



SMS for outlook add-in

Installation, configuration and  
usage guide

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## Introduction

Installing the txtstream SMS for outlook add-in is easy and will only take a minute or two. We will be using screen shots from a windows 10 computer running outlook 2013.

If you are updating the add-in from a previous version, make sure to uninstall the old version before continuing with the installation of the new version via windows settings and apps.

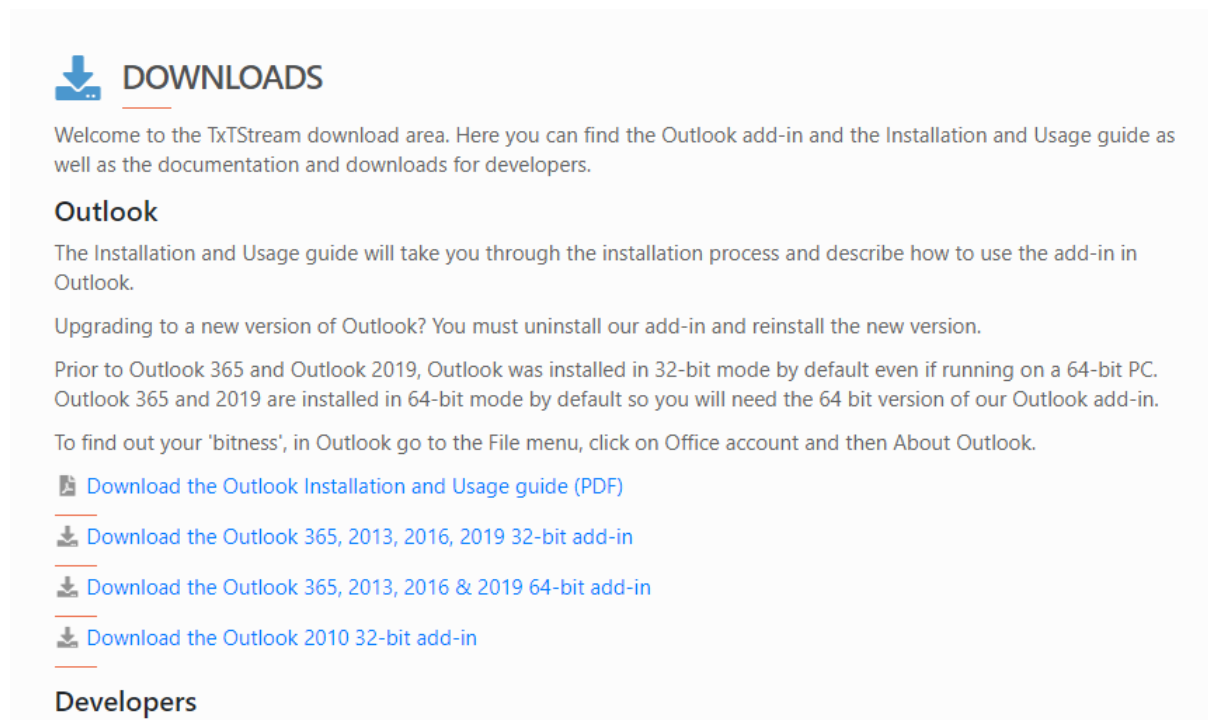
### Step 1: Download and start the install

We need to close outlook if it is open before installing the add-in. You may want to determine your 'bitness' first. There are actually two versions of outlook for each release i.e. outlook 2013 or outlook 365 etc. A 32-bit one and a 64-bit one. You have to download the correct add-in version.

By default outlook 2013 and outlook 2016 install in 32 bit mode while outlook 2019 and outlook 365 install in 64 bit mode.

You can determine your bitness in outlook by going to the file menu, clicking on office account and then clicking on about outlook.

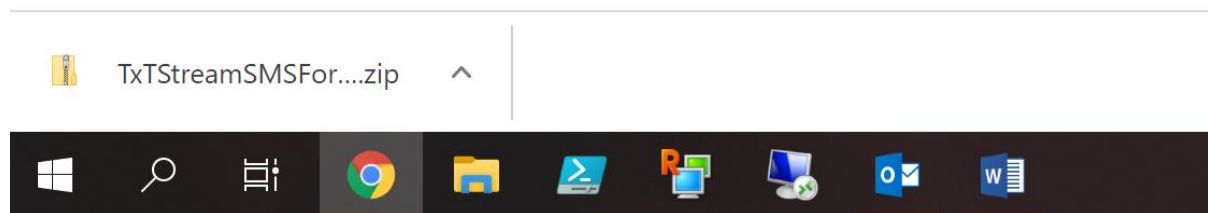
Download the add-in by going to [www.txtstream.co.nz](http://www.txtstream.co.nz) and clicking on the links drop down at the top of the page. Then click on downloads.



The screenshot shows a webpage titled "DOWNLOADS" with a blue download icon. The text reads: "Welcome to the TxTStream download area. Here you can find the Outlook add-in and the Installation and Usage guide as well as the documentation and downloads for developers." Below this is a section for "Outlook" with instructions on installation and upgrading. It lists four download links: "Download the Outlook Installation and Usage guide (PDF)", "Download the Outlook 365, 2013, 2016, 2019 32-bit add-in", "Download the Outlook 365, 2013, 2016 & 2019 64-bit add-in", and "Download the Outlook 2010 32-bit add-in". A "Developers" section is also visible at the bottom.

Choose the correct download and click on the link to start downloading the file.

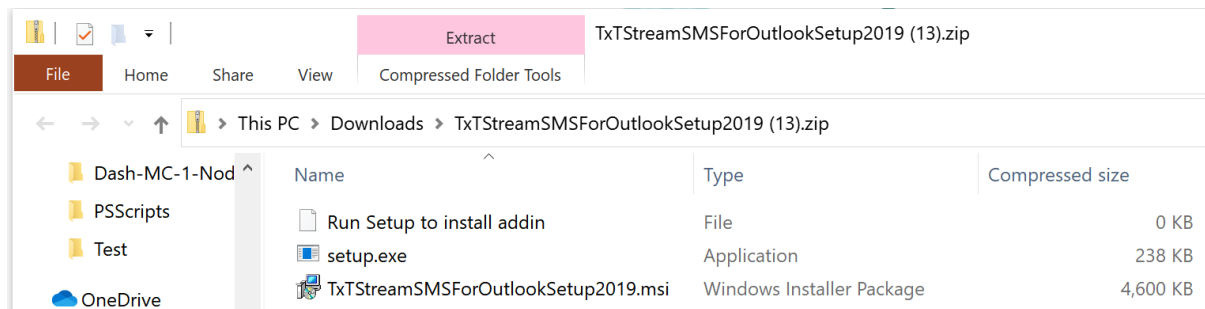
Open the downloaded file by either clicking on it or double clicking on it depending on which browser you use. For example, in chrome, you will see :



And a single click will open the file in chrome.

When opening the downloaded file, you may be presented with warnings or asked if you want to run or open the downloaded file. Answer yes, accept, open or run as appropriate.

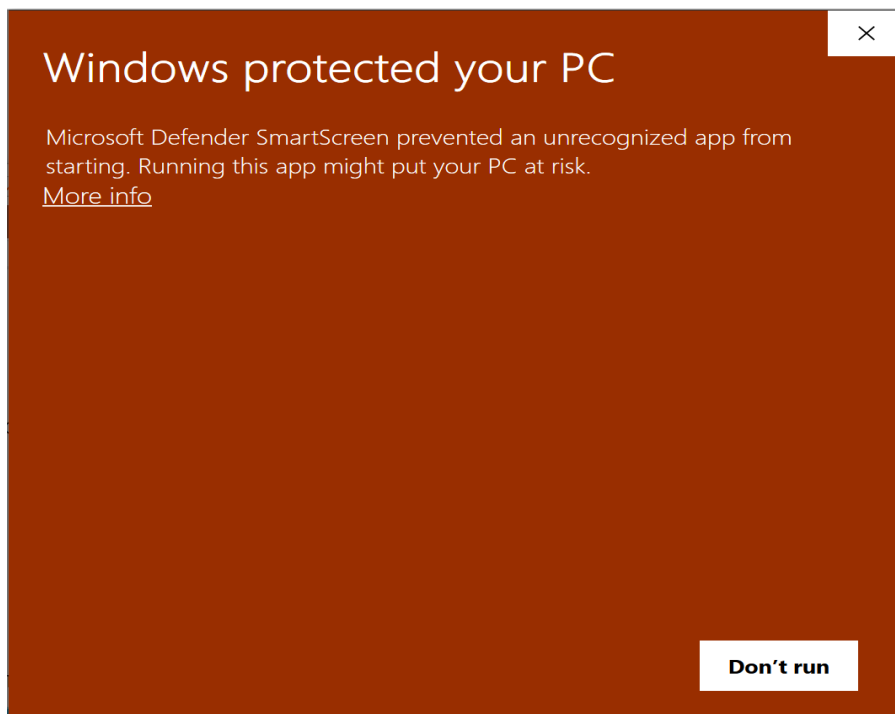
When the downloaded file is open, the contents of the file will be displayed in windows explorer :



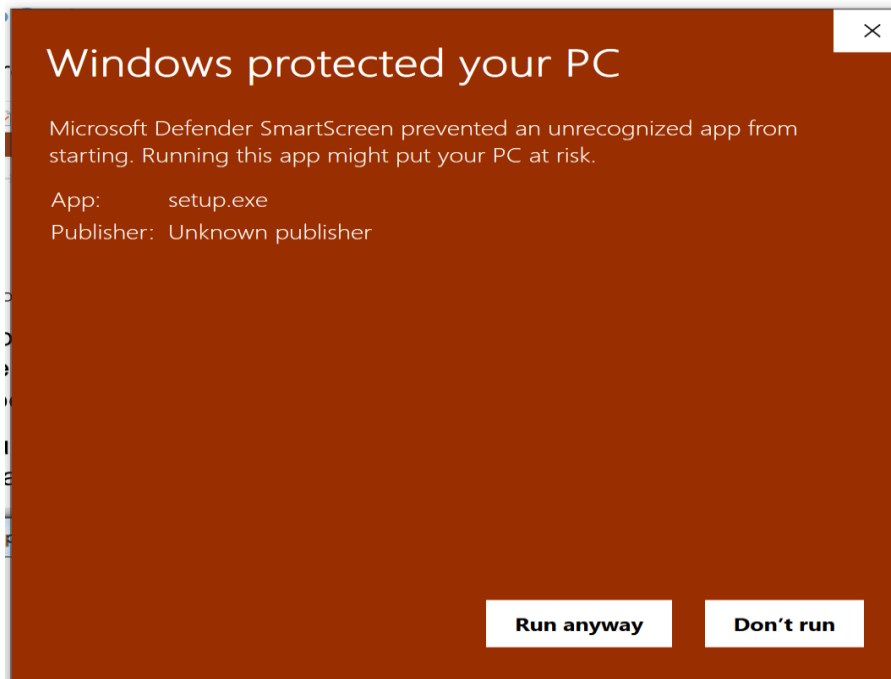
Double-click on setup (you may not see the .exe part as shown in the example) to start the installation process.

Running setup rather than the install file (.msi) means that any required prerequisites will be automatically installed for you.

Again, depending on your version of windows, you may see a warning screen like this one :

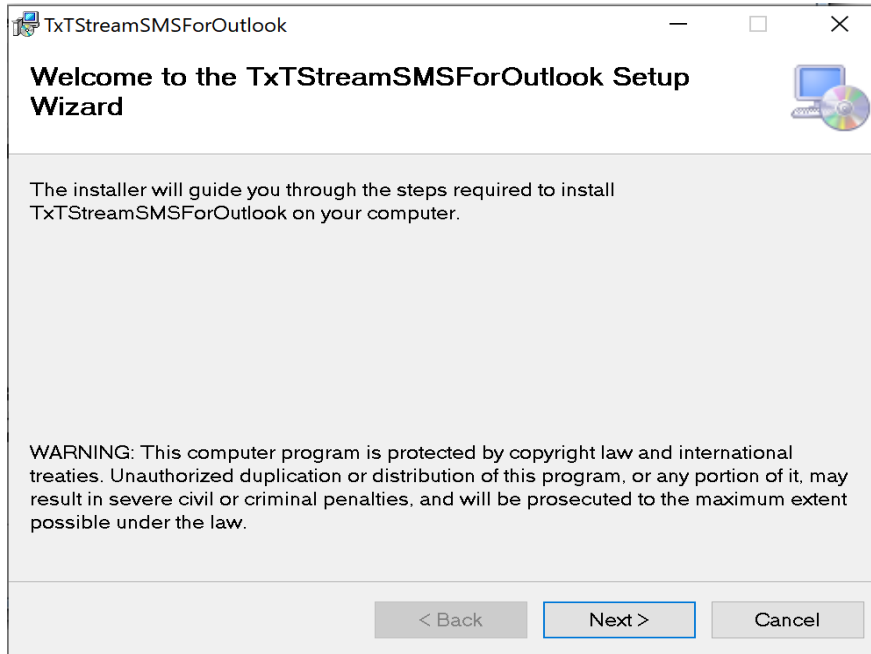


Click on the more info link and then when the next screen is displayed, click on run anyway :

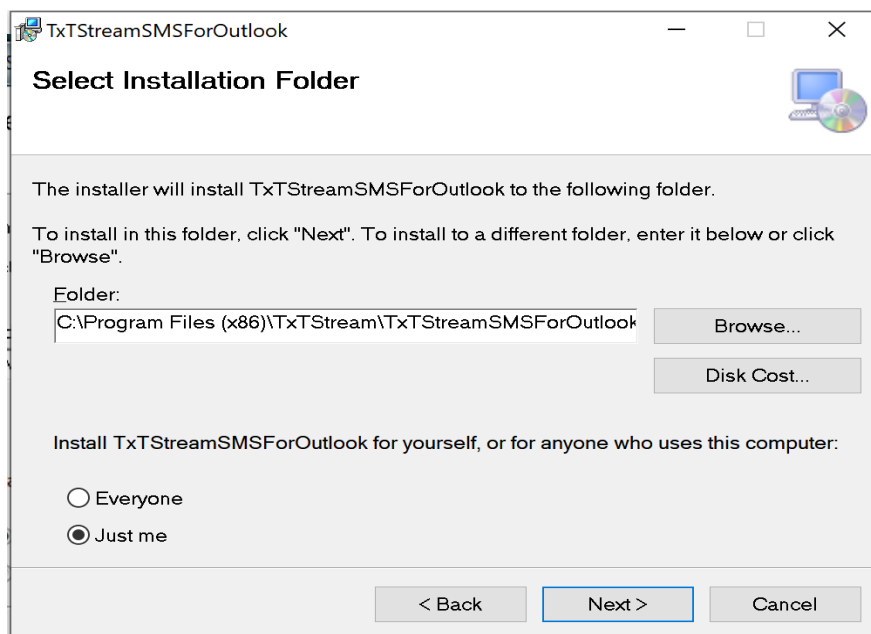


## Step 2: Install the add-in

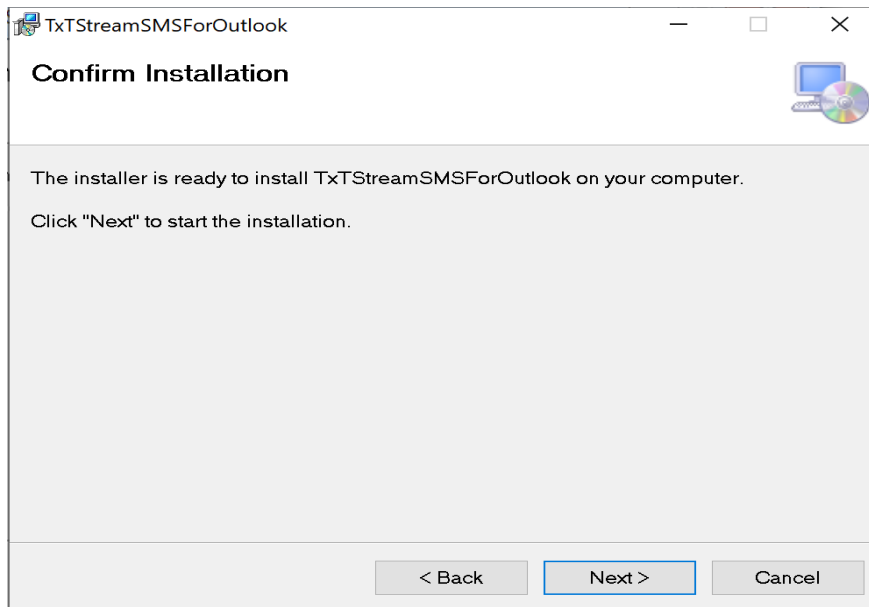
We can now run through the installation process. Choose the defaults unless you have a specific technical reason not to do so.



Click next...

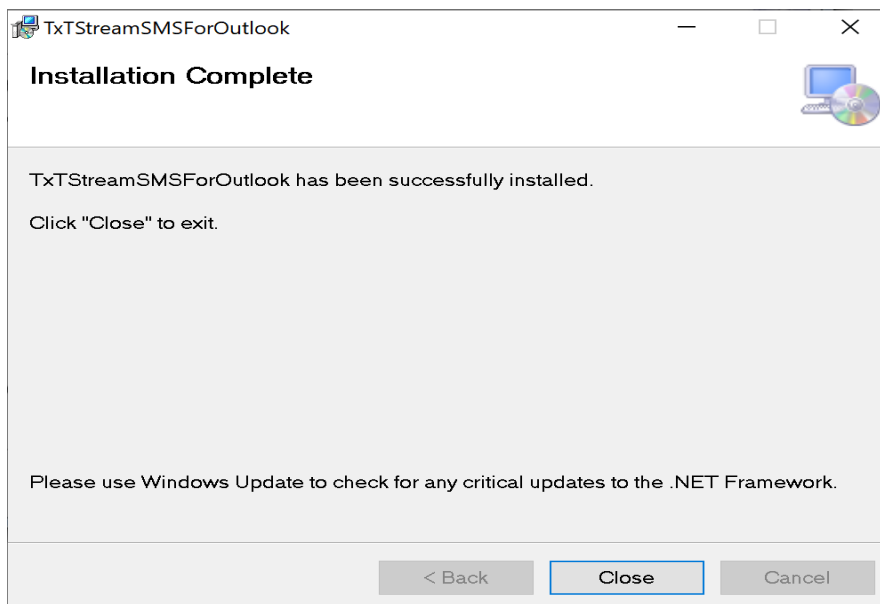


Click next...



Click next...wait for a few seconds and...

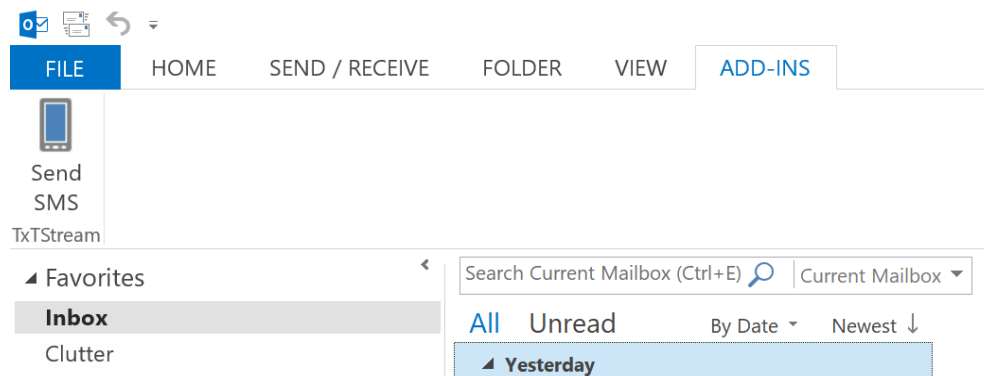
And you're done! The installation confirmation shows and you can start outlook again.



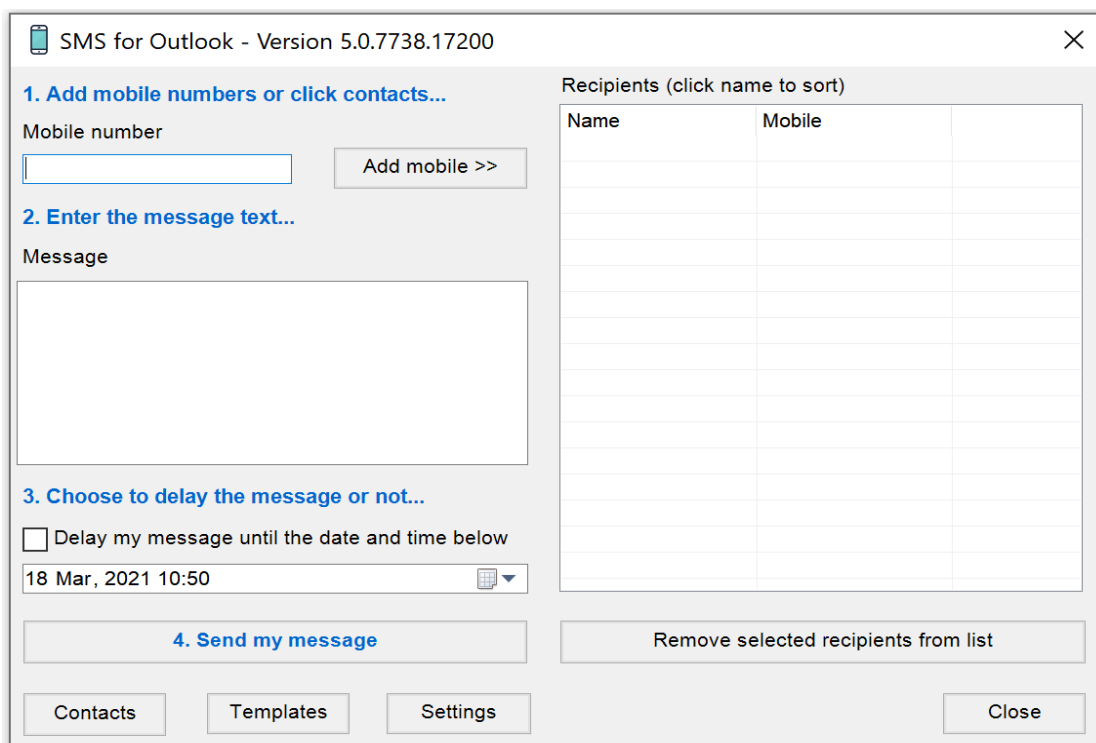


## Step 3: Sending an SMS

When you start outlook after the install, a new menu tab labelled add-ins will have been added if it wasn't there before. Click on add-ins and then click on send SMS to start the add-in.



You will see the following screen :



If this is a new install, you will be in evaluation mode meaning that you are limited to five evaluation messages, limited in length. We'll go through some of the entry fields and buttons below.

## Recipient

Enter a mobile number in the mobile field and click add mobile. Keep doing this for as many recipients as you require. You can also select from your outlook contacts.

If you are sending to just one mobile there is no need to click the add mobile button. Just type in the number and press tab to get to the message.

## Message

Type the message to be sent. This is limited to 430 characters plus the length of your from name (the outlook profile name and any prefixes or overrides in settings, see below). A counter at the top of the message box will show you how many characters you have left in the **current block** and how many charging blocks will be charged. The actual SMS is sent as one continuous message.

## Send

Press the send message button to send your message to all the selected recipients. If required, you can tick the delayed send box, and choose a date and time in the future to send the message.

Note that just changing the date and time does not delay the message. The check box needs to be ticked too.

## Contacts

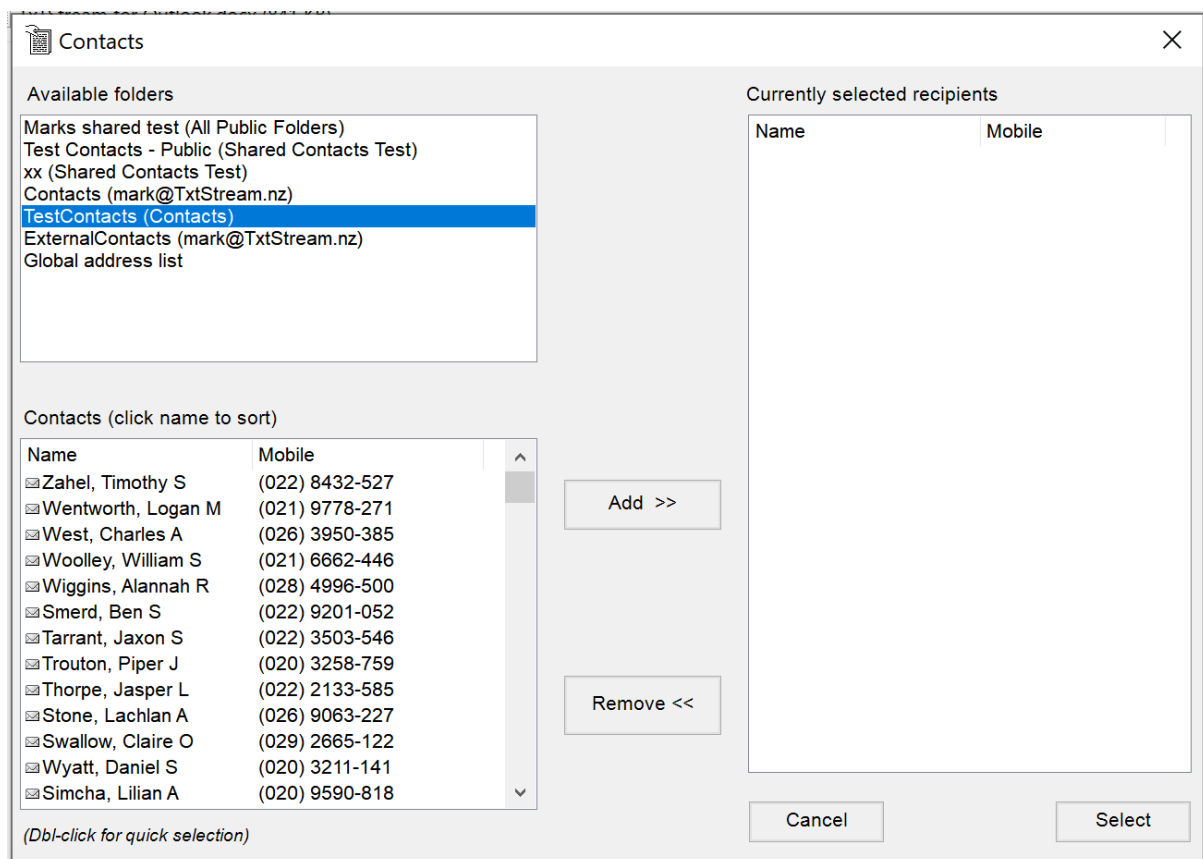
Click on the contacts button to select a contact, multiple contacts or groups and distribution lists from your outlook contacts.

Only contacts that have an entry in the mobile number field will be displayed.

Double click to add a contact to the recipients list or highlight and click add.

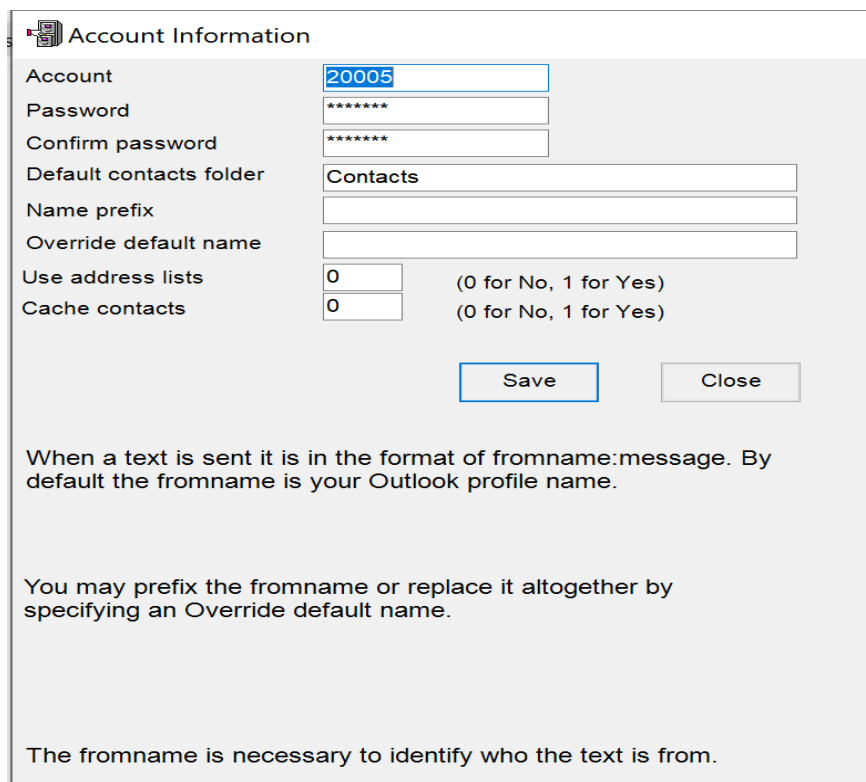
We recommend you create a group or list in your outlook contacts for frequently texted groups of people. You can then simply add the group each time. All editing of contacts and groups is done in outlook, not the add-in.

Below is an example of the contacts screen. The default contacts list can be set in settings and is the one loaded and displayed when the screen opens :



## Step 4: Setting the account and options

For normal usage, you will want to enter your txtstream account and password. Click on the settings button and the settings screen will open :



Account Information

Account	<input type="text" value="20005"/>
Password	<input type="password" value="*****"/>
Confirm password	<input type="password" value="*****"/>
Default contacts folder	<input type="text" value="Contacts"/>
Name prefix	<input type="text"/>
Override default name	<input type="text"/>
Use address lists	<input type="text" value="0"/> (0 for No, 1 for Yes)
Cache contacts	<input type="text" value="0"/> (0 for No, 1 for Yes)

When a text is sent it is in the format of fromname:message. By default the fromname is your Outlook profile name.

You may prefix the fromname or replace it altogether by specifying an Override default name.

The fromname is necessary to identify who the text is from.

### Account

The default value for a new installation is Evaluation. If you are trialing the add-in leave this field as is. If you have a txtstream account, enter your account number here. Ensure that it is your account number and not the account name.

### Password

If you are trialing txtstream leave this field as is. If you have entered your account number above, enter your account password here.

## **Default contacts folder**

You may change the default contacts folder that is loaded when you click the contacts button. Most users will use the default of contacts.

## **Name prefix**

When a text is sent, it is in the format *fromname:message*. By default the *fromname* is your outlook profile name. You may prefix the *fromname* by entering the prefix here. For example, if your outlook profile name is *txtstream*, the messages sent will look like *txtstream:hi here is your test message*. You can use the prefix to customize this to say something like *mark from txtstream:hi here is your test message*. Keep in mind that using a prefix will reduce the available length of your message text.

## **Override default name**

This will override the name from your outlook profile entirely and will be used as the *fromname* instead (see name prefix above). For example, your outlook profile might have a name of *Joe Blogs*, but you want your SMS texts to come from *Blogs and Co*. You would enter *Blogs and Co* in this field.

Most clients will use the installed defaults of 0 and 0 for the settings items of use address lists and cache contacts. The use of these items may be required however depending on your outlook and exchange configuration. Please refer to the technical notes section for more details concerning these options.

Make sure to click on save when you are done!

## Templates

We recommend you use templates for frequently sent texts.

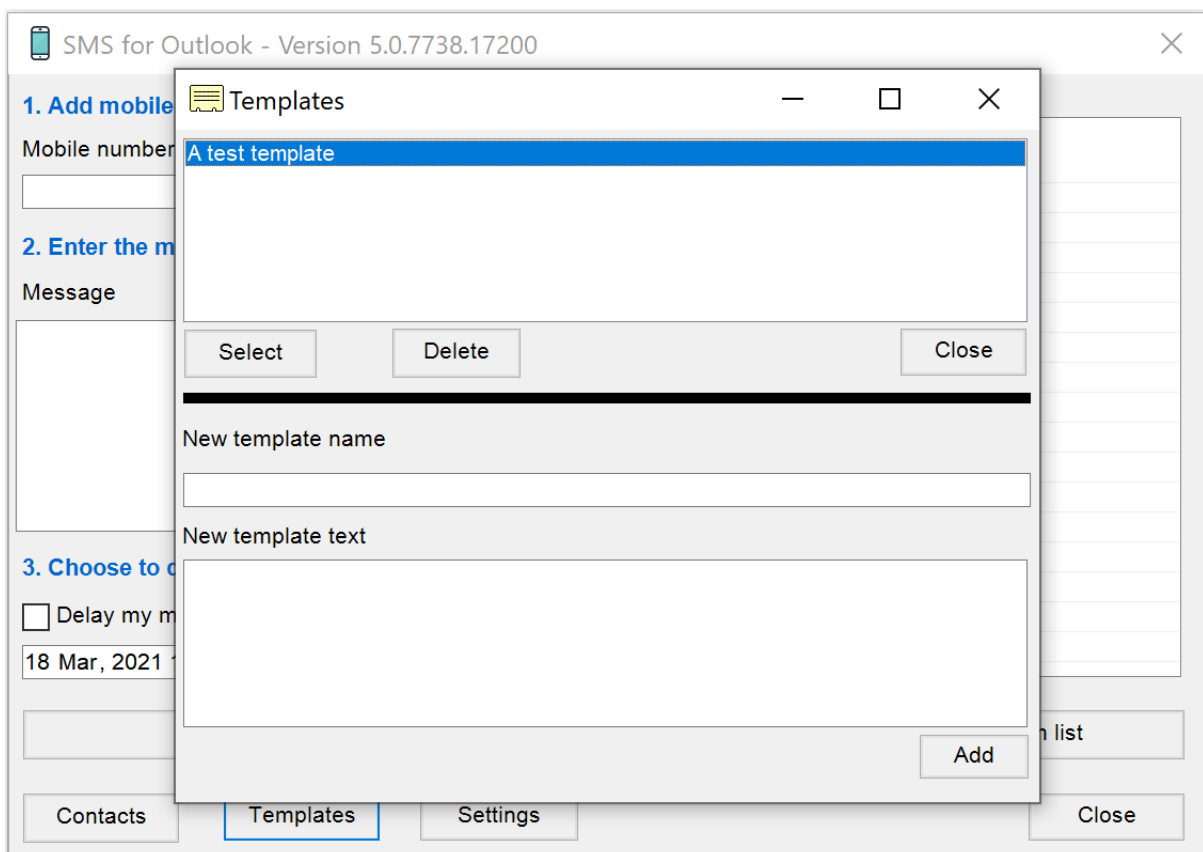
Click on the templates button.

Enter the text for your template under new template text. Enter a name in the new template name field and click add.

Using a template :

1. Click on the templates button.
2. Click on the name of the template you created.
3. Click on select.

The message field will now be populated with your template message.



## Helpful information

### **Message replies**

When you send a text to a mobile phone, the recipient will be able to reply to that message. Any reply will come back to your email and show both the reply and original message.

If you reply to that email, the reply will be sent back to the mobile. However, in the case of replies to replies, the message sent to the mobile will be limited to 160 characters including the outlook profile name (or any prefixes or overrides specified in settings).

### **Message validity**

Once a text message has been sent, the recipient has up to seven days to reply (this is an estimate only and we cannot guarantee seven days). If they attempt to reply after this, the message will fail to be delivered back to you.

### **Sending number**

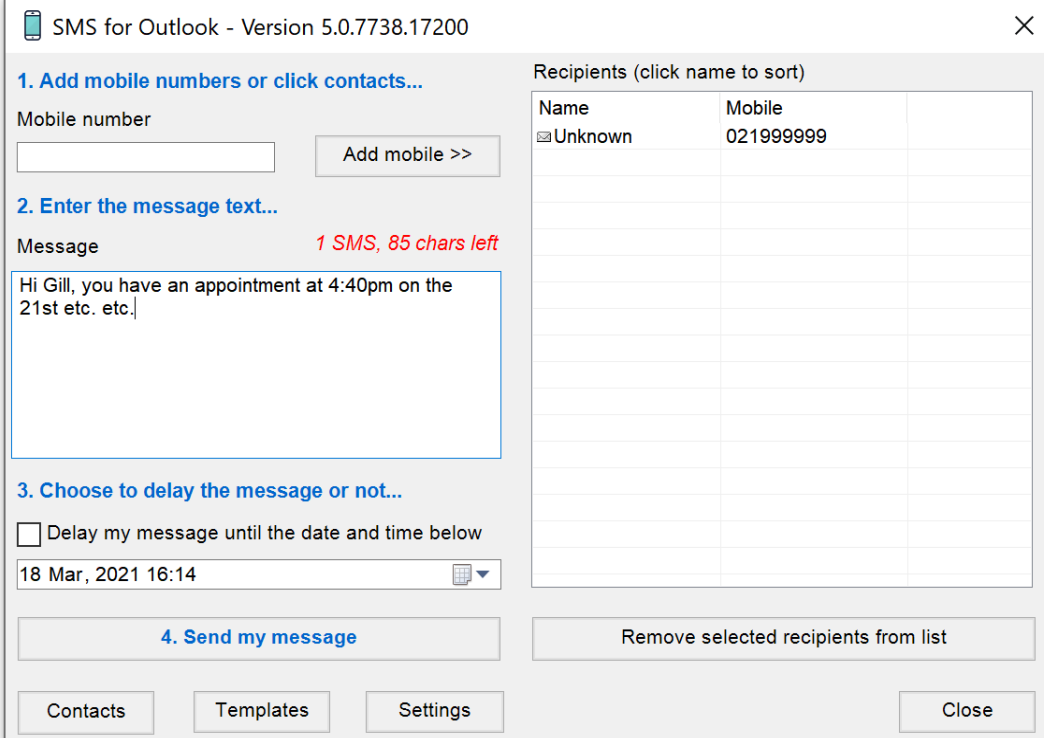
The number your texts come from (the sending number that appears on the mobile) is randomly chosen from a pool of numbers at send time. Because of this and the seven day message validity, it is important that your recipients do not add the number to their phones contacts and try to send you a message at a later date. The message will be sent but you will not receive it.

### **Undeliverable messages**

If for any reason such as mobile out of range or inbox full etc. we cannot deliver the message within a set amount of time (approx. one hour in most cases) we will send you batched non-delivery email notifications detailing the mobile number(s), the message(s) and the reason(s) the message(s) could not be delivered.

## Message length

Messages are charged in 160 character blocks. The first block will include the from name that always precedes the message to identify to the recipient who the message is from. You can send up to 430 characters of typed text. The add-in will show you how many characters are left in the **current block** and how many SMS's (blocks) this message will use as per the example below :



The screenshot shows the 'SMS for Outlook' application window. The title bar reads 'SMS for Outlook - Version 5.0.7738.17200'. The interface is divided into several sections:

- 1. Add mobile numbers or click contacts...:** A text input field for 'Mobile number' and an 'Add mobile >>' button.
- 2. Enter the message text...:** A text area containing the message 'Hi Gill, you have an appointment at 4:40pm on the 21st etc. etc.'. To the right of the text area, it displays '1 SMS, 85 chars left'.
- 3. Choose to delay the message or not...:** A checkbox labeled 'Delay my message until the date and time below' is unchecked. Below it is a date and time selector showing '18 Mar, 2021 16:14'.
- 4. Send my message:** A large button to send the message.
- Recipients (click name to sort):** A table with two columns: 'Name' and 'Mobile'. The first row contains 'Unknown' and '021999999'. Below the table is a button labeled 'Remove selected recipients from list'.
- Footer:** Three buttons labeled 'Contacts', 'Templates', and 'Settings', and a 'Close' button on the right.



## Your txtstream account

To view your account information, usage and charges, simply go to the txtstream website at [www.txtstream.co.nz](http://www.txtstream.co.nz) and click on the logins tab at the top of the page, then click on my account.

Enter your account number and password to logon to your account area.

In the accounts area, you can:

- Access current and historical usage and financial details
- See who has been sending texts
- Create and manage sub accounts
- View invoices
- Change your password

## Technical notes

With the range of installation types, mixed client and mixed outlook version scenarios and on premises versus cloud exchange possibilities, there can be installation, access and performance issues. While we have done our best to mitigate these, problems may still arise. Here are some notes and options that may help.

### **Cached exchange mode**

Always run the add-in using outlook's cached exchange mode if using contacts.

### **The add-in uses the drafts folder**

The add-in, to deal with the outlook object model, will put SMS messages to be sent in the drafts folder. This is normal. The messages will be sent from the drafts folder using the normal send/receive synchronisation and a record of the message will appear in the sent items folder as per a normal email.

### **Contacts appear to be missing**

In some circumstances, you may have contacts that have mobile numbers but they don't appear in the contact lists. Check that they have an email address, and if not, add one and see if they appear. Under some circumstances, the add-in simply cannot get the information from outlook if no email address was supplied for a contact.

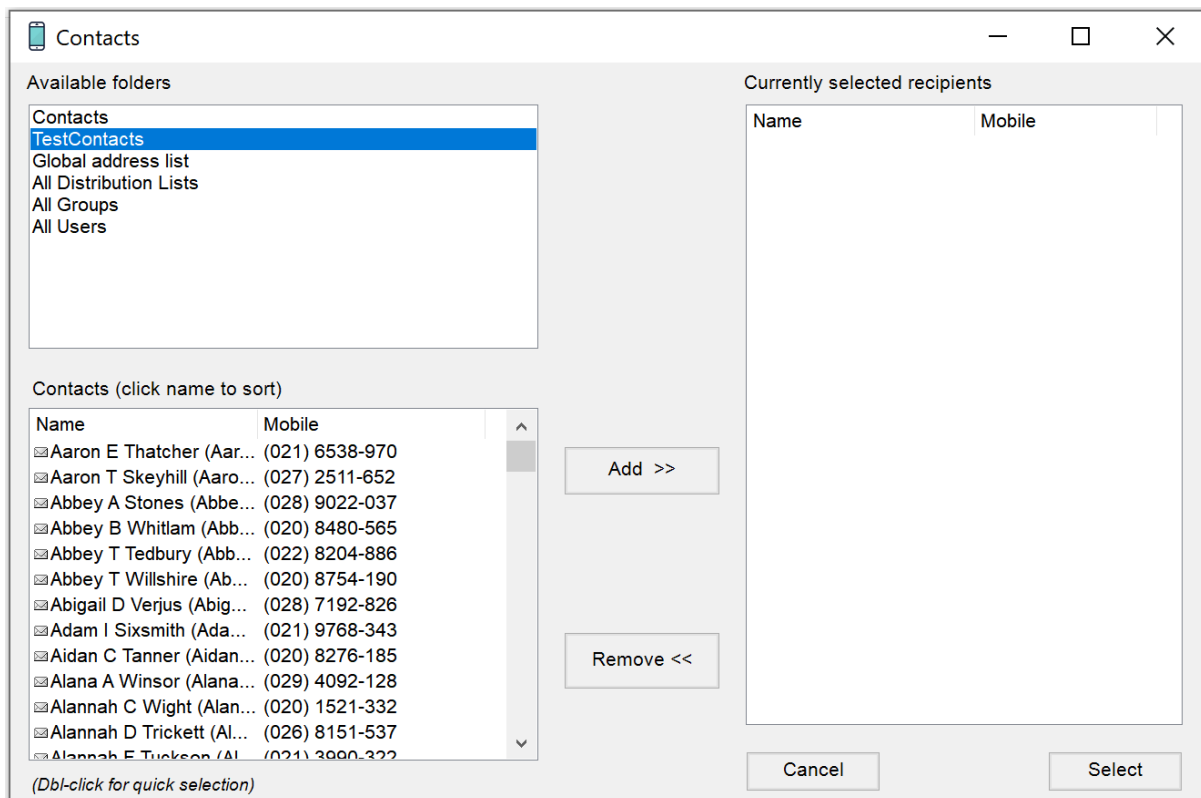
### **The add-in doesn't appear**

You must have admin access or local admin access to install the add-in. It needs to create initial registry settings per user to store the add-in settings and to tell outlook that a new add-in needs to be loaded.

You should also check that the correct add-in was installed for outlook's bitness.

## Slow to load the default contacts lists

There can be many reasons for this, mostly centred around exchange performance and unfortunately there is no magic bullet. The add-in, as well as traversing contacts folders, as an alternative, also allows access to the address lists. In settings, set use address lists to 1. Then go into contacts. An example screen for using address lists vs. contact folders is shown below. Depending on your installation, the address list you need may or may not show.



## Slow to load contacts from a contact folder or address lists

Although initial loading of contacts can be slower i.e. the first time after starting outlook, this should improve after that initial access. If it does not, you can try setting cache contacts to 1 in the settings. This will cache the contacts upon initial load (the first time contacts are accessed in the add-in after outlook starts) making subsequent accesses to that contacts folder or address list extremely fast. The downside is that any changes to the exchange/outlook list will not be reflected in the add-in's cached list. To get around this without having to shut down outlook and restart, we have added a clear cache button shown in the example

below. Note that only the contacts folder or address list designated as the default contacts folder in settings is cached. Clearing the cache will actually clear it, and in the same step reload it from exchange or outlook. The button only appears when the default contacts folder specified in settings is the currently selected folder.

