

How Do I Convert A Normal User to An Agent?

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Question:

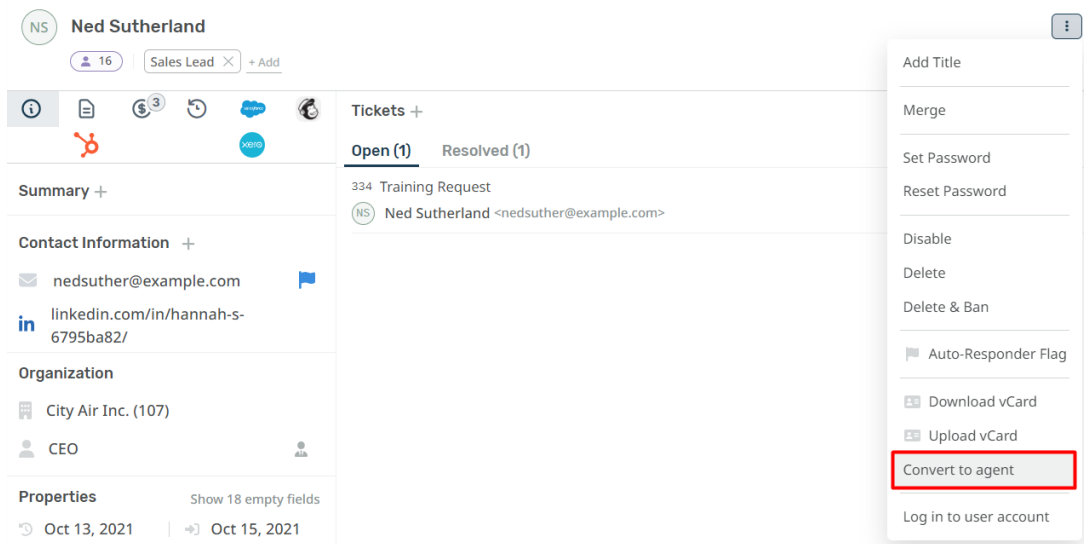
We have a user in the Helpdesk, but I want them to be able to respond to tickets. How do I upgrade them to an agent account?

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 a user profile for Ned Sutherland. The profile includes a header with the user's name and role (Sales Lead), a summary section, contact information (email and LinkedIn), organization details (City Air Inc. CEO), and a properties section. A settings menu is open on the right side of the profile, listing various actions such as 'Add Title', 'Merge', 'Set Password', 'Reset Password', 'Disable', 'Delete', 'Delete & Ban', 'Auto-Responder Flag', 'Download vCard', 'Upload vCard', 'Convert to agent', and 'Log in to user account'. The 'Convert to agent' option is highlighted with a red box.

Note

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

