked="" type="radio"/> Require the user to check the checkbox</div>
Agent Validation	<div><input checked="" type="radio"/> No agent validation</div> <div><input type="radio"/> Require the agent to check the checkbox</div>
Agent Only Field	<input type="checkbox"/> Only show this field to agents

2. Go to **Admin > Tickets > Departments** and create a new department called New Users.

3. In the Layout tab, select **Use Custom Form Layout for "New Users"**.

4. Drag the custom user you added onto the ticket form. Here, we've added the custom "I agree to your network policy" field, and we're adding a custom ID number field:

The screenshot shows the 'Layout' tab of a ticket form editor. At the top, there are tabs for 'Properties', 'Permissions', 'Layout', and 'Website Embed'. Below these, there are two buttons: 'Use Default Form Layout' and 'Use Custom Form Layout for "New Users"'. A blue notification bar states: 'This is a custom layout that applies only to this department. Any changes you make to this layout will not affect any others.' Below this, there are two tabs: 'User Form' and 'Agent Form'. The 'User Form' tab is active, showing a form with the following fields: 'Department', 'Subject', 'Test', 'Custom date', 'Message', 'User Email', 'User Language', and 'I agree to your network policy'. To the right of the form, there are two panels: 'Ticket Fields' and 'User Fields'. The 'Ticket Fields' panel contains: 'Product', 'Category', 'Priority', 'CC', 'CAPTCHA', 'Attachments', 'Price range', 'Approval process', and 'Approved?'. The 'User Fields' panel contains: 'Name', 'Timezone', and 'Acme ID number'. A blue button labeled 'Acme ID number' is positioned below the 'I agree to your network policy' field, with a mouse cursor hovering over it.

5. To make it easy for users to find the form, you can put it on its own page on your website/intranet. Select the **Website Embed** tab, leave "Show code snippets for forms specifically for this department" selected, and add the code to your site.

6. You could set up a trigger so that, if users who haven't agreed to the network policy submit a ticket to any other department than "New Users", they get an automatic reminder email to fill in the new user form. You'll need to create a new email template for this reminder.

Criteria

The criteria section is a list of terms that must match before the actions are applied to the ticket.

when

The following conditions are met:

Department

is not

✖ New Users

and

I agree to your network policy

is

Off

+ Criteria

or

The following conditions are met:

+ Criteria

Actions ?

then

The following actions will run:

Template:

must-agree-policy.html

[edit template](#)

To:

☒ Email only the ticket owner

☐ Email everyone on the ticket (owner and all CC's)

Send User Email

From Name:

Helpdesk Name (A1 Goods)

From Email:

The account set on the ticket

Headers:

Add header

Set Labels

☒ Add labels

✖ policy-not-agreed

☐ Remove labels

+ Action