



CompleteSMS:

# Administrator Guide

Last updated: June 29, 2025

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# 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

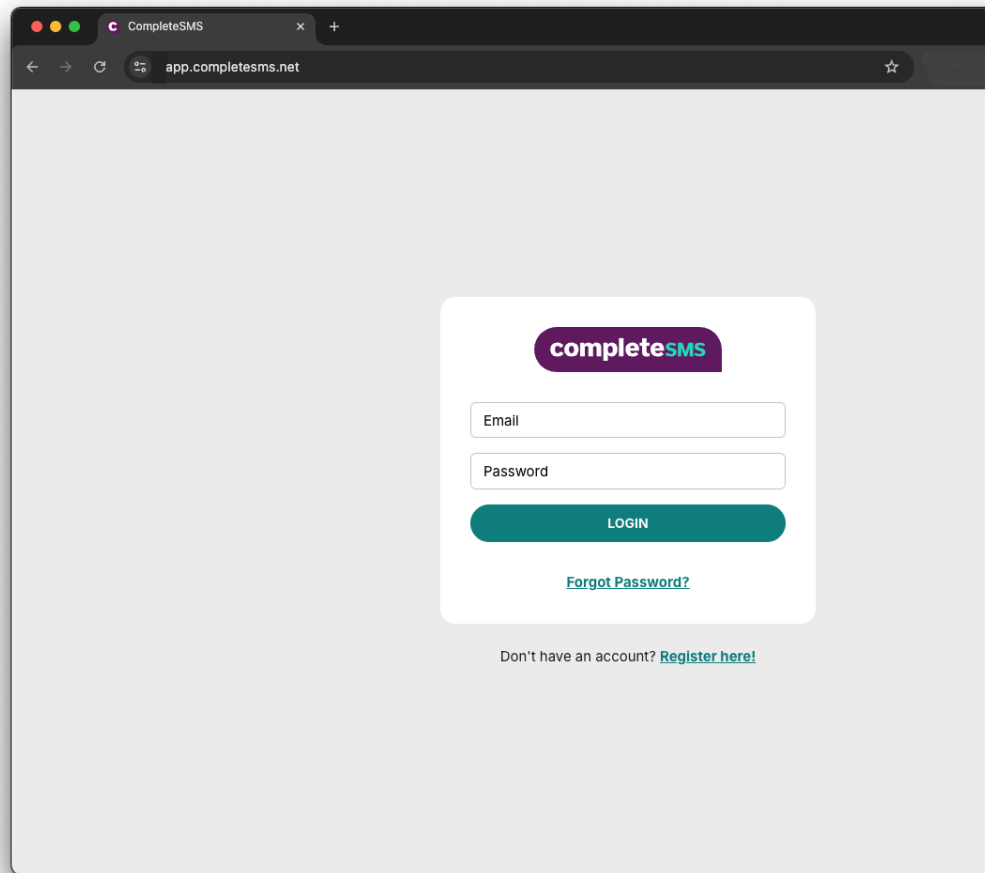
**Restrictions:**

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

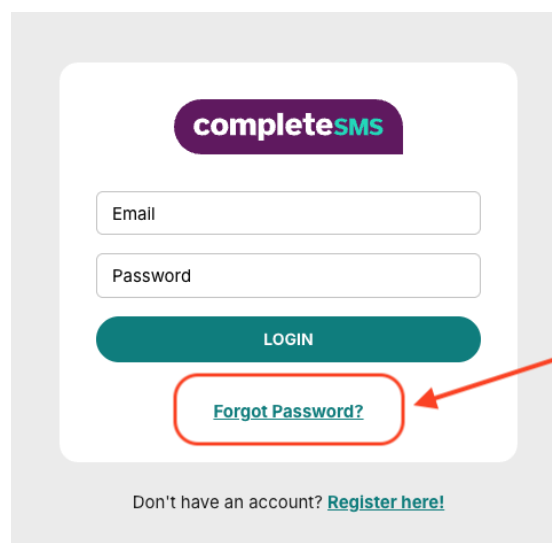
# Log In

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)

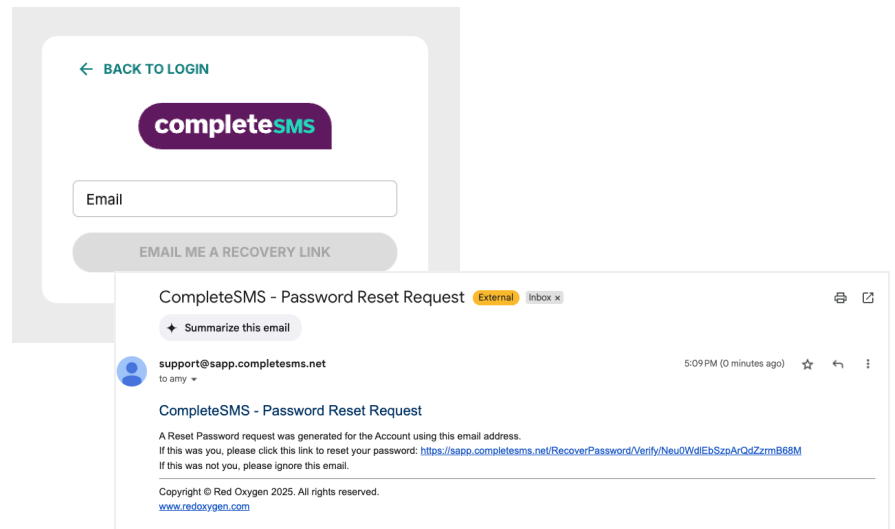


If you've forgotten your password, press the **Forgot Password** link. (If this is your first time logging in, you may be required to do this step)



Enter the email used for  
your account

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



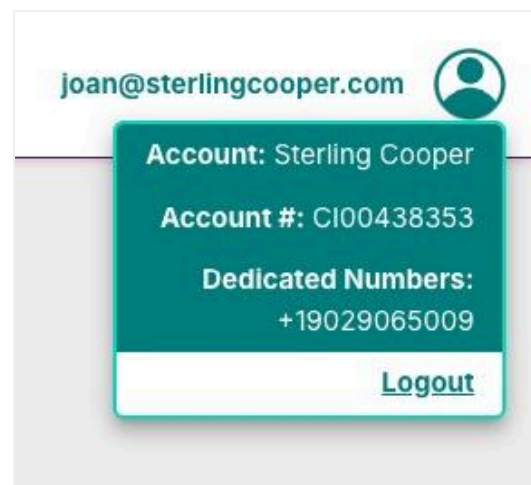
Type in a new password  
(must be at least 8 characters  
with at least one uppercase letter, one  
lowercase letter, one numeral, and one  
special character)

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

This screenshot shows the 'Set New Password' screen. It has a 'BACK TO LOGIN' link at the top. Below the 'completeSMS' logo are two input fields: 'New Password' and 'Confirm New Password', each with a toggle icon. Underneath 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, 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.

The screenshot shows the 'completeSMS' interface. The top navigation bar includes 'Send SMS', 'Account' (highlighted with a red box), 'Reports', and 'Billing'. The user 'joan@sterlingcooper.com' is logged in. The left sidebar shows 'Administrators' (highlighted with a red box), 'Cost Centers', and 'Users'. The main content area is titled 'Administrators' and features an 'ADD NEW ADMIN' button. Below this is a table with the following data:

| Name          | Email                   | Department | Access Level             | Contact Type                     |
|---------------|-------------------------|------------|--------------------------|----------------------------------|
| Don Draper    | don@sterlingcooper.com  |            | FullAdministrationAccess | Primary Sales, Secondary Billing |
| Joan Holloway | joan@sterlingcooper.com |            | FullAdministrationAccess |                                  |

4. Fill in the details about the administrator.

The screenshot shows the 'Add New Administrator' form. The top navigation bar is the same as the previous screenshot. The left sidebar shows 'Administrators' (highlighted with a red box), 'Cost Centers', and 'Users'. The main content area is titled 'Add New Administrator' and includes a 'Back to Administrator List' link. The form is divided into sections: 'CONTACT INFORMATION' and 'ACCESS LEVEL'. The 'CONTACT INFORMATION' section has fields for 'Name \*', 'Email \*', 'Position', and 'Department'. The 'ACCESS LEVEL' section has a dropdown menu labeled 'Select Access Level'.

5. Select their access level.

A close-up of the 'Access Level' dropdown menu. The label 'Access Level \*' is followed by a dropdown menu with the text 'Select Access Level' and a downward arrow.

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

| Contact Type |  |
|--------------|--|
| Billing      | <input type="radio"/> Primary <input type="radio"/> Secondary <input checked="" type="radio"/> N/A |
| Sales        | <input type="radio"/> Primary <input type="radio"/> Secondary <input checked="" type="radio"/> N/A |
| Technical    | <input type="radio"/> Primary <input type="radio"/> Secondary <input checked="" type="radio"/> N/A |

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.

completeSMS

Send SMS

Account

Reports

Billing

joan@sterlingcooper.com

Administrators

Cost Centers

Users

Administrators

ADD NEW ADMIN

D J

| Name          | Email                   | Department | Access Level             | Contact Type                     |
|---------------|-------------------------|------------|--------------------------|----------------------------------|
| Don Draper    | don@sterlingcooper.com  |            | FullAdministrationAccess | Primary Sales, Secondary Billing |
| Joan Holloway | joan@sterlingcooper.com |            | FullAdministrationAccess |                                  |

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.

completeSMS Send SMS **Account** Reports Billing joan@sterlingcooper.com

Administrators  
Cost Centers  
**Users**

**Users**

SEARCH USERS

Name Email Mobile Number

Cancel SEARCH

**ADD NEW USER**

| Name       | Email                  | Mobile Number | Status | Type | Max. Msgs/Day | Cost Centers |
|------------|------------------------|---------------|--------|------|---------------|--------------|
| Don Draper | don@sterlingcooper.com | -             | Active | User | 25            | NotAssigned  |

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

completeSMS Send SMS **Account** Reports Billing

Administrators  
Cost Centers  
**Users**

← [Back to User List](#)

**Add New User**

User Name \*

Email \*

Mobile

Country \*



- 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.

Language \*

Select One

Cost Centers

Max SMS Per Day \*

25

Set Password \*

Confirm Password \*

Cancel

SAVE CHANGES

Password Requirements

Min 8 characters and must consist of at least:

- One uppercase letter
- One lowercase letter
- One number
- One symbol

## 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**.

**completeSMS** Send SMS **Account** Reports Billing joan@sterlingcooper.com

**Administrators**  
**Cost Centers**  
**Users**

**Users**

SEARCH USERS

Name Email Mobile Number

Cancel SEARCH

ADD NEW USER

| Name          | Email                    | Mobile Number | Status | Type | Max. Msgs/Day | Cost Centers |
|---------------|--------------------------|---------------|--------|------|---------------|--------------|
| Don Draper    | don@sterlingcooper.com   | -             | Active | User | 25            | NotAssigned  |
| Joan Holloway | joan@sterlingcooper.com  | 5552223333    | Active | User | 50            | Marketing    |
| Peggy Olsen   | peggy@sterlingcooper.com | -             | Active | User | 25            | Copywriting  |
| Pete Campbell | pete@sterlingcooper.com  | -             | Active | User | 25            | Marketing    |

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

**completeSMS** Send SMS **Account** Reports Billing

**Administrators**  
**Cost Centers**  
**Users**

← [Back to User List](#)

**User Profile**

PEGGY@STERRLINGCOOPER.COM

Dedicated Numbers No dedicated numbers assigned

User Name \*

## 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.

The screenshot shows the completeSMS dashboard. The top navigation bar includes 'Send SMS', 'Account' (highlighted with a red box), 'Reports', and 'Billing'. The user email 'joan@sterlingcooper.com' and a profile icon are on the right. The left sidebar has 'Administrators', 'Cost Centers' (highlighted with a red box), and 'Users'. The main content area is titled 'Cost Centers' and features an 'ADD NEW' button. Below it is a table with columns 'Name', 'Contact', and 'Number of Users'.

| Name        | Contact        | Number of Users |
|-------------|----------------|-----------------|
| Copywriting | Joan Holloway  | 1               |
| IT          | Roger Sterling | 1               |

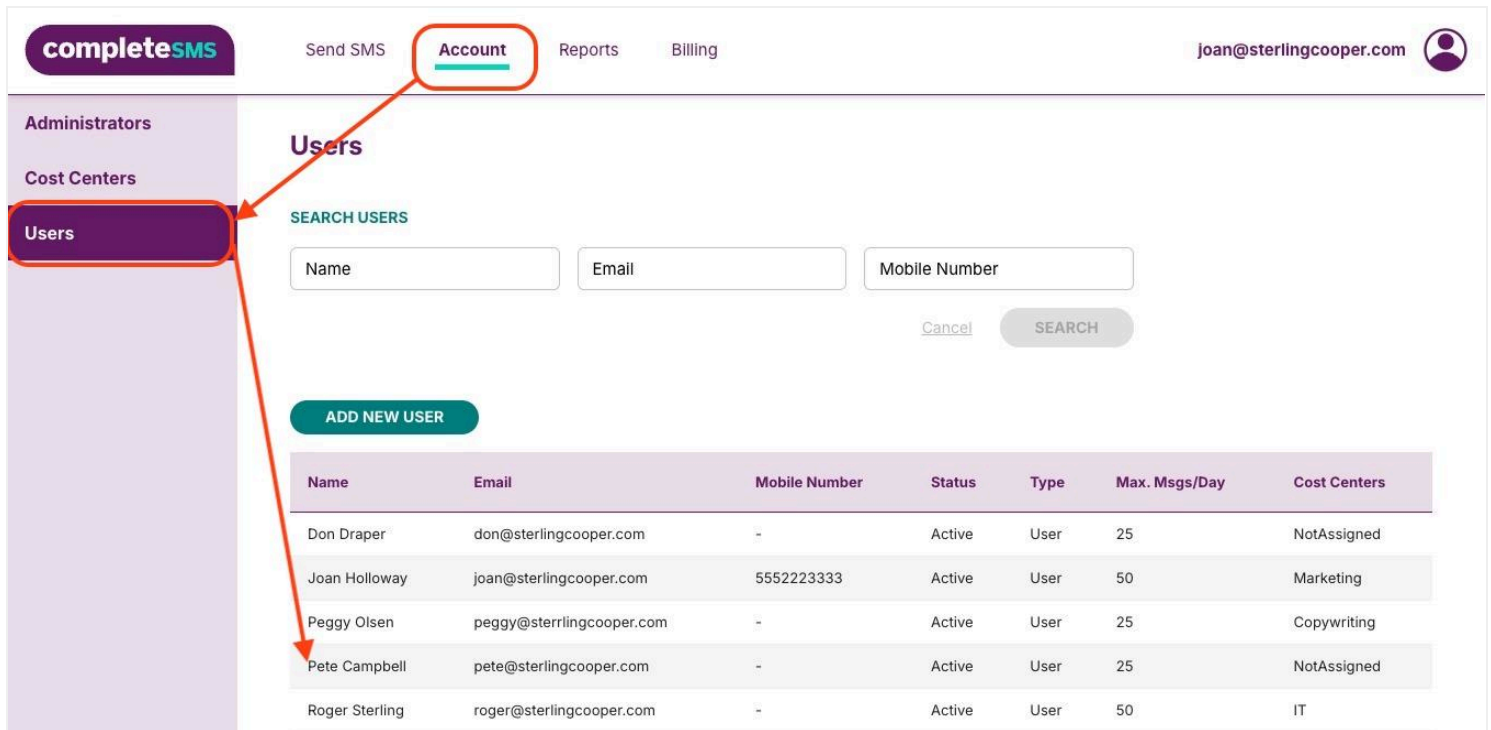
4. Name the new cost center.
5. Select an administrator from the drop down menu, this person is considered the owner of the cost center, often they are the manager of that department or possibly the administrator that added it.

The screenshot shows the 'Add New Cost Center' form. The top navigation bar is the same as the previous screenshot. The left sidebar has 'Administrators', 'Cost Centers' (highlighted with a red box), and 'Users'. The main content area is titled 'Add New Cost Center' and includes a 'Back to Cost Centers' link. The form has two fields: 'Name' with the value 'Marketing' and 'Contact Name' with a dropdown menu showing 'Don Draper'. There are 'Cancel' and 'SAVE' buttons at the bottom.

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

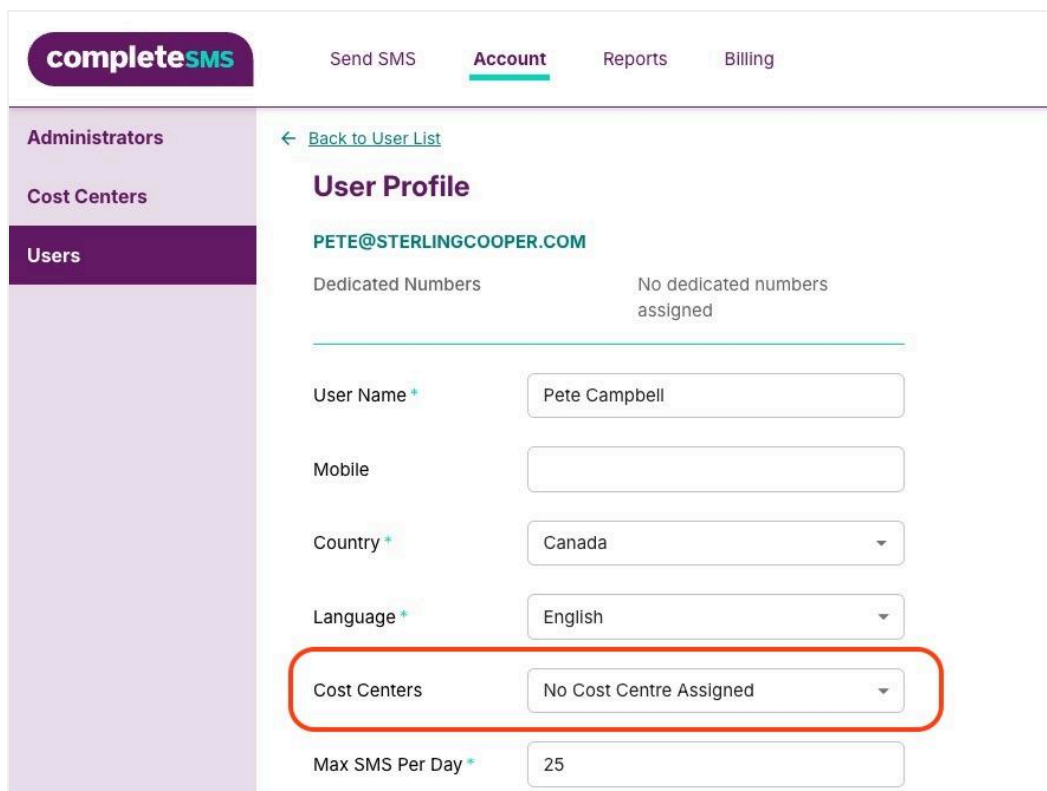
## Add a User to a Cost Center

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.



The screenshot shows the 'completeSMS' interface. In the top navigation bar, the 'Account' tab is highlighted with a red circle. On the left sidebar, the 'Users' menu item is highlighted with a red box. Two red arrows originate from this box: one points to the 'Account' tab in the top bar, and the other points to the 'Users' table below. The 'Users' section includes a search bar with fields for Name, Email, and Mobile Number, and a 'SEARCH' button. Below the search bar is an 'ADD NEW USER' button. The 'Users' table lists several users, including Pete Campbell, who is highlighted with a red arrow from the sidebar.

| Name           | Email                    | Mobile Number | Status | Type | Max. Msgs/Day | Cost Centers |
|----------------|--------------------------|---------------|--------|------|---------------|--------------|
| Don Draper     | don@sterlingcooper.com   | -             | Active | User | 25            | NotAssigned  |
| Joan Holloway  | joan@sterlingcooper.com  | 5552223333    | Active | User | 50            | Marketing    |
| Peggy Olsen    | peggy@sterlingcooper.com | -             | Active | User | 25            | Copywriting  |
| Pete Campbell  | pete@sterlingcooper.com  | -             | Active | User | 25            | NotAssigned  |
| Roger Sterling | roger@sterlingcooper.com | -             | Active | User | 50            | IT           |



The screenshot shows the 'completeSMS' User Profile page for Pete Campbell. The 'Account' tab is selected in the top navigation bar. The left sidebar shows the 'Users' menu item. The page title is 'User Profile' with the email 'PETE@STERLINGCOOPER.COM'. Below the title, there is a section for 'Dedicated Numbers' with the text 'No dedicated numbers assigned'. The form fields include: User Name (Pete Campbell), Mobile (empty), Country (Canada), Language (English), Cost Centers (No Cost Centre Assigned, highlighted with a red box), and Max SMS Per Day (25).

[Back to User List](#)

**User Profile**  
**PETE@STERLINGCOOPER.COM**

Dedicated Numbers: No dedicated numbers assigned

User Name: Pete Campbell

Mobile:

Country: Canada

Language: English

Cost Centers: No Cost Centre Assigned

Max SMS Per Day: 25

## 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.

completeSMS Send SMS **Account** Reports Billing joan@sterlingcooper.com

Administrators **Cost Centers** Users

**Cost Centers**

ADD NEW

| Name        | Contact        | Number of Users |
|-------------|----------------|-----------------|
| Copywriting | Joan Holloway  | 1               |
| IT          | Roger Sterling | 1               |
| Marketing   | Don Draper     | 2               |
| NotAssigned | Joan Holloway  | 1               |

< > 1 > >| 10 Per Page Cost Centers Found: 4

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.

completeSMS Send SMS **Account** Reports Billing joan@sterlingcooper.com

Administrators **Cost Centers** Users

← [Back to Cost Centers](#)

**Edit Cost Center**

Name \* Marketing

Contact Name Don Draper

[Cancel](#) **SAVE**

J P

| Name          | Email                   | Cell Number | Status   | Max. Msgs Per Day |
|---------------|-------------------------|-------------|----------|-------------------|
| Joan Holloway | joan@sterlingcooper.com | 5552223333  | Inactive | 50                |
| Pete Campbell | pete@sterlingcooper.com |             | Inactive | 25                |

< > 1 > >| Users Found: 2

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.

**completeSMS** Send SMS Account **Reports** Billing joan@sterlingcooper.com

**Cost Centre Reports**

User Reports  
Message Reports  
Reply Reports

**Cost Centre Reports**

Account: Sterling Cooper

Quick Report: For the Last Week

Activity Between: 20/Jun/2025 12:00 AM To 26/Jun/2025 11:59 PM

User's Timezone is (GMT-05:00) Eastern Time - Eastern Standard Time

EMAIL REPORT

| Cost Centre                 |       | Messages (Parts) ② |          |         | Reminders (Parts) ② |         |
|-----------------------------|-------|--------------------|----------|---------|---------------------|---------|
| Name                        | Users | Direct             | Standard | Replies | Sent                | Pending |
| <a href="#">Marketing</a>   | 1     | 0 (0)              | 1 (1)    | 0 (0)   | 0 (0)               | 0 (0)   |
| <a href="#">NotAssigned</a> | 1     | 0 (0)              | 6 (6)    | 5 (5)   | 0 (0)               | 0 (0)   |
| Total                       | 2     | 0 (0)              | 7 (7)    | 5 (5)   | 0 (0)               | 0 (0)   |

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

completeSMS

Send SMS

Account

Reports

Billing

joan@sterlingcooper.com

Cost Centre Reports

User Reports

Message Reports

Reply Reports

### User Reports

Quick Report: For the Last Week

Activity Between: 21/Jun/2025 12:00 AM To 27/Jun/2025 11:59 PM

User's Timezone is (GMT-05:00) Eastern Time - Eastern Standard Time

☐ Show All EMAIL REPORT

D J P R

| Customer User                            |        | Messages (Parts) ⓘ |          |               |         | Reminders (Parts) ⓘ |         | Calls (Minutes) |
|--|--------|--------------------|----------|---------------|---------|---------------------|---------|-----------------|
| Name                                     | Status | Direct             | Standard | International | Replies | Sent                | Pending |                 |
| <a href="#">peggy@sterlingcooper.com</a> | Active | 0 (0)              | 25 (25)  | 0 (0)         | 23 (23) | 0 (0)               | 0 (0)   | 0 (0)           |
| <a href="#">joan@sterlingcooper.com</a>  | Active | 0 (0)              | 7 (7)    | 0 (0)         | 5 (5)   | 0 (0)               | 0 (0)   | 0 (0)           |
| <a href="#">don@sterlingcooper.com</a>   | Active | 0 (0)              | 0 (0)    | 0 (0)         | 0 (0)   | 0 (0)               | 0 (0)   | 0 (0)           |

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.

| Date                                   | Type     | User                    | From         | To          | Country        | Status    | Error |
|--|----------|-------------------------|--------------|-------------|----------------|-----------|-------|
| <a href="#">Jun 26, 2025, 02:27 PM</a> | Standard | joan@sterlingcooper.com | +19029065009 | 13174184665 | U S A & Canada | Delivered | N/A   |
| <a href="#">Jun 26, 2025, 02:24 PM</a> | Standard | joan@sterlingcooper.com | +19029065009 | 17787439380 | U S A & Canada | Delivered | N/A   |
| <a href="#">Jun 26, 2025, 02:24 PM</a> | Standard | joan@sterlingcooper.com | +19029065009 | 17787173180 | U S A & Canada | Delivered | N/A   |
| <a href="#">Jun 26, 2025, 02:24 PM</a> | Standard | joan@sterlingcooper.com | +19029065009 | 17787430280 | U S A & Canada | Delivered | N/A   |
| <a href="#">Jun 26, 2025, 02:24 PM</a> | Standard | joan@sterlingcooper.com | +19029065009 | 17787173080 | U S A & Canada | Delivered | N/A   |

## 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

**completeSMS** Send SMS Account **Reports** Billing joan@sterlingcooper.com

**Cost Centre Reports**  
**User Reports**  
**Message Reports**  
**Reply Reports**

### Message Reports

Quick Report: For the Last Week

Activity Between: 20/Jun/2025 12:00 AM To 26/Jun/2025 11:59 PM  
User's Timezone is (GMT-05:00) Eastern Time - Eastern Standard Time

[Advanced Filters](#)

By Field: Type User From To Status Error

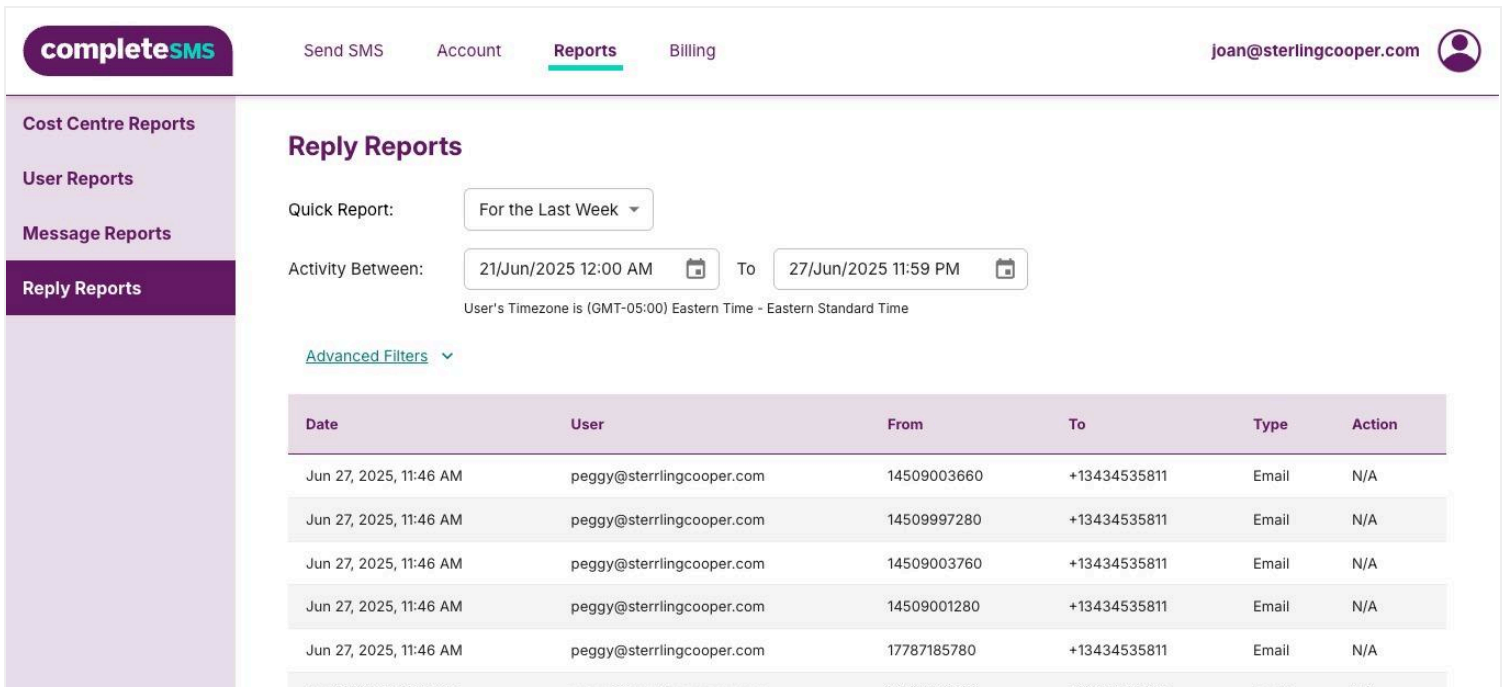
| Date                                   | Type     | User                    | From         | To          | Country        | Status    | Error |
|--|----------|-------------------------|--------------|-------------|----------------|-----------|-------|
| <a href="#">Jun 26, 2025, 03:24 PM</a> | Standard | joan@sterlingcooper.com | +19029065009 | 19025104007 | U S A & Canada | Delivered | N/A   |
| <a href="#">Jun 26, 2025, 02:27 PM</a> | Standard | joan@sterlingcooper.com | +19029065009 | 13174184665 | U S A & Canada | Delivered | N/A   |
| <a href="#">Jun 26, 2025, 02:24 PM</a> | Standard | joan@sterlingcooper.com | +19029065009 | 17787439380 | U S A & Canada | Delivered | N/A   |
| <a href="#">Jun 26, 2025, 02:24 PM</a> | Standard | joan@sterlingcooper.com | +19029065009 | 17787173180 | U S A & Canada | Delivered | N/A   |

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.



**completeSMS** Send SMS Account **Reports** Billing joan@sterlingcooper.com

**Cost Centre Reports**  
**User Reports**  
**Message Reports**  
**Reply Reports**

### Reply Reports

Quick Report: For the Last Week

Activity Between: 21/Jun/2025 12:00 AM To 27/Jun/2025 11:59 PM

User's Timezone is (GMT-05:00) Eastern Time - Eastern Standard Time

[Advanced Filters](#)

| Date                   | User                      | From        | To           | Type  | Action |
|------------------------|---------------------------|-------------|--------------|-------|--------|
| Jun 27, 2025, 11:46 AM | peggy@sterrlingcooper.com | 14509003660 | +13434535811 | Email | N/A    |
| Jun 27, 2025, 11:46 AM | peggy@sterrlingcooper.com | 14509997280 | +13434535811 | Email | N/A    |
| Jun 27, 2025, 11:46 AM | peggy@sterrlingcooper.com | 14509003760 | +13434535811 | Email | N/A    |
| Jun 27, 2025, 11:46 AM | peggy@sterrlingcooper.com | 14509001280 | +13434535811 | Email | N/A    |
| Jun 27, 2025, 11:46 AM | peggy@sterrlingcooper.com | 17787185780 | +13434535811 | Email | N/A    |

## 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

