

How do I add Custom User Fields to Ticket Forms?

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You can add custom user fields to the ticket submission forms on the Help Centre or/and those embedded on your website.

You can use this to collect important user-specific information which will help you solve tickets, and store it on the CRM record of the user for future use.

For example, suppose your agents will need to know a user's account number at your company to solve their ticket. You can add a compulsory 'account number' field to your ticket form to ensure each user submits it.

Since the data from custom fields is stored as part of the user CRM record, if a user submits a second ticket via the web, the account number field will already be prefilled for them.

Here's how to add a custom ticket field, using the example of an account number.

1. Go to **Admin > CRM > Fields > User Fields**.
2. Click **+ New** in the top right corner.
3. Select the type of input the field will take. Since we're just storing an account number, the simple **Single-line Text** option will work, so click **Configure Field**.
4. Enter the settings for the field. The **Title** and **Description** will be shown on the ticket form, so make sure they are meaningful to the user. Let's say the account number has to be 8 digits - the **regular expression** is used to enforce this. Make sure the field is enabled, and click **Create**.

Field type

Single-line Text

Title*

Account Number



☐ Display an alias to end-users

☒ Enabled

☐ Agent only field

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

Description

Your 8 digit account number

Reference Alias

Default value

☐ Make links clickable

User validation

Match regular expression



`^\d{8}$`

☐ Require user to provide value

Agent Validation

Match regular expression



`^\d{8}$`

☐ Require agent to provide value

5. Now we have to edit the ticket forms. Go to **Admin > Ticket Structure > Departments** and then select the relevant department you would like to edit the ticket form for. You can have different forms for different departments, but let's assume we want the user account number to be on every form, so we can just edit the default layout. Select the department that uses the Default form.

6. Open the Form Editor for this Department, select **+ Field**, and add the user field you just created, i.e. **Account Number**.

Edit: Complaints

Information Permissions **Form** Website Embed

Form

Default Form Editor

This default layout is not being used by other departments.

User Form Agent Form

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

+ Field

7. Once added, click the cog next to the field to edit the details.

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)



⋮ What is your complaint regarding? (Select Field)

⋮ Subject (Single-line Text)

⋮ Priority (Select Field)

⋮ Message (Multi-line Text)

⋮ Attachments

⋮ Account Number (Single-line Text)  

+ Field

8. In this case, we would want to disable **"Only show when there is a value"**, since we would like the user to be able to enter the account number on their existing tickets.

User Field Options: Account Number (Single-line Text)

- ☒ Show this field during ticket creation
- ☒ Let the user view this field after the ticket is created
 - ☐ Only show when there is a value
- ☒ Let the user edit this field after the ticket is created
- ☐ Only show this field based on custom criteria

9. Click **Done** and **Save**.

10. The field is now shown on the user ticket form in the "Contact Us" section of the Help Center.

Account Number

Your 8 digit account number

In this example, you would also want to add the account number field to the agent form, so agents could see the value entered by users, or add the value if they were creating a ticket on behalf of a user.

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