CompleteSMS:

Administrator Guide

Last updated: June 29, 2025

Table of Contents

Roles and Access Levels

Administrator

Admin per account: unlimited
Access levels:
Sales Agent - not available
Help Desk Operator - not available
Accounting and Reports - not available
Full Administrator Access
Capabilities:

- Create and delete administrators
- Create and deactivate users
- Review invoices
- Review reporting
- Send and receive messages
- Create, edit and delete personal address book contacts and distribution lists
- Create, edit and delete global address book contacts and distribution lists
- Create, edit and delete personal SMS templates
- Create, edit and delete global SMS templates
- Create, edit and delete cost centers - not available
- Updating payment method/card on file

Restrictions:

- Resetting user passwords
- Changing user emails
- Resetting other administrator passwords
- Changing administrator emails

User

Users per account: unlimited
Access levels: 1
Capabilities:

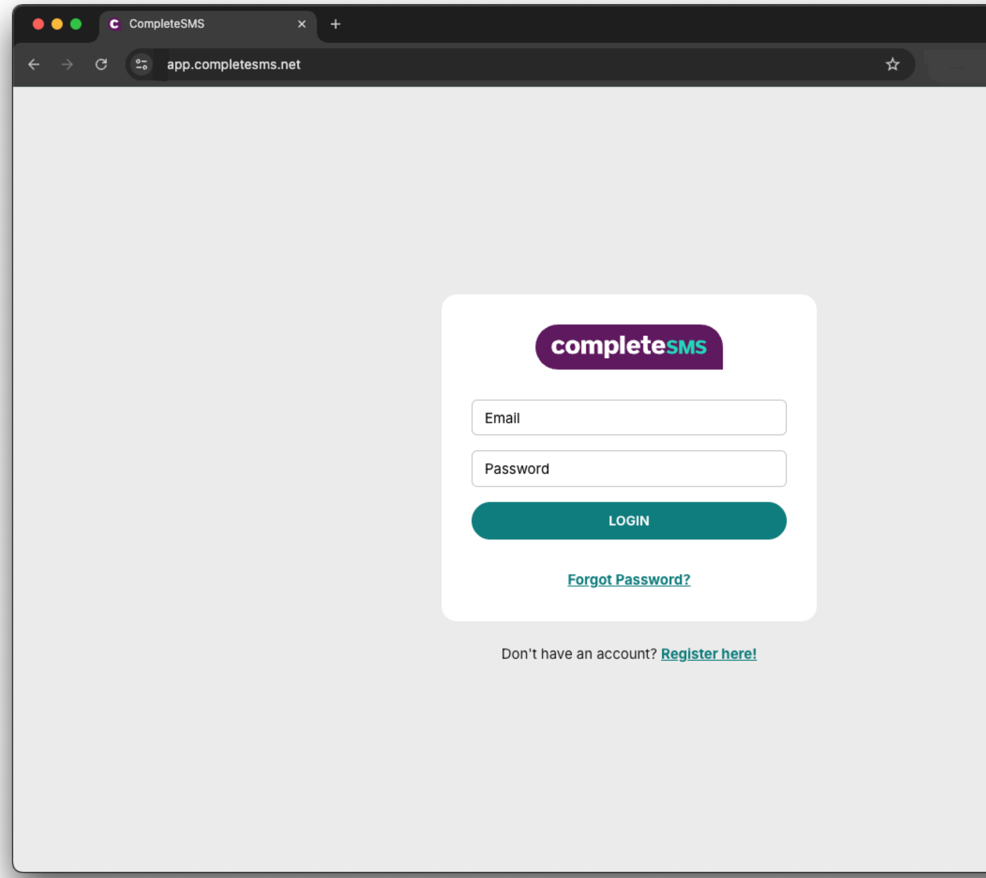
- Send and receive messages
- Create, edit and delete personal address book contacts and distribution lists
- Use global contacts
- Create, edit and delete personal SMS templates
- Use global templates

Restrictions:

- Deleting global address book contacts or distribution lists
- Deleting global SMS templates
- Viewing billing or reporting details
- Adding or deleting administrators or users

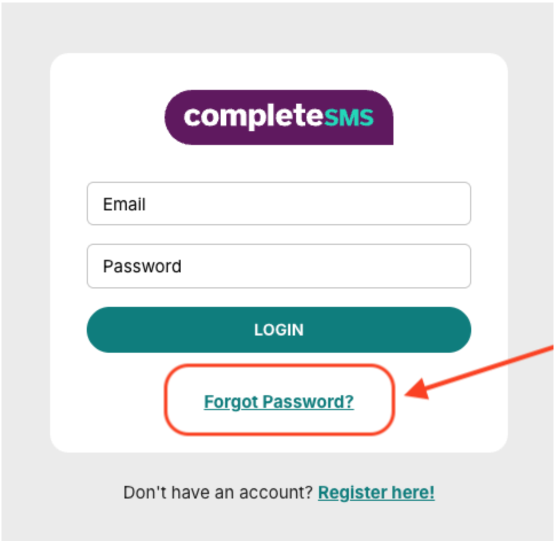
Log In

After an account has been set up by another administrator you can log in.

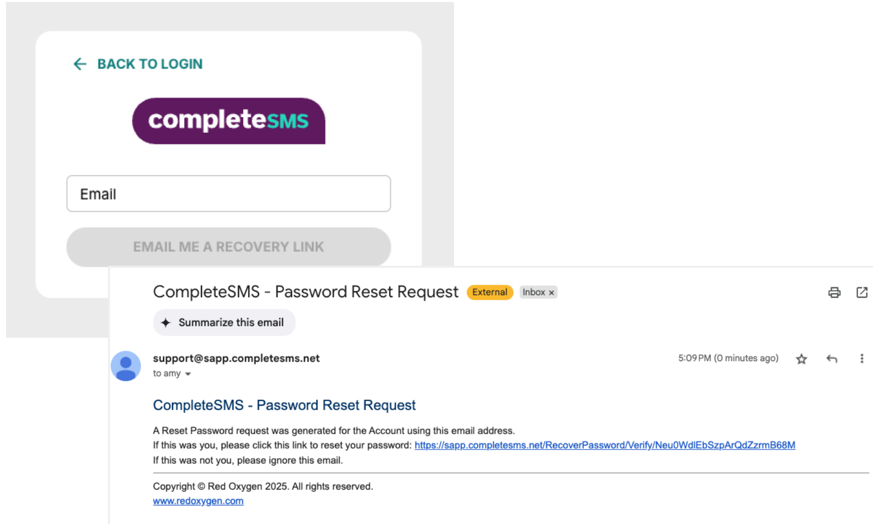


On any browser go to: https://app.completesms.net (Best user experience—Google Chrome)

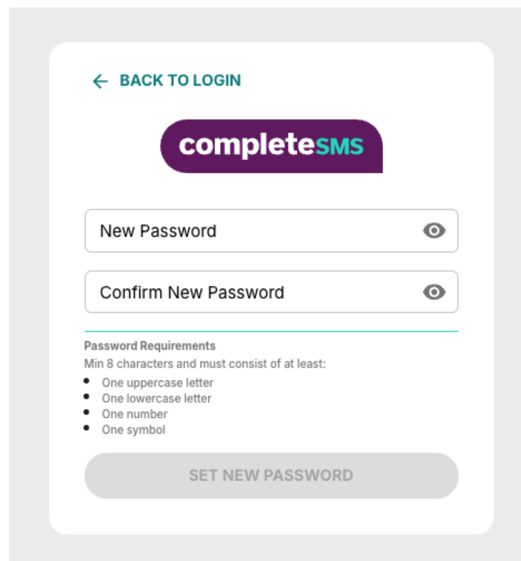
If you've forgotten your password, press the **Forgot Password** link. (If this is your first time logging in, you may be required to do this step)



Enter the email used for your account

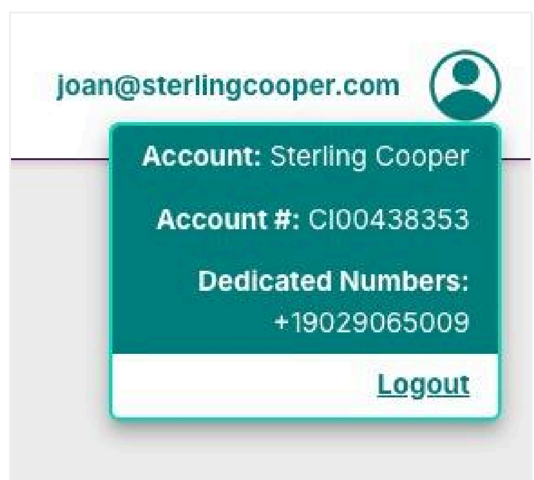


You will receive an email with a reset link
Click on the link



Type in a new password
(must be at least 8 characters
with at least one uppercase letter, one lowercase letter, one numeral, and one special character)

Go back to the login screen and login with your new password.



Once logged in, your email will appear next to the profile avatar in the top right hand corner of your screen.

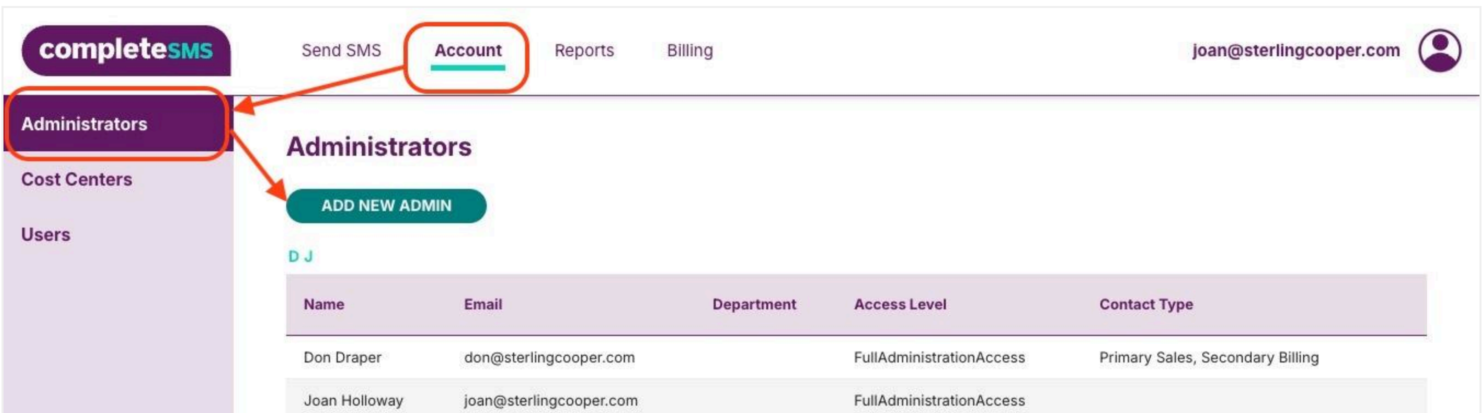
Click on the avatar to view your account number, and any dedicated numbers assigned to your account. Here's where you'll log out at the end of the day, as well.

Administrator Tasks

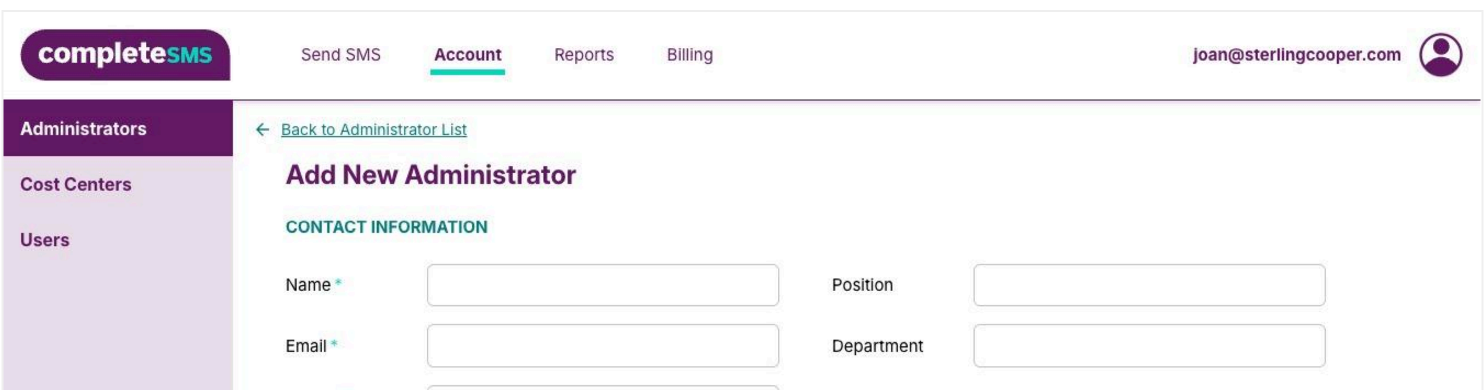
Add a New Administrator

As an administrator you have permissions to create additional administrators.

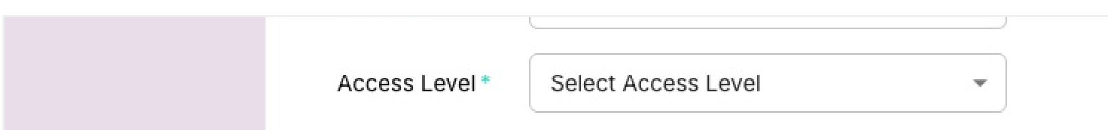
1. Select **Account** in the top navigation.
2. Make sure your sidebar navigation is on **Administrators.**
3. Click on the **Add New Admin** button.



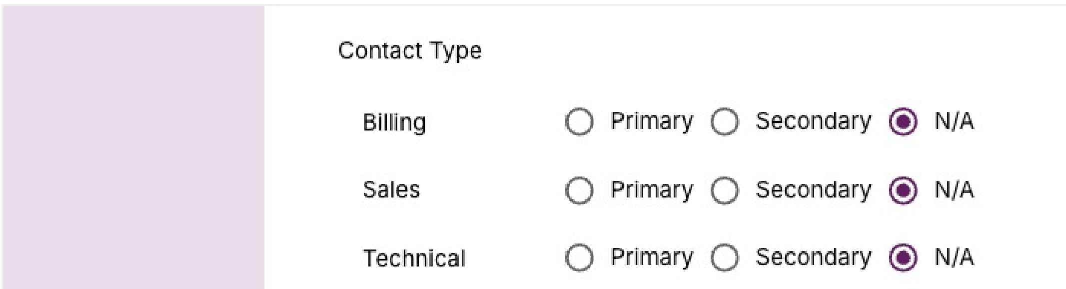
4. Fill in the details about the administrator.



5. Select their access level.



6. Select if they should be contacted in case of changes/questions/emergencies for billing, sales or technical issue.



7. Make sure to complete the rest of the form, including the Company information.
8. Click on **Save**.
   If you have mistakenly missed a field, a pop-up will warn you.

Edit an Administrator Profile

As an administrator you have permissions to edit another administrator's profile, except for their email address and password.

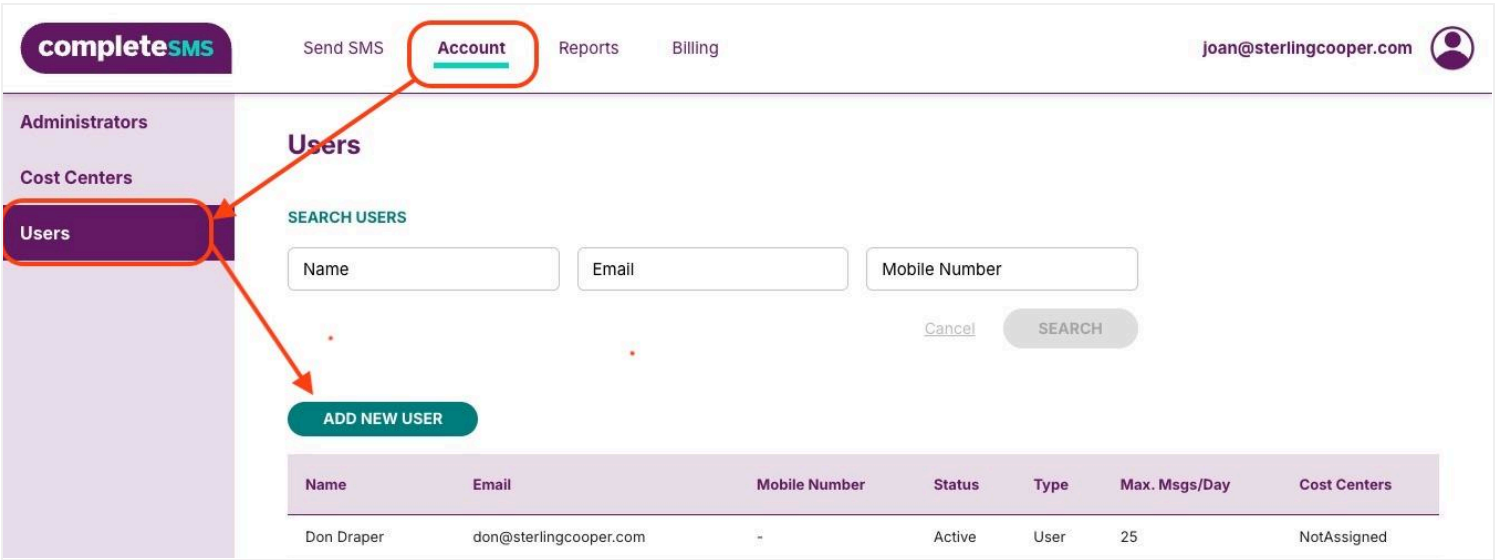
1. Select **Account** in the top navigation.
2. Make sure your sidebar navigation is on **Administrators.**
3. Select one of the names in the list.

4. Modify as necessary and hit **Save.**
5. Contact Support if an email address requires changes.

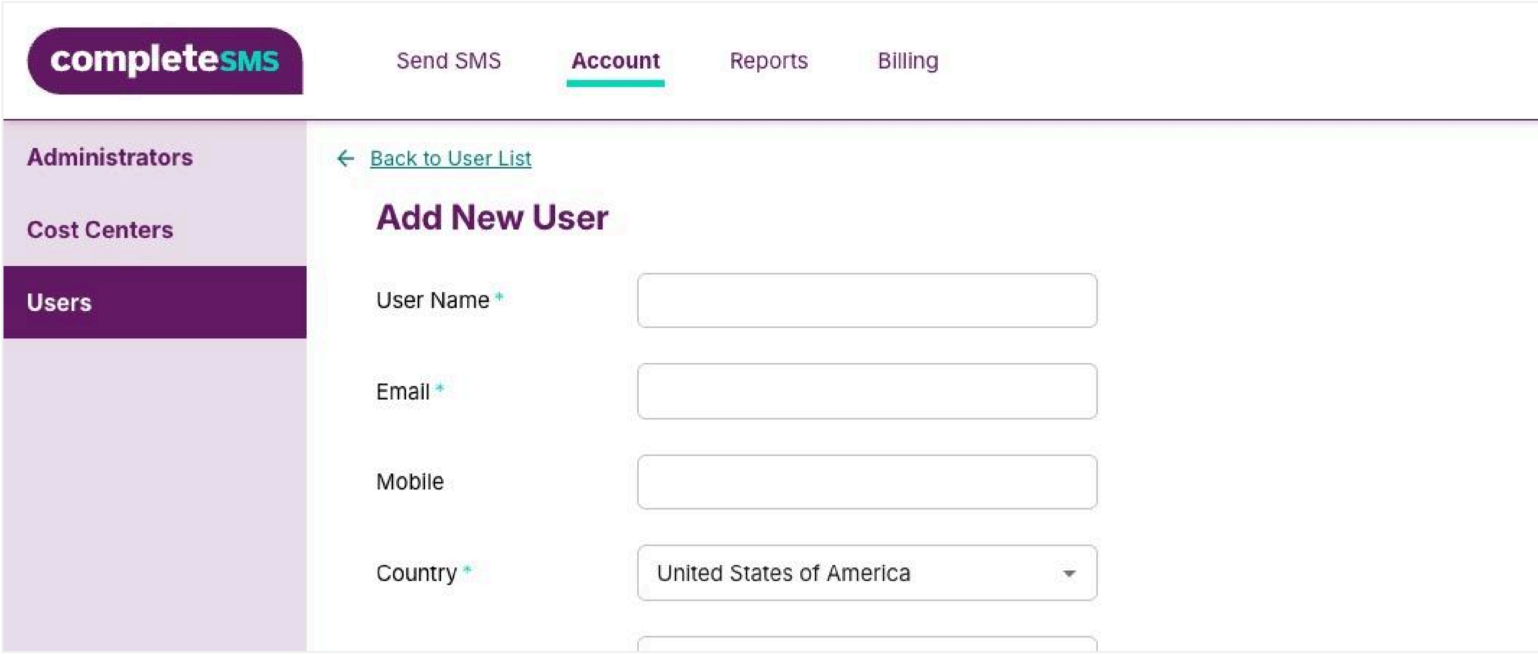
Add a New User

As an administrator you have the permissions to create a new user.

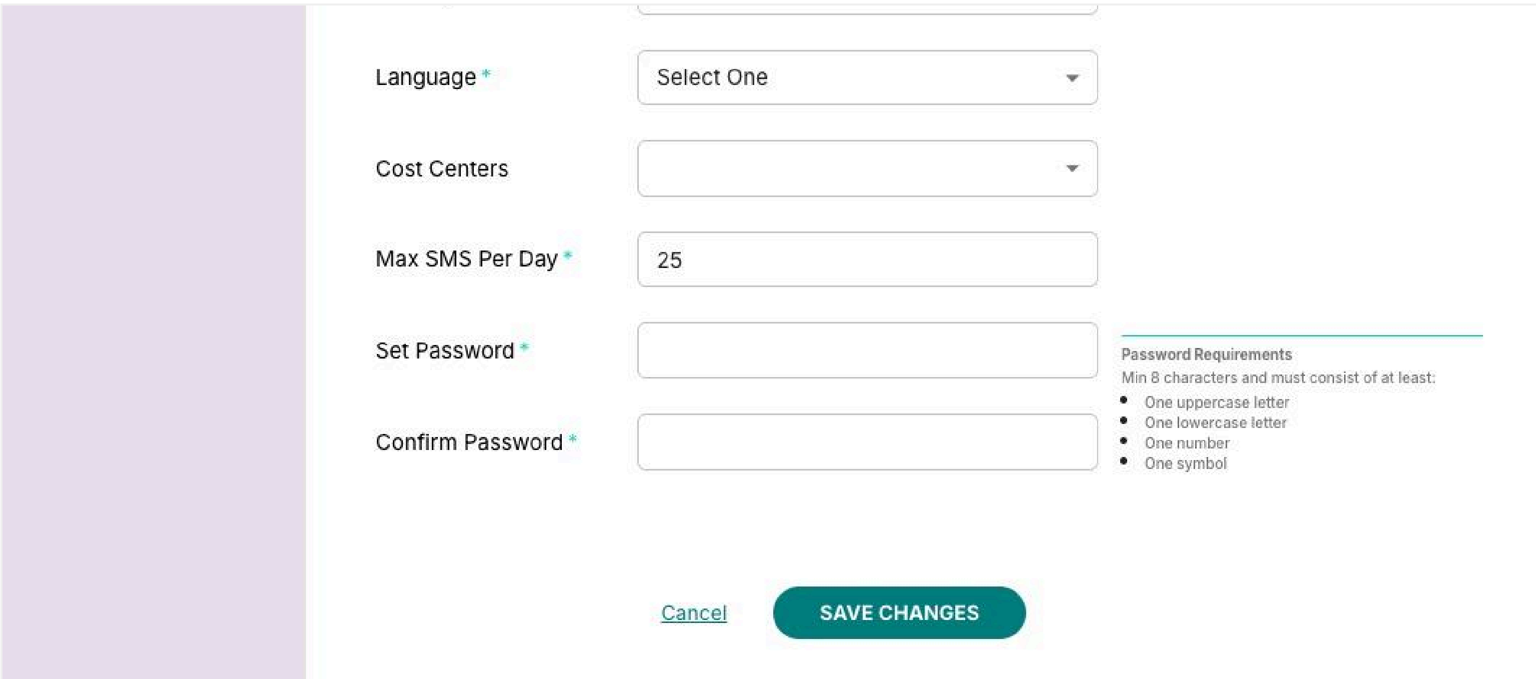
1. Select **Account** in top navigation.
2. Select **Users** from the sidebar navigation.
3. Click on the **Add New User** button.



4. Fill in the appropriate information.
    a. *Country*—country they are sending messages from.



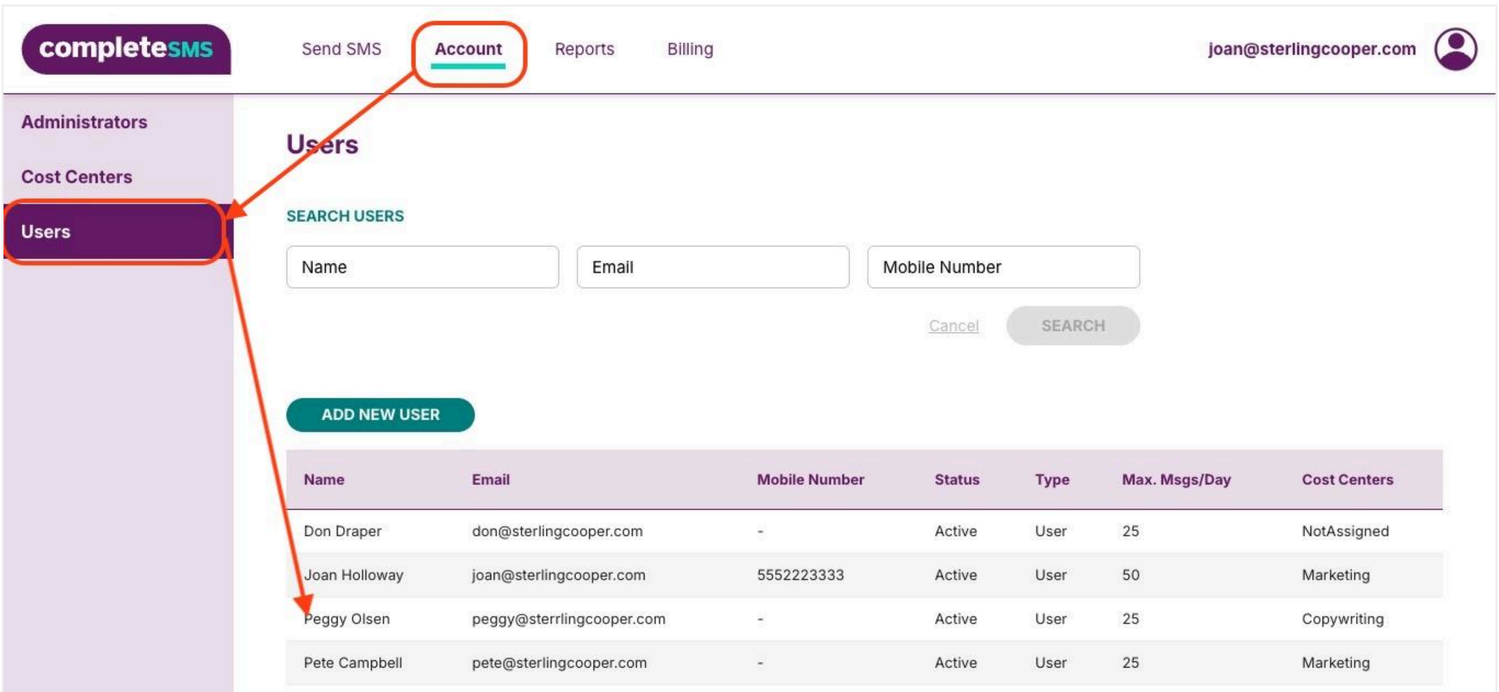
b. *Cost Center*—not required, [Learn more on creating cost centers and adding users to them.]
c. *Maximum SMS Per Day* (24 hours)—we suggest setting this low to minimize accidental large sends. If the limit is reached, an administrator can modify the quantity.



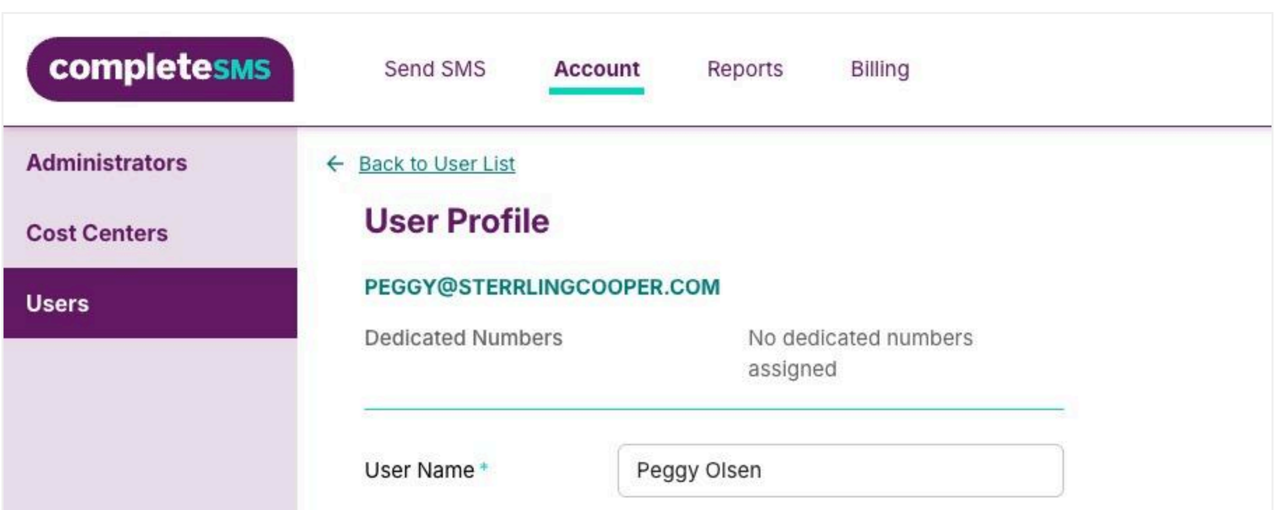
Edit a User Profile

As an administrator you have permissions to edit an administrator's profile, except for their email address and password.

1. Select **Account** in the top navigation.
2. Select **Users** from the sidebar navigation.
3. Select one of the names in the list .
4. Modify as necessary and hit **Save.**



The User Profile also shows any dedicated numbers assigned to the user.

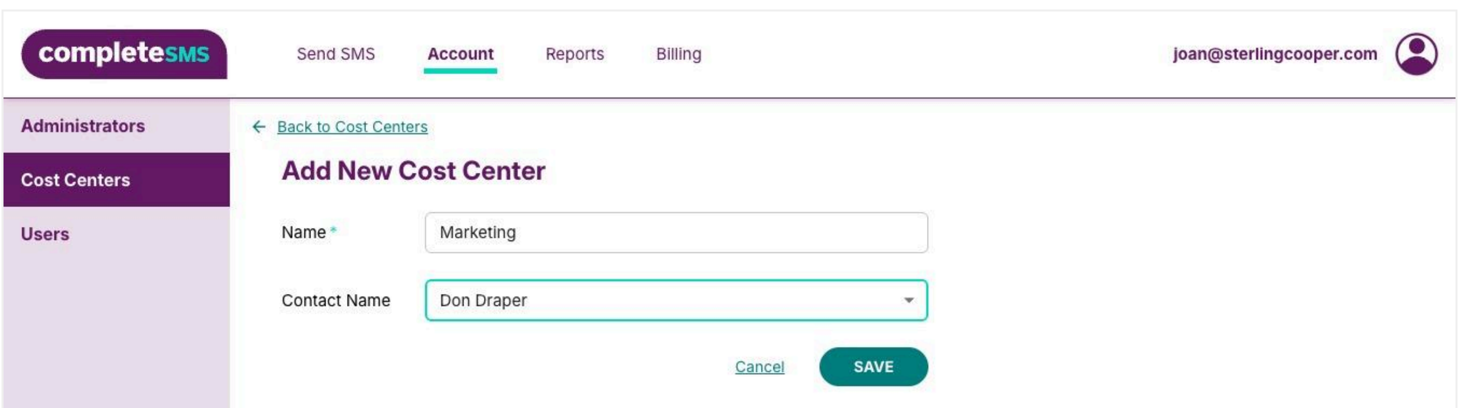


Add Cost Centers

As an administrator you have permissions to add Cost Centers and assign users to Cost Centers.

1. Select **Account** in top navigation.
2. Select **Cost Centers** from the sidebar navigation to see the list of existing Cost Centers.
3. Hit the **Add New** button.

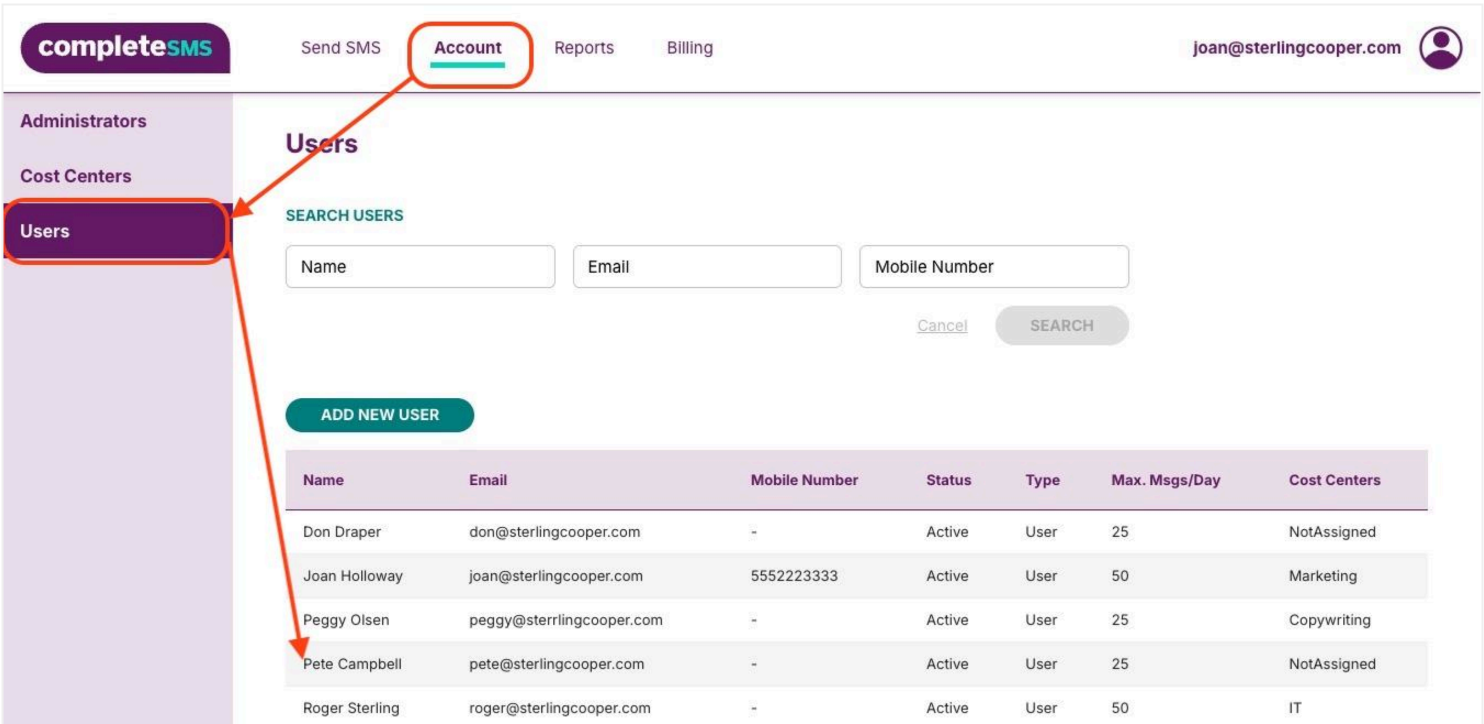
4. Name the new cost center.
5. Select an administrator from the drop down menu, this person is considered the owner of the cost center, often they are the manager of that department or possibly the administrator that added it.

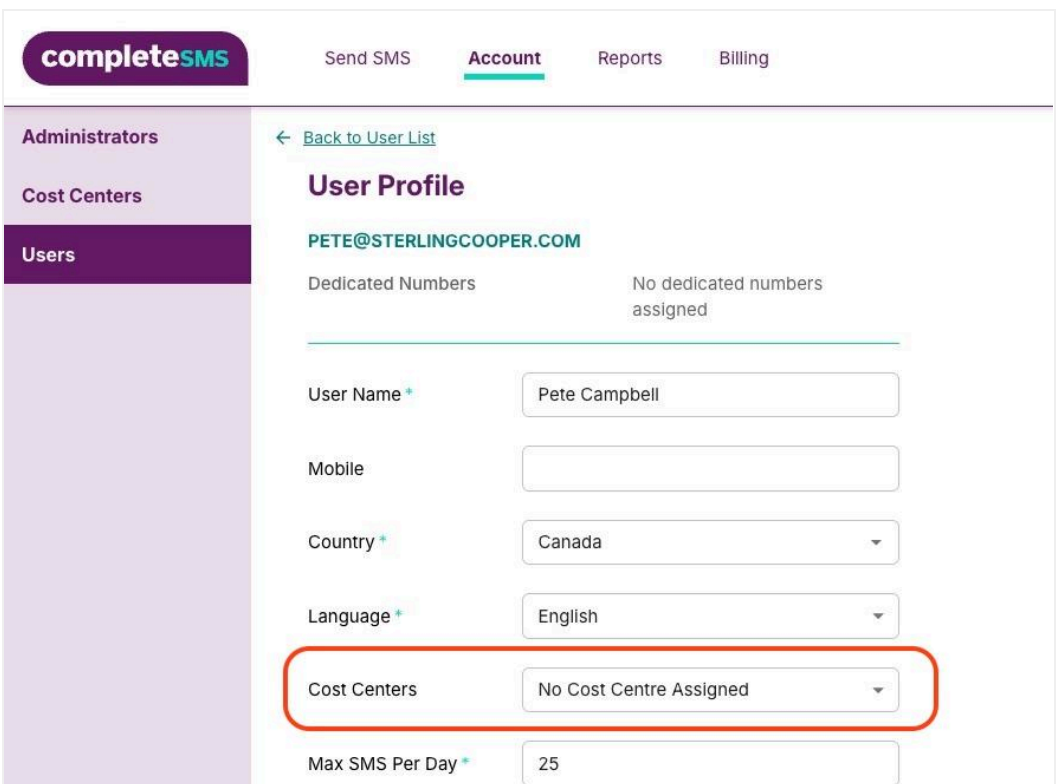


6. Don't forget to hit **Save**.

Add a User to a Cost Center

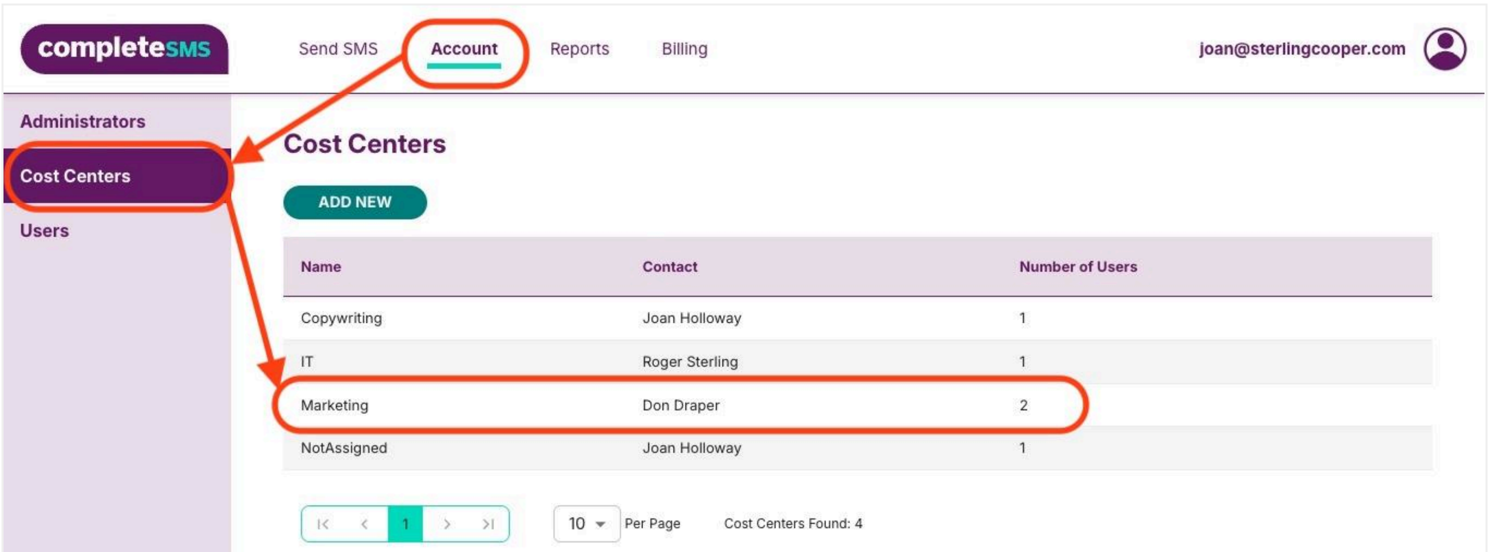
This is typically assigned when creating a new user, but if you create a new cost center after that user's already been created, you will need to go into each user and add the cost center to their profile.



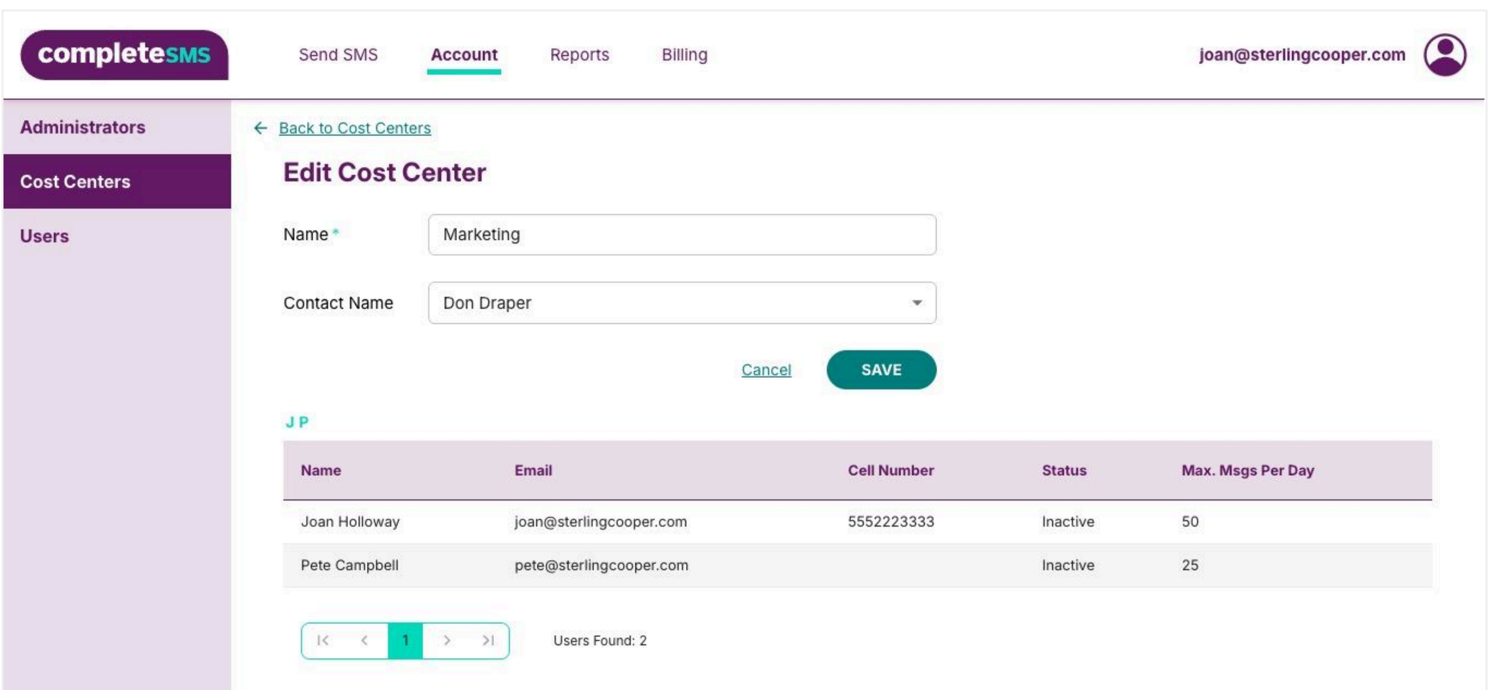


View a List of Who's Assigned To a Cost Center

1. Select **Accounts** in the top navigation.
2. Select **Cost Centers** from the sidebar navigation.



3. Click on the name of a cost center in the list.
4. The cost center details will be revealed.
5. Here you can also change the the title and the owner of the Cost Center.

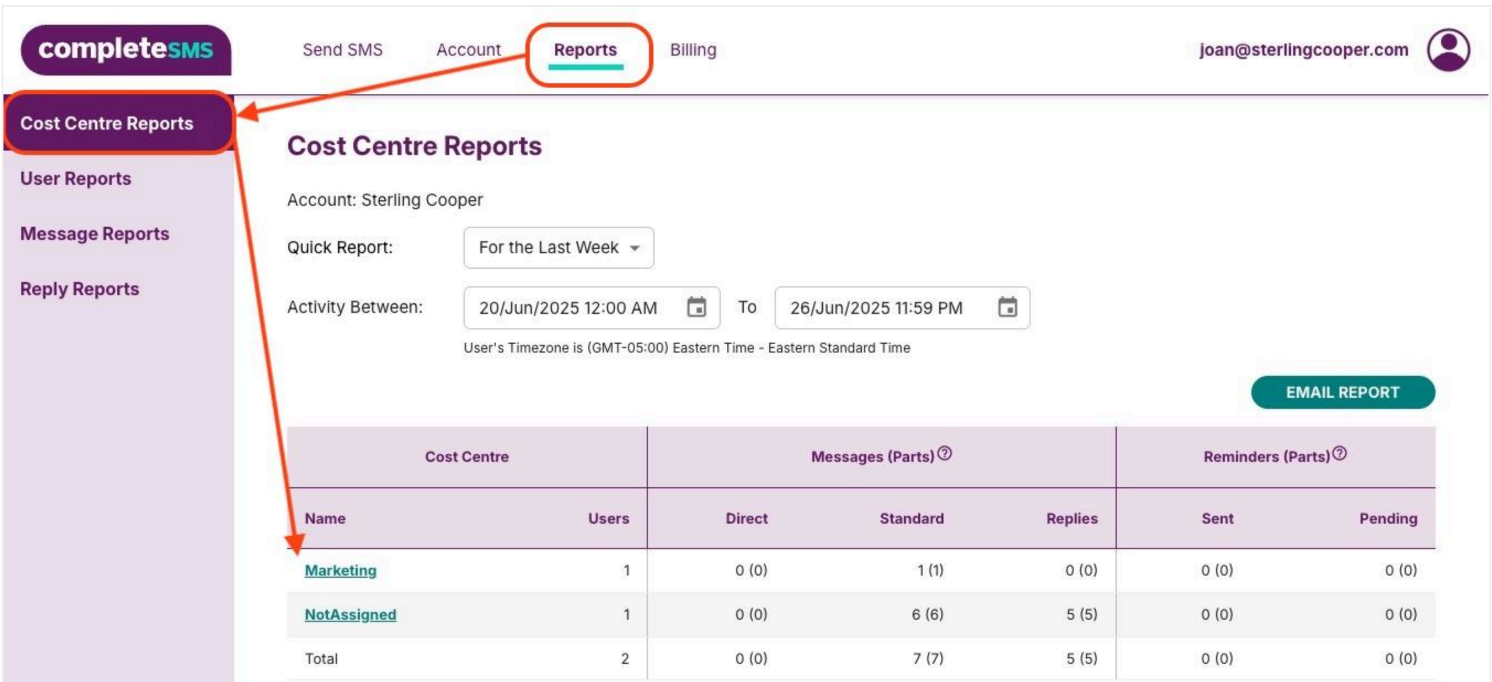


6. You can change a user's cost center in their profile at any time.

Reporting

Cost Center Reports

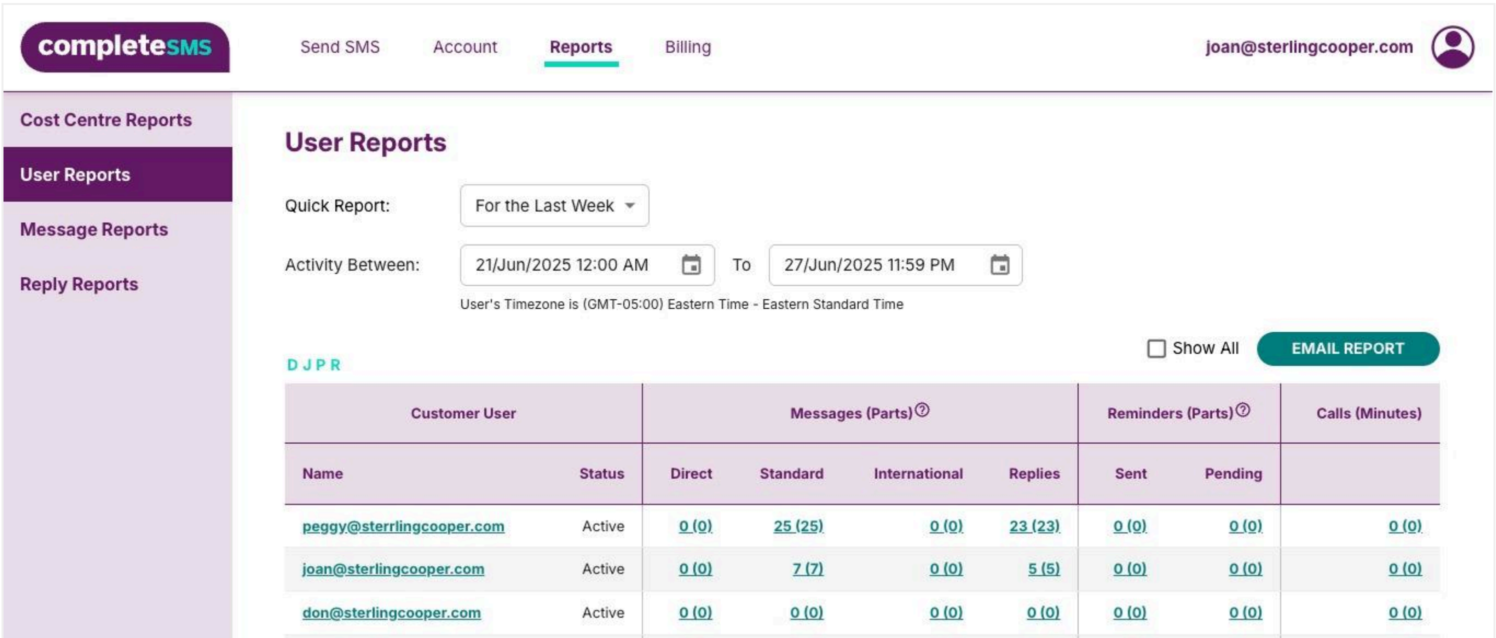
1. Select **Reports** in the top navigation.
2. Select **Cost Center Reports** from the sidebar navigation.
3. This report shows you how many messages have been sent on each cost center for the date range you've selected.
4. Select a cost center from the report and it will drill down to show who, within the specified cost center, sent messages, and how many messages they sent in that timeframe including replies.
5. You can email this report to yourself by pressing the **Email Report** button, you will receive a .csv of the query.



Direct messages are messages sent through our API, all other software will be added under Standard message.

User Reports

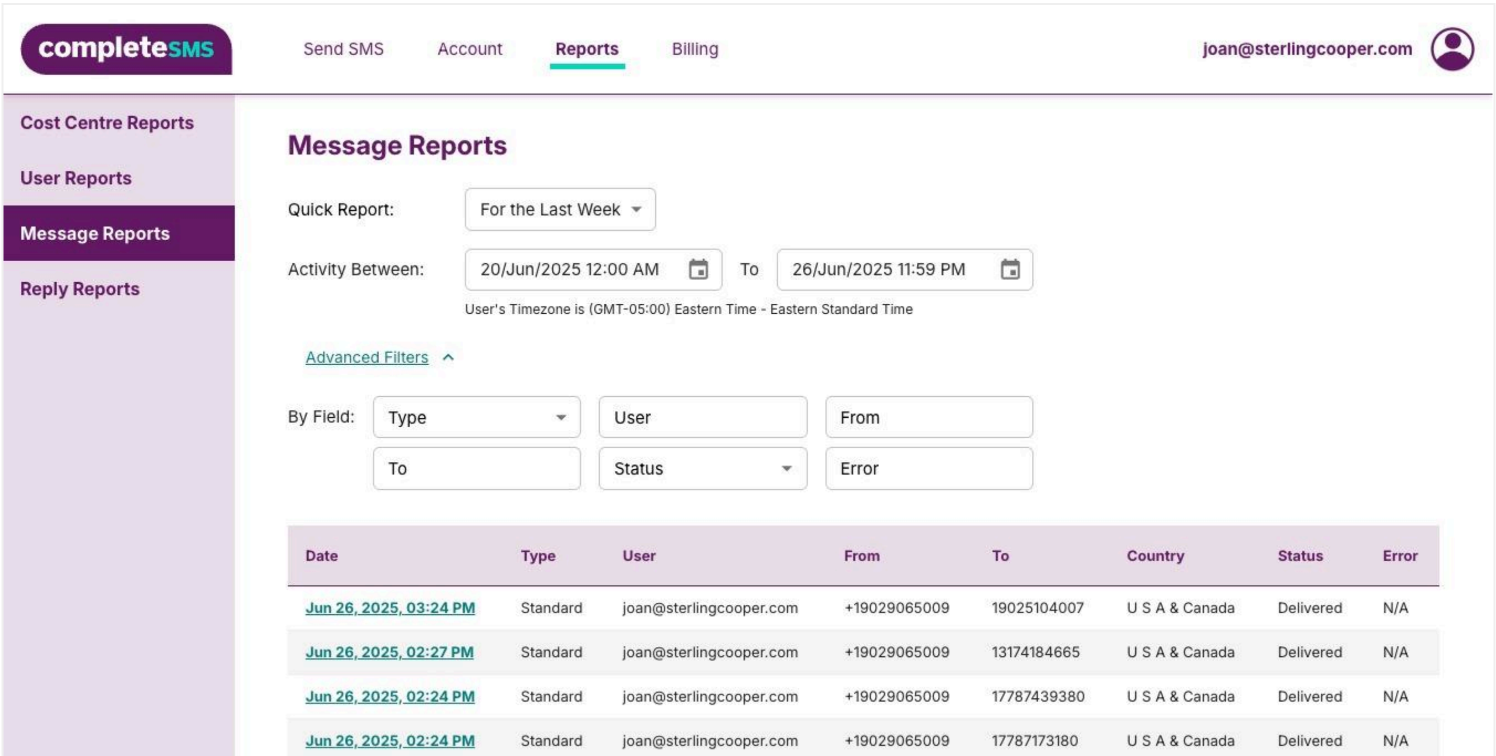
1. Select **Reports** in the top navigation
2. Select **User Reports** from the sidebar navigation
3. This report will show you what users, within the account, have sent or received messages in the selected timeframe



4. Clicking on any of the quantities in any column will drill down to the details of the individual messages (redirecting you the Message Reports tab)
5. You can email this report to yourself by pressing the **Email Report** button, you will receive a .csv of the query.

Message Reports

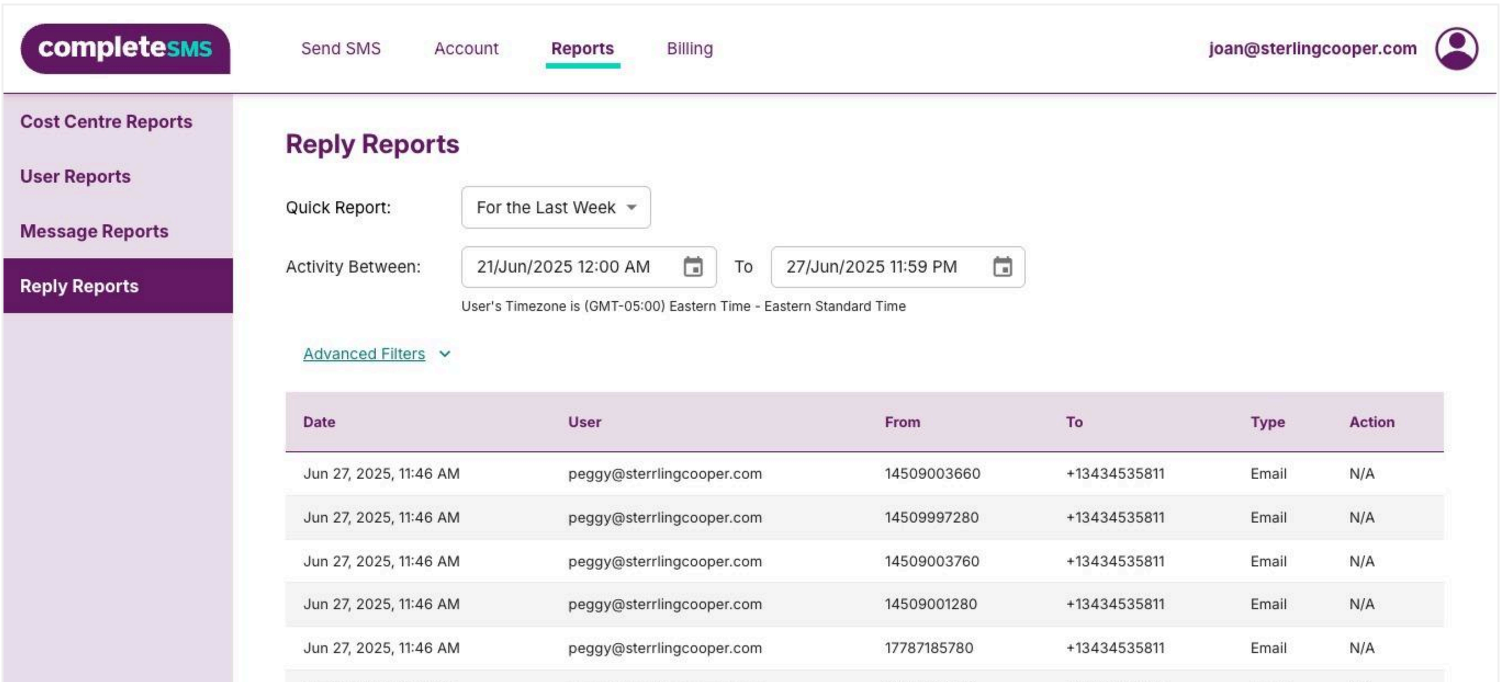
1. Select **Reports** in the top navigation
2. Select **Message Reports** from the sidebar navigation
3. This report will show you every message sent in the selected timeframe



4. Clicking on the date will give you a bit more detail of that message (you will not see the content of the message).
5. The Advanced Filters are a great way to narrow in on specific messages.

Reply Reports

1. Select **Reports** in the top navigation
2. Select **Reply Reports** from the sidebar navigation
3. This report will show you every reply received in the selected timeframe
4. Clicking on the date will give you a bit more detail of that message (you will not see the content of the message).
5. The Advanced Filters are a great way to narrow in on specific messages.



Billing

View an Invoice

1. Select **Billing** in top navigation
2. Select **Invoices** from the sidebar navigation
3. By clicking on the title of an invoice, you can view the invoice details on your screen
4. You can download/print the invoice by selecting the printer icon under the 3 dots on the right hand side of the table
5. You can forward the invoice via email by selecting the mail icon under the same three dots

Update Your Credit Card

1. Select **Billing** in top navigation
2. Select **Payment Method** from the sidebar navigation
3. Hit **Add Card** to change credit card information