

CompleteSMS for Outlook: Installation and User Guide

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# **Before Installation**

#### Custom Add-in

CompleteSMS for Outlook is a custom add-in to be used with Microsoft 365's Outlook, online and on the locally downloaded Outlook app. You won't find the add-in in the Microsoft store, yet. You must have the CompleteSMS for Outlook manifest file (provided, upon request, by Red Oxygen) for installation of this custom add-in.

#### New Outlook Only

- The CompleteSMS for Outlook add-in can only be installed on New Outlook. New Outlook is the most current version of Outlook that comes in the Microsoft 365 suite our Outlook.com.
- If you are using Classic Outlook, we offer OfficeSMS for the locally downloaded Classic Outlook application.
- If you don't know what version of Outlook you are using, <u>here's a handy Microsoft</u> <u>guide that might help</u>.

#### **Outlook Email Only**

- You must have an Outlook domain email address (or one owned by Microsoft like @hotmail, @msn, @xbox, @live, or even your company domain if it's a Microsoft account)
- This Outlook address must be on your Red Oxygen account as a User for the add-in to authenticate properly and allow you to log into the add-in.
- You must log into Outlook with this Outlook email account, it can't be an alias.



# Installation

- 1. Log into your Outlook account
- 2. Select an existing email from your inbox, as you cannot use the Apps icon in the main ribbon or left hand ribbon, it must be the one within the email pane.

**Important:** Ensure that the Reading Pane in Outlook is set to Right or Below. Otherwise, add-ins will be unavailable. To configure your Reading Pane, select View > Reading Pane.

- 3. Select the small Apps icon in the top right corner of 5 1 88 the email reading pane. To: You Fri 8/30/2024 1:0 We're here to help if you have any questions on installing your CompleteSMS for Outlook add-in Tip: If you do not see the for Microsoft 365. app icon, select the 3-dot icon and select Apps from - -the dropdown. Thank you, The CompleteSMS Team Support: 415.814.1444 ← Reply → Forward
- 4. Select the Get Add-Ins menu item





- Send feedback X 5. Select 'My add-ins' and Add-Ins for Outlook look near the bottom for Add-ins may access personal information. By turning an add-in on, you agree to its License Terms and Privacy Policy. ✓ Search add-ins 'Custom Addins'. My add-ins My add-ins CompleteSMS for Outlook Store Add-ins Add-ins that you added from the Office store is a **custom add-in**, you No add-ins found will need to install it by Admin Managed uploading a file. Add-ins deployed by your administrator. Browse all admin-managed add-ins Bing Maps My Templates Là Map addresses found in your email. This add-in will send addresses to Bing but will not share your data with any 0 Add Added Added by Micro. oft Microsoft has provided ese add-ins so you can try them out. Bing Maps My Templa Map addresses found in your email. This add-in will send addresses to Bing but will not share your data with any Added **Custom Addins** You can install add-ins from a file or from a URL. + Add a custom add-in  $\sim$ No add-ins found.
- Select 'Add from File...', then select the manifest file you've been provided by your Red Oxygen representative..

'ou can install add-ins from a file or	from a URL. + Add a custom add-in V
lo add-ins found.	Add from URL
	Add from File





 Confirm it's been installed, by making sure you can see it on the 'My add-ins' page

Added	🔗 Added	
Custom Addins		
You can install add-ins from	m a file or from a URL. $+$ Add a custo	om add-in 🗸
Completes	ıs	
CompleteSMS for Outloo	k	
Custom add-In		
Added		

9. Go back to your inbox, select an email and click on the Apps icon, the add-ins box will appear, and you should be able to see the CompleteSMS icon.

Sometimes you need to refresh, or click on a different email for the icon to load.



10. To continue installation, select 'Send SMS' from the CompleteSMS icon in The email ribbon.





11. The Login panel will sweep in from the right.



- 12. If your email address has an account on the CompleteSMS platform already:
  - a. Clicking the Login button.
  - b. In the next window, Allow a new window to open
  - c. Select the correct Microsoft login information
  - d. Agree to the permissions required for the add in/app
  - e. Start sending SMS

**If you do not have an existing CompleteSMS account,** you will be asked to set up a trial account.

After opening the trial, CompleteSMS will send you a welcome email. If you do not see it in your inbox check your junk folder and mark it as 'Not Junk'. This step will ensure that your SMS email receipts will appear in your inbox. CompleteSMS × Create Trial Account • No Obligation • No Credit Card Required • 15-Day Trial • 25 Free SMS Credits • Access to CompleteSMS • Free Live Support

Start Your Free Trial

redaxygen

### Add Quick Icon to Email Ribbon

1. Go to three-dot icon and select 'Customize actions'

(as shown to the right)

← ← ← ⊂ ← 📴 ···· Fri 8/30/2024 1:09 PM CompleteSMS for Outlook add-in



- 2. Select CompleteSMS checkbox and hit Save
- Customize reading pane actions × Choose actions and add-ins you want to see when you select a message to read 6 6 0 0 Triage Advanced Respond Addins Reply all by meeting 🗌 🔟 Delete 📃 🔮 Report junk Send to OneNote Forward as attachment 📃 🖂 Mark as unread Report phishing G CompleteSMS Flag 🗌 🍪 Block Create rule Report a concern 🗌 🙃 Print at Translate Show in immersive reader 8 View message source Open in new window Download Download as EML Download as MSG Cancel
- 3. Refresh your email and the icon will eventually appear in the ribbon—from there you can quickly send or reply to SMS





# How to:

#### Send a Message

- 1. Select an existing email (any email, even if you aren't sending the SMS to that person)
- 2. Click the CompleteSMS icon dropdown, and select 'Send SMS'



- 3. The CompleteSMS add-in interface will sweep in from the right.
  - a. If you are using the family or personal versions of Microsoft365 your interface will look like this. This is also the version used throughout the guide.
  - b. If you are using the business or enterprise version of Microsoft 365, your interface will look like this. The option of selecting and sending to a Contact Group is the only difference in function between the two versions.



 Add recipient phone number or select from 4 your Outlook contacts that appear when you begin typing a number or name.





- 5. Enter a message
- 6. Hit the Send button
- 7. See success message



#### Settings

With the settings gear icon you can add templates, signatures and review your account information.

**PLEASE NOTE:** Your Timezone here and in the CompleteSMS web portal must match to ensure your scheduled texts deliver when expected.

After changing your Timezone click on the back arrow and it will be autosaved.





#### **Create Templates**

Templates allow you to prepare multiple messages only once and and then save them in your templates library.

When selecting from your template dropdown list, you can rest assured that it's a consistent message every time.

You can even set a default template, so you can set it and save yourself even one more mouse click.

1

CompleteSMS

Sending a text message with

PP Polly Piper

Add Recipients.

G	CompleteSMS	×
$\leftarrow$	Templates	
You	haven't added any templat	tes yet.
	Add New	

2

 $\leftarrow$ 

503

Manage Templates

Manage Signatures

My Account

CompleteSMS

Templates

You haven't added any templates yet.

Add New

X

#### How to create a new template:

- 1. Select 'Manage Templates' from the Settings menu
- 2. Then 'Add New'

- 3. Add a title for your template, make it something easily recognizable from a list of other templates.
- 4. Add your template content/text, don't worry, you can change it in the compose stage after you select it from your list, if you'd like.
- 5. 'Save Template
- If you'd like a default template to appear every time you start a new message, select one from the list, and uncheck 'No Default Template'





#### **Create Signatures**

Signatures are similar to templates, but think about them more as a wrapper for your template or message. It's the salutation, and closing of your message.

An example on how to use the opening and closing sections could be: announcing who you are in the opener and opt-out instructions in closing.

**But remember:** the character count of the signature will be added to the message or template character count to determine how many SMS parts of which your message will be counted.

C	CompleteSMS	×
$\leftarrow$	Signature	
You	haven't added any signature	es yet.
	Add New	

- 1. Select 'Manage Signatures' from the Settings menu
- 2. Then 'Add New'

- 3. Add a title for your signature, make it something easily recognizable from a list of other templates.
- 4. Add your signature content/text, don't worry, you can change it in the compose stage after you select it from your list, if you'd like.
- 5. 'Save Signature'
- 6. This is how the signature will appear after selecting it from the dropdown. The space between the header and footer is where you enter your message text, or if a template is selected, it will automatically appear between the header and footer.



C CompleteSMS

Sending a text message with

😰 Polly Piper >

Add Recipients...

503

Manage Templates

Manage Signatures

My Account



Add Recipients		
[Paws and Claws Pampering]		/
Thank you, Your Meowarvelous Groomer STOP to unsubscribe		
MS Characters: 87 / Message Co	unt: 1	
Select a Template		1
Standard office message	×	
Send Later		



7. There's also a default setting similar to Templates.



#### Schedule a Message

Scheduling a text to send sometime in the future is easy and convenient. The schedule a message feature gives you the opportunity to prepare the message while you're thinking of it, and set it to send later, keeping you from having to remember to do it.

- 1. Check the 'Send Later' checkbox
- 2. Select a Date
- Select a time (To change the minutes increment, highlight just the two minute numerals and change them.)
- 4. Click the send button.

This will put your message in a queue, and you can see the message queued as 'Pending' in your CompleteSMS 'Sent' folder. If you want to cancel the message before the date and time you selected, check the box next to the message in the Sent folder, and then the 'Cancel Pending Messages' button.

Standard office message × 503 Send Later 👝 Polly Piper 🗙 2 Tue Sep 10 2024 Add Recipients. Pick a time [Paws and Claws Pampering] Send Thank you, Your Meowarvelous Groomer STOP to unsubscribe SMS Characters: 87 / Message Count: 1 1 Select a Template Standard office message Send Later Standard office message 3 Tue Sep 10 2024 titi Send Later 8:30 AM Ħ Select a date. Send Send

X

C CompleteSMS

**Note:** See Timezone note in <u>Setting</u>s section.



## Reply to SMS

- Select an email that's a reply from someone you previously sent an SMS
- 2. Original message. Example: This is the original message you sent to Polly.
- Reply to original message.
  Example: this is Polly's reply to you.
- Now you can reply to their messages by clicking the CompleteSMS icon dropdown, and select 'Reply Via SMS'
- 5. When the CompleteSMS add-in interface the recipient field will be prepopulated with the number/contact that you're replying to.

Where the last SMS you sent to: 1317

Was sent: Fri Sep 06 2024 16:07:00 GMT+0000 (Coordinated Universal

Containing the Text: [Paws and Claws Pampering] Chowder's pedicure appointment is Tues June 3. Thank you, Your Meowarvelous Groomer STOP to

3

Discover

groups

Find

SMS Reply from 1317

Undo

0

Print

ply from 1317

We'll be there!

To: You

- 6. This example: The 'Standard office message' signature has been marked as the default, that's why it's pre-populated the message field.
- 7. Complete the message as you would a brand new message and send it.

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1

s

3

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Time)

unsubscribe

Pin Snooze



CompleteSMS

🦻 Polly Piper 🗙

[Paws and Claws Pampering]

Meowarvelous Groomer

SMS Characters: 87 / Message Count: 1

Add Recipients.

k you,

STOP to unsubscribe

Select a Template

Send Later

7

Standard office message

5

G - ...

G Send SMS

G Reply Via SMS

6

CompleteSMS

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Fri 9/6/.

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X

203

× ×

## Send On Mobile

To send using the Outlook App on your mobile device, you must have installed the add-in on your computer.

- 1. Android devices show three vertical buttons at the top of the email, that you can click and find the CompleteSMS icon.
- 2. iOS devices have the three horizontal dots that can be clicked to find the CompleteSMS icon.

Not seeing the app icon? It's not unusual for Microsoft to take a few minutes to load the app icon. Please be patient and check back in  $\sim$ 15 mins.



## Uninstall the Add-in

- 1. Go to the apps icon in email ribbon
- 2. Select Get add-ins.
- 3. Select My add-ins, scroll down to CompleteSMS tile
- 4. Select three dot icon
- 5. Select remove





