Add new user on existing SMS-Magic Account

Add a New User to your existing Zoho CRM account

1. Login to your Zoho CRM account as an Administrator
2. Go to Setup and select Users in Users and Control



3. Add a new user



4. Verify and activate the new user on Zoho CRM
5. Login with this newly created user in Zoho CRM.

Add a new user to your existing SMS Magic account

1. Login to your SMS Magic account as Admin User.
2. Go to Account Info -> User Management. Click on Invite User.
3. If you have enough Available licenses, you will be able to invite a new user. If not, kindly contact care@screen-magic.com to purchase more user licenses.
4. Add the email address of users you wish to invite one by one
5. The count of Available Licenses will keep on updating as you add users
6. Click on Invite. All the users invited will be by default Standard Users.
7. An Invitation email with Subject “You’re invited to join SMS-Magic” will be sent to the entered email addresses
8. You can keep track of the invite status in the User

Details table.

Follow the below steps to Join SMS-Magic on receiving an Invitation –

1. Click on the Join SMS-Magic link in the Invitation Email.
2. Fill in the details and Click on Register.
3. Once registered, Click on Login, and it will take you to Sign In page of SMS-Magic.
4. Sign In using Zoho CRM Single Sign On and start using SMS-Magic Web Portal services.
5. Go to Account Info and check if the Account ID is the same as the Account ID for the SMS-Magic account of your business.

Note:
The Account ID should be the same after user addition. If there is a different Account ID in place the user was not added to the existing Account. Reach out to care@screen-magic.com if a new SMS-Magic account gets created.

Request Access to SMS-Magic Account

A Zoho CRM user of your organization can request access to SMS-Magic Account. When this Zoho CRM user logs in to SMS-Magic account using Zoho CRM SSO, if they are already not assigned a Portal License, then they can raise a request to get the license and access the SMS-Magic account. SMS-Magic Admin User can approve this request by assigning a Portal license to this user.