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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. At the top, the user's name 'Ned Sutherland' is shown with a circular avatar containing the initials 'NS'. Below the name, there are tags for '16' and 'Sales Lead', along with an '+ Add' button. The profile is divided into several sections: 'Summary +', 'Contact Information +', 'Organization', and 'Properties'. The 'Contact Information' section lists the email 'nedsuther@example.com' and a LinkedIn profile. The 'Organization' section shows 'City Air Inc. (107)' and the role 'CEO'. The 'Properties' section indicates 'Show 18 empty fields' and shows dates 'Oct 13, 2021' and 'Oct 15, 2021'. On the right side, there is a 'Tickets +' section with tabs for 'Open (1)' and 'Resolved (1)'. A ticket titled '334 Training Request' is listed, associated with 'Ned Sutherland <nedsuther@example.com>'. A context menu is open on the right, showing 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 border), and 'Log in to user account'.

Note

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

