

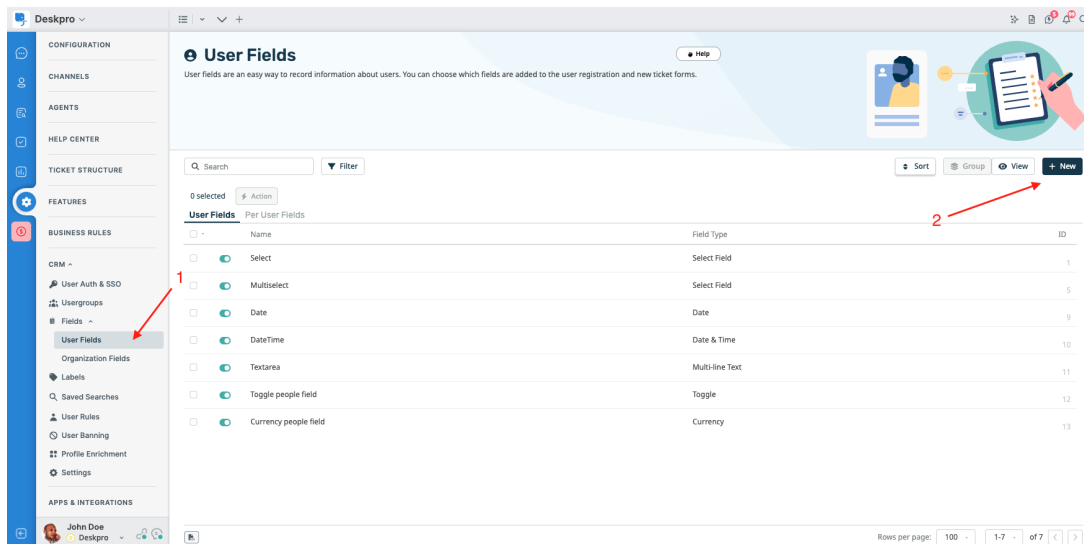
## How do I set up a new user registration form?

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.



The screenshot shows the Deskpro Admin interface. On the left sidebar, under the 'FEATURES' section, 'User Fields' is highlighted with a red arrow labeled '1'. The main content area is titled 'User Fields' and contains a table of fields. A red arrow labeled '2' points to the '+ New' button in the top right corner of the table.

<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

Field Type

Select Field

Select Field

Date

Date & Time

Multi-line Text

Toggle

Currency

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.

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

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

InformationPermissionsFormWebsite 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 FormAgent 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

CreateCancel

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

InformationPermissionsFormWebsite 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

Q

✎ Edit temp...

To

Email only ticket owner

▼

From name

Helpdesk name

▼

From email

The account set on the ticket

▼

Add headers

+

Create

Cancel

## Related Content

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