completesms

a red@xygen solution

CompleteSMS for Outlook:

Installation and User Guide

Last updated: December 29, 2025

CompleteSMS.com

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Questions or help with install?
Contact us: support@completesms.com

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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.**

What versions of Outlook can it be installed?

- The CompleteSMS for Outlook add-in can be installed on New and Classic Outlook from Microsoft 365.

- The add-in works on both the online and downloaded local app, as well as your smartphone's Outlook app.

- If you don't know what version of Outlook you are using, [here's a handy Microsoft guide that might help](#).

Do you have a Microsoft email account?

- **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 be the same email you use when logging into Outlook, it cannot be an alias.
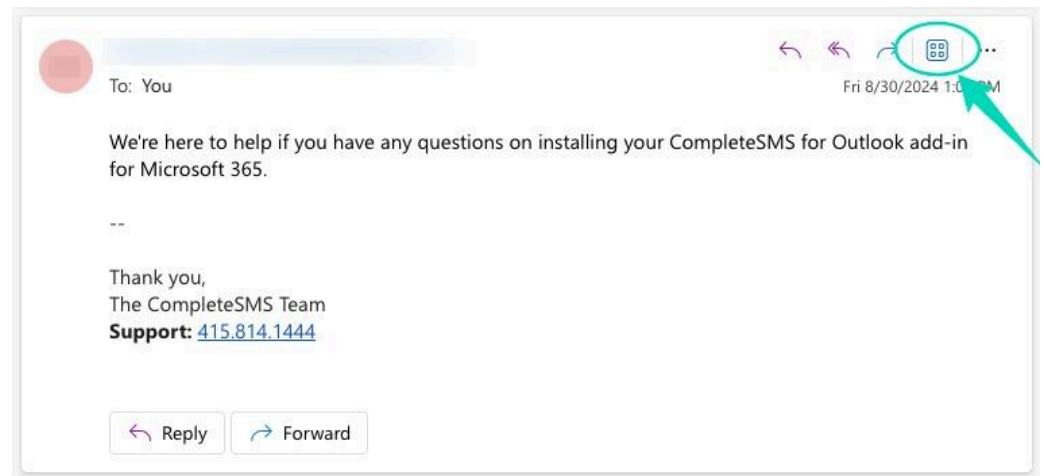
Installation on Individual Accounts

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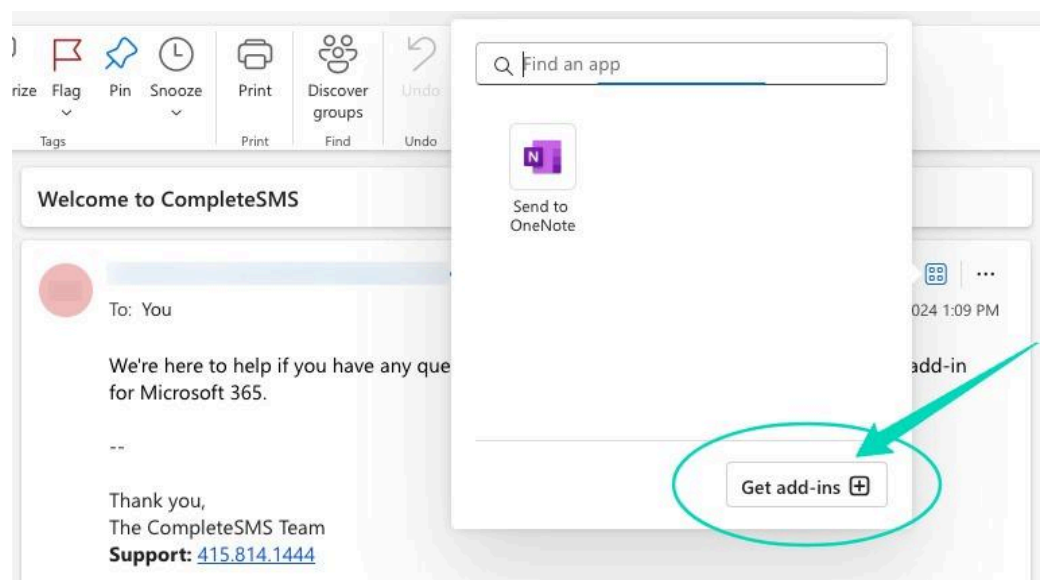
   Important: Ensure that the Reading Pane in Outlook is set to Right or Below. Otherwise, add-ins will be unavailable.
   To configure your Reading Pane, select View > Reading Pane.

3. Select the small Apps icon in the top right corner of the email reading pane.

   Tip: If you do not see the app icon, select the 3-dot icon and select Apps from the dropdown.
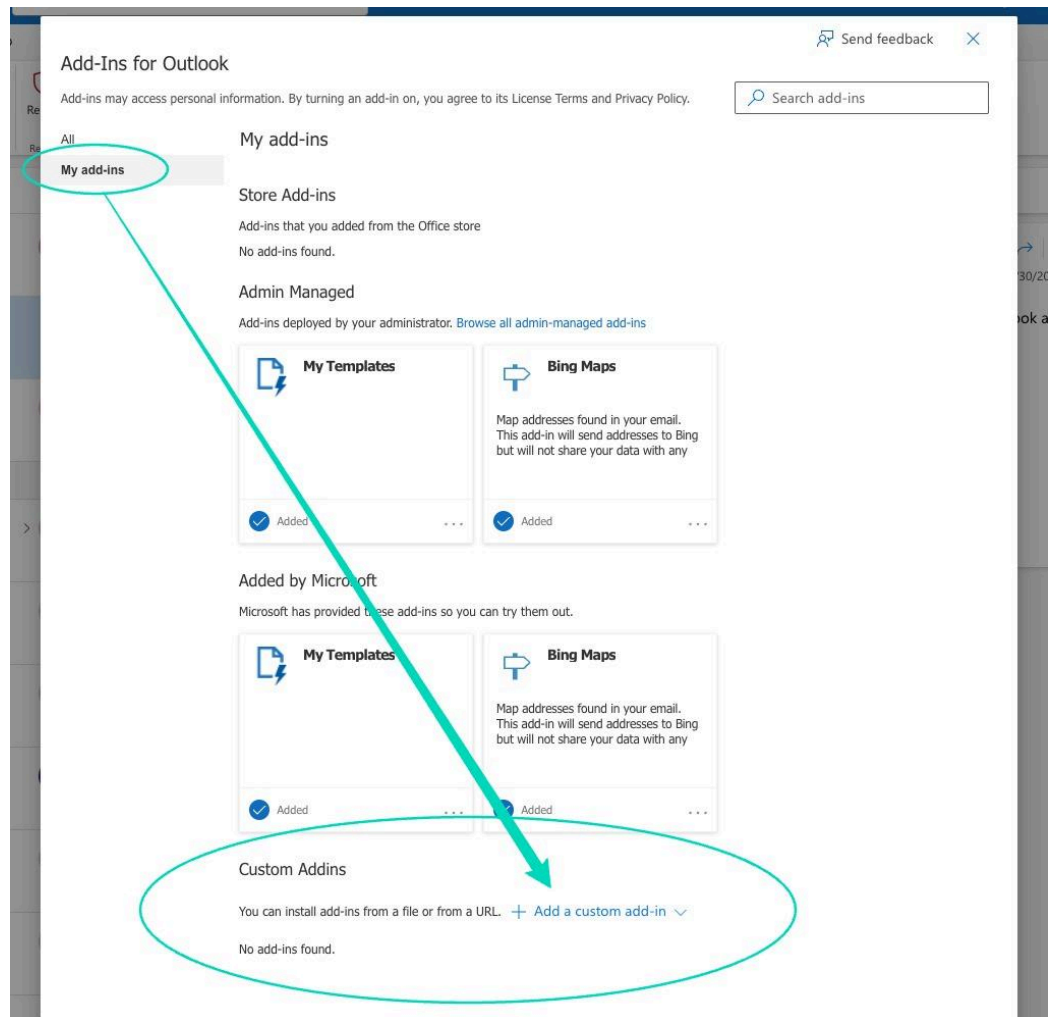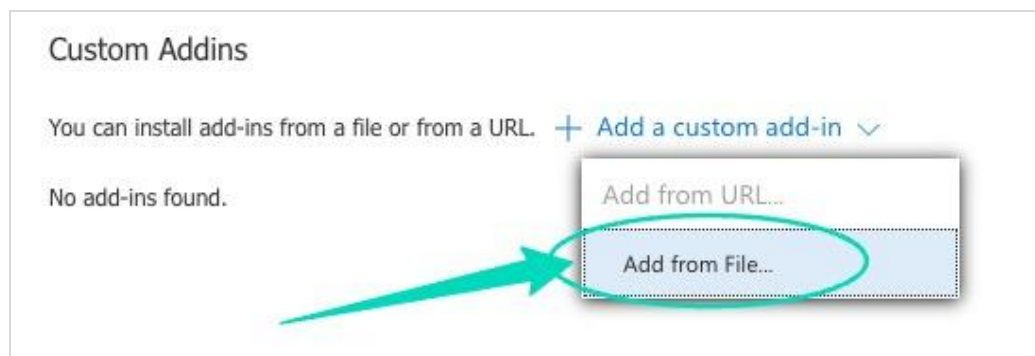

4. Select the Get Add-Ins menu item

5. Select 'My add-ins' and look near the bottom for 'Custom Addins'.
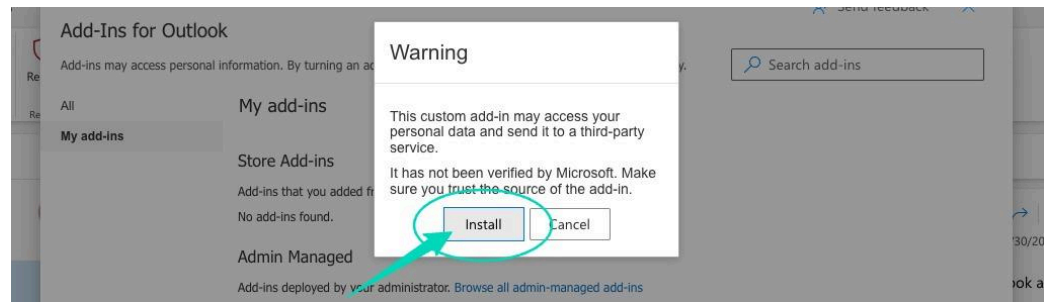
CompleteSMS for Outlook is a **custom add-in**, you will need to install it by uploading a file.
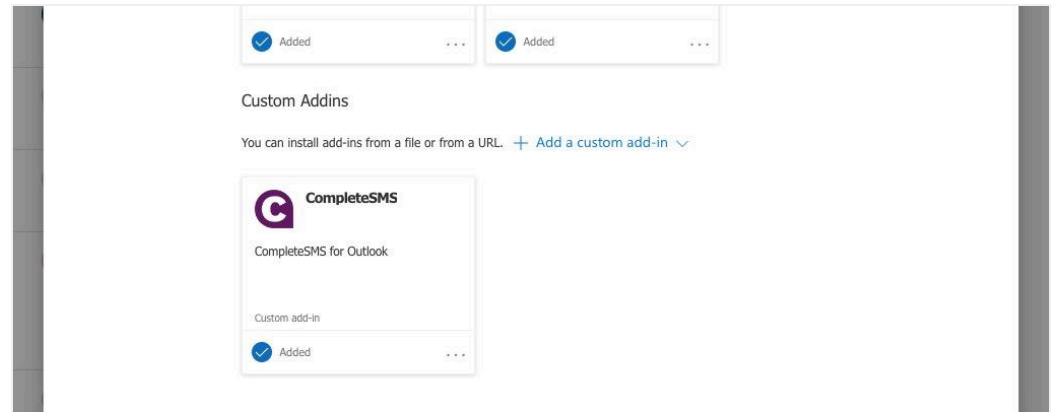

6. Select 'Add from File...', then select the manifest file you've been provided by your Red Oxygen representative..
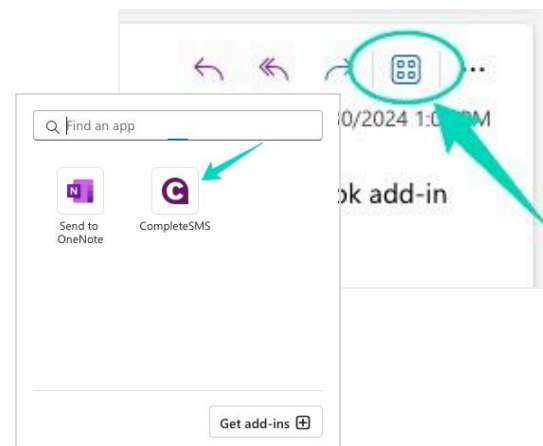
7. Agree to 'Install'

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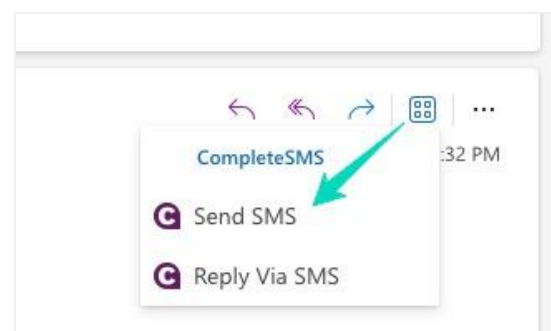

9. Go back to your inbox, select an email and click on the Apps icon, the add-ins box will appear, and you should be able to see the CompleteSMS icon.
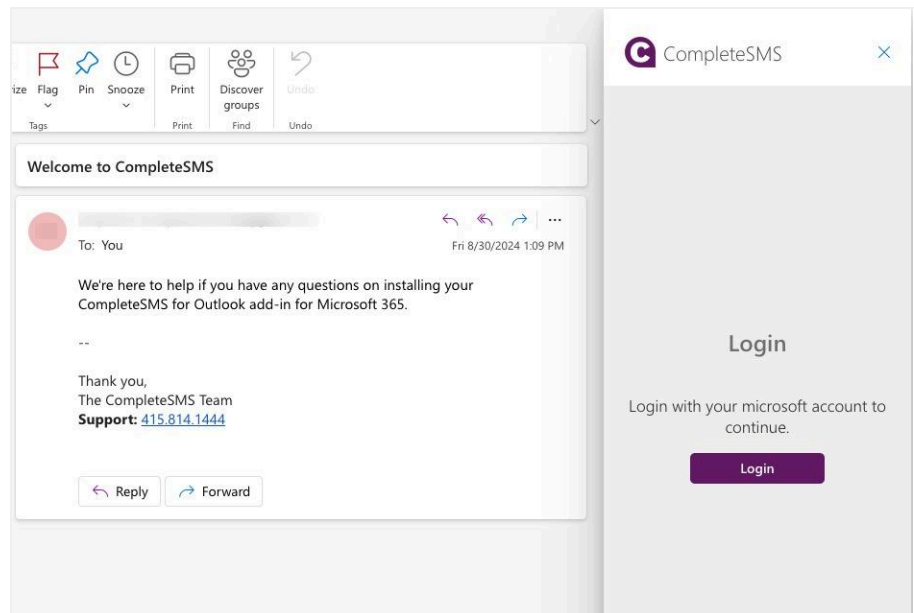
Sometimes you need to refresh, or click on a different email for the icon to load.

10. To continue installation, select 'Send SMS' from the CompleteSMS icon in The email ribbon.
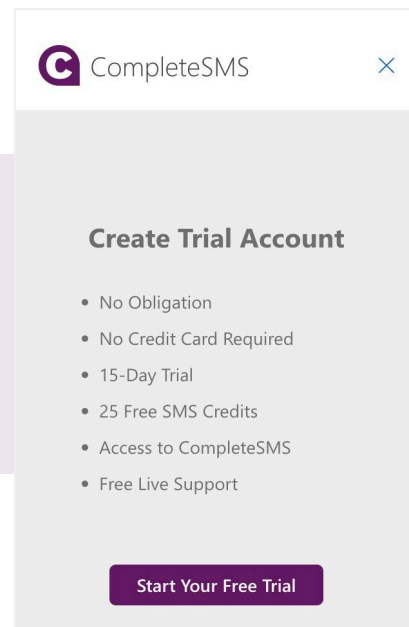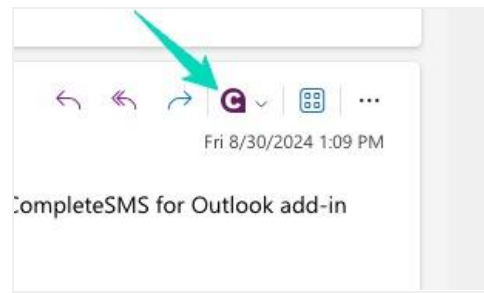
11. The Login panel will sweep in from the right.

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.
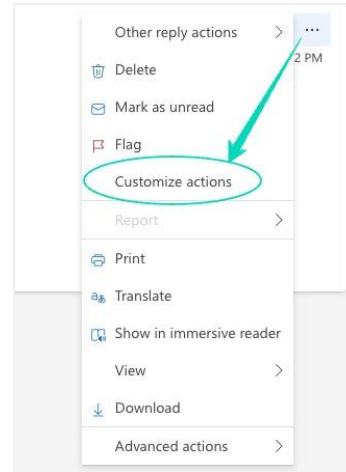
After opening the trial, CompleteSMS will send you a welcome email. If you do not see it in your inbox check your junk folder and mark it as 'Not Junk'. This step will ensure that your SMS email receipts will appear in your inbox.
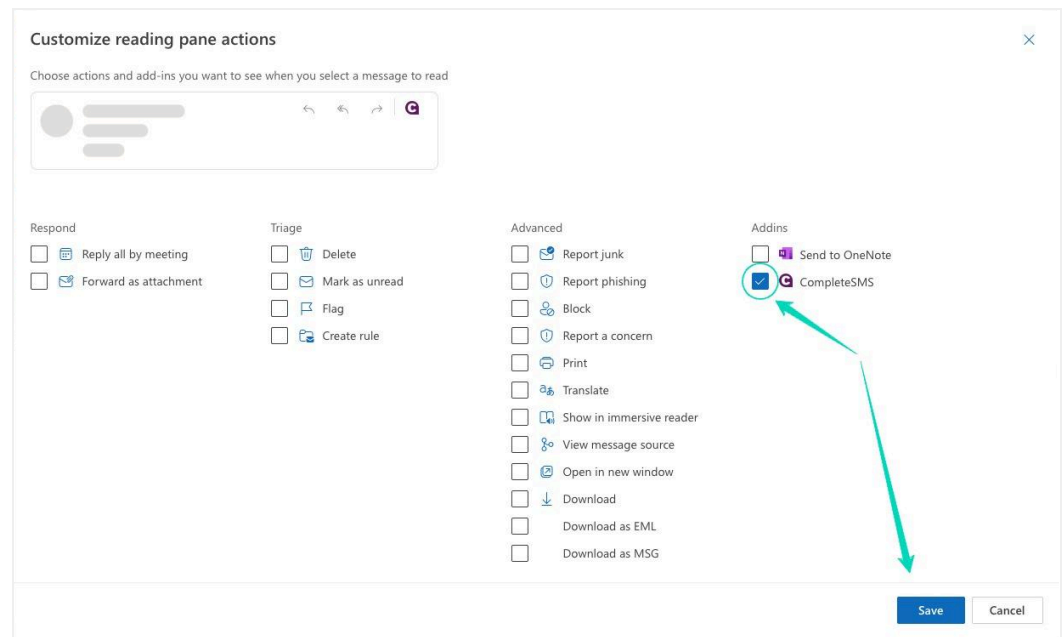
Add Quick Icon to Email Ribbon (version dependent)
—as shown to the right

Fri 8/30/2024 1:09 PM

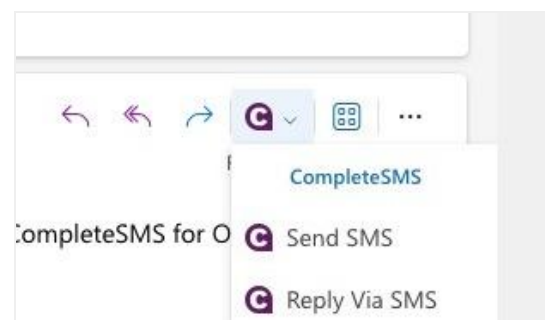CompleteSMS for Outlook add-in

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

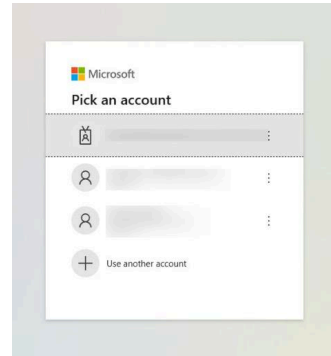2. Select CompleteSMS checkbox and hit Save

3. Refresh your email and the icon will eventually appear in the ribbon—from there you can quickly send or reply to SMS
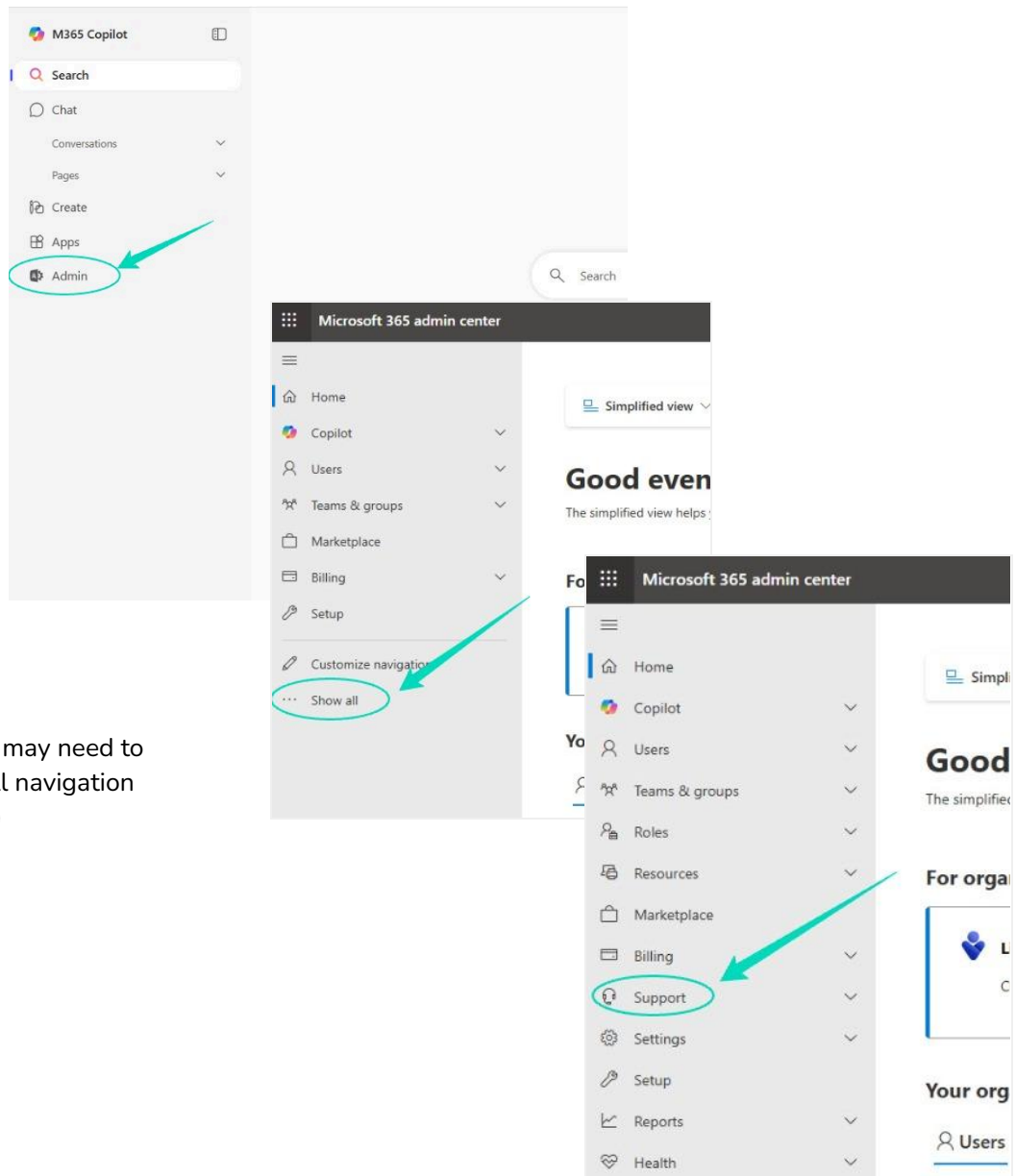
Installation Using Admin Panel

If you are an administrator of your account, or if you have an administrator that is someone other than yourself, you'll need to install CompleteSMS for Outlook through the Admin Panel.

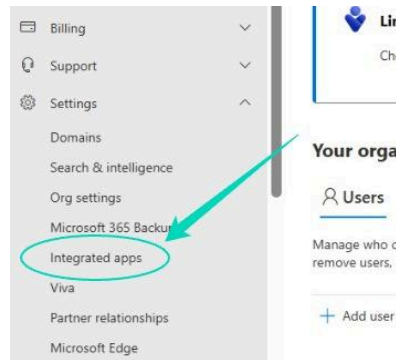1. Log into your Microsoft account, as the account administrator

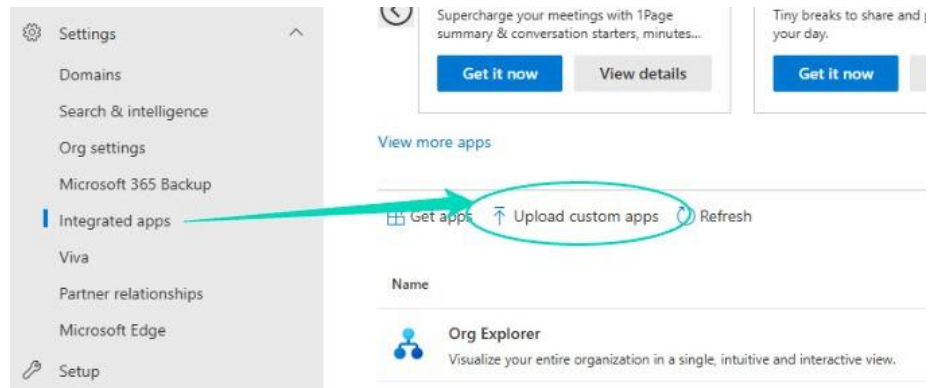2. Select Admin from the left-hand navigation bar

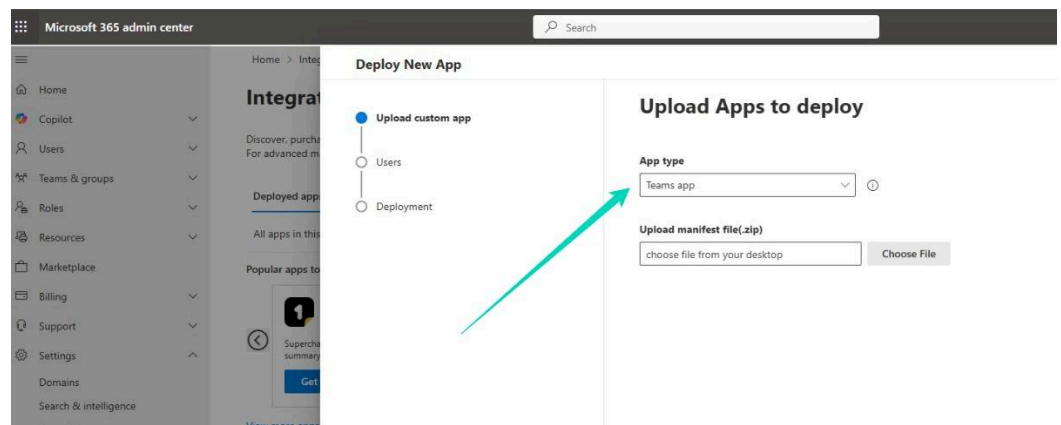3. Select Settings (you may need to expand the Show All navigation item to see Settings)
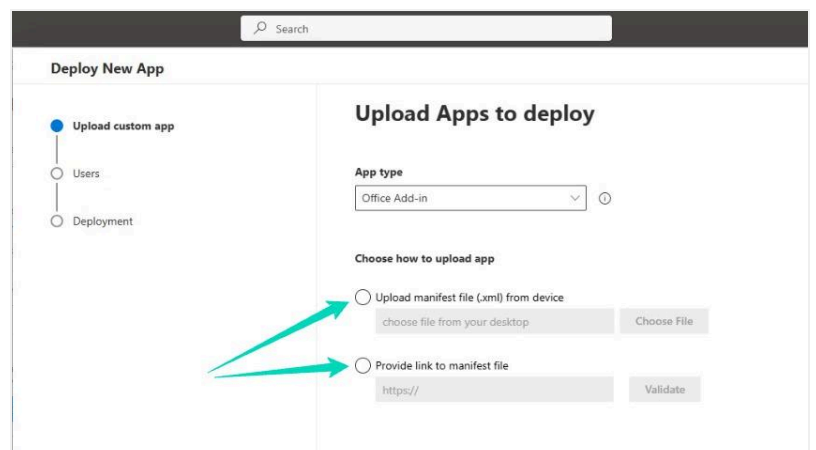
4. Select Integrated apps.

5. Choose Upload custom apps — this will open Deploy New App page

6. Select the App type as Office Add-in

7. Upload Manifest .xml file that Red Oxygen supplied you or enter the .xml url (https://o365.completesms.net/manifest.xml)

8. Select Validate. Once validated, hit Next

9. Here you'll choose who's receiving the deployment (You, Entire organization or a Specific user/group) and hit next.
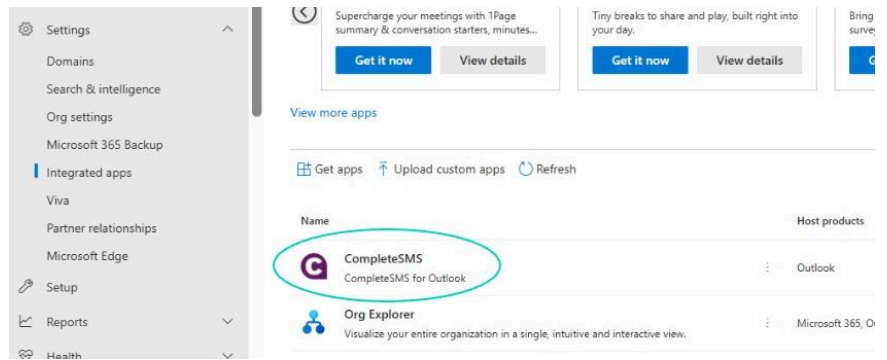
10. Next you'll have to Allow permissions and click Finish deployment.

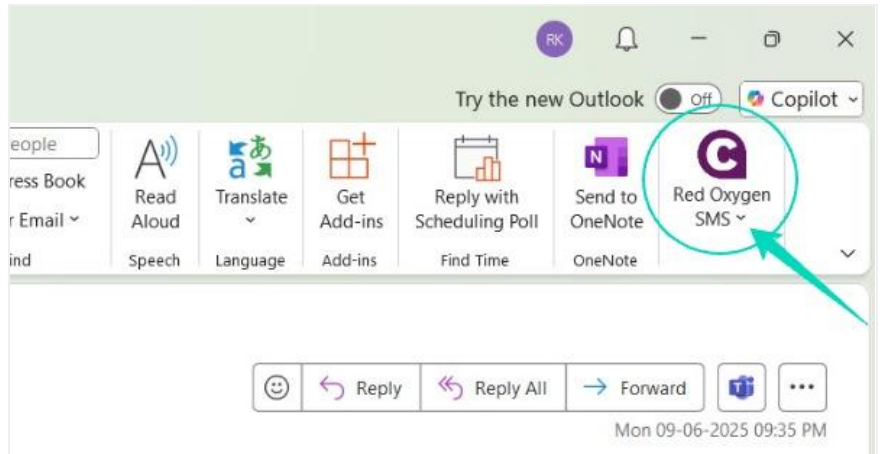11. Deployment will take a few minutes, but then you'll receive a confirmation message.

    Notice: It can take up to 72 hours for the app to appear. Users may need to relaunch Microsoft 365 to view the add-in icon on the app ribbon.

12. Finish up by clicking the Done button.

13. You'll likely see the CompleteSMS entry in the list of applications immediately, but again, your users may not see it for 72 hours after deployment.
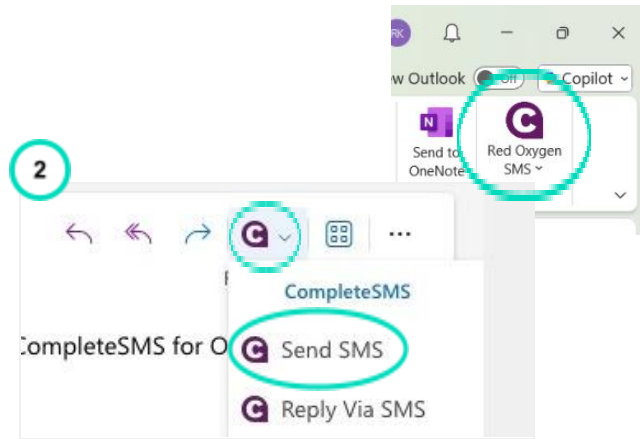

14. Once Microsoft has completed the deployment, your users will be able to see the CompleteSMS logo in their ribbon.
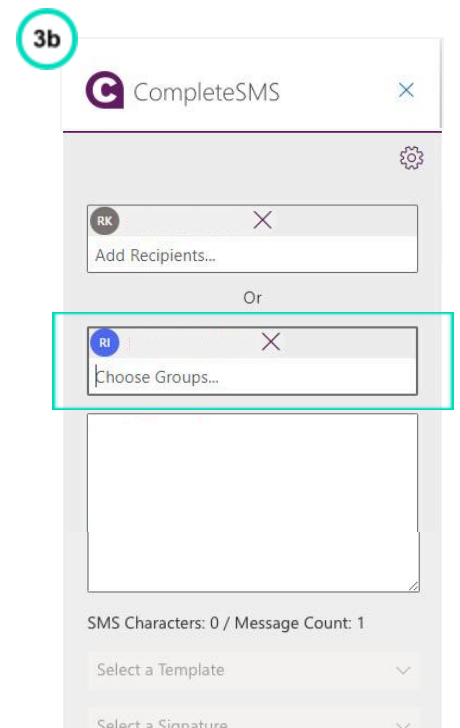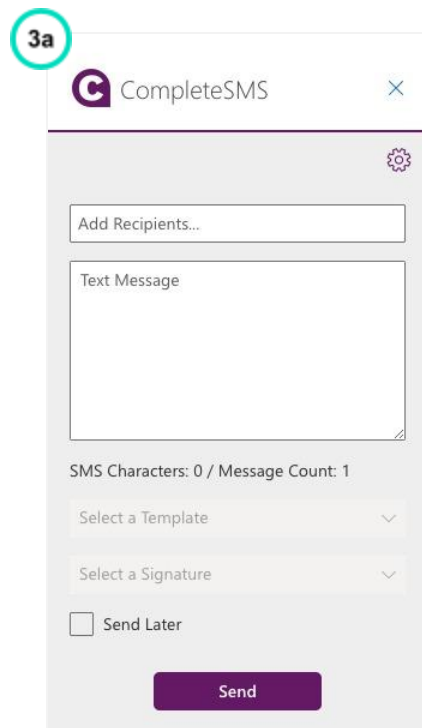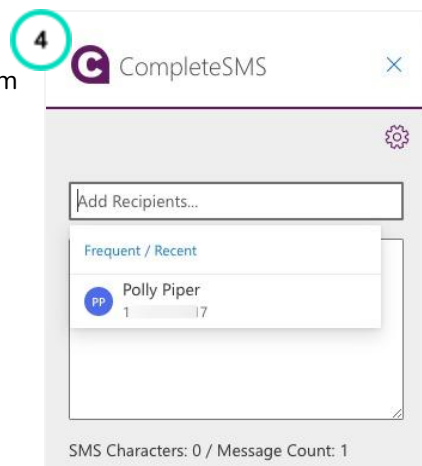
How to:

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' (this icon may be located in the top ribbon, the email's ribbon or you may need to select the 3-dot icon in the upper corner of your selected email.
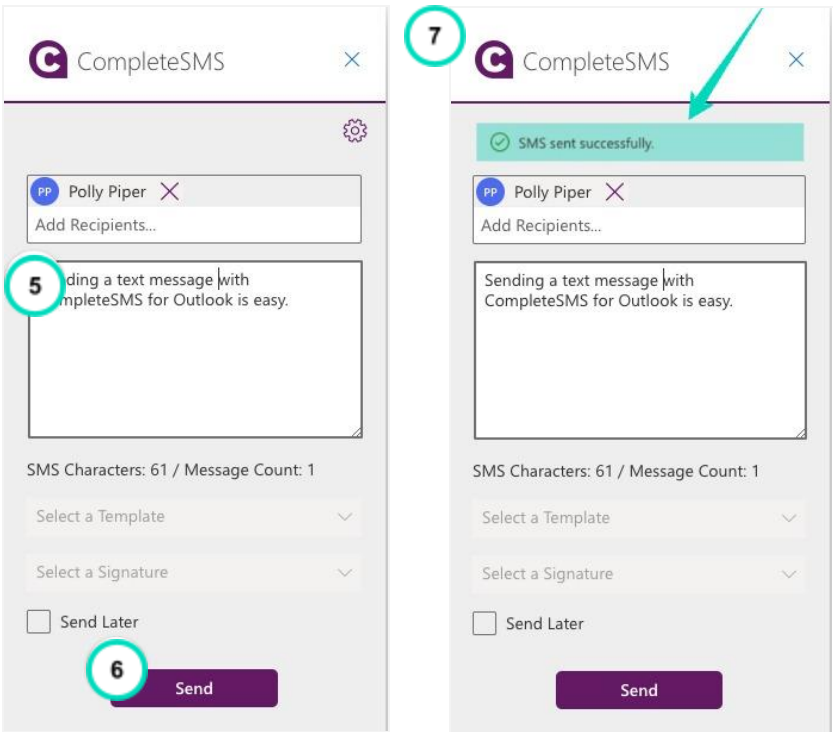
3. The CompleteSMS add-in interface will sweep in from the right.

   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.**

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

5. Enter a message

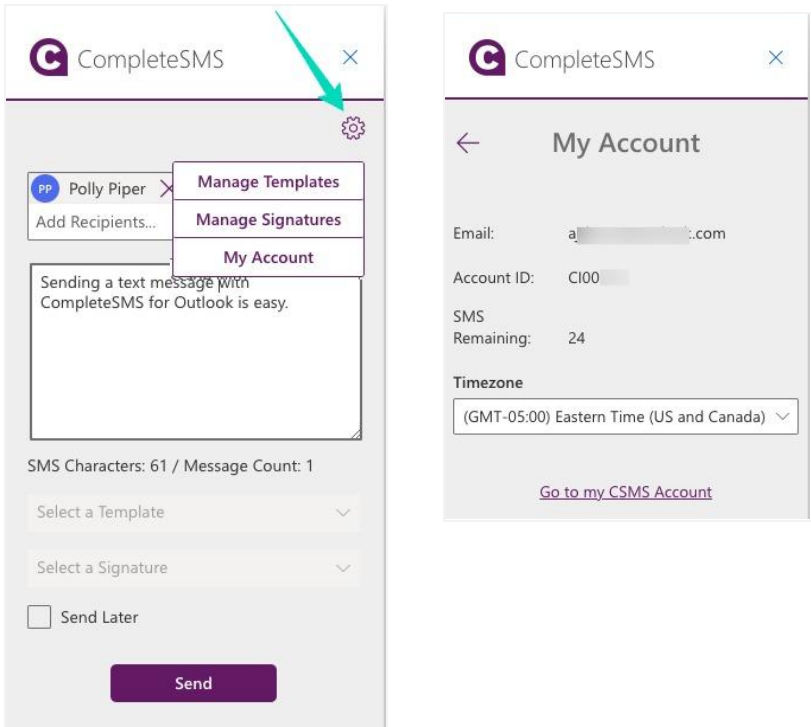6. Hit the Send button

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.
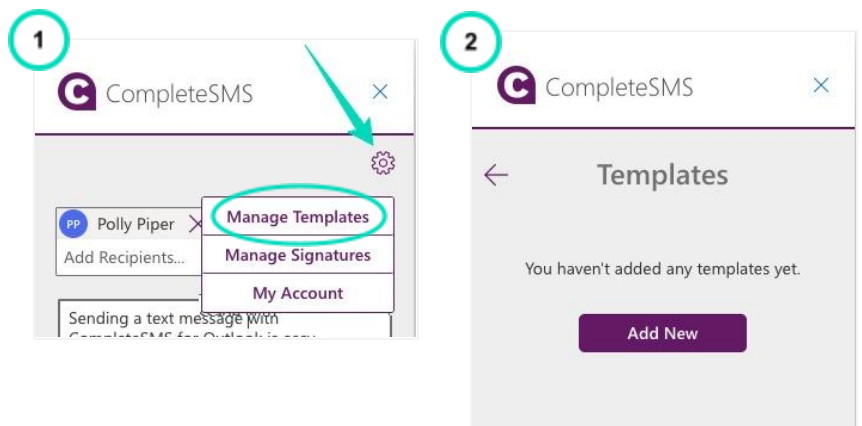
Create Templates

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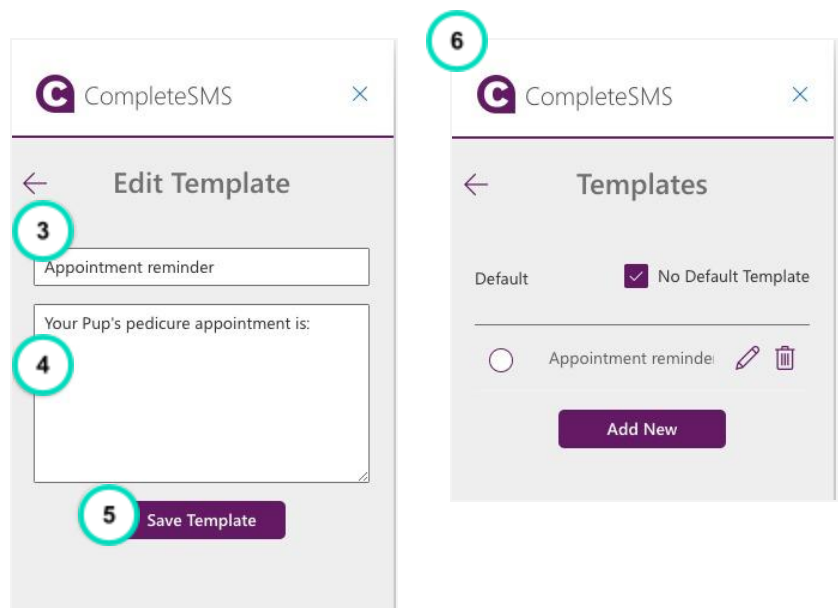
You can even set a default template, so you can set it and save yourself even one more mouse click.

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

6. 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'
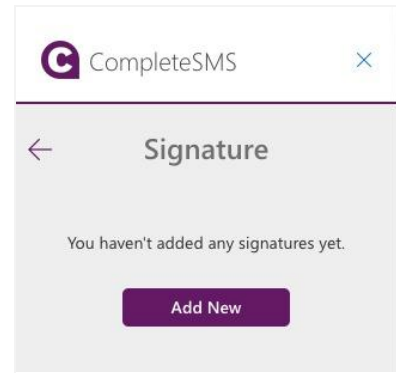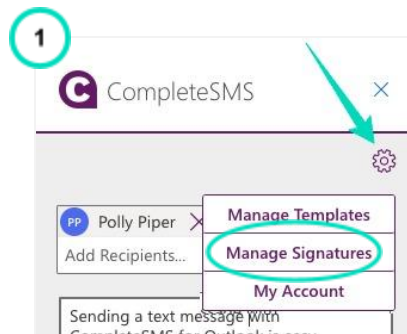
Create Signatures

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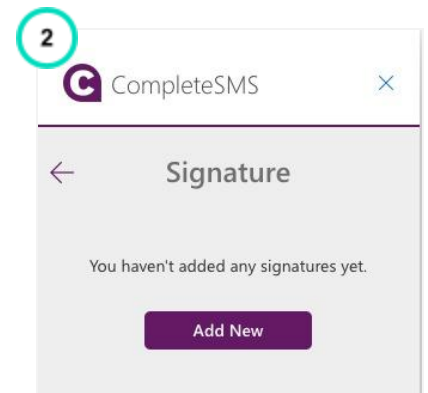
But remember: the character count of the signature will be added to the message or template character count to determine how many SMS parts of which your message will be counted.
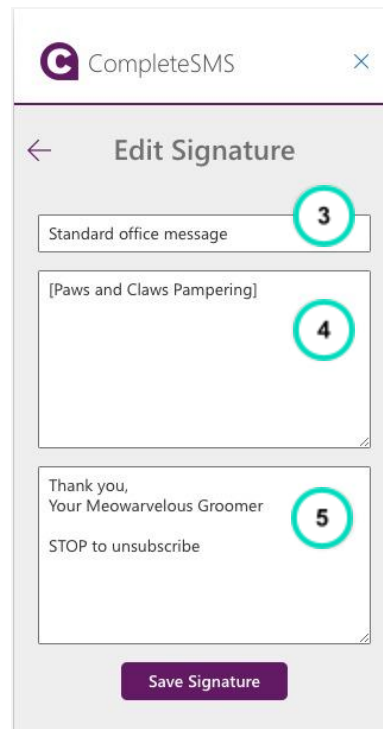

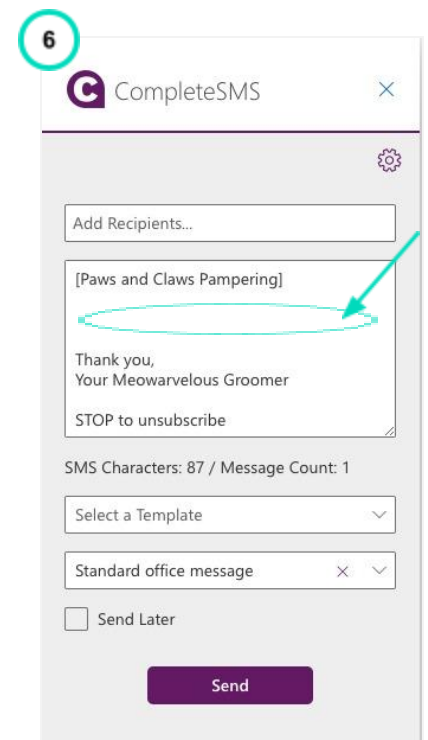1. Select 'Manage Signatures' from the Settings menu

2. Then 'Add New'

3. Add a title for your signature, make it something easily recognizable from a list of other templates.

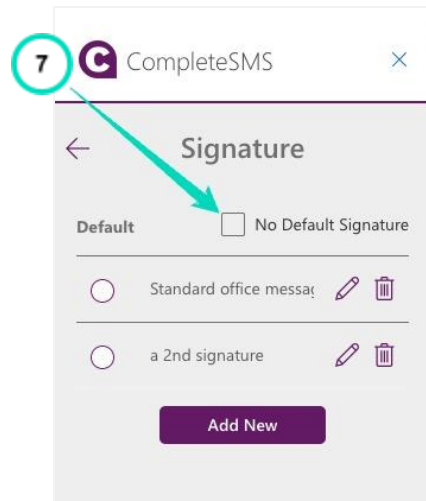4. Add your signature content/text, don't worry, you can change it in the compose stage after you select it from your list, if you'd like.

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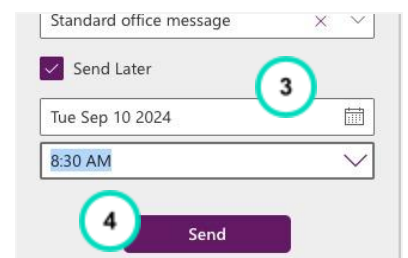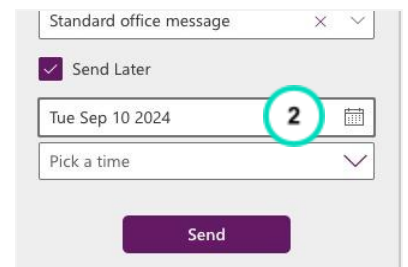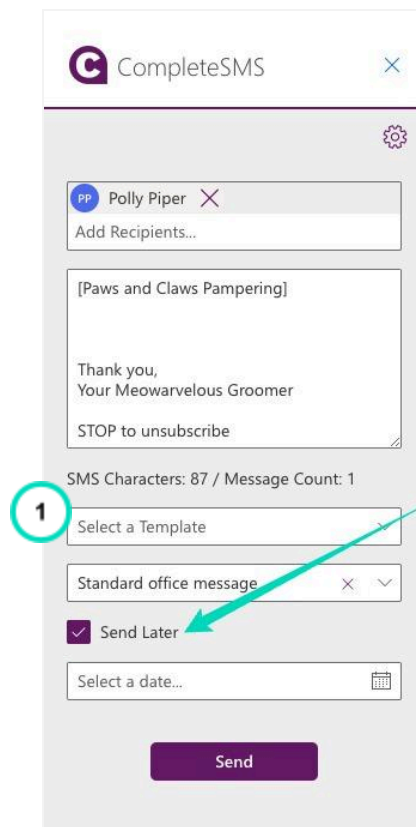
7. There's also a default setting similar to Templates.

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

3. 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.

Note: See Timezone note in Settings section.

Reply to SMS

1. 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.

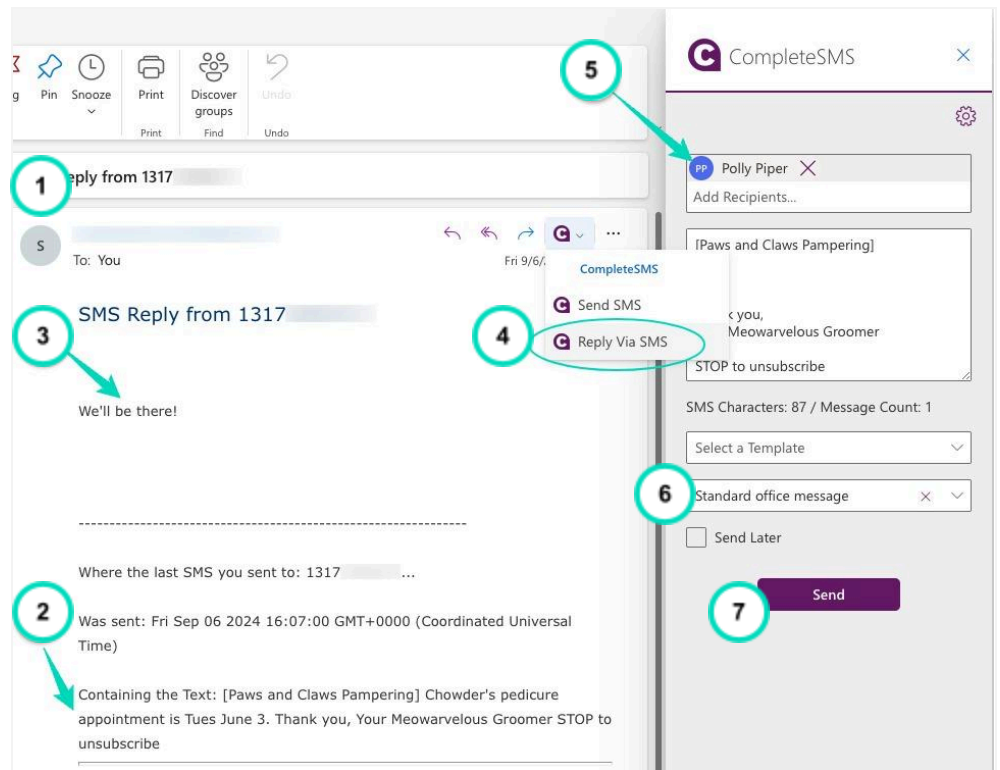3. Reply to original message.
Example: this is Polly's reply to you.

4. 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.

6. This example: The 'Standard office message' signature has been marked as the default, that's why it's pre-populated the message field.

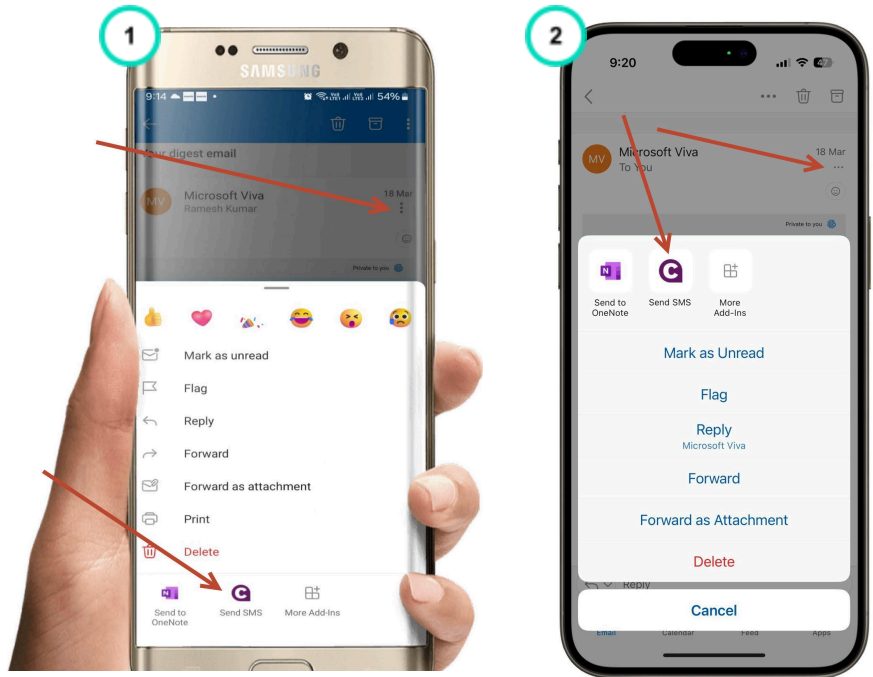7. Complete the message as you would a brand new message and send it.

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 ～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