

Creating Effective New Ticket Contact Forms

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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 [Ticket Contact Form](#) is to make the most of Deskpro's Built-in 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!



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

Every [Department](#) 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.

The screenshot shows the 'Layout' configuration page for the 'Support' department. The left sidebar lists departments: Support, Sales, Marketing, and Events. The main content area has tabs for Properties, Permissions, Layout (selected), and Website Embed. Under the Layout tab, there are two buttons: 'Use Default Form Layout' and 'Use Custom Form Layout for "Support"'. A blue banner states: '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.' Below this, there are two sections: 'User Form' and 'Agent Form'. The 'User Form' section lists fields: User Name & Email, Department, Subject, and Message & Attachments. The 'Agent Form' section lists fields: User Name & Email, Department, Subject, and Message & Attachments. On the right, there are two lists of fields: 'Ticket Fields' (Product, Category, Priority, CC, CAPTCHA, Account Number, Due Date) and 'User Fields' (Timezone). At the bottom, there are 'Save', 'Reset', and 'Delete' buttons.

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!

This screenshot shows the 'Layout' configuration page for the 'Support' department with a custom form layout. The left sidebar is the same as the previous screenshot. The main content area shows the 'Layout' tab selected. The 'User Form' and 'Agent Form' sections are now populated with fields: User Name & Email, Department, Product, Subject, Message & Attachments, Category, Account Number, and CC. Each field has a 'Settings' cog icon on its right side. The 'Ticket Fields' and 'User Fields' lists are no longer visible. At the bottom, there are 'Save' and 'Reset' buttons.

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

Category

\$10-\$100

Account Number

Subject *

Message *

Drag a file in here or Choose a file

Cc

Submit Reset

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 FormAgent Form

≡

User Name & Email

≡

Department

≡

Product

⚙

⚙

≡

Category

⚙

⚙

≡

Account Number

⚙

⚙

≡

Subject

≡

Message & Attachments

≡

CC

⚙

⚙

Ticket Fields · ⚙

Priority

CAPTCHA

Due Date

User Fields · ⚙

Timezone

SaveResetDelete

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

Support ▾ Awaiting Agent ▾ 1 ▾

PROPERTIES TASKS (0) BILLING & TIME LOG

Agent • Unassign Team

Arya Stark ▾ None ▾

Language: English ▾

Account Number: 2017-03-08 13:57

Due Date:

Product: Computers ▾

Priority: Urgent ▾

Category: \$1000-\$5000 ▾

Workflow: Under Investigation ▾

Labels:

Lock Merge Under Investigation Follow Up Feedback

REPLY NOTE

Attach Snippets B I U

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