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How do I set up a new user registration form?

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

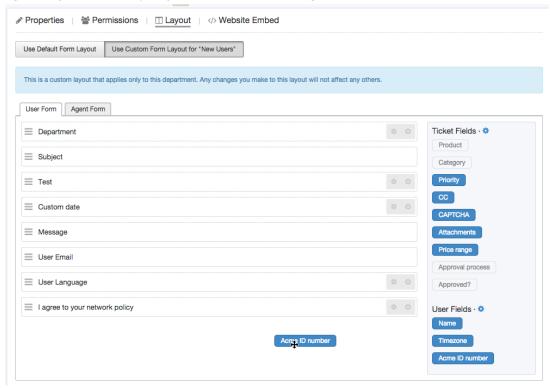
Some organizations need new users to complete a form to provide information, agree to network policies etc.

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:

| Field Type | Toggle (On/Off) | |
|------------------|--|--|
| Enabled | ☑ Enable this field | |
| Title * | I agree to your network policy | |
| Description * | By checking this box, you agree to abide by Acme Corp's network policy, detailed here . | |
| Checkbox Label | I agree | |
| Default state | Checked by default | |
| User Validation | No user validation Require the user to check the checkbox | |
| Agent Validation | No agent validation Require the agent to check the checkbox | |
| Agent Only Field | 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:



- 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.

