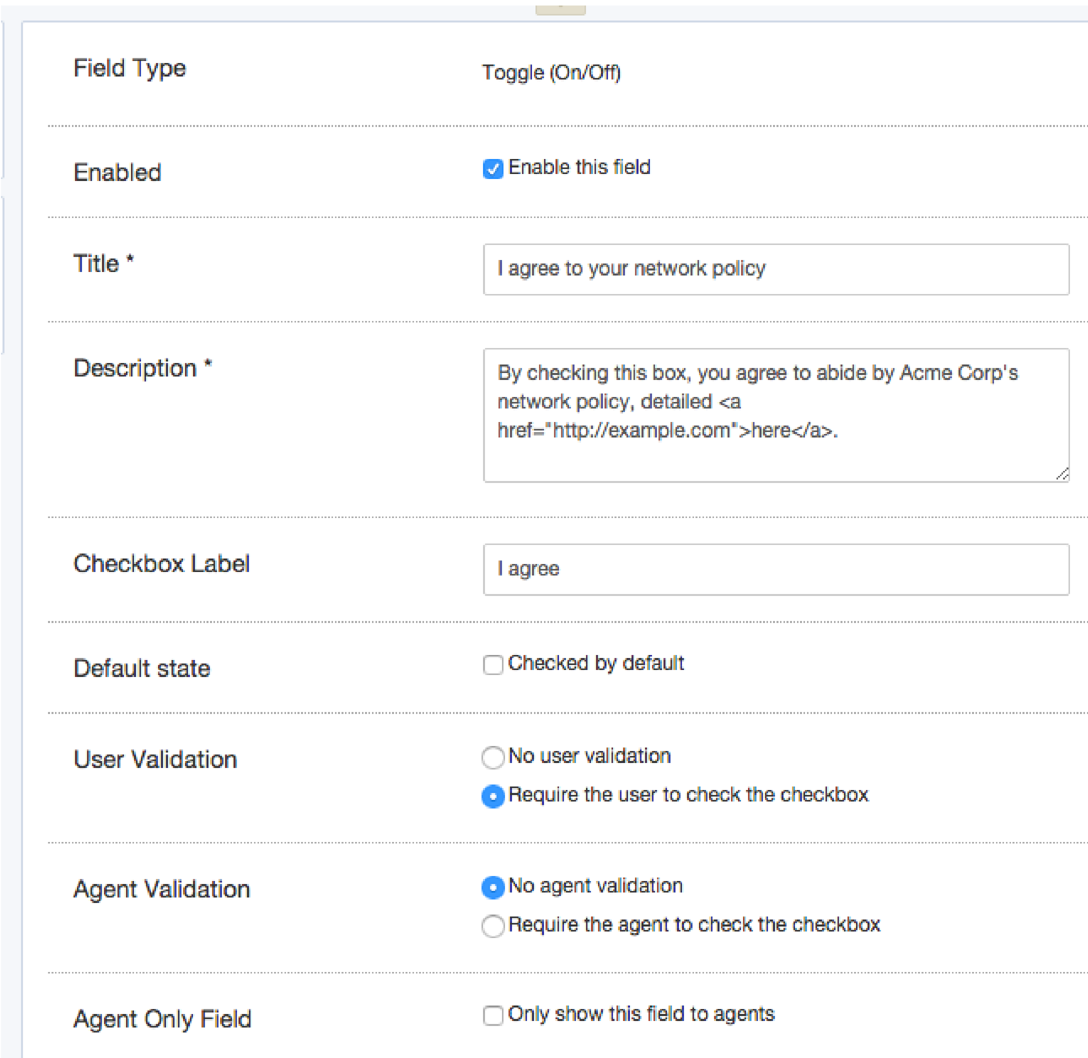
How do I set up a new user registration form?

Ben Henley - 2023-09-08 - Comments (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.

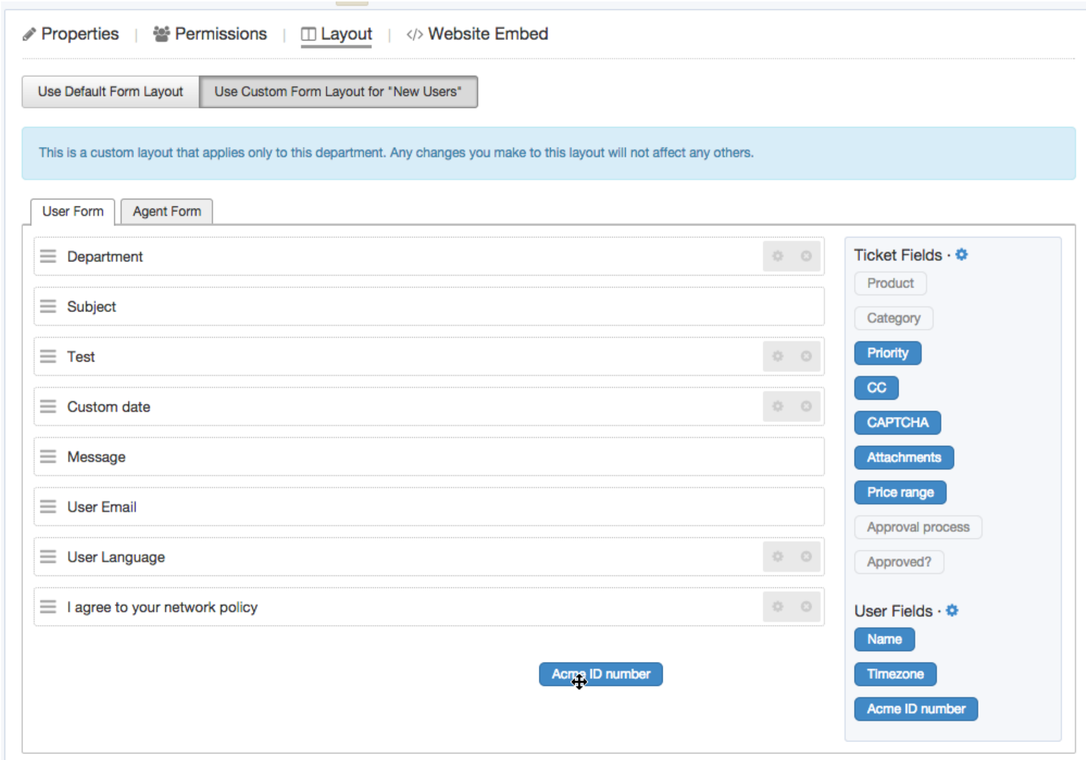
1. Go to **Admin > CRM > Users > Fields**, and under Custom Fields, create fields to store the user information your form will collect. For example, you might need a field to record that the user agreed to your network policy:



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

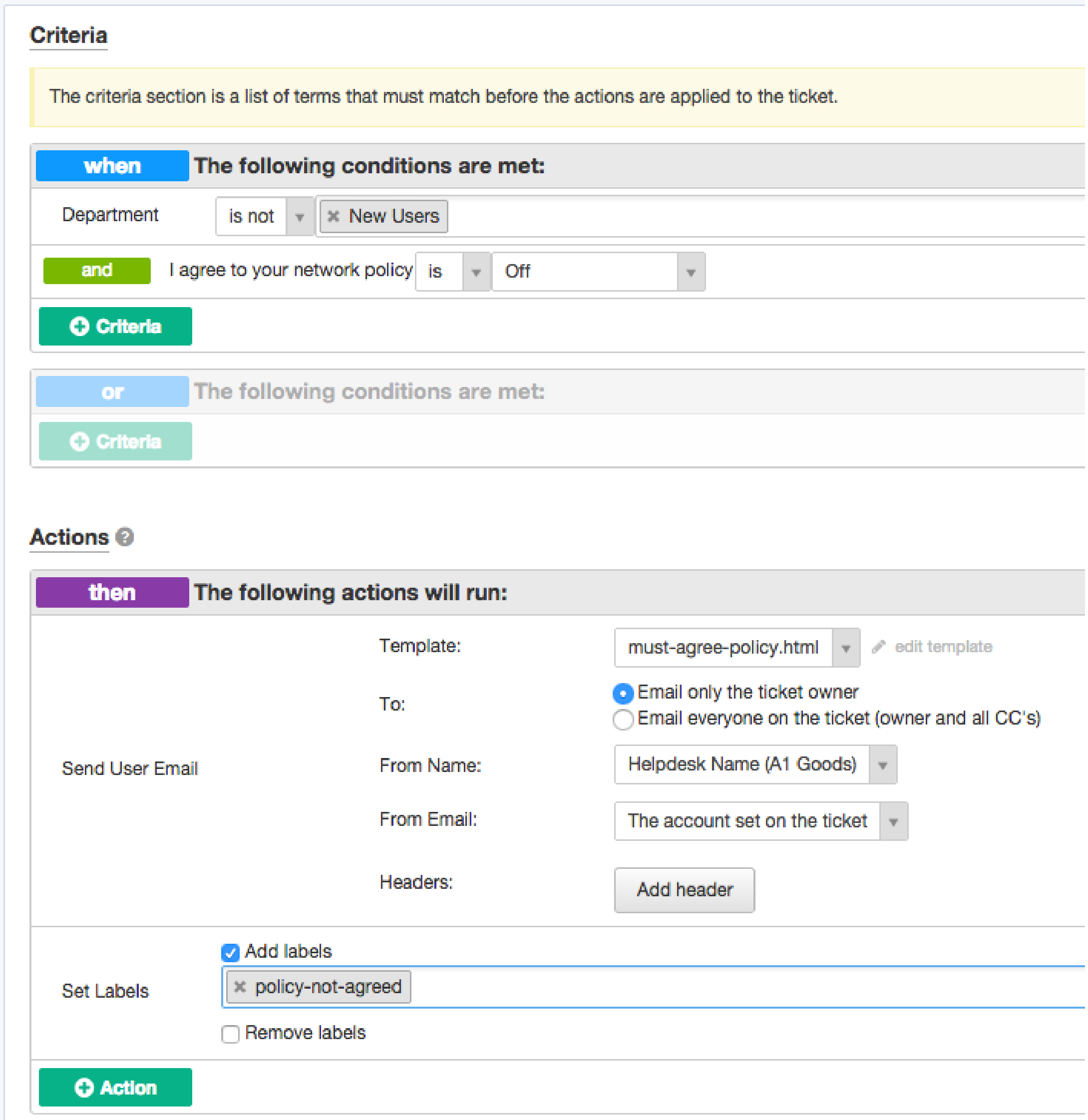
3. In the Layout tab, select **Use Custom Form Layout for "New Users"**.

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:



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
Add labels
Set Labels
policy-not-agreed
Remove labels
Action