

How to create custom forms and lists in Service Desk

Click 'Admin Panel' > 'Manage' > 'Forms'

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What are forms?

Forms are used in various Service Desk interfaces to collect information from end-users, customers and your company. For example, the contact form collects a new user's name, email address and phone number.

You can manage forms at 'Admin Panel' > 'Manage' > 'Forms'

- **Built-in forms** - Service Desk includes the following standard forms which you can edit as required:
 - **Contact Information** - Collect the email / phone / address details of new users. This form is published on your support portal.
 - **Ticket Details** - Collect details about the nature of an issue from a user. This can include a description of the issue, the asset affected, the priority level, and more. This form is published on your support portal.
 - **Company Information** - Collect and store details about your company (name, address, website etc). This information is inserted into the system emails sent by Service Desk. You can view and populate this form at 'Admin Panel' > 'Settings' > 'Company' > 'Basic Information'.
 - **Customer Information** - Collect details about a customer organization. Staff can add new customers with this form at 'Staff Panel' > 'Users' > 'Customers' > 'Add New Customer'.
- **Custom forms** – You can create custom forms to collect specific pieces of data, usually from end-users.

For example, you may have a ticket category on your support website called 'Laptop Issues'. You can show a custom form to users that choose this category. The form could ask relevant questions like the laptop model/brand, the operating system and the nature of the problem('Windows won't boot', 'VPN connection', 'Problem with an application', etc).

- **Custom lists** - Lists are used to populate the menus in your forms. For example, you may have a drop-down menu on one of your forms which asks 'What is your laptop's operating system?'. The custom list for this menu would include items like 'Windows 10', 'Windows 8/8.1', 'Ubuntu', 'Debian', 'Chrome OS' etc.

Add a new custom form

- Login to Comodo One / Dragon
- Click 'Applications' > 'Service Desk'
- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Forms'
- Click 'Add New Custom Form'

The screenshot shows the 'Service Desk' interface. The left sidebar contains a 'MANAGE' menu item (circled in red) with a sub-menu 'Forms' (also circled in red). The main content area is titled 'Custom Forms' and displays a table of built-in forms. Below this table, there are buttons for 'Add New Custom Form' and 'Delete', and a 'Show 25 records' dropdown. A second table below shows custom forms.

BUILT-IN FORMS		LAST UPDATED
	Contact Information	04/30/2018 1:55 pm
	Ticket Details	04/30/2018 1:55 pm
	Company Information	04/30/2018 1:55 pm
	Customer Information	04/30/2018 1:55 pm

« Prev 1 Next »

[+ Add New Custom Form](#) [Delete](#) Show 25 records

<input type="checkbox"/>	CUSTOM FORMS	LAST UPDATED
<input type="checkbox"/>	Asset Information	04/30/2018 1:55 pm
<input type="checkbox"/>	Troubleshooting	02/21/2019 11:18 am

You can now construct your custom form:



Custom Form

Add new custom form section

Custom forms are used to allow custom data to be associated with tickets

Title: * ?

Instructions: ?

Form fields available for new custom form

SORT ?	LABEL ?	TYPE ?	INTERNAL ?	REQUIRED ?	VARIABLE ?	DELETE ?
⇅	<input type="text"/>	Short Answer ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
⇅	<input type="text"/>	Short Answer ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
⇅	<input type="text"/>	Short Answer ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	
⇅	<input type="text"/>	Short Answer ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	

Internal Notes: be liberal, they're internal

Title: Enter a label for the form page. For example, 'Tell us about your problem '. The title is shown at the top of the page.

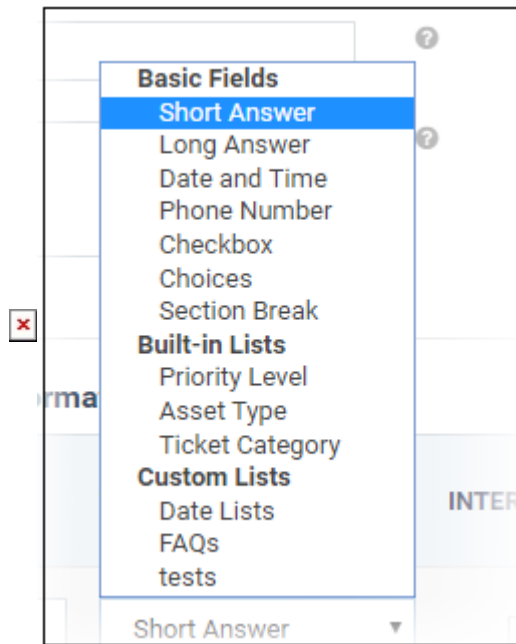
Instructions: Enter short guidance for the user. For example, 'Please answer the following questions to help us get started on your issue'.

Form Fields

- **Sort:** Drag and drop the fields to your preferred order. The questions are shown in this order on your form.
- **Label:** Enter the name of the field. This should relate to or introduce the item you select in the 'Type' column.
- **Type:** Select the type of input expected from the user.
 - **Basic fields** - Form elements for the user to complete. If you select one of these then your label

should tell the user what information is expected of them.

- For example, 'Short answer' and 'Long answer' are blank spaces. Your label should tell the user what to type - 'Name', 'Address', etc.
- Similarly, 'Checkbox' means the form will show a checkbox to the user to tick as appropriate. Your label should provoke a simple 'Yes' or 'No' response. For example, 'I have read and agree to the terms and conditions', or 'Save this payment type'.
- **Built-in / Custom lists** - These allow users to select their answer from a preset list. For example, the 'Priority Level' list is a drop-down menu with 'Low', 'Normal', 'High' and 'Critical'.



- Built-in lists cannot be edited but can be made public or kept internal.
- You can create your own custom lists as required. [Click here](#) for help to create custom lists for drop-down menus.
- **Internal:** Select this if the fields are intended for admins and staff to complete. If left unchecked, the fields can be used in both staff forms and customer facing forms.
- **Required:** Will mark the field as mandatory. Respondents must complete the field in order to submit the form.
- **Variable:** Specify a label for the field variable that you can call in your email templates.
 - Variables can be used in both built-in and custom forms.
 - You can insert these variables in the body of your email templates. The variables dynamically fetch the respective field data.
 - To add a variable, simply paste a string with the following format to the body of the mail:

`%{identifier.variable}`

- For example, the 'User Details' form has a field called 'name'. The string to call the user's name is '`%{ticket.user.name}`'. You then enter 'Hi `%{ticket.user.name}`' in your auto-responder mail. A user called 'Bob' creates a ticket. The mail to him would read 'Hi Bob'.

- Custom forms can be added to the following interfaces:

1. **Ticket Categories** - 'Admin Panel' > 'Manage' > 'Ticket Category' > 'Add New Category' or click on a ticket category > 'New ticket options' > 'Custom form'

2. **User details** - 'Staff Panel' > 'Users' > 'User Directory' > click on a user > 'More' > 'Manage forms'

3. **Customer details** - 'Staff Panel' > 'Users' > 'Customers' > click on a customer > 'More' > 'Manage forms'

4. **Ticket details** - 'Staff Panel' > 'Tickets' > select a ticket category > click a ticket number to open it > 'More' > 'Manage forms'

- The identifier depends on the type of interface to which the custom form is added. The following table shows the identifiers for the interfaces in which forms are used

Interface	Variable format
Ticket categories and Ticket details	<code>%{ticket.variable}</code>
User details	<code>%{ticket.user.variable}</code>
Customer details	<code>%{customer.variable}</code>

Let's say you added a new field called 'Salutation' to a form, entered 'salutation' in the variable column and apply the form to the user details interface ('Staff Panel' > 'Users' > 'User Directory' > click a user > User page). You could reference the user's actual salutation in an email template with the variable `%{ticket.user.salutation}`.

- See [this wiki](#) if you need help to use variables in email templates.
- **Delete:** Use this checkbox to remove a field.
- **Internal notes:** Add any remarks about the form. Only admins and staff can see these comments.

Click 'Add Form' to save the form

- Saving the form enables the field configuration option:





- Click the 'Config' button to view and edit field properties. The field properties depend on the form parameter. For example, the 'Date' properties are shown below:

Field Configuration – Date ✕

Time: *Show time selection with date picker*

Timezone Aware: *Show date/time relative to user's timezone*

Earliest: 
Earliest date selectable

Latest: 

Allow Future Dates: *Allow entries into the future*

Help Text:
Help text shown with the field

- Update the fields as required. Click 'Save' for your settings to take effect.

An example custom form is shown below:



Printer Information

Please fill in the fields below

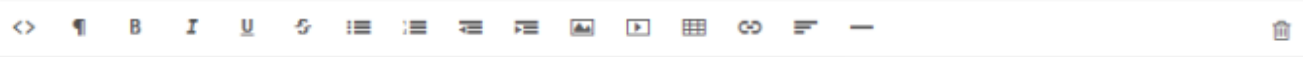
Name of the Printer:	<input type="text" value="-- Select --"/>
Model Number:	<input type="text"/>
Brand Name:	<input type="text"/>
Is working now:	<input type="text"/>
Date Purchased:	<input type="text"/> 
Check List:	<input type="text" value="-- Select --"/>
Warranty:	<input type="text"/> 

Ticket Details

Please Describe Your Issue

Issue Summary:

Issue Details:



Details on the reason(s) for opening the ticket.

Edit a built-in or custom form

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Forms'
- Click the name of the built-in form or custom form

The 'Contact Information' built-in form is shown below as an example:



Comodo.One > Service Desk > Manage > Forms

Custom Form

Update custom form section

Custom forms are used to allow custom data to be associated with tickets

Title: * ⓘ

Instructions:

Form Fields fields available for ticket information

SORT	LABEL	TYPE	INTERNAL	REQUIRED	VARIABLE	DELETE
↕	<input type="text" value="Email Address"/>	Short Answer <input type="button" value="Config"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="email"/>	<input type="checkbox"/>
↕	<input type="text" value="Full Name"/>	Short Answer <input type="button" value="Config"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="name"/>	<input type="checkbox"/>
↕	<input type="text" value="Phone Number"/>	Phone Number <input type="button" value="Config"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="phone"/>	<input type="checkbox"/>
↕	<input type="text" value="Internal Notes"/>	Long Answer <input type="button" value="Config"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="notes"/>	<input type="checkbox"/>
↕	<input type="text"/>	Short Answer <input type="button" value="Config"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
↕	<input type="text"/>	Short Answer <input type="button" value="Config"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

Internal Notes: be liberal, they're internal

- Update the editable fields as required. The update procedure is similar to adding a new custom form. See [above](#) for help with this.
- Click 'Save changes'
- The updates will appear in all interfaces that use the form.

Add a custom list

Click 'Admin Panel' > 'Manage' > 'Lists'

- This area lets you manage lists of items which populate the drop-down menus on your forms.
- For example, if you add a custom field called 'Salutation' to the new user (contact information) form, then your list would include items like 'Mr', 'Mrs', 'Ms', 'Senor', 'Senora', etc.
- Once saved, you can select your new list in the 'Type' column of the form edit screen. For example:

- Click 'Admin Panel' > 'Manage' > 'Forms'
- Click on the 'Contact Information' from
- Click 'Add new field'. Type 'Salutation' as the label
- You can select your custom list from the 'Type' drop-down:

The screenshot shows a form configuration interface. On the left, there are three input fields: 'Phone Number', 'Internal Notes', and 'Salutation'. To the right of these fields is a dropdown menu. The dropdown menu is open, showing a list of options: 'Priority Level', 'Asset Type', 'Ticket Type', 'Custom Lists', 'Salutations', and 'Short Answer'. The 'Salutations' option is highlighted in blue. To the right of the dropdown menu, there are three checkboxes: the first is unchecked, the second is checked, and the third is unchecked. Below the form, there is a small blue icon.

- You can also set up multi-level lists with a 'parent-child' structure. The contents of the child list dynamically change depending on the item chosen in the parent list.

Create a new custom list

- Open the admin panel (see the last link on the left)
- Click 'Manage' > 'Lists'
- Click 'Add New Custom List':

Custom Lists

 [+ Add New Custom List](#)

 Delete



LIST NAME ↕

PARENT LIST

CREATED ↕



[FAQ](#)

04/27/2016 4:50 pm



[Date List](#)

04/27/2016 4:51 pm

Add New Custom List

Custom lists are used to provide drop-down lists for custom forms.

Definition

Items

Properties

Parent List

Name: *

Plural Name:

Sort Order:

Alphabetical



Internal Notes:

Add List

Reset

Cancel

Follow these steps to create your list:

- [Step 1 – General settings](#)
- [Step 2 - Add items to the list](#)

- Step 3 – Define item properties (optional)
- Step 4 - Enter the values for the properties (optional)
- Step 5 - Map list items to parent list (optional)

Step 1 - General settings

Open the 'Definition' tab in the new list screen:

✖

Add New Custom List

Custom lists are used to provide drop-down lists for custom forms.

Definition
Items
Properties
Parent List

Name: *

Plural Name:

Sort Order: ▼

Internal Notes:

Add List
Reset
Cancel

- **Name:** Create a label for the list. This should describe the items in the list itself. For example, if you add a field called 'Operating System' to your new ticket form, then you could enter 'OS' as the name of the list.
- **Plural Name:** Enter the term to describe multiple instances of the list. For example, if your list is called 'Country', then the plural is 'Countries'. The plural form is shown in the 'Type' column of the field at 'Admin Panel' > 'Manage' > 'Forms'. If you leave this field blank, Service Desk will simply add an 's' on the end of the name.
- **Sort Order:** Choose how list items should be shown in the list (alphabetical, reverse alphabetical, or sorted manually). The options selected here will be applied to the items in the 'Items' tab.

- **Internal Notes:** Add any comments about the list. The comment are only visible to staff and admins.

Click 'Add List' to save the list

Step 2 - Add items to the list

- Click the 'Items' tab.

The screenshot shows the 'Add New Custom List' interface. At the top, there's a title 'Add New Custom List' and a subtitle 'Custom lists are used to provide drop-down lists for custom forms.' Below this are four tabs: 'Definition', 'Items', 'Properties', and 'Parent List'. The 'Items' tab is selected. The main area shows 'Showing 0 list items' and a table with the following structure:

VALUE	EXTRA – ABBREVIATIONS AND SUCH	DISABLED	DELETE
+ <input type="text"/>	<input type="text"/>		
+ <input type="text"/>	<input type="text"/>		
+ <input type="text"/>	<input type="text"/>		
+ <input type="text"/>	<input type="text"/>		

At the bottom left of the table area is a green button labeled 'Add New Item'.

Type each item you want in the list on a separate row. These are the options you will present in the drop-down menu.

For example, if your list is called 'Operating System', then your items could be 'Windows 10', 'Windows 8/8.1', 'Ubuntu', 'Debian', 'iOS', 'Android' etc.

- **Value** - Enter the label of the item. This is what the user sees in the list.
 - **Extra** - Abbreviations and such.
 - **Disabled** - Enable or disable the item. Disabled items are not shown in the drop-down, but can be quickly re-enabled later.
 - **Delete** - Remove the item.
- Click 'Add New Item' if you want more than four items in the list.
 - Click 'Save Changes'. The 'Disabled' and 'Delete' check-boxes become active after you save the list.

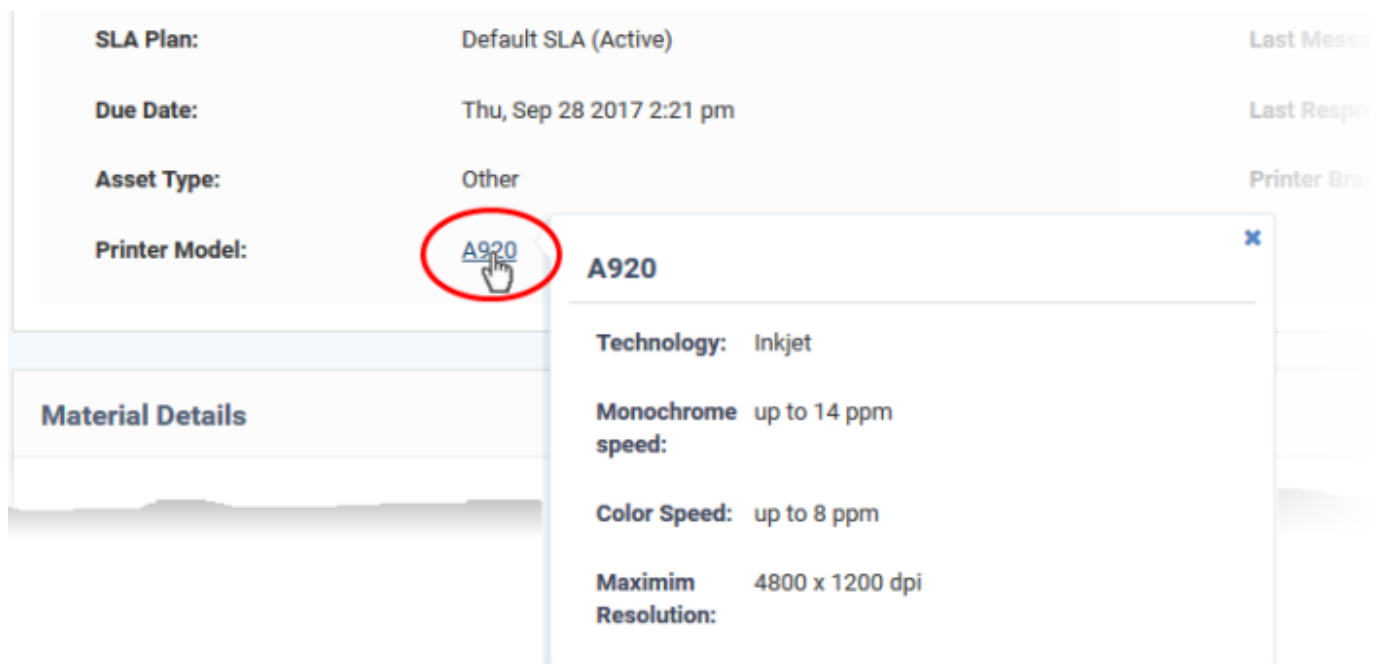
You can finish at this point if required.

The custom list is available for selection in the 'Type' column of the forms available at 'Admin Panel' > 'Manage' > 'Forms'.

Steps 3 – 5 are optional, allowing you to add tool-tips to your custom list and to create child lists.

Step 3 - Define item properties (optional)

- The 'Properties' tab lets you add more details about the items in your list. Staff and users can see this information when they place their mouse over the item.
- For example, say you added a custom field, 'Printer Model', to your 'Ticket Details' form. You then created a custom list which consists of various printer models.
- You could add 4 items in the 'Properties' tab - 'Technology', 'Monochrome Speed', 'Color Speed' and 'Maximum Resolution'. You can then define values for the 4 properties for each printer model.
- Users select the model they are having problems with when they create their ticket. Staff and users can then see the additional model info in the ticket details screen:



The screenshot shows a ticket details form with the following fields:

- SLA Plan:** Default SLA (Active)
- Due Date:** Thu, Sep 28 2017 2:21 pm
- Asset Type:** Other
- Printer Model:** A dropdown menu with 'A920' selected and circled in red. A tooltip is open for 'A920' showing the following properties:
 - Technology:** Inkjet
 - Monochrome speed:** up to 14 ppm
 - Color Speed:** up to 8 ppm
 - Maximim Resolution:** 4800 x 1200 dpi

Below the form, there is a section titled 'Material Details'.

Example process:

- Populate the 'Definition' and 'Items' tabs as explained in steps 1 and 2
- Click the 'Properties' tab.
- Create your properties. In our example, 'Technology', 'Monochrome Speed', 'Color Speed' and 'Maximum Resolution'.
- Leave the 'Type' as 'Short Answer' for now.
- Click 'Save Changes'

- Go back to the 'Items' tab
- Click the 'Properties' link in the row of your first item
- Type the specs of the item concerned for each property then 'Save'.
- Repeat for all items in the list
- Click 'Save Changes' to save the entire list.
- The additional properties will be visible to staff and users in the ticket details screen.

Add properties to a list

- Click the 'Properties' tab

Update custom list

Custom lists are used to provide drop-down lists for custom forms.

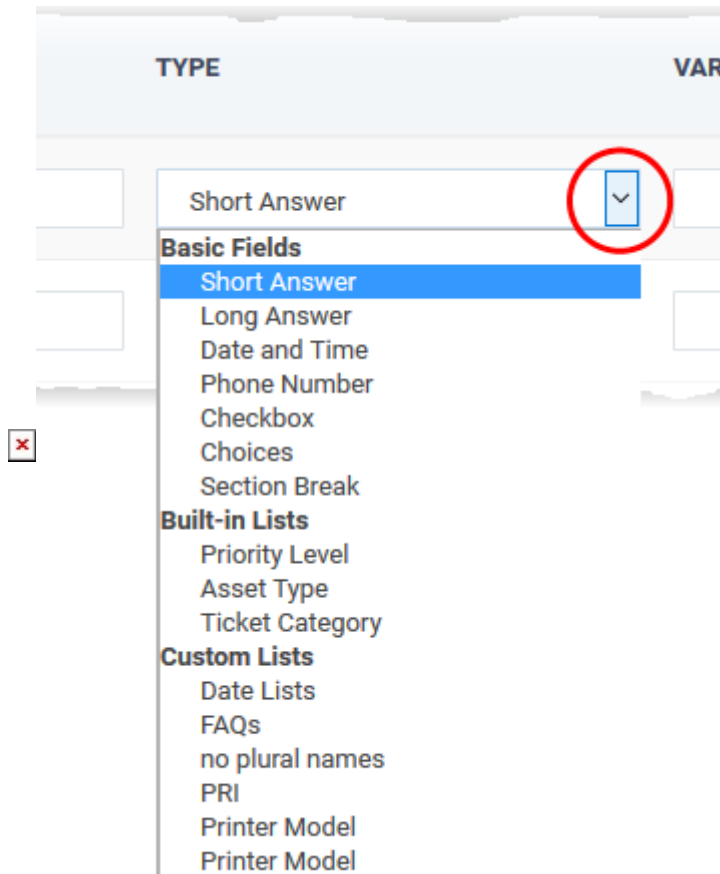
Definition
Items
Properties
Parent List

Item Properties properties definable for each item

SORT	LABEL	TYPE	VARIABLE	DELETE
+	<input style="width: 90%;" type="text"/>	Short Answer ▼	<input style="width: 90%;" type="text"/>	
+	<input style="width: 90%;" type="text"/>	Short Answer ▼	<input style="width: 90%;" type="text"/>	

Save Changes
Reset
Cancel

- **Label:** Type the name of the property. For example, 'Maximum Resolution'.
- **Type:** Choose how you want to present the information. 'Short Answer' means you can type a short definition into a text-box.



Tip: If required, you can create a custom list of parameters. You can then select that as drop-down for entering the values for the property.

- **Variable** - Enter a variable name for the field data. The variables can be used in email templates for sending automated messages.
 - For example if you use the variable name 'resolution' for the 'Maximum Resolution' property, then you can use '%{**identifier**.resolution}' in email templates to fetch the actual value. The **identifier** depends on the interface in which you use the form. See [above](#) for explanation of using variables in the email templates.
- **Delete** - Lets you remove the parameter while editing the list.

Note: The 'Variable' and 'Delete' options will be active after you save the list.

- Click 'Save Changes' to save the list
- Reopen the 'Properties' tab after saving the list.

Update custom list

Custom lists are used to provide drop-down lists for custom forms.

Definition Items **Properties** Parent List

Item Properties properties definable for each item

SORT	LABEL	TYPE	VARIABLE	DELETE
↕	Technology	Short Answer	Config	<input type="checkbox"/>
↕	Monochrome speed	Short Answer	Config	<input type="checkbox"/>
+		Short Answer		
+		Short Answer		

Save Changes Reset Cancel

- **Config:** Click the 'Config' button for a property to set up how the property field is shown for entering the value in the 'Item Properties' dialog ([next step](#)). You can also set the limits, specify help text shown for the field, lead text shown inside the field and more. The example below shows the configuration screen for the 'Short Answer' type field



- Configure the field and click 'Save'
- Repeat the process for configuring other properties

Tip: You can add more properties using the new blank items appearing in the interface and repeating the process. Also, you can manually sort the items to the order in which they have to appear in the 'Properties' tool tip, by dragging the icon in the 'Sort' column to required position.

- Click the 'Save Changes' to save the properties list.

Step 4 - Enter values for the properties (optional)

- Click the 'Items' tab after saving the properties list
- Click the 'Properties' link of an item

Update custom list

Custom lists are used to provide drop-down lists for custom forms.

Definition	Items	Properties	Parent List
Showing 6 list items			
VALUE	EXTRA – ABBREVIATIONS		
A920	<input type="checkbox"/>	Properties	
A940	<input type="checkbox"/>	Properties	
HP Deskjet 1010 Printer	<input type="checkbox"/>	Properties	

Item Properties – A920

Technology:

Monochrome speed:

Color Speed:

Maximum Resolution:

The fields added under the 'Properties' tab in the [previous step](#) appear in this dialog.

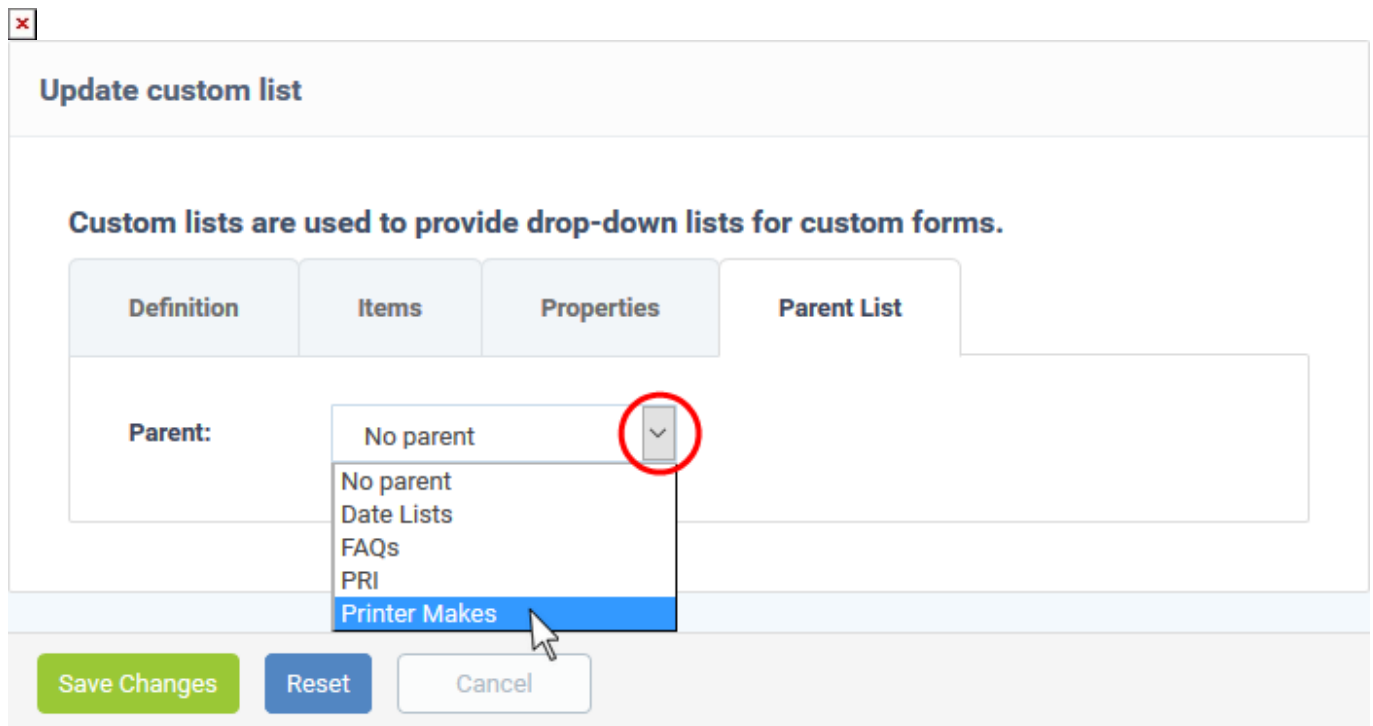
- Enter the values for the properties and click 'Save'
- Repeat the process to specify properties for all items
- Click 'Save Changes' to save the entered properties for the items

Step 5 - Map list items to parent list (optional)

- Custom lists can be constructed to have a multi-level 'parent-child' structure. When the parent and child lists are selected for successive fields in a custom form, the contents of a child list dynamically change depending on the item selected in the parent list.
- The 'Parent List' tab lets you choose a parent list, if the currently configured list is a child list.
 - Once a parent list is chosen, options for selecting the parent item for each item in the currently configured list appears
 - The parent and child lists can be added for successive fields in a custom form
 - When an item is chosen from the parent field drop-down in the interface where the form is used, the successive child field drop-down shows only the corresponding child items and so on

Configure parent items for currently configured list

- Click the 'Parent List' tab



Update custom list

Custom lists are used to provide drop-down lists for custom forms.

Definition Items Properties **Parent List**

Parent: ▼

- No parent
- Date Lists
- FAQs
- PRI
- Printer Makes**

Save Changes Reset Cancel

- Choose the parent list for the currently configured list from the drop-down

After selecting the parent list, the list of items in the currently configured list will appear with a drop-down menu beside each (under 'Parent Item'). Each drop-down contains the list of all items included in the chosen parent list.



Update custom list

Custom lists are used to provide drop-down lists for custom forms.

Parent: Printer Makes

ITEMS	PARENT ITEM
ML - 1676	Select a parent item
A920	Select a parent item Brother Dell Epson Hewlett Packard Samsung
A940	Select a parent item

- Choose the respective parent item or each item in the currently configured child list one by one, from the 'Parent Item',
- Click 'Save Changes'

The custom list is added and will be available for adding to custom field drop-downs in custom forms.

Field Types in Custom Forms and Custom Lists

Field Type	How the field will be displayed in the target form
Short Answer	Single line text box
Long Answer	Multi line text box
Date and Time	Shows the date field with calendar icon to choose a date. If configured for time, displays a drop-down that shows time at intervals of 15 minutes, for the user to choose the time.
Phone number	Shows single line text field for entering phone number. If configured, shows an additional box for 'Extension' number
Check box	Displays a checkbox for the field.

Choices	<p>Displays a drop-down for the user to choose an option. The options to be shown are to be configured from the 'Forms' interface.</p> <p>Example: Field Label = Mode of Service Options = Site Visit, Remote Access</p> <p>'Choices' is an alternative to ' Custom Lists'. Choices can be used to create an ad-hoc drop-down for a form, rather than creating a custom list under the 'Lists' interface and choosing it for the field in a custom form.</p>
Section Break	Lets you to insert a break in the form between sections in a single form.
Built-in lists	Shows a drop-down menu with options defined in the selected built-in list
Custom Lists	Shows a drop-down menu with options defined in the custom list