

How do I set up a new user registration form?

Ben Henley - 2018-05-08 - Comment (1) - Using Deskpro

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 'Layout' tab of the ticket form editor. 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 the following fields:

- Department
- Subject
- Test
- Custom date
- Message
- User Email
- User Language
- I agree to your network policy

At the bottom of the form, there is a blue button labeled 'Acme ID number' with a mouse cursor hovering over it. To the right of the form, there are two panels: 'Ticket Fields' and 'User Fields'. The 'Ticket Fields' panel includes: Product, Category, Priority, CC, CAPTCHA, Attachments, Price range, Approval process, and Approved?. The 'User Fields' panel includes: 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

[+ Criteria](#)

or The following conditions are met:

[+ Criteria](#)

Actions ?

then The following actions will run:

Send User Email

Template: [edit 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

[+ Action](#)

Tags

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