



CompleteSMS:

User Guide

Last updated: June 29, 2025

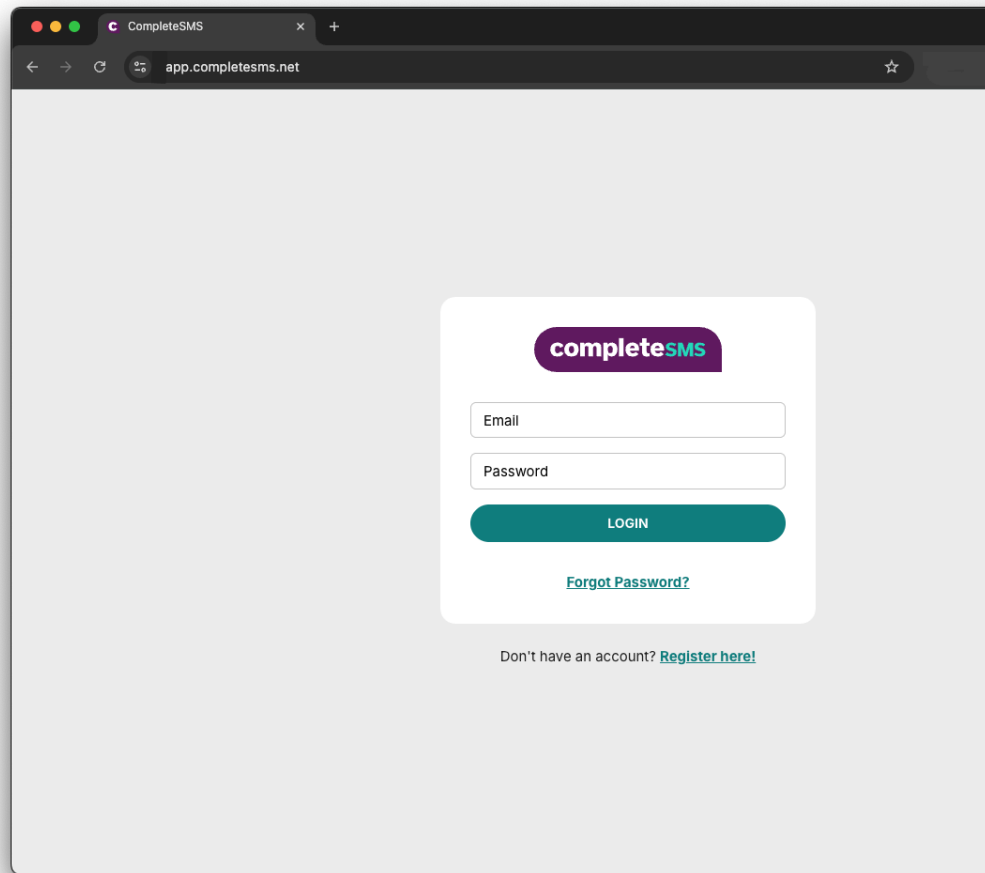
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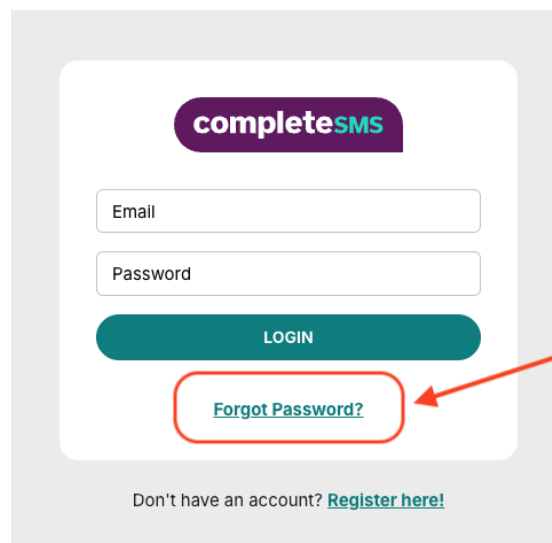
Log In

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

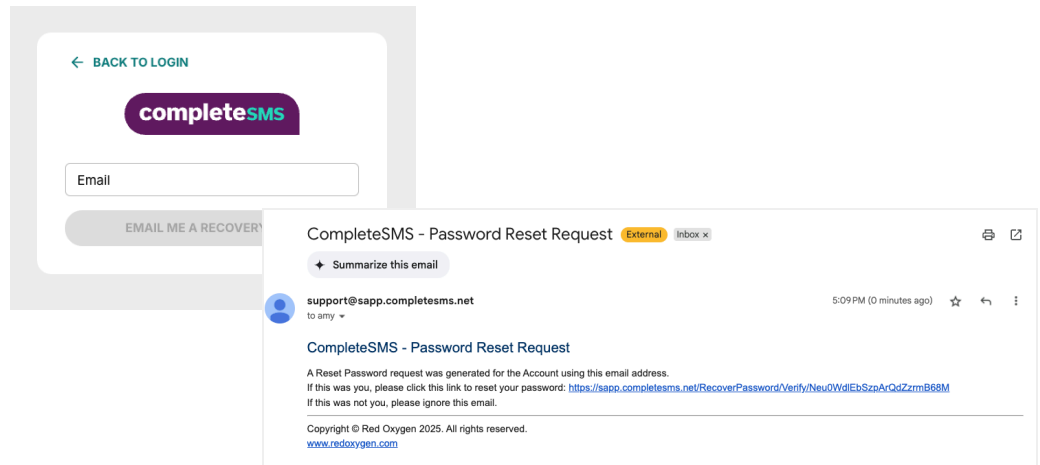
On any browser go to:
<https://app.completesms.net>
(Best user experience—
Google Chrome).



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).



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

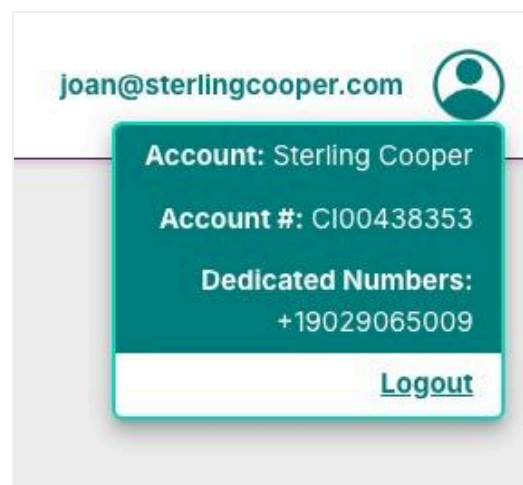


Type in a new password (must be at least 8 characters with at least one uppercase letter, one lowercase letter, one numeral, and one special character)

The screenshot shows the 'completeSMS' password reset form. It has a 'BACK TO LOGIN' link and the 'completeSMS' logo. There are two input fields: 'New Password' and 'Confirm New Password', both with toggle icons for password visibility. Below these fields is a 'Password Requirements' section stating 'Min 8 characters and must consist of at least:' followed by a bulleted list: 'One uppercase letter', 'One lowercase letter', 'One number', and 'One symbol'. At the bottom is a 'SET NEW PASSWORD' button.

Once logged in, you'll see your email and profile avatar in the top right hand corner of your screen.

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



Address Book

Create a Contact in the Address Book

Contacts are stored in your address book and you can have as many as you'd like. You can create distribution lists from your contacts.

There are two types of contacts:

1. **Global**
 - a. All users can send to Global contacts.
 - b. Only Administrators can create or delete.
2. **Personal**
 - a. Only available in your personal user account.
 - b. All Users can create or delete their own Personal contacts.

The steps are the same for either type:

1. Go to the **Send SMS** navigation item in the top bar.
2. Select **Address Book** in the sidebar navigation.
It will automatically land on the Contacts tab of the Address book.
3. Select **Add New**.

completeSMS Send SMS peggy@sterlingcooper.com

Address Book

CONTACTS 3 Contacts LISTS 0 Lists MANAGE

Search Contacts By Name or Number Filter ☐ Personal ☐ Global Search

IMPORT ADD NEW Export Contacts Delete Selected

Name	Email Address	Phone Number	Type	Lists	
James Smith	george@jetsons.com	+14509003630	Personal		<input type="checkbox"/>
Mary Johnson	george@jetsons.com	+14509003660	Personal		<input type="checkbox"/>
Robert Williams	george@jetsons.com	+14509001280	Personal		<input type="checkbox"/>

NEW CONTACT X

Contact Type * ☒ Personal ☐ Global

Name *

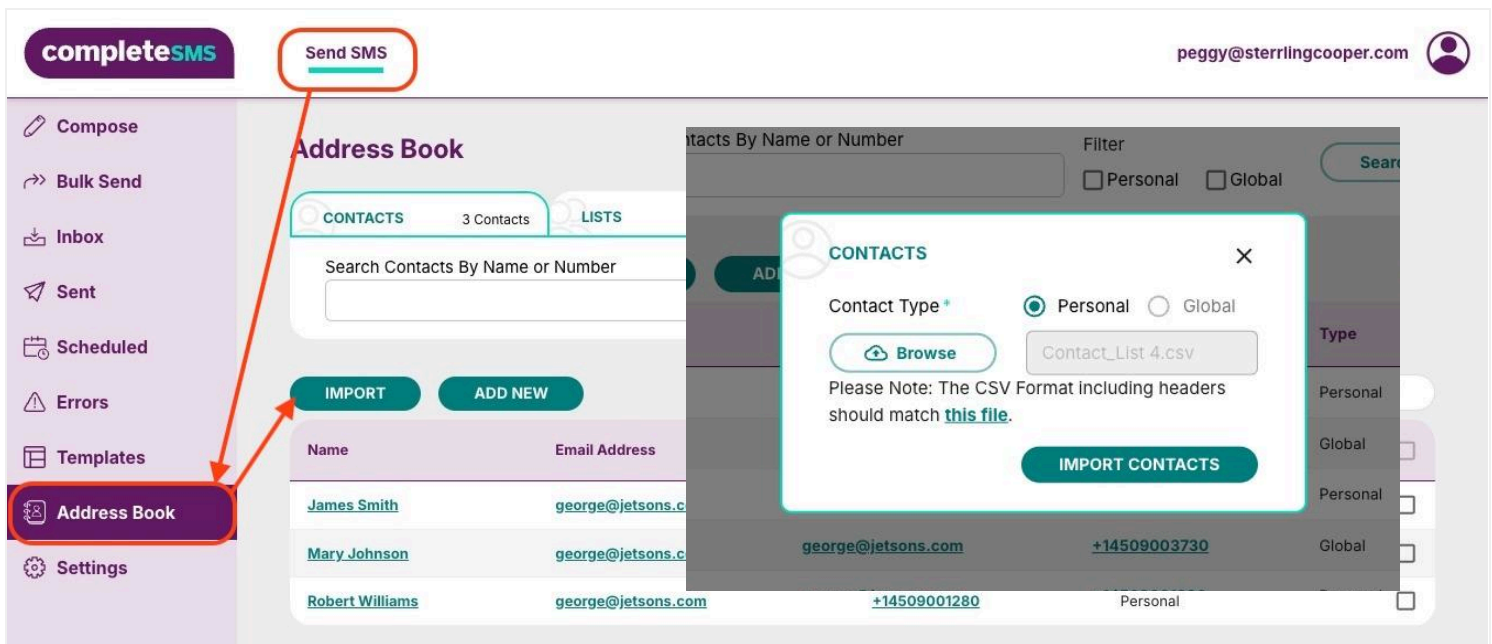
Email Address

Phone Number *

4. Choose if it should be a **Global** or **Personal** contact (only Admins will be able to select global).
 5. Fill in appropriate fields.
 6. Hit **Save** to add to the Address Book.
-
7. If you'd like to export your Address Book select **Export Contacts** and all of your contacts will export at one time.

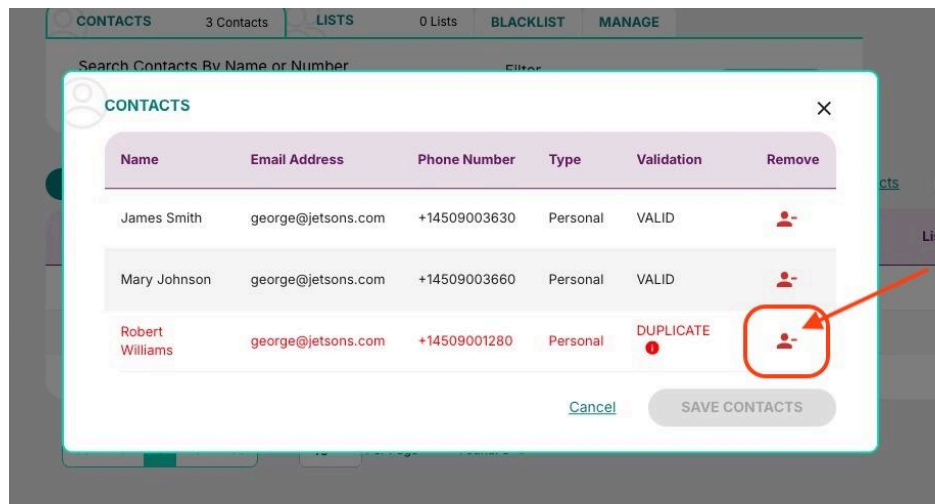
Import Contacts From a Spreadsheet

1. Go to the **Send SMS** navigation item in the top bar.
2. Select **Address Book** in the sidebar navigation.
3. Select **Import Contacts**.



4. Your CSV must match exactly the provided sample spreadsheet (headers must be exactly as shown and in the same column location)

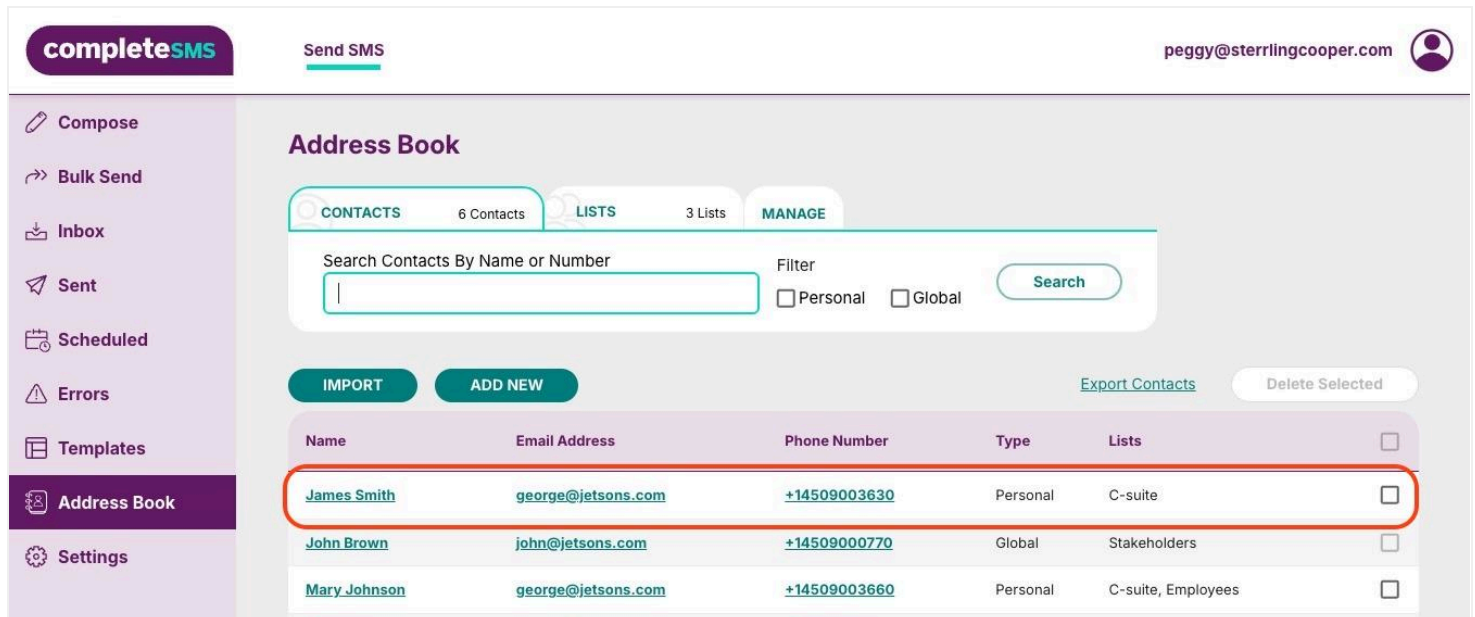
5. Choose if it should be a **Global** or **Personal** contact (only Admins can create Global contacts).
6. Browse and select the .csv you'd like to import.
7. Once imported, you will be asked to confirm the upload. If there are duplicates, they will appear in red and will need to be deleted by clicking on the person icon before the contacts can be saved.



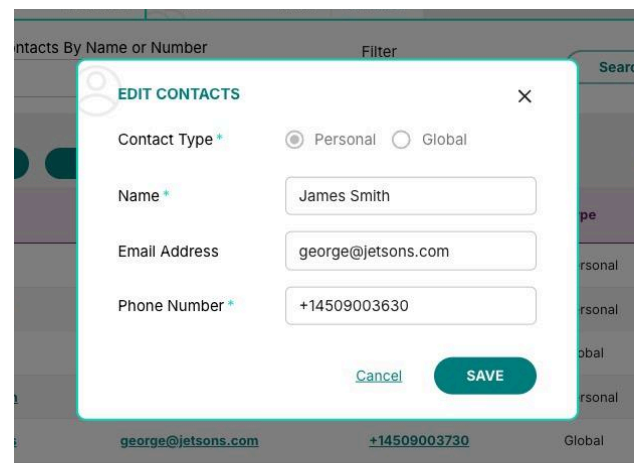
Edits Contacts

1. Go to the **Send SMS** navigation item in the top bar.
2. Select **Address Book** from the sidebar navigation

3. Click on the contact row you'd like to edit



4. Update the affected fields
Contact can't be modified after the contact is originally created.
5. Hit **Save**.



Create a Distribution List

Distribution lists are a great way to organize your contacts to easily send the same message to more than one person at a time.

There are two types of contacts:

3. Global

- a. All users can send to Global lists.
- b. Only Administrators can create or delete.

4. Personal

- a. Only available in your personal user account.
- b. All Users can create or delete their own Personal lists.

The steps are the same for either type:

- 1. Got to the **Send SMS** top navigation item.
- 2. Select **Address Book** in the sidebar navigation
- 3. Select the **Lists** tab
- 4. Choose if it should be a **Global** or **Personal** contact by selecting the appropriate tab
- 5. Select **Add New**

The screenshot shows the 'completeSMS' web application. The top navigation bar includes 'Send SMS' (highlighted with a red box) and the user email 'peggy@sterrlingcooper.com'. The left sidebar contains navigation items: Compose, Bulk Send, Inbox, Sent, Scheduled, Errors, Templates, Address Book (highlighted with a red box), and Settings. The main content area is titled 'Address Book' and has two tabs: 'CONTACTS' (6 Contacts) and 'LISTS' (3 Lists, highlighted with a red box). Below the tabs is a search bar labeled 'Search By List Name' and a filter section with radio buttons for 'Personal' and 'Global'. An 'ADD NEW' button (highlighted with a red box) is located below the search bar. A table displays the current lists:

List Name	Type	Quantity of Contacts	Select
C-suite	Personal	3	<input type="checkbox"/>
Employees	Personal	2	<input type="checkbox"/>
Stakeholders	Global	3	<input type="checkbox"/>

At the bottom, there is a pagination control showing '1' of 3 items, '10' items per page, and 'Found: 3' results.

A modal form titled 'LISTS' is shown. It contains two radio buttons for 'List Type': 'Personal' (selected) and 'Global'. Below this is a text input field for 'List Name *'. At the bottom of the modal are two buttons: 'Cancel' and 'Add Contacts'.

6. Choose if it should be a **Global** or **Personal** distribution list(only Admins will be able to select global).
7. Name your list.
8. Add contacts to your list by clicking the checkboxes next to existing contacts from your address book..

Address Book

LISTS

Select	Name	Email Address	Phone Number	Type
<input type="checkbox"/>	James Smith	jim@jetsons.com	+14509003630	Personal
<input type="checkbox"/>	John Brown	john@jetsons.com	+14509000770	Global
<input checked="" type="checkbox"/>	Mary Johnson	george@jetsons.com	+14509003660	Personal
<input checked="" type="checkbox"/>	Patricia Jones	george@jetsons.com	+14509003730	Global
<input checked="" type="checkbox"/>	Robert Williams	george@jetsons.com	+14509001280	Personal
<input type="checkbox"/>	Robert Williams	bob@jetsons.com	+14509001280	Global

3 Contacts Selected

[Cancel](#) [CREATE LIST](#)

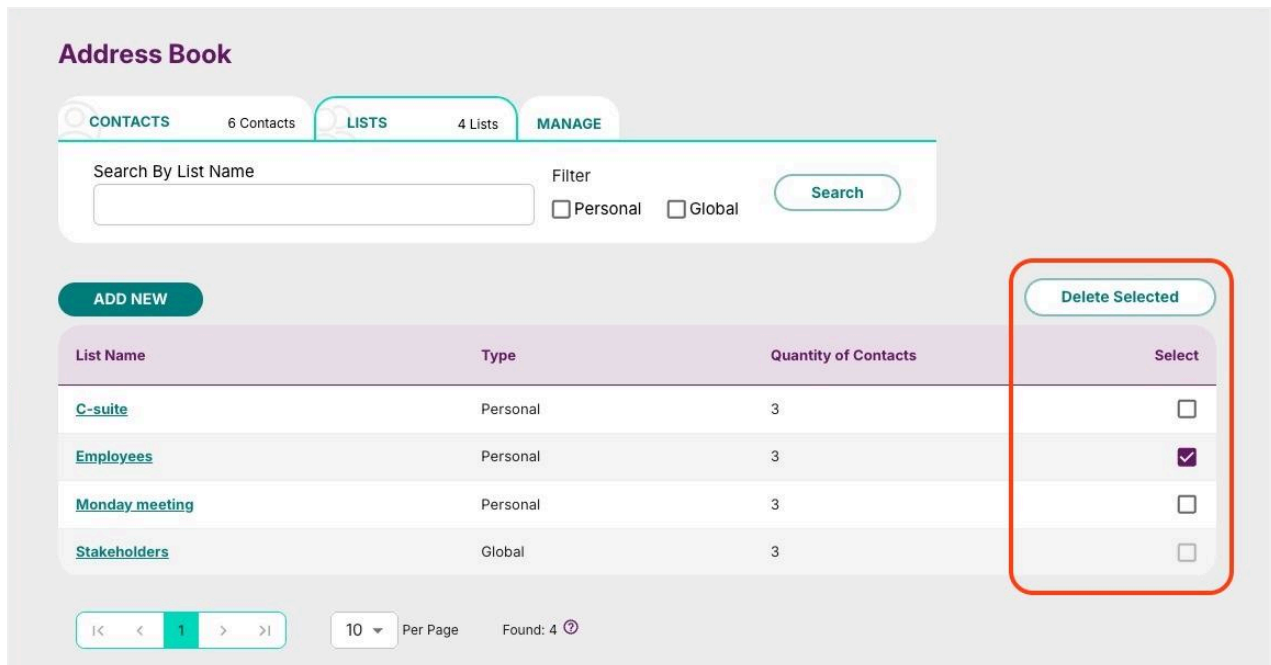
List Type: Personal List Name: Monday meeting

Edit a Distribution List

You can add or remove contacts from a distribution list without having to recreate it.

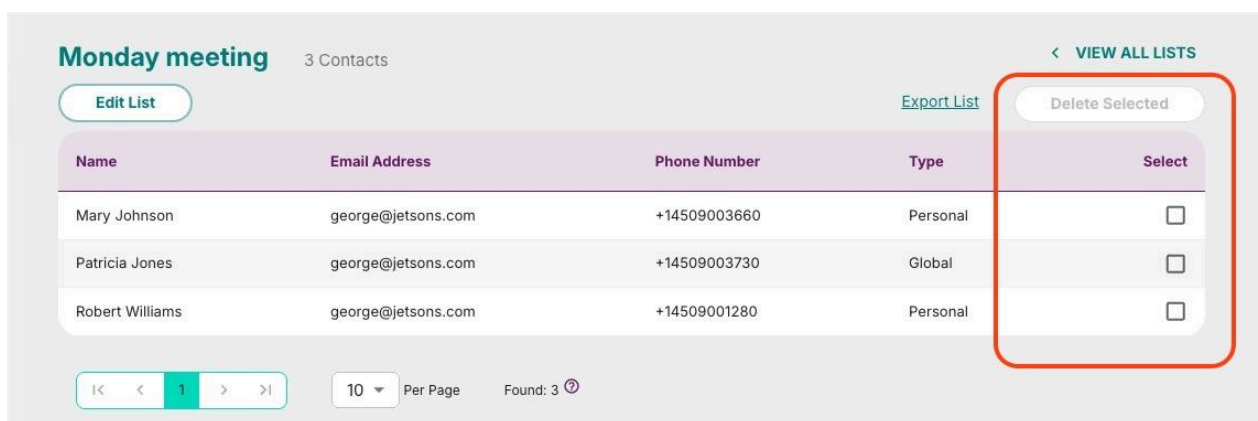
Remove a Distribution List:

1. Go to the **Send SMS** top navigation
2. Go to **Address Book** and select the **Lists** tab
3. Check the box(es) next to the list you'd like to remove
4. Hit the **Delete Selected** (the button will only become clickable once a list is checked)



Remove Contacts from a Distribution list:

1. Go to the **Send SMS** top navigation
2. Go to **Address Book** and select the **Lists** tab
3. Click on the list you'd like to modify
4. Check the box(es) next to the names you'd like to remove
5. Hit the **Delete Selected** (the button will only become clickable once a list is checked)



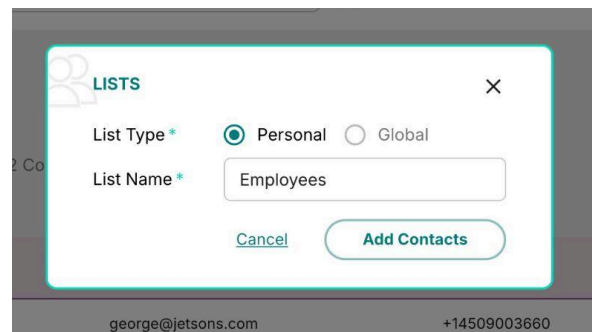
Add a Name to a Distribution List:

1. Go to the **Send SMS** top navigation.
2. Go to **Address Book** and select the **Lists** tab.

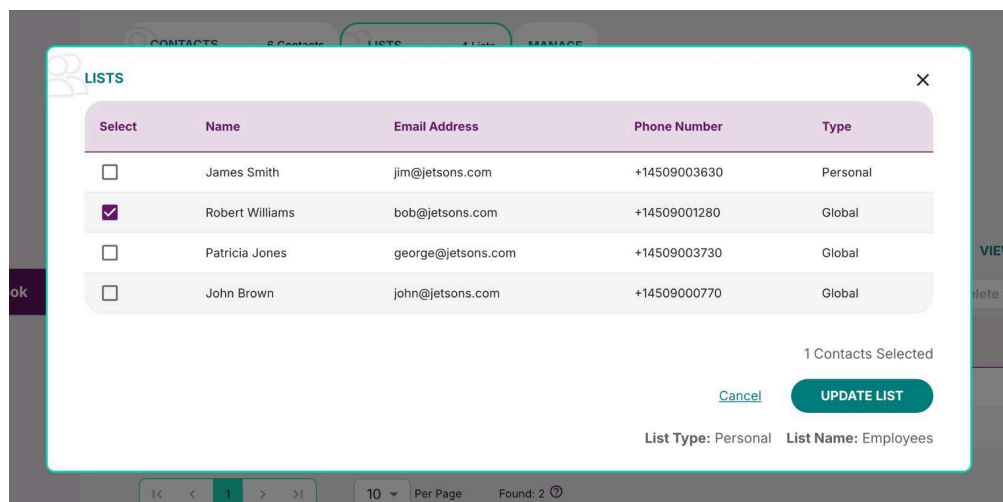
- Click to open the list you'd like to modify.
- Click the **Edit List** button.



- First, you'll have the opportunity to change the list's name (the List Type is not editable)
- Select **Add Contacts** button.



- A list of all of your contacts will appear, scroll through and check the boxes next to the contacts you'd like to add.
- Update List.**



Settings

Update Your Timezone

The timezone selected will be reflected in your Sent, Inbox, Errors and Scheduled tabs. If you're an admin, this applies to you as well, but if you view a report under the Reports tab, it will reflect the median UTC time.

When your User account is created, the timezone is set at GMT+00:00, UTC standard, this will persist until you change it.

1. Go to the Send **SMS** tab in the top navigation.
2. Select **Settings** from the sidebar navigation
3. Change **Timezone** to the one you'd prefer.

The screenshot shows the CompleteSMS interface. In the top navigation bar, the 'Send SMS' tab is highlighted with a red circle. On the left sidebar, the 'Settings' option is also highlighted with a red circle. An orange arrow points from the 'Settings' sidebar item to the 'Time Zone' dropdown menu in the main settings area. The 'Time Zone' dropdown is currently set to '(GMT+00:00) - UTC Standard Time' and is also circled in red. Below the dropdown, a small text note reads: 'CompleteSMS Server: Timezone is (GMT+00:00) UTC Standard Time'. Other settings visible include 'Delivery Receipts' (Disabled), 'Phone Number' (empty field), and 'Forward replies to:' (My email selected). On the right, account statistics show 'N/A' for Account Credits Remaining and '25' for User Messages Remaining.

Create an SMS Signature

Consistently sign-off without having to type it in every time.

1. Go to the Send **SMS** tab in the top navigation.
2. Select **Settings** from the sidebar navigation.

The screenshot shows the 'SIGNATURE' settings page. A red box highlights the signature input area, which contains the text: '—Peggy, Copywriter' and 'STOP to stop'. Below the input area, a note states: 'The characters in your signature are counted in your total message character count'. At the bottom, a character count is displayed: '31/335 Character(s) = 30 Standard Character(s) + 1 Unicode Character(s)'.

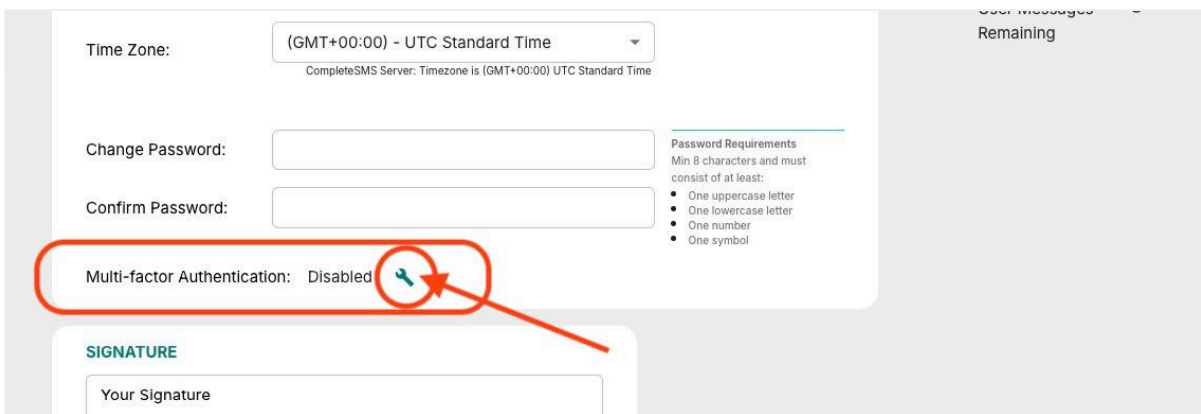
3. Add a signature in the field and hit **Save** to utilize this signature on future SMS.

Reminder: Characters in your signature will count toward your total SMS character count.

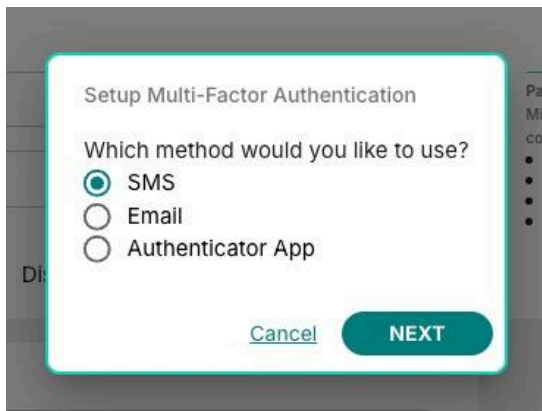
Activate Multi-Factor Authentication

Multi-factor authentication is a quick and easy step you can take to protect your CompleteSMS account. Everytime you log in, you'll verify that it's you. Quick and easy.

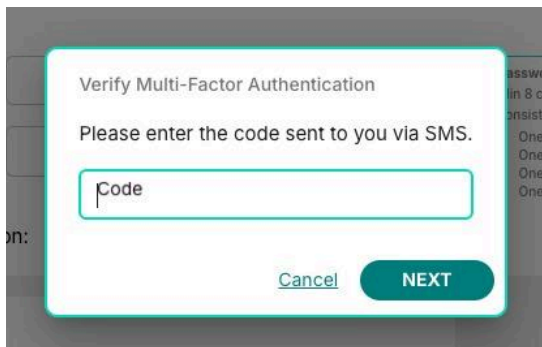
1. Go to the Send **SMS** tab in the top navigation.
2. Select **Settings** from the sidebar navigation.
3. If you haven't set up MFA yet, it will show as Disabled.
4. Click on the little wrench to get started.

A screenshot of the CompleteSMS Settings page. The 'Multi-factor Authentication' section is highlighted with a red rectangle and a red arrow pointing to a wrench icon. The status is 'Disabled'. Other visible fields include 'Time Zone' (GMT+00:00 - UTC Standard Time), 'Change Password', 'Confirm Password', and 'SIGNATURE' (Your Signature). A 'Password Requirements' box lists: Min 8 characters and must consist of at least: One uppercase letter, One lowercase letter, One number, One symbol.

5. From there you'll be asked your preference for signing in, SMS, Email Authenticator Application.
6. Once decided, hit Next.

A screenshot of the 'Setup Multi-Factor Authentication' dialog box. It asks 'Which method would you like to use?' with three radio button options: SMS (selected), Email, and Authenticator App. There are 'Cancel' and 'NEXT' buttons at the bottom.

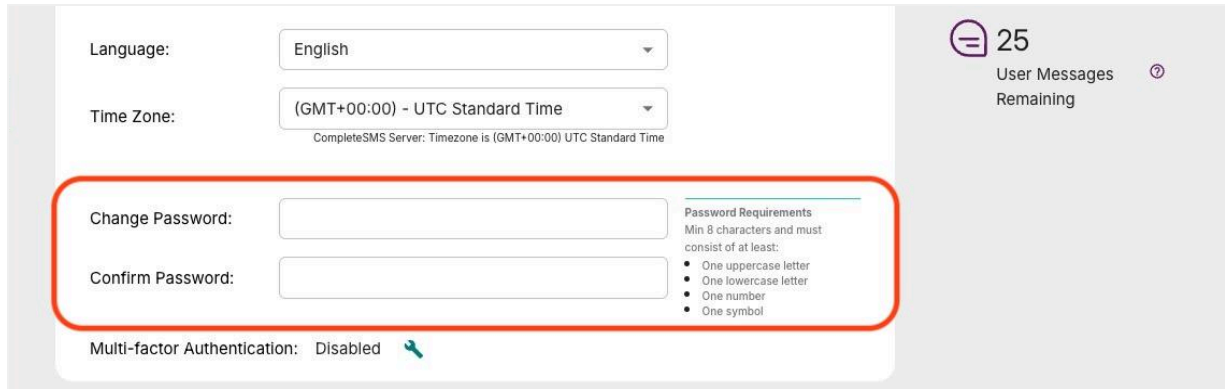
7. You'll receive a code via your selected option.
8. Enter the code, hit next.
9. Then hit Save before closing out the Settings page.

A screenshot of the 'Verify Multi-Factor Authentication' dialog box. It asks 'Please enter the code sent to you via SMS.' and has a text input field labeled 'Code'. There are 'Cancel' and 'NEXT' buttons at the bottom.

Change Your Password

As a User you can change your password at any time. By using the Forgot Password link on the login page or in your Settings.

1. Go to the Send **SMS** tab in the top navigation.
2. Select **Settings** from the sidebar navigation.



The screenshot shows a user settings interface. At the top, there are dropdown menus for 'Language' (set to English) and 'Time Zone' (set to (GMT+00:00) - UTC Standard Time). Below these, a red rectangular box highlights the 'Change Password' section. This section contains two input fields: 'Change Password:' and 'Confirm Password:'. To the right of these fields, a 'Password Requirements' box lists the criteria: 'Min 8 characters and must consist of at least:' followed by a bulleted list: 'One uppercase letter', 'One lowercase letter', 'One number', and 'One symbol'. Below the password fields, there is a 'Multi-factor Authentication' status set to 'Disabled' with a key icon.

3. Enter your new password in the **Change Password** field
4. Enter again in the **Confirm Password** field
5. Hit **Save** before closing the page.

How to Send SMS

Compose and Send an SMS

In Compose you can send messages to one or more individuals, sending the same message to everyone, though, the recipients won't see who else the message was sent.

1. Go to the Send **SMS** tab in the top navigation.
2. Select **Compose** in the sidebar navigation

The screenshot shows the 'completeSMS' web application interface. At the top, there's a header with the 'completeSMS' logo, a 'Send SMS' tab, and a user profile for 'peggy@sterringcooper.com'. A sidebar on the left contains navigation links: 'Compose' (active), 'Bulk Send', 'Inbox', 'Sent', 'Scheduled', 'Errors', 'Templates', 'Address Book', and 'Settings'. The main content area is titled 'Compose' and is divided into three sections: 'RECIPIENTS', 'MESSAGE', and 'SCHEDULE SEND'. The 'RECIPIENTS' section has a search bar labeled 'Search and Add Contacts' with a 'Select...' dropdown. The 'MESSAGE' section has a text input field with the placeholder 'Type your message or insert a template', an 'Insert Template' button, and a signature checkbox. Below the message field, it shows '0/765 Character(s) = 0 Standard Character(s)', '0 Credit(s) Cost = 1 Message Parts * (0 Local Numbers + 0 International Numbers)', and '0 Message(s)'. The 'SCHEDULE SEND' section has a checkbox for 'Send this message at a later date and time', a date/time picker set to '27/Jun/2025 09:24 AM', and an '(Optional) Add Subject' field. A 'SEND' button is at the bottom. On the right side, there are two status boxes: 'N/A Account Credits Remaining' and '25 User Messages Remaining'.

3. Select your recipients:
 - a. Start typing a name or phone number of a contact in your address book, and then click on it in the list when it pops up.

- b. Or directly type in a phone number of a recipient even if they aren't in your Contacts.
- c. Don't forget you can also select a distribution list from the dropdown list.

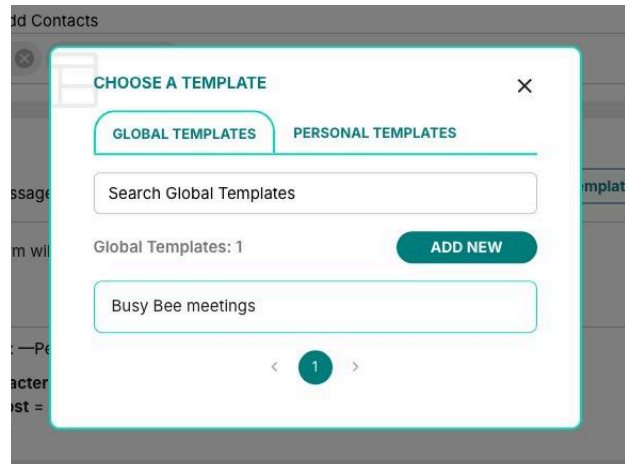
Changed your mind on a recipient you've already selected? Remove recipient names by clicking on the 'x' associated with the contact

4. Character and credit count

- a. Below the field you'll see the quantity of characters in the message and how many credits it will be counted as once sent.
- b. CompleteSMS supports standard and unicode characters. Each counted as a credit at different thresholds. If there is even just one unicode character, the whole message will be counted as a unicode message.

5. Instead of typing a message, you can select from one of the templates you've created in the Templates tab.
 - a. Click on the Insert Template button.

- b. Select the Global or Personal tab.
- c. Double click on the template you'd like to use.
- d. If you don't see one you'd like to use, you can add a new one right there!

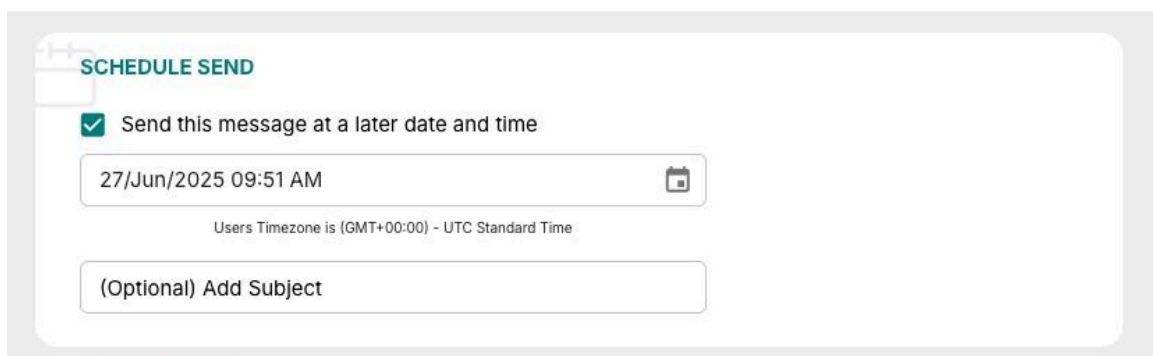


6. If you've set up a signature in the Settings tab, you'll be able to select it by checking the Signature box.



Reminder: The characters that make up your signature will be added to the total character count and will be reflected in the count shown.

7. If you'd prefer to send your message at a later date and time, you can schedule your message
 - a. Check on the Schedule Send checkbox
 - b. Select a date and time.
 - c. Add a message subject if you'd like, this will make it easier to filter in your Scheduled tab, if you were to need to edit the scheduled time.



8. **Last step:** Review and hit Send when you're ready.

Upon hitting **Send**, a modal window will appear to tell you how many messages have been sent or will be sent if it's been scheduled.

In this modal window, you'll be able to mark a checkbox if you want to use the same message content for the next SMS you'll be sending.

Select **OK**, or x-out of the modal window to return to the compose page.

Templates

Create Message Templates

If you tend to send the same messages over and over, create a template to save some keystrokes in the future.

There are two types of templates:

5. Global

- a. All users can send to Global templates.
- b. Only Administrators can create or delete.

6. Personal

- a. Only available in your personal user account.
- b. All Users can create or delete their own Personal templates.

The steps are the same for either type:

1. Go to **Send SMS** in the top navigation
2. Select **Templates** in the sidebar navigation

The screenshot displays the 'completeSMS' web application interface. In the top navigation bar, the 'Send SMS' button is circled in red. The left sidebar contains various navigation options, with 'Templates' highlighted by a red circle. An orange arrow points from the 'Templates' sidebar item to the 'ADD NEW' button in the main content area. The main content area is titled 'Templates' and features two tabs: 'GLOBAL' (1 Template) and 'PERSONAL' (0 Templates). Below the tabs is a search bar labeled 'Search Global Templates'. A table lists the templates, with one entry: 'Busy Bee meetings' with the message 'It's Sylvia's turn to give their presentation at the luncheon on Mon.' and type 'Global'. The table has columns for 'Template Name', 'Template Message', and 'Type'. At the bottom, there is a pagination bar showing '1' of 1 page, '10' items per page, and 'Found: 1'.

3. Click on **Add New**
4. Choose if it should be a **Global** or **Personal** template by selecting the appropriate tab
5. Name your template
6. Add the content of your template
7. Hit **Create Template**

Reminder: characters in your template will count toward your total SMS character count

Create a message template while on the Compose page.

When composing a message, you'll be able to select this template from a list. If you plan on adding additional information along with your template content, make sure to add the template first, and then add the new content around it (or in it, for that matter)

1. While in the compose page you realize that you might want to make a template for the information you need to send:
2. Select the **Insert Template** button
3. In the pop-up that follows, select the type of template (defaults to Global), and then click the **Add New** button.
4. You'll be able to create and then select the new template without leaving the compose screen.

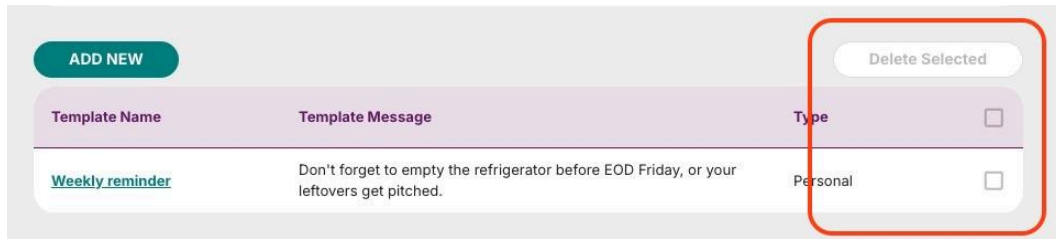
Edit a Template

1. Go to the Send **SMS** tab in the top navigation.
2. Select **Templates** from the sidebar navigation.
3. Click on the template you'd like to edit.
4. Edit the desired content.
5. Hit **Save**.

Template Name	Template Message	Type
Weekly reminder	Don't forget to empty the refrigerator before EOD Friday, or your leftovers get pitched.	Personal

Delete a Template

1. Go to the Send **SMS tab** in the top navigation.
2. Select **Templates** from the sidebar navigation.
3. Check the box(es) of the templates you'd like to delete.
4. Click on **Delete Selected**.



Sending SMS in Bulk

The bulk interface is used when sending personalized messages to multiple recipients at once, using merge fields that pull information from your uploaded csv. The .csv is used only for one send, and is then automatically removed from the system. You will need to upload a .csv file for each send, even if sending to the same list multiple times.

completeSMS Send SMS peggy@sterlingcooper.com

[Compose](#) **[Bulk Send](#)** [Inbox](#) [Sent](#) [Scheduled](#) [Errors](#) [Templates](#) [Address Book](#) [Settings](#)

Bulk Send Guide

FORMATTING YOUR BULK SEND LIST

To send in bulk, you must first upload a .csv file. (example [.csv file](#))

- At minimum, your file should list the mobile phone # and name of the recipients. The file can also contain other columns of information that you might want to use to customize your message.
- Your spreadsheet can have headers if you'd like, or leave them out if you'd rather.
- You can add a message in one of the .csv columns or use a template that you've already saved in 'Templates' (see Building A Template below).

BUILDING A TEMPLATE FOR BULK SENDS

Build your template in the Template folder before preparing the send.

The template needs to be formatted with the column number (Column A=1, B=2), the number must be in brackets like this: [3]

If I want a template that says this using the spreadsheet below:
ex: March acct. balance: Adam has 9 tokens remaining.

My template needs to look like this:
[3] acct. balance: [2] has [4] tokens remaining.

	A	B	C	D
1	number	name	month	quantity
2	61409733656	Adam	March	9
3	61438668645	Brooke	March	8
4	61408881474	Connor	March	7

Optional Method

If you'd rather not add the template into CompleteSMS, you can add it into your spreadsheet. Format the message the same way, but add it to one of the columns in the spreadsheet. Then instead of selecting a template, you'll select which column it's in.

	A	B	C	D	E
1	number	name	month	quantity	message
2	61409733656	Adam	March	9	[3] acct. balance: [2] has [4] tokens remaining.
3	61438668645	Brooke	March	8	[3] acct. balance: [2] has [4] tokens remaining.
4	61408881474	Connor	March	7	[3] acct. balance: [2] has [4] tokens remaining.
5	61409739116	Dylan	March	6	[3] acct. balance: [2] has [4] tokens remaining.
6	61427385850	Emily	March	9	[3] acct. balance: [2] has [4] tokens remaining.
7	61408862613	Fraser	March	5	[3] acct. balance: [2] has [4] tokens remaining.
8	61409738527	Grace	March	4	[3] acct. balance: [2] has [4] tokens remaining.
9	61408821578	Harry	March	3	[3] acct. balance: [2] has [4] tokens remaining.
10	61438665377	Iris	March	2	[3] acct. balance: [2] has [4] tokens remaining.

DON'T SHOW AGAIN SKIP

How To Send in Bulk

1. After reading/skipping the Bulk intro page it's time to send in bulk.
2. Upload a .csv file by selecting the **Browse** button.

completeSMS Send SMS peggy@sterrlingcooper.com

Bulk Send

CHOOSE RECIPIENT LIST

Upload CSV file: **Browse**

[View File Format and Template Building Guide](#)

RECIPIENT DETAILS

Phone Number Column:

Name Column:

MESSAGE DETAILS

☒ CSV file's column **Browse**

☐ Template **Browse**

SCHEDULE SEND

☐ Send SMS later

Users Timezone is (GMT+00:00) - UTC Standard Time

Day/ 25/ 25/ N/A

Account status
(period/limit/remaining/credit)

3. Select the column recipient mobile numbers reside

RECIPIENT DETAILS

Phone Number Column:

Name Column:

MESSAGE DETAILS

☒ CSV file's column **Browse**

☐ Template **Browse**

SCHEDULE SEND

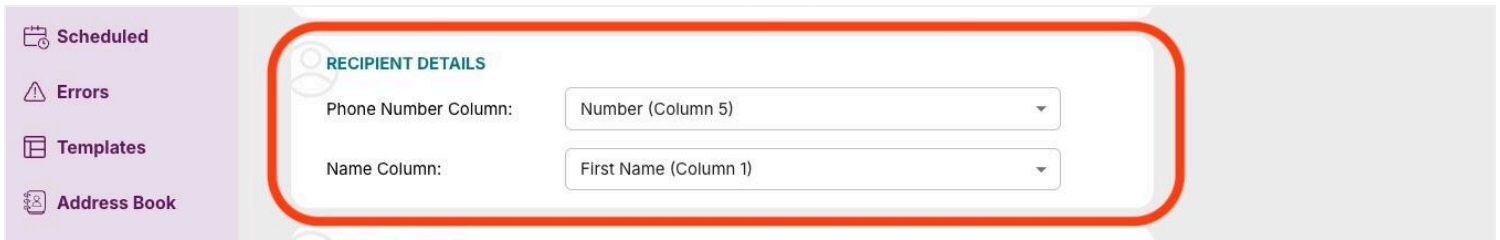
Day/ 25/ 25/ N/A

Account status
(period/limit/remaining/credit)

select

- First Name (Column 1)
- Middle Name (Column 2)
- Last Name (Column 3)
- Email (Column 4)
- Number (Column 5)**
- message (Column 6)

4. Select the column that has the name/contact identifier (this is for reference when viewing your Inbox and Sent files, this information won't appear in your message unless you include that column in your template)

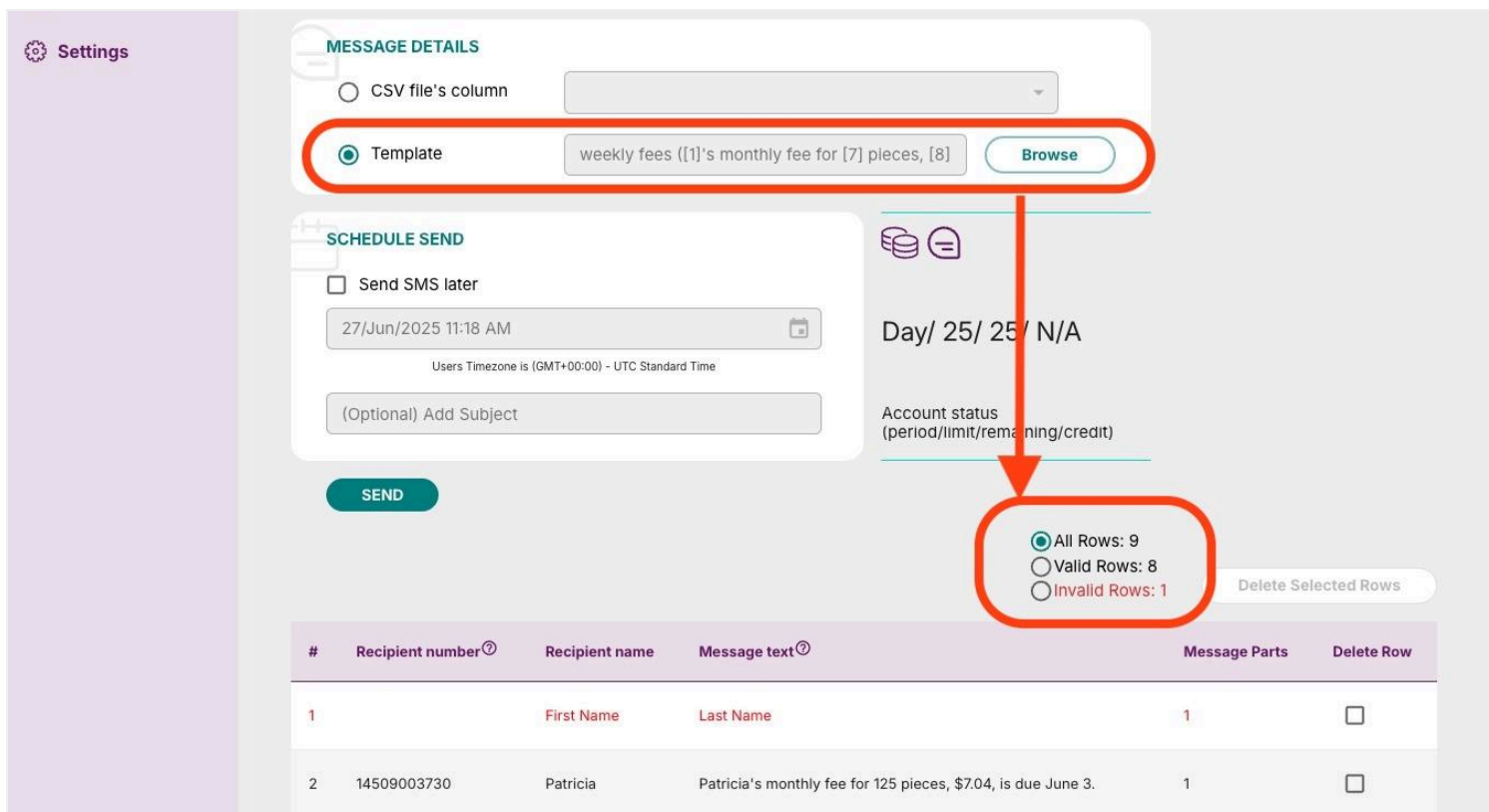


RECIPIENT DETAILS

Phone Number Column: Number (Column 5)

Name Column: First Name (Column 1)

5. Select the location of your SMS message:
 - a. If you've added the message in one of the columns of your .csv, you'll need to select the column that that messages appear
 - b. If you elect to use a template, select the template using the **Templates** button (learn how to [create](#) and [format](#) bulk send templates)
6. After selecting the message location review the health of the list by scrolling down to view the mailing list.



MESSAGE DETAILS

☐ CSV file's column

☒ Template weekly fees ([1]'s monthly fee for [7] pieces, [8]) Browse

SCHEDULE SEND

☐ Send SMS later

27/Jun/2025 11:18 AM

Users Timezone is (GMT+00:00) - UTC Standard Time

(Optional) Add Subject

SEND

Day/ 25/ 25/ N/A

Account status (period/limit/remaining/credit)

☒ All Rows: 9
☐ Valid Rows: 8
☐ Invalid Rows: 1 Delete Selected Rows

#	Recipient number [?]	Recipient name	Message text [?]	Message Parts	Delete Row
1		First Name	Last Name	1	<input type="checkbox"/>
2	14509003730	Patricia	Patricia's monthly fee for 125 pieces, \$7.04, is due June 3.	1	<input type="checkbox"/>

7. Look at the valid and invalid rows to see if the list needs updated or contacts need deleted.
- When uploading from a .csv, and the file has headers, it will appear as an invalid row. Delete if you want to clean up the view, all of the other messages will still deliver.
 - You can delete any row you don't want to send, it doesn't have to be a red highlighted row.

(Optional) Add Subject

Account status
(period/limit/remaining/credit)

SEND

☒ All Rows: 9
☐ Valid Rows: 8
☐ Invalid Rows: 1

Delete Selected Rows

#	Recipient number [?]	Recipient name	Message text [?]	Message Parts	Delete Row
1		First Name	Last Name	1	<input checked="" type="checkbox"/>
2	14509003730	Patricia	Patricia's monthly fee for 125 pieces, \$7.04, is due June 3.	1	<input type="checkbox"/>
3	14509001280	Robert	Robert's monthly fee for 25 pieces, \$8.90, is due June 3.	1	<input type="checkbox"/>
4	14509003650	Michael	Michael's monthly fee for 669 pieces, \$123.93, is due June 3.	1	<input type="checkbox"/>
5	14509001200	Linda	Linda's monthly fee for 865 pieces, \$5.45, is due June 11.	1	<input type="checkbox"/>

8. Do you want to schedule these messages to be sent at a later date and/or time? Mark the checkbox and select a date and time from the calendar and date picker.

☒ CSV file's column: Last Name (Column 3)

☐ Template

Browse

SCHEDULE SEND

☐ Send SMS later

27/Jun/2025 10:49 AM

Users Timezone is (GMT+00:00) - UTC Standard Time

(Optional) Add Subject

SEND

Day/ 25/ 25/ N/A

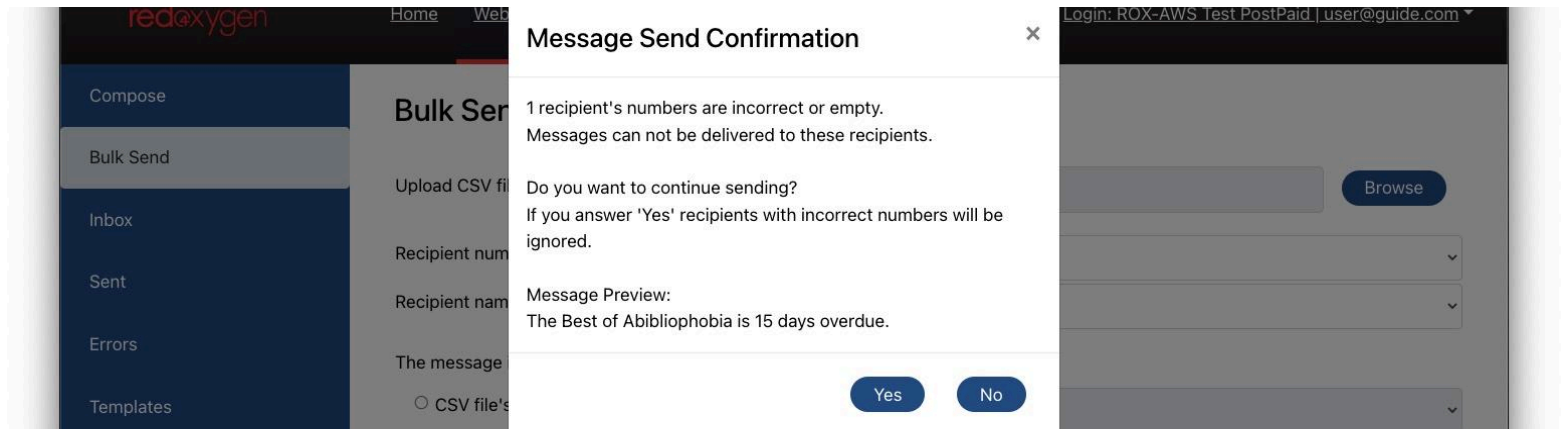
Account status
(period/limit/remaining/credit)

☒ All Rows: 15
☐ Valid Rows: 15
☐ Invalid Rows: 0

Delete Selected Rows

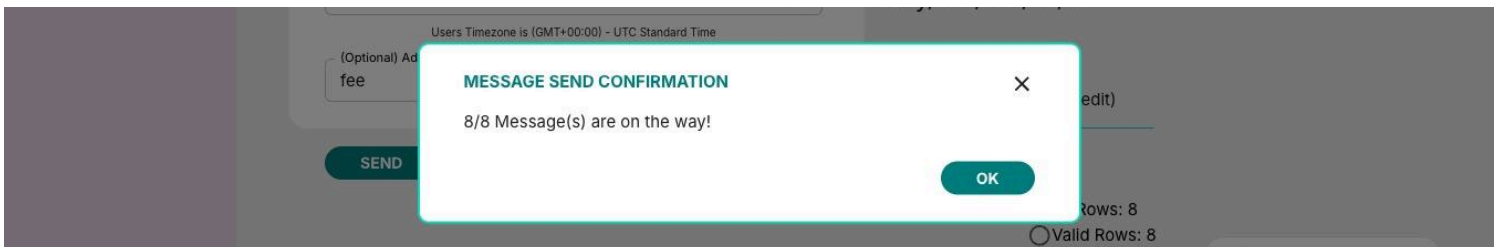
9. Double check the information in the table at the bottom of your screen

10. If all is good, select the **Send** button



11. Approve or cancel send on message/sender confirmation pop-up

12. Lastly, you'll receive a final confirmation for your peace of mind.



How to Format a .csv for Bulk Sending

Your .csv files can be created in any spreadsheet software that can be saved out as a .csv file (e.g., Microsoft Excel, Google Sheets, Numbers, etc.)

- Your files can have headers, but it's not a requirement.
- At minimum, your file should list the mobile phone # and name of the recipients.
- The file can also contain other columns of information that you might want to use to customize your message.
- You can add a message in one of the .csv columns or use a template that you've already saved in 'Templates'.

	A	B	C	D	E	F
1	First	Last	Email	Book title	Fee	Phone
2	Jay	Robin	jrobin@mail.com	The Mockingjay	\$4.00	(123)456-1234
3	Sharon	Smith	ssmith@generic.com	Secrets of Cats	\$2.50	(235)123-1256
4	Jerry	Jackson	jjackson@aohl.com	Jumanji	\$3.00	256-325-7845

How to Format a Bulk Send Template

Your template corresponds with your spreadsheet.

Each column is counted as a number, e.g., A=1, B=2, F=6, etc.

A placeholder in your template is the column number of the corresponding content surrounded by brackets, e.g., [3], [10] and so on.

Example:

Your spreadsheet may look like this:

	A	B	C	D	E	F	
1	First	Last	Email	Book title	Fee	Phone	
2	Jay	Robin	jrobin@mail.com	The Mockingjay	\$4.00	(123)456-1234	
3	Sharon	Smith	ssmith@generic.com	Secrets of Cats	\$2.50	(235)123-1256	
4	Jerry	Jackson	jjackson@aohl.com	Jumanji	\$3.00	256-325-7845	

Your template could read:

Hello [1] - Please return [4] to your local library and pay the [5] fee.

(Hello Jay - please return The Mockingjay to your local library and pay the \$4.00 fee.)

Reminder: Templates will be stored, your .csv files will not, but you can use a new .csv file with a stored template.

Create a Bulk Send Template

If you tend to send the same messages over and over, create a template to save some keystrokes in the future.

All bulk send templates are stored under the template tab (along with templates for individual sends) in the left-hand navigation

If you haven't created a template before starting your bulk send, you can create it while on the bulk send screen.

If you need to edit a template, you'll need to go to the Templates navigation item in the left hand navigation and select the template to edit.

Global

All users can send to Global templates.

Only Administrators can create or delete.

Personal

Only available in your personal user account.

All Users can create or delete their own Personal templates.

The steps are the same for either type:

1. Select **Templates** in the sidebar navigation
2. Choose if it should be a **Global** or **Personal** contact by selecting the appropriate tab
3. Click on **Create Template**

4. Name your template
5. Add the content of your template
6. Hit **Save**

Reminder: characters in your template will count toward your total SMS character count

The screenshot shows the 'NEW TEMPLATE' modal form. At the top, there are tabs for 'GLOBAL' (1 Template) and 'PERSONAL' (0 Templates). The 'PERSONAL' tab is active. The form includes a 'Contact Type' section with radio buttons for 'Personal' (selected) and 'Global'. Below this is a 'Template Name' input field and a 'Template Message' text area. A character count at the bottom shows '0/765 Character(s) = 0 Standard Character(s)' and '1 Message Parts'. A 'CREATE TEMPLATE' button is at the bottom right.

This screenshot shows the 'NEW TEMPLATE' modal form with the 'PERSONAL' tab selected. The 'Contact Type' is set to 'Personal'. The 'Template Name' field contains 'weekly fees'. The 'Template Message' text area contains '[1]'s monthly fee for [7] pieces, [8], is due [6].'. The character count at the bottom shows '50/765 Character(s) = 50 Standard Character(s)' and '1 Message Parts'. The 'CREATE TEMPLATE' button is at the bottom right.

The screenshot shows the 'completeSMS' web application interface. The top navigation bar includes the 'completeSMS' logo, a 'Send SMS' button, and a user profile for 'peggy@sterlingcooper.com'. The left sidebar contains navigation links: Compose, Bulk Send, Inbox, Sent, Scheduled, Errors, Templates (highlighted), Address Book, and Settings. The main content area is titled 'Templates' and has tabs for 'GLOBAL' (1 Template) and 'PERSONAL' (2 Templates). The 'PERSONAL' tab is active, showing a search bar and a table of templates. The table has columns for 'Template Name', 'Template Message', and 'Type'. Two templates are listed: 'weekly fees' and 'Weekly reminder'. The 'weekly fees' template is highlighted with a red box.

Template Name	Template Message	Type
weekly fees	[1]'s monthly fee for [7] pieces, [8], is due [6].	Personal
Weekly reminder	Don't forget to empty the refrigerator before EOD Friday, or your leftovers get pitched.	Personal

Tracking Your SMS

Inbox

- The Inbox is where you'll be able to view all of the SMS replies you've received
- Listed in chronological order you can also search by timeframe or exact date and time
- Select an item from the list to view details on the message initially sent and the reply to that message
- This shows one interaction, if your conversation has more, there will be additional entries for the other replies

completeSMS

Send SMS

peggy@sterrlingcooper.com

Compose

Bulk Send

Inbox

Sent

Scheduled

Errors

Templates

Address Book

Settings

Inbox

SEARCH INBOX

Quick Report: For the Last Year (365 Days)

Activity Between: 28/Jun/2024 12:00 AM To 27/Jun/2025 11:59 PM

User's Timezone is (GMT-05:00) Eastern Time (US and Canada) - Eastern Daylight Time

Advanced Filters

Search

Export

Date	From	Name	Message
Jun 27, 2025, 11:46 AM	+14509003660	Mary	Did you know that kangaroos can not walk backwards? 8/31/2023 Thank you for the message. CSMSLIST
Jun 27, 2025, 11:46 AM	+14509997280	Elizabeth	Did you know that kangaroos can not walk backwards? 8/31/2023 Thank you for the message. CSMSLIST
Jun 27, 2025, 11:46 AM	+14509003760	William	Did you know that kangaroos can not walk backwards? 8/31/2023 Thank you for the message. CSMSLIST
Jun 27, 2025, 11:46 AM	+14509001280	Robert	Did you know that kangaroos can not walk backwards? 8/31/2023 Thank you for the message. CSMSLIST

Sent

- The Sent page is where you'll view all of the SMS you've sent (view Inbox for replies to any sent item).
- Listed in chronological order you can also search by timeframe or exact date and time.
- Select an item from the list to view details on the message sent

completeSMS

Send SMS

peggy@sterrlingcooper.com

Compose

Bulk Send

Inbox

Sent

Scheduled

Errors

Templates

Address Book

Settings

Sent

SEARCH SENT MESSAGES

Quick Report:

For the Last Year (365 Days)

Activity Between:

28/Jun/2024 12:00 AM

To

27/Jun/2025 11:59 PM

User's Timezone is (GMT-05:00) Eastern Time (US and Canada) - Eastern Daylight Time

Advanced Filters

By Field:

From

To

Name

NOTE: Numbers should be entered as only digits, no spaces or +.

Message

Status

Search

Export

Cancel All Pending Messages

Date/Time	From	To	Name	Message	Status	Select
Jun 27, 2025, 11:45 AM	+13434535811	14509001200	Linda	Linda's monthly fee for 865 pieces, \$5.45, is due June 11.	Delivered	<input type="checkbox"/>
Jun 27, 2025, 11:45 AM	+13434535811	17787185780	Barbara	Barbara's monthly fee for 37 pieces, \$43.52, is due June 16.	Delivered	<input type="checkbox"/>

Errors

- The Errors page displays a list of SMS you've sent that were errored and why
- Listed in chronological order you can also search by timeframe or exact date and time.
- Select an item from the list to view details on the message

completeSMS

Send SMS

peggy@sterringcooper.com

Compose

Bulk Send

Inbox

Sent

Scheduled

Errors

Templates

Address Book

Settings

Errors

SEARCH ERRORS

Quick Report:

For the Last Year (365 Days)

Activity Between:

28/Jun/2024 12:00 AM

To

27/Jun/2025 11:59 PM

User's Timezone is (GMT+00:00) - UTC Standard Time

Advanced Filters

Search

Export

Date/Time	From	To	Name	Error Status	Error Code	Error Text
No results found.						