

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	<input checked="" type="checkbox"/> Enable this field
Title *	<input type="text" value="I agree to your network policy"/>
Description *	<input a>."="" example.com\">here<="" http:="" type="text" value="By checking this box, you agree to abide by Acme Corp's network policy, detailed
Checkbox Label	<input type="text" value="I agree"/>
Default state	<input type="checkbox"/> Checked by default
User Validation	<input type="radio"/> No user validation <input checked="" type="radio"/> Require the user to check the checkbox
Agent Validation	<input checked="" type="radio"/> No agent validation <input type="radio"/> Require the agent to check the checkbox
Agent Only Field	<input type="checkbox"/> 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:

The screenshot shows the configuration interface for a ticket form. At the top, there are tabs for 'Properties', 'Permissions', 'Layout', and 'Website Embed'. Below these, there are two buttons: 'Use Default Form Layout' and 'Use Custom Form Layout for "New Users"'. A blue notification bar states: 'This is a custom layout that applies only to this department. Any changes you make to this layout will not affect any others.'

The main form area is divided into two sections: 'User Form' and 'Agent Form'. The 'User Form' section contains several fields: 'Department', 'Subject', 'Test', 'Custom date', 'Message', 'User Email', 'User Language', and 'I agree to your network policy'. Each field has a menu icon on the left and a settings icon on the right. Below the 'I agree to your network policy' field, there is a blue button labeled 'Acme ID number' with a plus sign, indicating it is being added to the form.

On the right side, there are two panels: 'Ticket Fields' and 'User Fields'. The 'Ticket Fields' panel includes buttons for 'Product', 'Category', 'Priority', 'CC', 'CAPTCHA', 'Attachments', 'Price range', 'Approval process', and 'Approved?'. The 'User Fields' panel includes buttons for 'Name', 'Timezone', and 'Acme ID number'.

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.

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

and I agree to your network policy is

or The following conditions are met:

Actions ?

then The following actions will run:

Send User Email

Template:

To: Email only the ticket owner
 Email everyone on the ticket (owner and all CC's)

From Name:

From Email:

Headers:

Set Labels Add labels

Remove labels