

Creating Effective Custom New Ticket Contact Forms

Lara Proud - 2023-08-21 - Comments (0) - Admin

What is a Ticket Contact Form?

A ticket contact form is a default feature on your Help Center; it is the principal channel users can use to submit tickets to your helpdesk.

Ticket forms can be embedded onto any of your web pages, and appear on your Help Center. You can create different custom Contact forms for each department; this ensures that your Agents have all the relevant information about an inquiry when a ticket gets submitted. But you can also have the same form for multiple departments if you wish.

How do I create effective Ticket Contact Forms?

The key to making an effective contact form is by making the most of Deskpro's built-in form fields as well as creating your own custom fields, this will enable you to collect information from your users before the ticket reaches your Agents.

Think of form fields as a supplement to email support, providing as much information about specific inquiries will help your Agents to solve issues faster and reduce the back-and-forth required to resolve an issue.

You can create custom fields by going to **Admin > Ticket Structure > Ticket Fields**.

The screenshot shows the 'Ticket Fields' configuration page. On the left is a sidebar with a navigation menu including: OVERVIEW, CONFIGURATION, CHANNELS, AGENTS, HELP CENTER, TICKET STRUCTURE (expanded), Departments, Statuses, Urgency, Ticket Fields (selected), Ticket Labels, FEATURES, BUSINESS RULES, CRM, APPS & INTEGRATIONS, and DATA. The main content area has a header with 'New' and 'Help' buttons. Below the header is a table of ticket fields. The table has columns for Name, Field Type, User Forms, Agent Forms, and ID. It lists 10 fields: Toggle, Priority, Type of product, Any further comment, Opening times, URL Field, File Field, Checkbox Field, and Radio Buttons Field. Each field has a checkbox in the 'Name' column and a toggle switch in the 'Field Type' column. At the bottom right, there is a pagination control showing 'Rows per page: 100' and '1-18 of 18'.

Name	Field Type	User Forms	Agent Forms	ID
<input type="checkbox"/> Toggle	Toggle			31
<input type="checkbox"/> Priority	Select Field			49
<input type="checkbox"/> Type of product	Single-line Text			48
<input type="checkbox"/> Any further comment	Multi-line Text			47
<input type="checkbox"/> Opening times	Display			46
<input type="checkbox"/> URL Field	Url			41
<input type="checkbox"/> File Field	File			40
<input type="checkbox"/> Checkbox Field	Select Field			36
<input type="checkbox"/> Radio Buttons Field	Select Field			32

Once you have created your custom fields, you can create your **Ticket Contact Forms**. You create Ticket Contact Forms for your Departments in **Admin > Ticket Structure > Departments**.

Select the department you require, and then open the **Form** tab where you can build your Ticket Contact Form by adding fields and ordering them using the handy drag-and-drop functionality.

Edit: Complaints

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)
- ⋮ Business Area (Select Field)
- ⋮ Message & Attachments (Multi-line Text)
- ⋮ Current Location (Single-line Text)

+ Field

You can add as many custom fields as you need. You can also create dependencies between fields for truly dynamic forms, e.g., only when a User selects that their 'Type of Product' is a 'Radiator' that 'When did you purchase the product?' appears.

Add field dependencies by selecting the **Cog** on a field and specifying the criteria; you can edit other advanced settings here.

Once you save your form, you can go to your Help Center and see the changes live by clicking on **Contact Us** and testing out the new fields you have created:

What are Agent Ticket Forms?

In the Agent interface, the fields that Users fill in when submitting a ticket will be displayed to the Agent on the individual ticket as an **Agent Ticket Form** in the **ticket properties panel**, so they have all the information available to them as they handle the ticket.

You will need to edit the **Agent Form** in **Admin > Ticket Structure > Departments** so that any custom fields you create are visible on the ticket for an Agent.

The screenshot shows a CRM ticket interface. At the top, there's a tab labeled "My radiator is faulty" with a sub-tab "My radiator is faulty" and a close button. Below the tab, there's a status bar showing "54" and "+ Add". The main content area is divided into two columns. The left column contains a sidebar with various fields: "Unassign", "Team", "Followers", "13 mins Next event", "57 secs Ticket Open", "57 secs User Waiting", "David Green (david.green@mail.com)", "Ref MUWF-2400-XMCK", "Brand 221B Energy", "Department* Complaints", "Language English", "Business Area Customer Support", "Type of Product Radiator", and "When did you purchase ... 28 December 2021". The right column contains a "FORM" section with a "History" tab. The "FORM" section shows a message from "David Green (david.green@mail.com)" with the text "Please could you help my radiator isn't working properly!". Below the message, there's a "Write a message..." input field. At the bottom, there's a "Send as" dropdown menu set to "Awaiting User", a "Close tab after email sent" checkbox, and buttons for "Agent", "Team", and "Macro".

Agents can edit or update the information provided in the ticket by clicking on a field; this is helpful if a User has accidentally put the wrong information down and helps to keep all records up to date.

In addition to Ticket Custom Fields, you can create custom User and Organization fields that can add and store additional information about them in your CRM.

Отметки
Contact Us
Ticket Forms

Содержимое по теме

- [How do I add Custom User Fields to Ticket Forms?](#)
- [How do I set up a new user registration form?](#)