

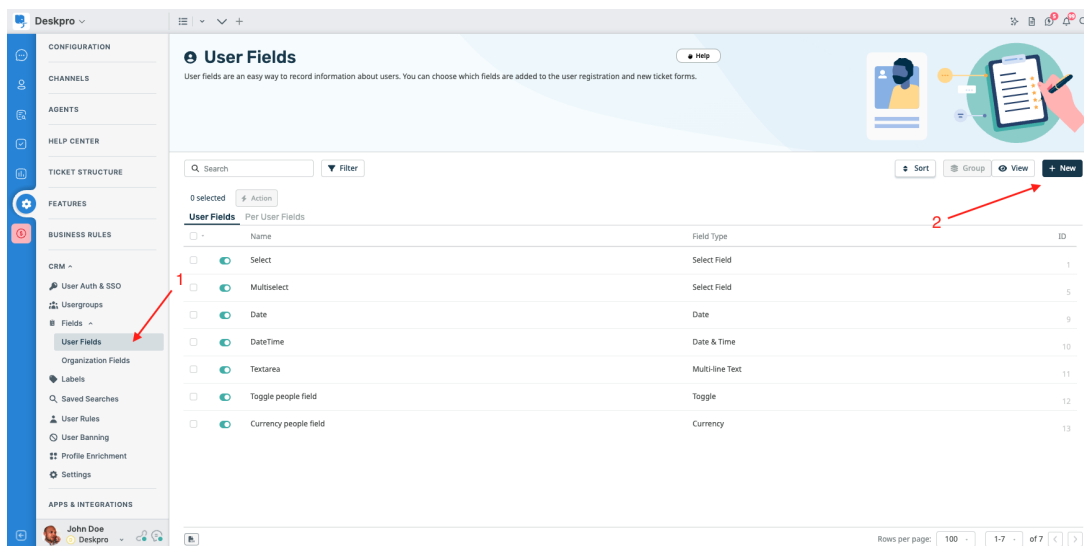
How do I set up a new user registration form?

Manu Marquez - 2023-09-08 - Comments (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.



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.

Help

on and new ticket forms.

Field Type

Select Field

Select Field

Date

Date & Time

Multi-line Text

Toggle

Currency

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

Configure Field

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

Field type

Toggle

Title*

I agree to your Network Policy

☒ Enabled

☐ Agent only field

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

Description

By checking this box, you agree to abide by Acme Corp's Network Policy

Reference Alias

Enabled display Label

Disable display Label

☐ Enabled by default

User validation

Require user to provide value

Agent Validation

No agent validation

Create

Cancel

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

InformationPermissionsFormWebsite 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 FormAgent 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

CreateCancel

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

InformationPermissionsFormWebsite 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

▼

N

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

Related Content

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