



[Wissensdatenbank](#) > [Using Deskpro](#) > [Admin](#) > [Creating Effective Custom New Ticket Contact Forms](#)

Creating Effective Custom New Ticket Contact Forms

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What is a Ticket Contact Form?

A ticket contact form is a default feature on your Help Center; it is the principal channel users can use to submit tickets to your helpdesk.

Ticket forms can be embedded onto any of your web pages, and appear on your Help Center. You can create different custom Contact forms for each department; this ensures that your Agents have all the relevant information about an inquiry when a ticket gets submitted. But you can also have the same form for multiple departments if you wish.

How do I create effective Ticket Contact Forms?

The key to making an effective contact form is by making the most of Deskpro's built-in form fields as well as creating your own custom fields, this will enable you to collect information from your users before the ticket reaches your Agents.

Think of form fields as a supplement to email support, providing as much information about specific inquiries will help your Agents to solve issues faster and reduce the back-and-forth required to resolve an issue.

You can create custom fields by going to **Admin > Ticket Structure > Ticket Fields**.

	Name	Field Type	User Forms	Agent Forms	ID
<input type="checkbox"/>	Toggle	Toggle	<input checked="" type="checkbox"/>	<input type="checkbox"/>	31
<input type="checkbox"/>	Priority	Select Field	<input type="checkbox"/>	<input type="checkbox"/>	49
<input type="checkbox"/>	Type of product	Single-line Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>	48
<input type="checkbox"/>	Any further comments	Multi-line Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>	47
<input type="checkbox"/>	Opening times	Display	<input type="checkbox"/>	<input type="checkbox"/>	46
<input type="checkbox"/>	URL Field	Url	<input checked="" type="checkbox"/>	<input type="checkbox"/>	41
<input type="checkbox"/>	File Field	File	<input checked="" type="checkbox"/>	<input type="checkbox"/>	40
<input type="checkbox"/>	Checkbox Field	Select Field	<input checked="" type="checkbox"/>	<input type="checkbox"/>	36
<input type="checkbox"/>	Radio Buttons Field	Select Field	<input checked="" type="checkbox"/>	<input type="checkbox"/>	32

Once you have created your custom fields, you can create your **Ticket Contact Forms**. You create Ticket Contact Forms for your Departments in **Admin > Ticket Structure > Departments**.

Select the department you require, and then open the **Form** tab where you can build your Ticket Contact Form by adding fields and ordering them using the handy drag-and-drop functionality.

Edit: Complaints

Information Permissions **Form** Website Embed

Form

Custom Form Editor

This is a custom layout that applies only to this department. Any changes you make to this layout will not affect any others.

User Form Agent Form

- ⋮ User Name & Email (Single-line Text)
- ⋮ Department (Select Field)
- ⋮ Subject (Single-line Text)
- ⋮ Business Area (Select Field)
- ⋮ Message & Attachments (Multi-line Text)
- ⋮ Current Location (Single-line Text)

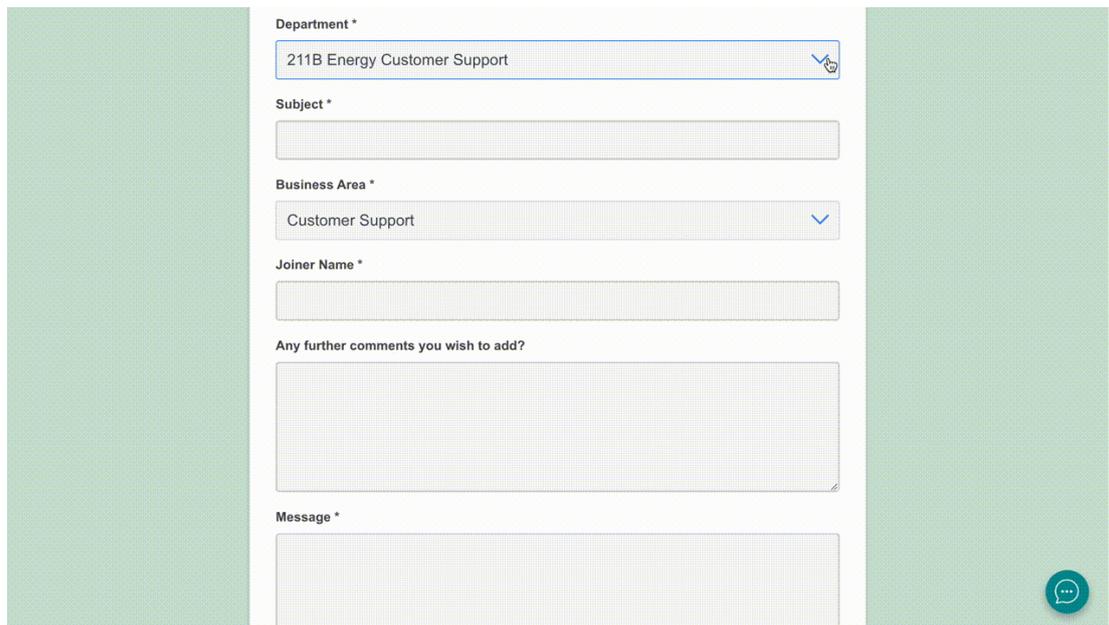
+ Field

You can add as many custom fields as you need. You can also create dependencies between fields for truly dynamic forms, e.g., only when a User selects that their 'Type of Product' is a 'Radiator' that 'When did you purchase the product?' appears.

Add field dependencies by selecting the **Cog** on a field and specifying the criteria; you can edit other advanced settings here.

The screenshot shows the 'Edit: Complaints' interface with a sidebar on the left containing navigation options: OVERVIEW, CONFIGURATION, CHANNELS, AGENTS, HELP CENTER, TICKET STRUCTURE (with a sub-menu for Departments, Statures, Urgency, Ticket Fields, and Ticket Labels), FEATURES, BUSINESS RULES, CRM, APPS & INTEGRATIONS, and DATA. The main content area is titled 'Edit: Complaints' and includes tabs for Information, Permissions, **Form**, and Website Embed. Under the 'Form' tab, there is a dropdown menu for 'Form' set to 'Custom Form Editor'. Below this is a note: 'This is a custom layout that applies only to this department. Any changes you make to this layout will not affect any others.' There are two sub-sections: 'User Form' (selected) and 'Agent Form'. The 'User Form' section contains a list of fields: User Name & Email (Single-line Text), Department (Select Field), Type of Product (Select Field), When did you purchase the product? (Date), Subject (Single-line Text), Business Area (Select Field), Message & Attachments (Multi-line Text), and Current Location (Single-line Text). A '+ Field' button is located at the bottom of the field list.

Once you save your form, you can go to your Help Center and see the changes live by clicking on **Contact Us** and testing out the new fields you have created:



The image shows a screenshot of a ticket submission form. The form is set against a light green background. It contains the following fields:

- Department ***: A dropdown menu with the selected value "211B Energy Customer Support".
- Subject ***: An empty text input field.
- Business Area ***: A dropdown menu with the selected value "Customer Support".
- Joiner Name ***: An empty text input field.
- Any further comments you wish to add?**: A large, empty text area.
- Message ***: An empty text input field.

In the bottom right corner of the form area, there is a circular icon with three dots, likely representing a chat or help function.

What are Agent Ticket Forms?

In the Agent interface, the fields that Users fill in when submitting a ticket will be displayed to the Agent on the individual ticket as an **Agent Ticket Form** in the **ticket properties panel**, so they have all the information available to them as they handle the ticket.

You will need to edit the **Agent Form** in **Admin > Ticket Structure > Departments** so that any custom fields you create are visible on the ticket for an Agent.

The screenshot shows a CRM ticket interface. At the top, there's a browser tab titled 'My radiator is faulty' with the email address 'david.green@m...'. The ticket title is 'My radiator is faulty'. Below the title, there are icons for 'Unassign', 'Team', and 'Followers'. A status bar shows 'Awaiting Agent' with a count of '1'. A 'FORM' section contains the message: 'Please could you help my radiator isn't working properly!'. The sender is identified as 'David Green (david.green@mail.com)'. The ticket details on the left include: Ref: MUWF-2400-XMCK, Brand: 221B Energy, Department: Complaints, Language: English, Business Area: Customer Support, Type of Product: Radiator, and When did you purchase...: 28 December 2021. At the bottom, there are buttons for 'Send as Awaiting User', 'Agent', 'Team', and 'Macro', along with a checkbox for 'Close tab after email sent'.

Agents can edit or update the information provided in the ticket by clicking on a field; this is helpful if a User has accidentally put the wrong information down and helps to keep all records up to date.

In addition to Ticket Custom Fields, you can create custom User and Organization fields that can add and store additional information about them in your CRM.

- Tags
- [Contact Us](#)
- [Ticket Forms](#)

Ähnliche Inhalte

- [How do I add Custom User Fields to Ticket Forms?](#)
- [How do I set up a new user registration form?](#)