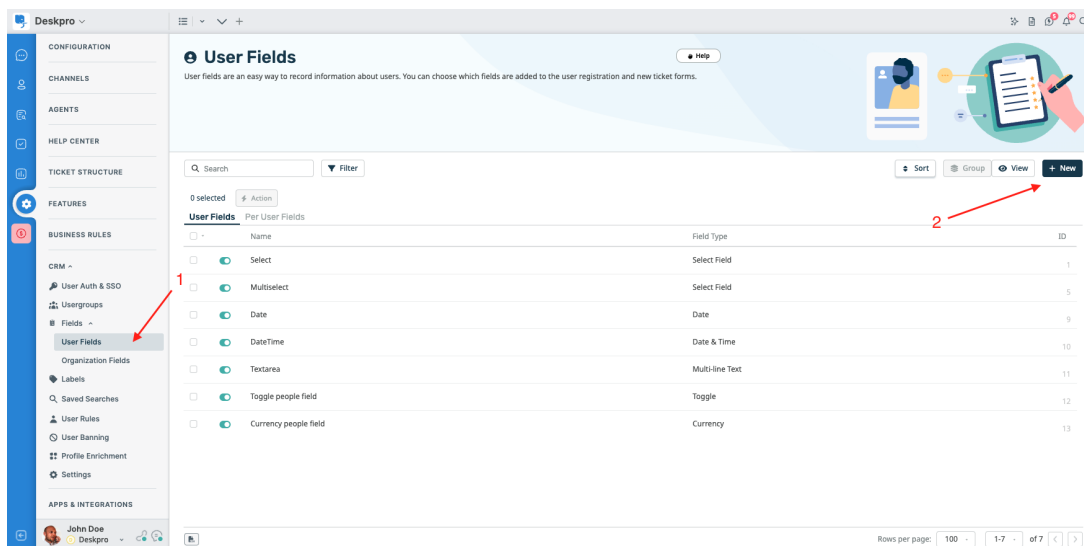# How do I set up a new user registration form?

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.

**Add: New Field**                                                              ×

| Field Type |
| --- |
| Select Field |
| Select Field |
| Date |
| Date & Time |
| Multi-line Text |
| Toggle |
| Currency |

○ 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.

**Add: New Field**

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 <a href="https://example.com/policy">Acme Corp's Network Policy</a>

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

---

Type

t Field

t Field

& Time

i-line Text

le

ency

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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

Information    Permissions    **Form**    Website Embed

1

Form

Custom Form Editor

2

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)
⠿ **Subject** (Single-line Text)
⠿ **Message** (Multi-line Text)
⠿ **Attachments**

+ Field

3

🔍 I agree    ✕

User Fields

I agree to your Network Policy

**Create**    Cancel

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**

Information    Permissions    Form    **Website 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 ▾ | Ⓝ 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

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## Related Content

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