

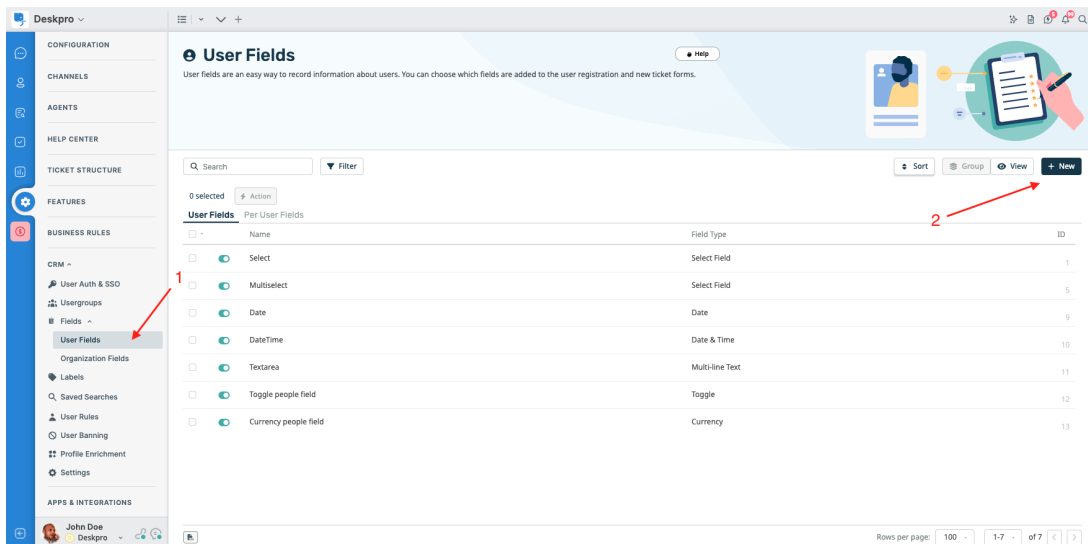
How do I set up a new user registration form?

Manu Marquez - 2023-09-08 - Kommentare (0) - Ticket Structure

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 all the information is added directly to their profiles. We'll also demonstrate how to embed a form to collect information from new users.

1. Go to **Admin > CRM > Fields > User Fields**. Click "New" to create a new Custom Field.



The screenshot shows the Deskpro Admin interface. The left sidebar is expanded to 'BUSINESS RULES' > 'CRM' > 'Fields' > 'User Fields', with a red arrow labeled '1' pointing to this menu item. The main content area is titled 'User Fields' and contains a table of field types. A red arrow labeled '2' points to the '+ New' button in the top right corner of the table area.

<input type="checkbox"/>	Name	Field Type	ID
<input type="checkbox"/>	Select	Select Field	1
<input type="checkbox"/>	Multiselect	Select Field	5
<input type="checkbox"/>	Date	Date	9
<input type="checkbox"/>	DateTime	Date & Time	10
<input type="checkbox"/>	Textarea	Multi-line Text	11
<input type="checkbox"/>	Toggle people field	Toggle	12
<input type="checkbox"/>	Currency people field	Currency	13

Choose a field from the list provided, and click **Configure Field**. For this example, we are going to use a toggle to record that the user agreed to your network policy.

on and new ticket forms.

Help

Add: New Field

- Single-line Text**
A single-line input box that the user can type into.
- Number**
Allows users to enter a numeric value.
- Multi-line Text**
A multi-line input box that the user can type into.
- Select Field**
Present predefined options to user as a drop-down, radio button or checkbox menu.
- Toggle**
This field displays as a single checkbox.
- Date**
Date Field lets user select a date using the calendar widget.
- Date & Time**
Date & Time field lets user select a date & time using the calendar widget.
- Display**
This field does not take input, instead displays the HTML entered by you the administrator.
- Hidden**
This is a hidden field in the new-ticket form with no visible UI for a user to interact with. The value can come from a cookie or a query string parameter, or you can use custom Javascript in your templates to set the field dynamically. The field is still editable in the agent interface via a text box.
- URL**

Field Type

Select Field

Select Field

Date

Date & Time

Multi-line Text

Toggle

Currency

Configure Field

During the field configuration, you will be able to set up Title, Description, and User Validation amongst other values.

Add: New Field ✕

Field type

Title*

Enabled
 Agent only field
Hide field from users, only agents will be able to see and edit this field.

Description

Reference Alias ?

Enabled display Label

Disable display Label

Enabled by default

User validation

Agent Validation

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

3. In the **Form** tab, select **Custom Form Editor**.

4. Click on the **+ Field** button to add your newly created Toggle field — type the name of your field to find it in the provided list:

Add: New Ticket Department ✕

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)

:: Message (Multi-line Text)

:: Attachments

+ Field

🔍 I agree ✕

User Fields

I agree to your Network Policy

Create Cancel

5. To make it easy for users to find the form, you can embed it on its own page on your website/intranet. Select the **Website Embed** tab, and add the code to your site.

Add: New Ticket Department



Information Permissions Form **Website Embed**

Website Embeds are code snippets you can copy directly into your website to quickly add a Deskpro contact form to any page.

Brand*

Default

Department

None

Language

English

Width

500 px

</> Generate Code

Embedded Form

```
<!--DESKPRO_EMBED_LOADER::BEGIN-->
<div id="deskpro_embed_form_container"></div>
<script type="text/javascript">
window.DESKPRO_EMBED_OPTIONS = {
  "helpdeskUrl": "https://5065-2a02-c7c-6b10-5200-10f1-
ac97-dbb0-5795.ngrok-free.app",
  "containerId": "deskpro_embed_form_container",
  "type": "form",
  "language": "en-US",
  "department": 0,
  "hide_department": 0,
  "width": "500"
};
</script>
```

Create

Cancel

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

Add: New Trigger ✕

3 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 not set			🗑️	+

Or when the following conditions are met:

	Select...	Select...			🗑️	+
--	-----------	-----------	--	--	----	---

4 Actions

These actions will apply when all of the criteria pass.

Then the following actions will run

	Send email to user					
Templates	Templates	🔍	✍️	Edit temp...		
To	Email only ticket owner				🗑️	+
From name	Helpdesk name					
From email	The account set on the ticket					

Add headers

Create **Cancel**

Ähnliche Inhalte

- [How do I add Custom User Fields to Ticket Forms?](#)
- [Creating Effective Custom New Ticket Contact Forms](#)