How do I set up a new user registration form?

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Some organizations need new users to complete a form to provide information, agree to network policies, etc.
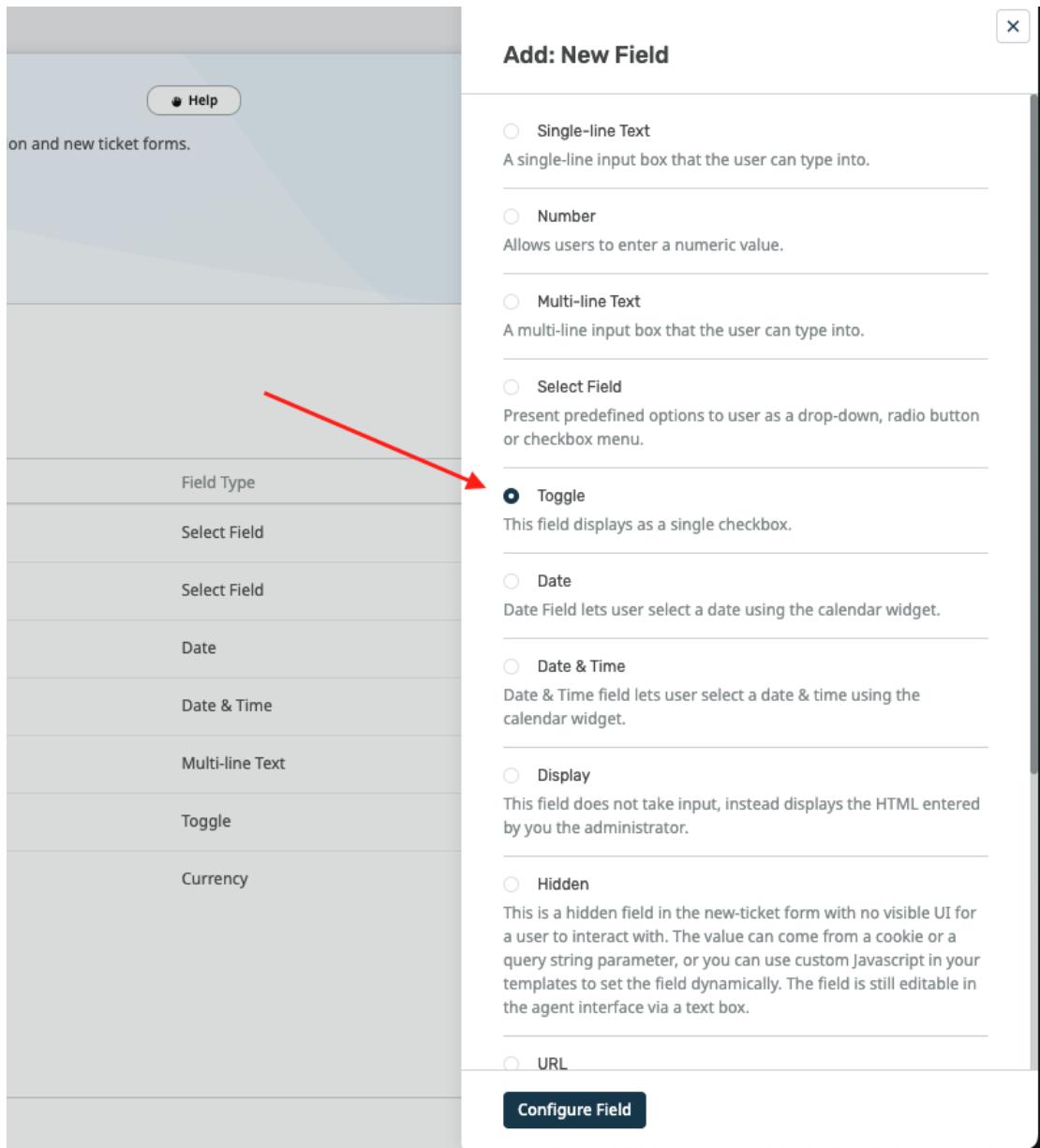
This article explains how you can implement this in Deskpro so that users can submit a ticket form and all the information is added directly to their profiles. We'll also demonstrate how to embed a form to collect information from new users.

1. Go to **Admin > CRM > Fields > User Fields**. Click "New" to create a new Custom Field.

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.

During the field configuration, you will be able to set up Title, Description, and User Validation amongst other values.

Add: New Field

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 Acme Corp's Network Policy

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

Information   Permissions   **Form**   Website Embed

1

Form

Custom Form Editor ▼

2

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   ◀ 3

🔍 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
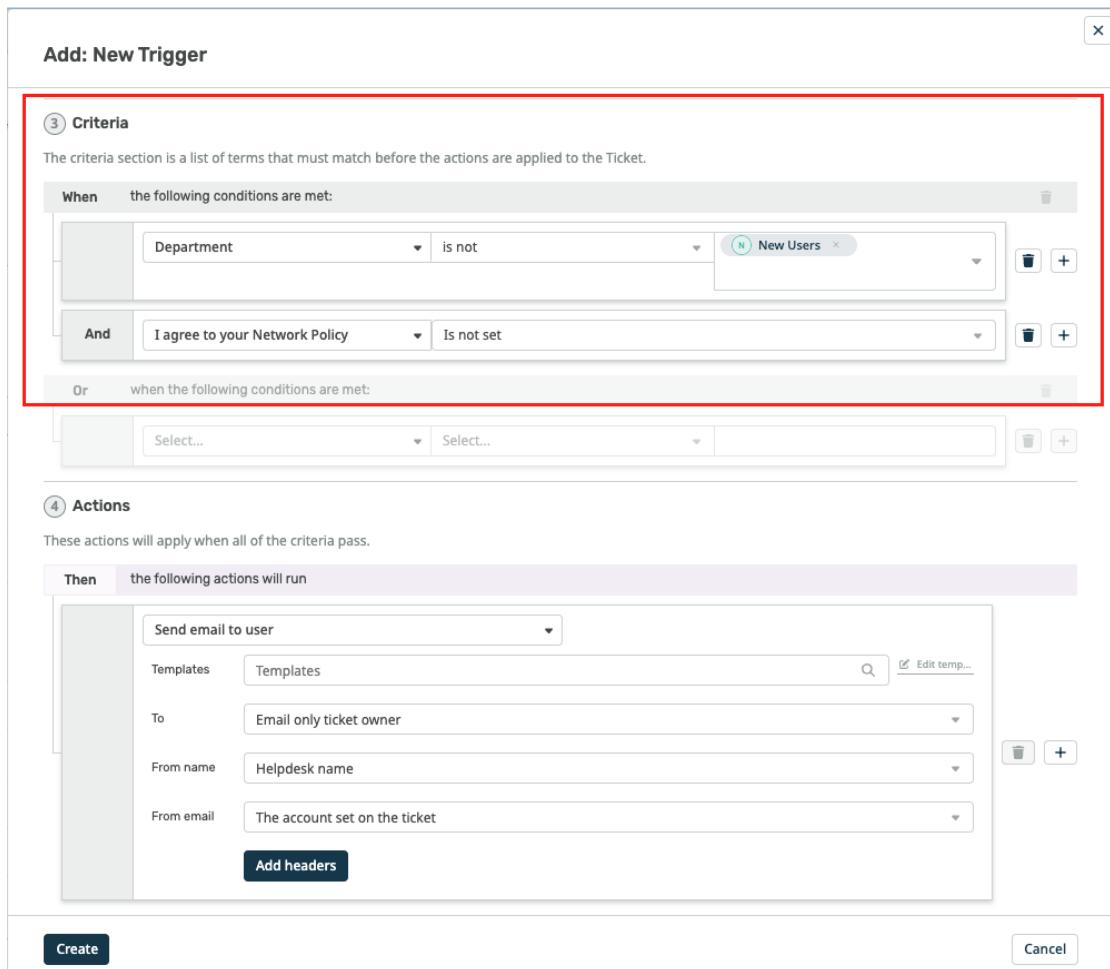
Templates | Templates | ✎ Edit temp...

To | Email only ticket owner

From name | Helpdesk name

From email | The account set on the ticket

Add headers

Create | **Cancel**

相关内容

- How do I add Custom User Fields to Ticket Forms?
- Creating Effective Custom New Ticket Contact Forms