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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 shows a user profile for Ned Sutherland. The profile includes a header with the user's name and a 'Sales Lead' tag. Below the header, there are several tabs: 'Summary', 'Contact Information', 'Organization', and 'Properties'. The 'Contact Information' tab is active, showing the user's email address (nedsuther@example.com) and LinkedIn profile. The 'Organization' tab shows the user is a CEO at City Air Inc. (107). The 'Properties' tab shows the user was created on Oct 13, 2021, and last updated on Oct 15, 2021. On the right side of the profile, there is a 'Tickets' section with a 'Tickets +' button and a list of tickets. The first ticket is '334 Training Request' by Ned Sutherland. A settings menu is open on the right side of the profile, with the 'Convert to agent' option highlighted in a red box. Other options in the menu include 'Add Title', 'Merge', 'Set Password', 'Reset Password', 'Disable', 'Delete', 'Delete & Ban', 'Auto-Responder Flag', 'Download vCard', 'Upload vCard', and 'Log in to user account'.

Note

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

