



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.

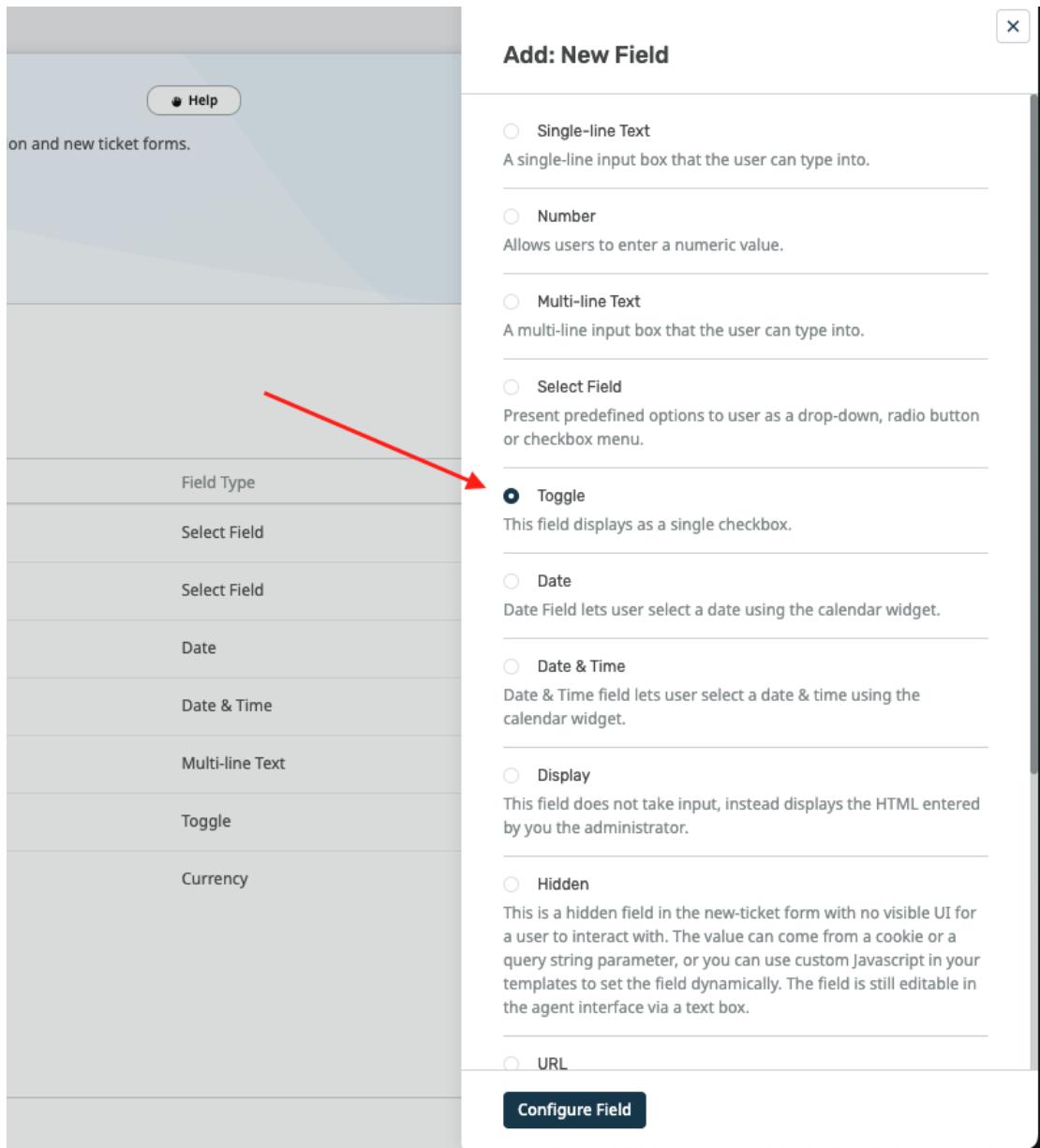
This article explains how you can implement this in Deskpro so that users can submit a ticket form and all the information is added directly to their profiles. We'll also demonstrate how to embed a form to collect information from new users.

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

The screenshot shows the Deskpro Admin interface with the sidebar expanded. The 'User Fields' link under the 'Fields' section is highlighted with a red arrow labeled '1'. In the main content area, the 'User Fields' table is displayed with various field types listed. A red arrow labeled '2' points to the '+ New' button in the top right corner of the table header.

ID	Field Type	Order
1	Select Field	1
5	Select Field	5
9	Date	9
10	Date & Time	10
11	Multi-line Text	11
12	Toggle	12
13	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.

Add: New Field

Field Type

- 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.

X
Add: New Field

Type

Text Field

Text Field

& Time

Multi-line Text

File

Encrypted

Field type

Title*

3

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

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

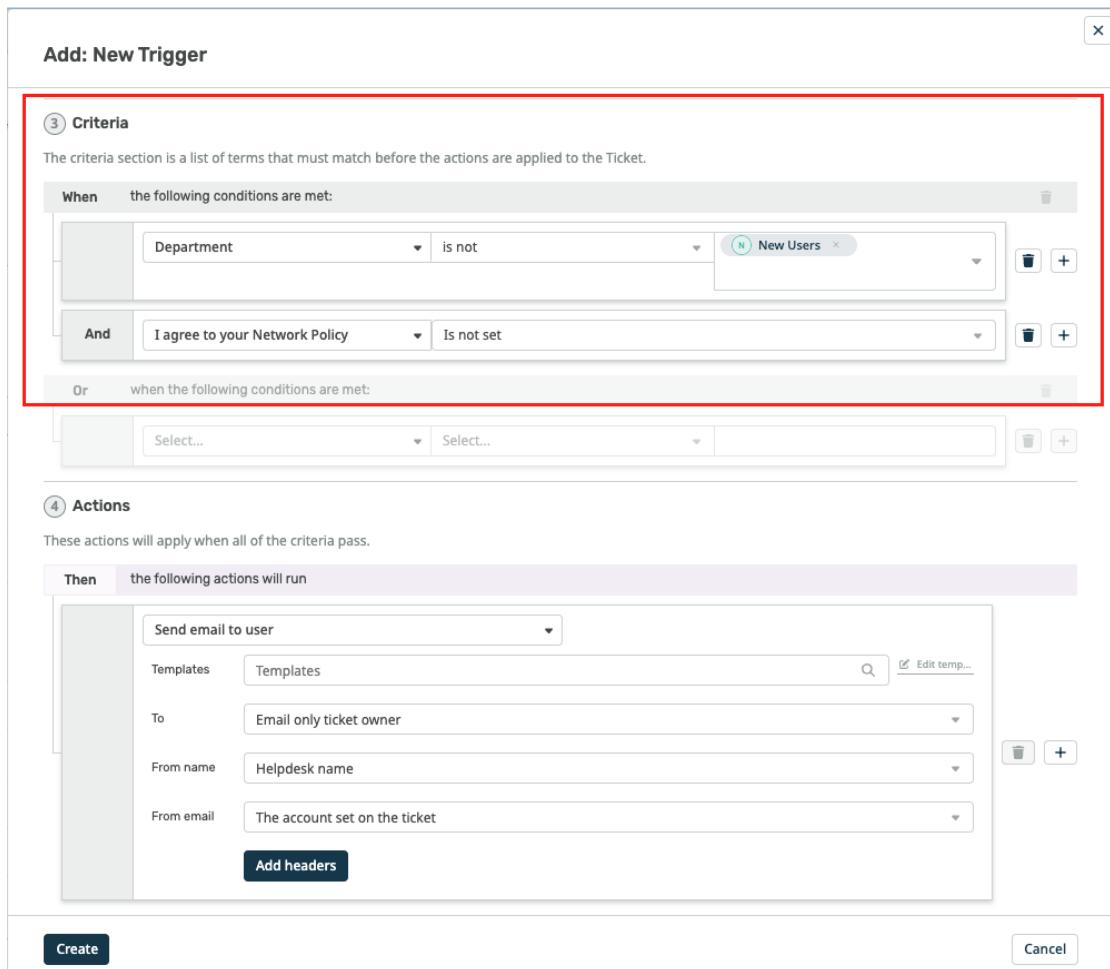
To: Email only ticket owner

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](#)