

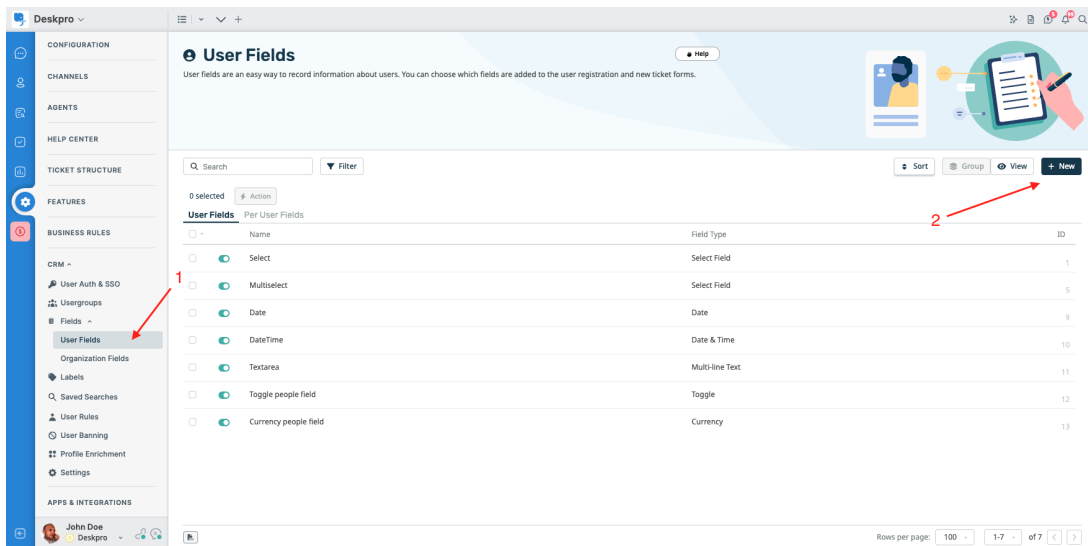
How do I set up a new user registration form?

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



The screenshot displays the Deskpro Admin interface for configuring User Fields. The left sidebar shows the navigation menu with 'User Fields' highlighted under the 'Fields' section, indicated by a red arrow labeled '1'. The main content area is titled 'User Fields' and contains a table of field types. A red arrow labeled '2' points to the '+ New' button in the top right corner of the table area.

<input type="checkbox"/>	Name	Field Type	ID
<input type="checkbox"/>	Select	Select Field	1
<input type="checkbox"/>	Multiselect	Select Field	5
<input type="checkbox"/>	Date	Date	9
<input type="checkbox"/>	DateTime	Date & Time	10
<input type="checkbox"/>	Textarea	Multi-line Text	11
<input type="checkbox"/>	Toggle people field	Toggle	12
<input type="checkbox"/>	Currency people field	Currency	13

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.

on and new ticket forms.

[Help](#)

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.

Add: New Field ✕

Field type

Title*

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

Description

Reference Alias ?

Enabled display Label

Disable display Label

Enabled by default

User validation

Agent Validation

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

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 Form Agent 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

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