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Creating Effective New Ticket Contact Forms

Lauren Cumming - 2023-10-06 - Comments (0) - Deskpro Legacy

What is a Ticket Contact Form?

Your Ticket Contact Form is a default feature in the User Portal that is the main channel for your Users to create Tickets in your Deskpro Helpdesk.

You can also embed this Ticket form in any webpage too!

For each Department in your Deskpro Helpdesk, you can create a unique Contact Form for your Users, so that you are getting relevant information from them when they create Tickets. You can of course have the same form for multiple Departments if you wish.

How do I create effective Ticket Contact Forms?

The key to creating an effective <u>Ticket Contact Form</u> is to make the most of Deskpro's Builtin Fields, and your own Custom Fields in order to collect information from your Users to help your Agents solve issues/inquiries faster and reduce the amount of communication needed a benefit over using just emails.

Ticket Fields are under **Admin > Tickets > Fields**.

You can add as many custom fields as you need to and you can also create Dependencies between Fields - e.g the User selects Product 1 and three additional Fields appear but *only* when they select that option. It is very customizable!

B Admin Dashboard	Built-In Fields	
© Setup ~	Built-In Fields	
🚔 Agents 👘	Categories	
Tickets *	Priorities	
E Departments	Workflows	
😂 Email Accounts		k
	Products	
! Urgency	2 Custom Fields	
> Fields	Account Number	
New Ticket triggers		
을 New Reply triggers	Due Date	
샬 Ticket Update triggers	+ Add	
III Macros		
T Filters		
Satisfaction		
∲ Escalations		
⊙ SLAs		
% Labels		
C Round Robin		
© Time Log & Billing Settings		
> Time Log & Billing Fields		
Ei Email Templates		
A Forward Settings		
rr≎ Problems & Incidents		
Ø Settings		

Once you have created Custom Fields, or enabled the Built-in Fields, go to your Departments under **Admin > Tickets > Departments**.

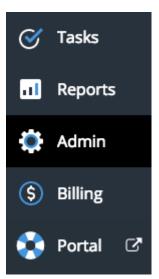
Every <u>Department</u> has a Layout section where you can customize which Fields appear for your Users and rearrange the order. You can choose to use a '**Default Layout**' which applies to all Departments or a '**Custom Form Layout**' for individual Departments.

3 Departments	٥×	Properties		
E Support		Use Default Form Layout Use Custom Form Layout for "Support"		
E Sales				
Marketing		All of your departments are using this default layout. If you make changes to this layout, it will affect all of your other departments too.		
Events Annu Department Default departments		User Form Agent Form		
		User Name & Email	Ticket Fields · •	
		≡ Department	Category	
The default department is pre-selected in new ticket forms		≡ _{Subject}	Priority	
Default department for agents: None		E Message & Attachments		
			САРТСНА	
			Account Number Due Date	
			Doe Date	
			User Fields · 🌣	
			Timezone	
		Save Reset	Delete	

To create Field Dependencies click on the **'Settings'** cog on an individual Field and specify the criteria - there are also a range of other advanced settings here too!

3 Departments	Properties 營 Permissions <u>□ Layout</u> Website Embed
E Support	Use Default Form Layout Use Custom Form Layout for "Support"
E Sales	
Marketing	All of your departments are using this default layout. If you make changes to this layout, it will affect all of your other departments too.
Events	User Form Agent Form
+ New Department	User Name & Email
Default departments	E Department
The default department is pre-selected in new ticket forms	Product 0 0
Default department for agents:	≡ subject
None v Default department for users:	E Message & Attachments
None *	Category
	E Account Number
	Save

After saving your Layout, you can go to the User Portal to see the form in action- simply click **'Portal'** in the App Bar.



Under 'Contact Us' you will see your form.

TIP: Try creating a New Ticket to test it out!

Department *

		¥
Product		
Product		
		· · · · · · · · · · · · · · · · · · ·
Category		
\$10-\$100		~
Account Number		
Subject *		
Message *		
🏦 Drag a file in here or	Choose a file	
Cc		
Submit	Reset	
- Cabinit		

How do I customize Agent Ticket Forms?

Within your Helpdesk, there are Ticket Forms for your Agents too.

If you want them to be able to view all of the information your Users have entered, you will need to make those Fields available to your Agents.

Under **Admin > Department > Layout**, there is an Agent Form. You can add all of the Fields on your Contact Form plus agent only fields such as '**Workflow'** and '**Priority'** as shown below.

Thus, when your Agents look at a Ticket they see all information provided by your Users, and they can add any additional internal information need to manage the request.

User Name & Email		Ticket Fields · 🌣
E Department		САРТСНА
Product		Due Date
E Category		User Fields · 🌣
E Account Number		
E Subject		
E Message & Attachments		
≡ cc		

These Fields will then appear under Ticket '**Properties'** in the Agent Interface on an individual Ticket.

Support - Awaiting Agent - 1 - P					
PROPERTIES TASKS (0) BILLING & TIME LOG					
Agent · Unassign Team F					
Arya Stark 🔻 None 🔻					
Language: English v					
Account Number: 2017-03-08 13:57					
Due Date:					
Product: Computers					
Priority: Urgent v					
Category: \$1000-\$5000 v					
Workflow:	Under Investigation v				
Labels:	٩				
	None				
Lock Merge	Under Investigation re				
	Follow Up				
REPLY NOTE	Feedback				
Attach					

As well as adding Ticket Custom Fields to your Forms, you can also create and add Custom **User** and **Organization** Fields.