

How Do I Convert A Normal User to An Agent?

Alexandra Mead - 2023-08-01 - Comments (0) - Admin

Question:

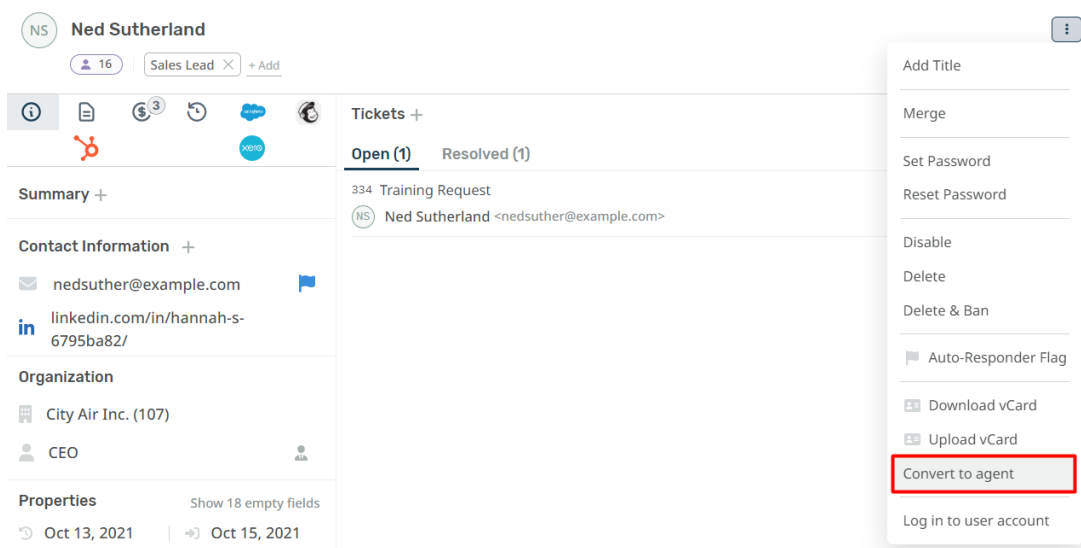
We have a user in the Helpdesk, but I want them to be able to respond to tickets. How do I upgrade them to an agent account?

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 contact information (email: nedsuther@example.com, LinkedIn: linkedin.com/in/hannah-s-6795ba82/), organization (City Air Inc. (107), CEO), and properties (created: Oct 13, 2021, updated: Oct 15, 2021). A 'Tickets +' section shows one open ticket: '334 Training Request' by Ned Sutherland. A settings menu is open on the right, 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.

