

How Do I Convert A Normal User to An Agent?

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Question:

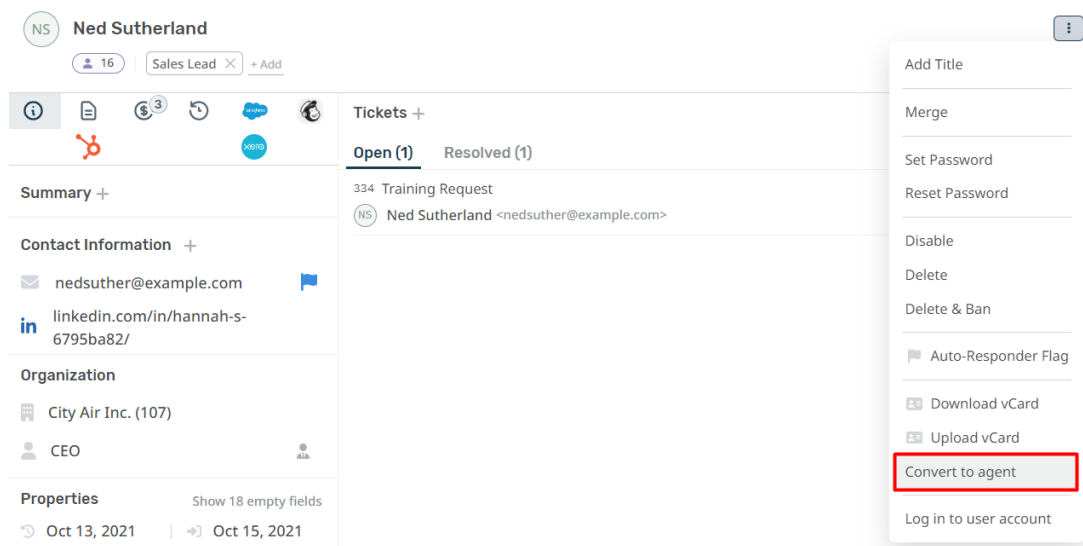
We have a user in the Helpdesk, but I want them to be able to respond to tickets. How do I upgrade them to an agent account?

Answer:

It's easy to convert a User to an Agent. Go to **Admin > Agent Profiles** and create an Agent account using their email address. You will then be prompted to convert the User account into a new Agent account.

Once they're created, you will have control over the account properties and permissions from the Admin interface as with any other Agent account. Additionally, all of the information added to their account while they were a User will be preserved, including any properties, tickets they've submitted, etc.

You can also convert a User to an Agent from the **CRM**. Just open the User's profile and open the settings on the right-hand side and select **Convert to agent**.



The screenshot displays the Deskpro CRM interface for a user profile. The user is Ned Sutherland, with a profile picture showing the initials 'NS'. The profile includes a 'Sales Lead' tag and a '+ Add' button. Below the profile header, there are icons for various actions: information, documents, a calendar, a clock, a mail icon, a speech bubble, and a user icon. The 'Tickets' section shows 'Open (1)' and 'Resolved (1)' tickets. A specific ticket is visible: '334 Training Request' by Ned Sutherland <nedsuther@example.com>. The left sidebar contains sections for 'Summary', 'Contact Information' (including email nedsuther@example.com and LinkedIn profile), 'Organization' (City Air Inc. (107) and CEO), and 'Properties' (showing dates Oct 13, 2021 and Oct 15, 2021). On the right, a context menu is open, listing various actions: 'Add Title', 'Merge', 'Set Password', 'Reset Password', 'Disable', 'Delete', 'Delete & Ban', 'Auto-Responder Flag', 'Download vCard', 'Upload vCard', 'Convert to agent' (highlighted with a red box), and 'Log in to user account'.

Note

Only agents with sufficient permissions will be able to convert a User account into an Agent.

