



SMS for Outlook

Installation, Configuration and Usage Guide

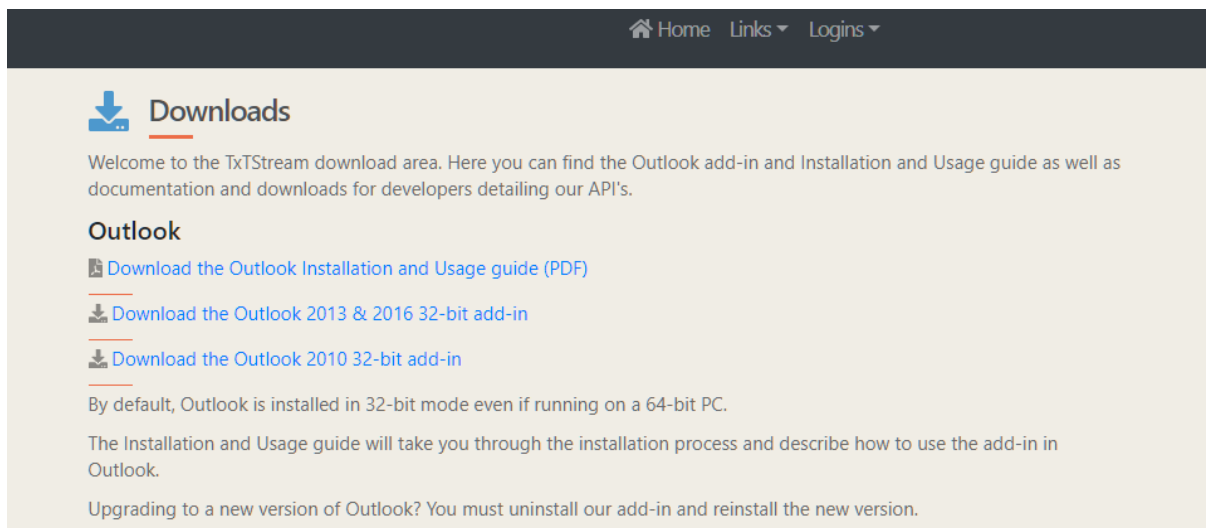
INTRODUCTION

Installing TxTStream's SMS for Outlook is easy and will only take a minute or two. We will be using screen shots from a Windows 10 PC running Microsoft Outlook 2016. Windows 7 or Outlook 2013 will be very similar.

STEP 1 : DOWNLOAD

If you have Microsoft Outlook open, close Outlook before running through the installation.

To download the latest version, go to www.txtstrea.co.nz and click on the links drop down at the top of the page. Click on downloads. Here is what you will see :



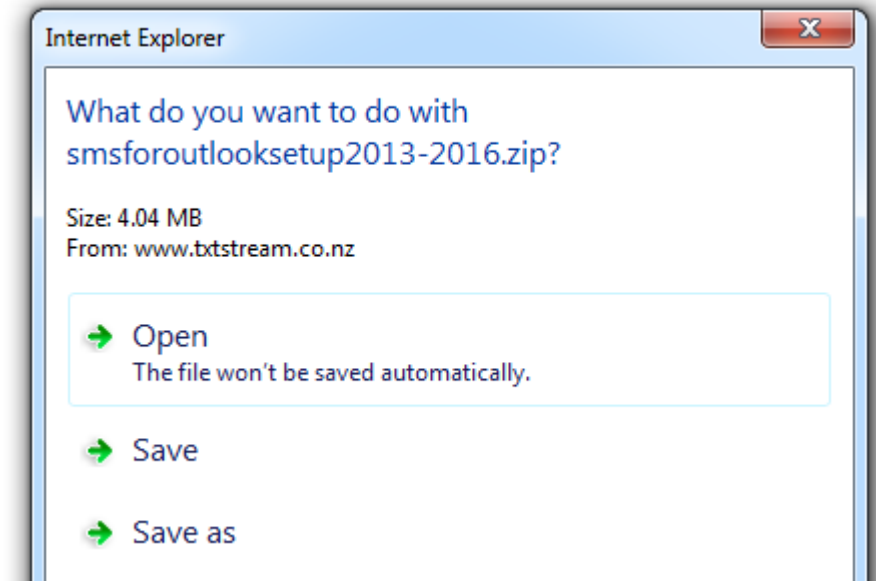
The screenshot shows the 'Downloads' page of the TxTStream website. At the top right, there is a navigation bar with 'Home', 'Links', and 'Logins'. The main heading is 'Downloads' with a download icon. Below the heading, there is a welcome message: 'Welcome to the TxTStream download area. Here you can find the Outlook add-in and Installation and Usage guide as well as documentation and downloads for developers detailing our API's.' Under the 'Outlook' section, there are three download links: 'Download the Outlook Installation and Usage guide (PDF)', 'Download the Outlook 2013 & 2016 32-bit add-in', and 'Download the Outlook 2010 32-bit add-in'. Below these links, there is a note: 'By default, Outlook is installed in 32-bit mode even if running on a 64-bit PC.' Another note states: 'The Installation and Usage guide will take you through the installation process and describe how to use the add-in in Outlook.' At the bottom, there is a note: 'Upgrading to a new version of Outlook? You must uninstall our add-in and reinstall the new version.'

Choose the correct download depending on which version of Microsoft Outlook you are running and click on the link.

Depending on which browser you used to get to the TxTStream Downloads page, the procedure is slightly different.

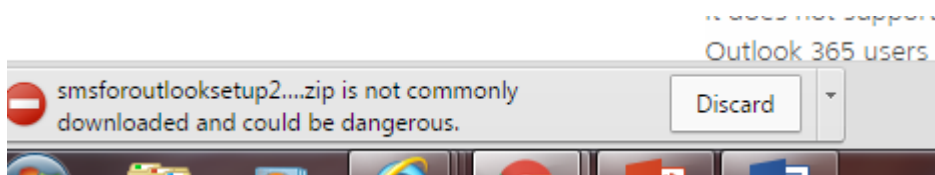
Microsoft Internet Explorer or Edge

Click on open...



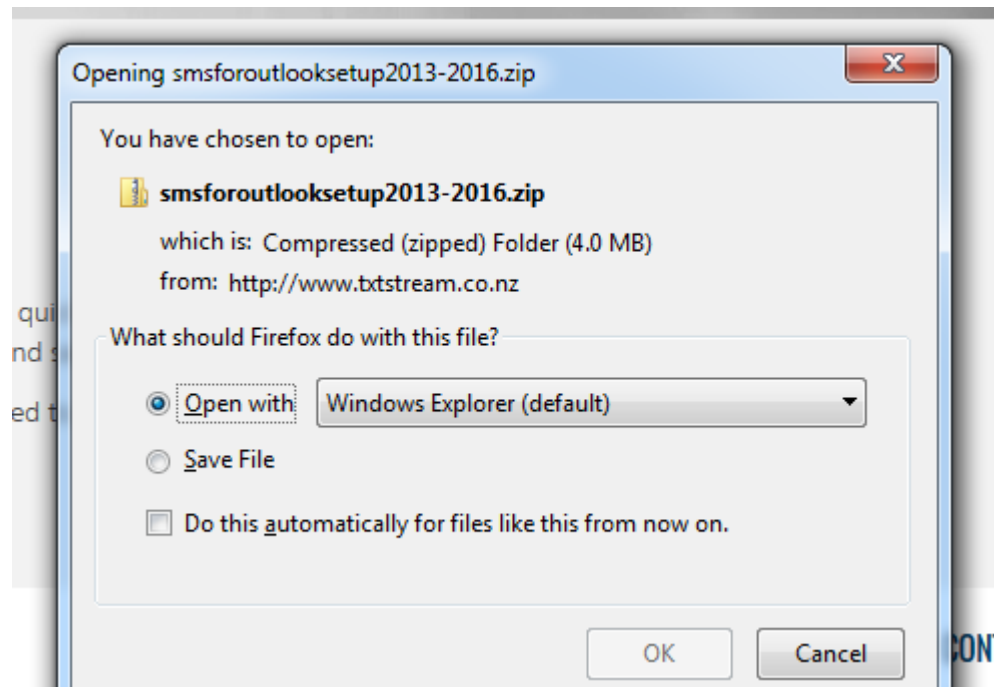
Google Chrome

You may receive the following warning...click on the down arrow and choose keep, then click on the downloaded file to open it...



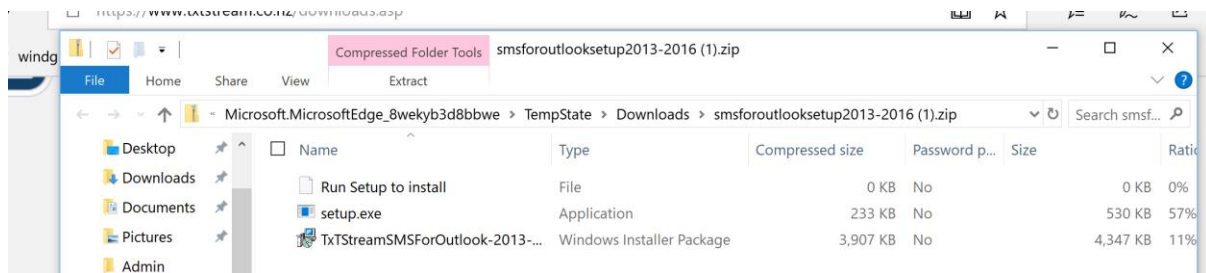
Mozilla Firefox

Click on OK, when the following screen appears...



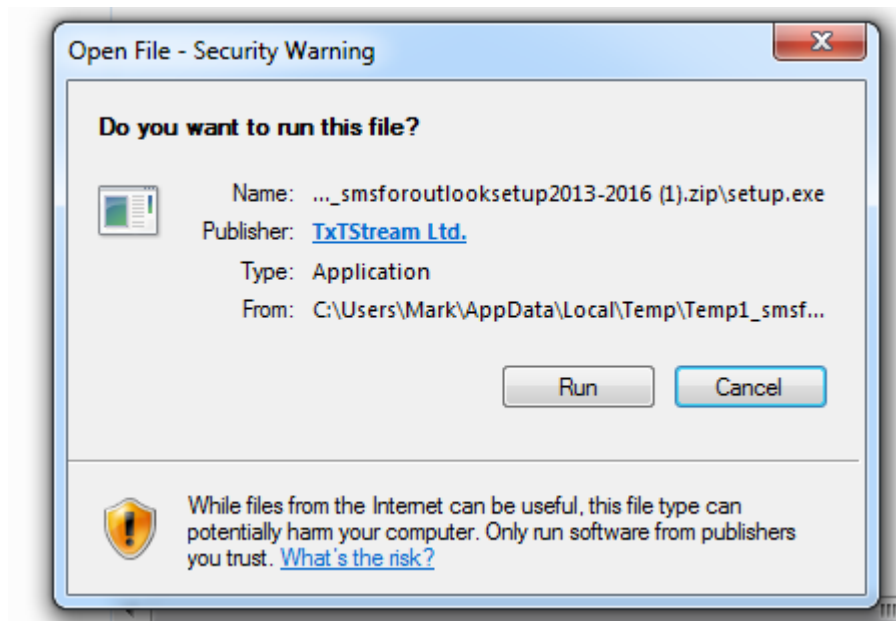
STEP 2 : INSTALLATION

A screen similar to the following will be displayed...

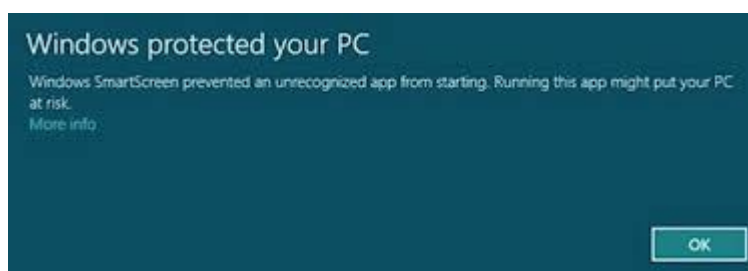


Double-click on Setup to start the installation process. Running Setup rather than the install file (.msi) means that any required prerequisites will be automatically installed for you.

Security warnings may be displayed while the software is installing, similar to the one below. Simply click Accept, Run, or OK as appropriate.

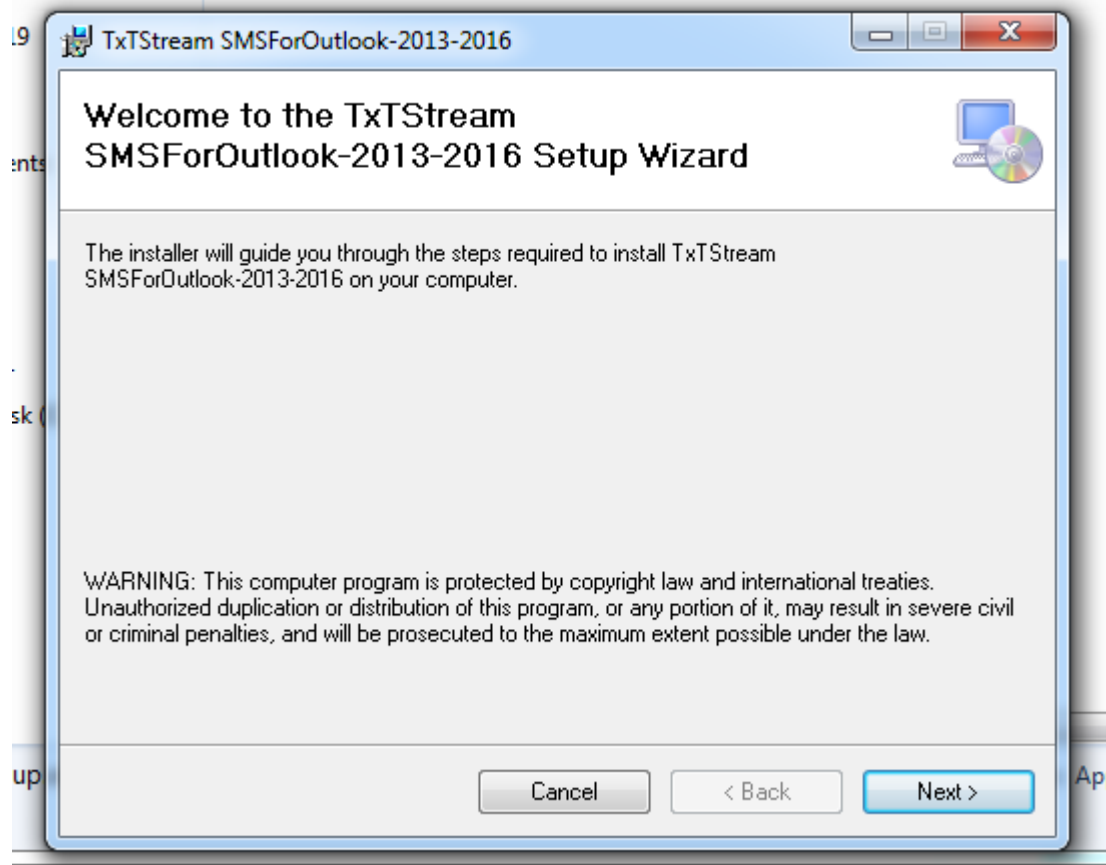


If you are running on Windows 8.1 or 10, you may see an additional warning similar to the screenshot below. If you do, click on More Info and then Run Anyway.

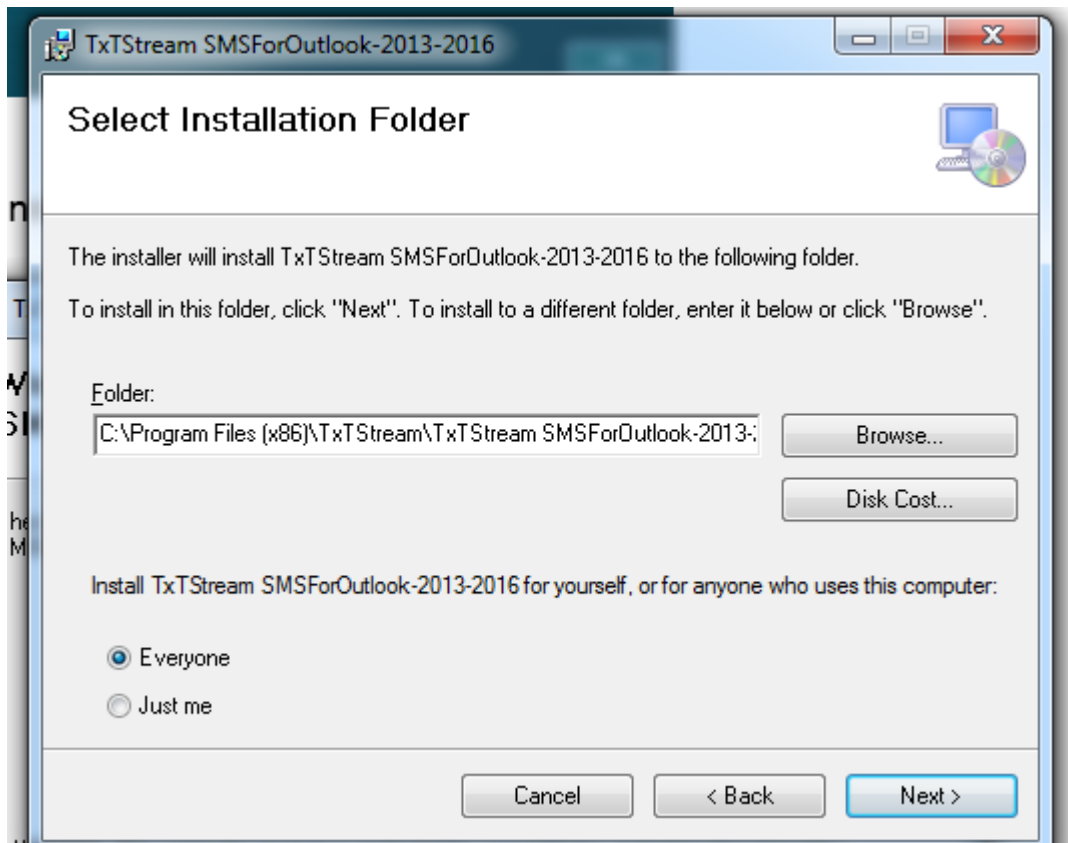


Once the installation has started, the process will check if it needs to download and install any other software from Microsoft to ensure your system is compatible. Answer Accept, Run, OK or Next to complete this process.

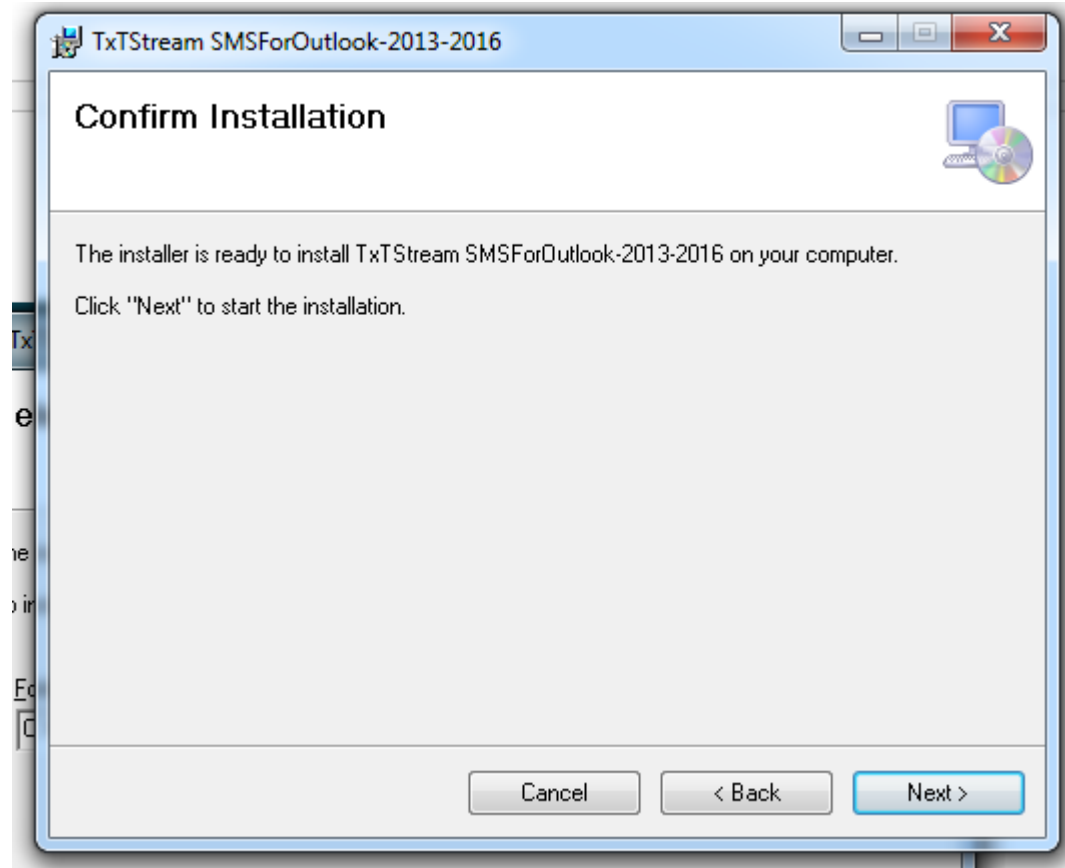
The Installation Wizard will display...



Click Next...

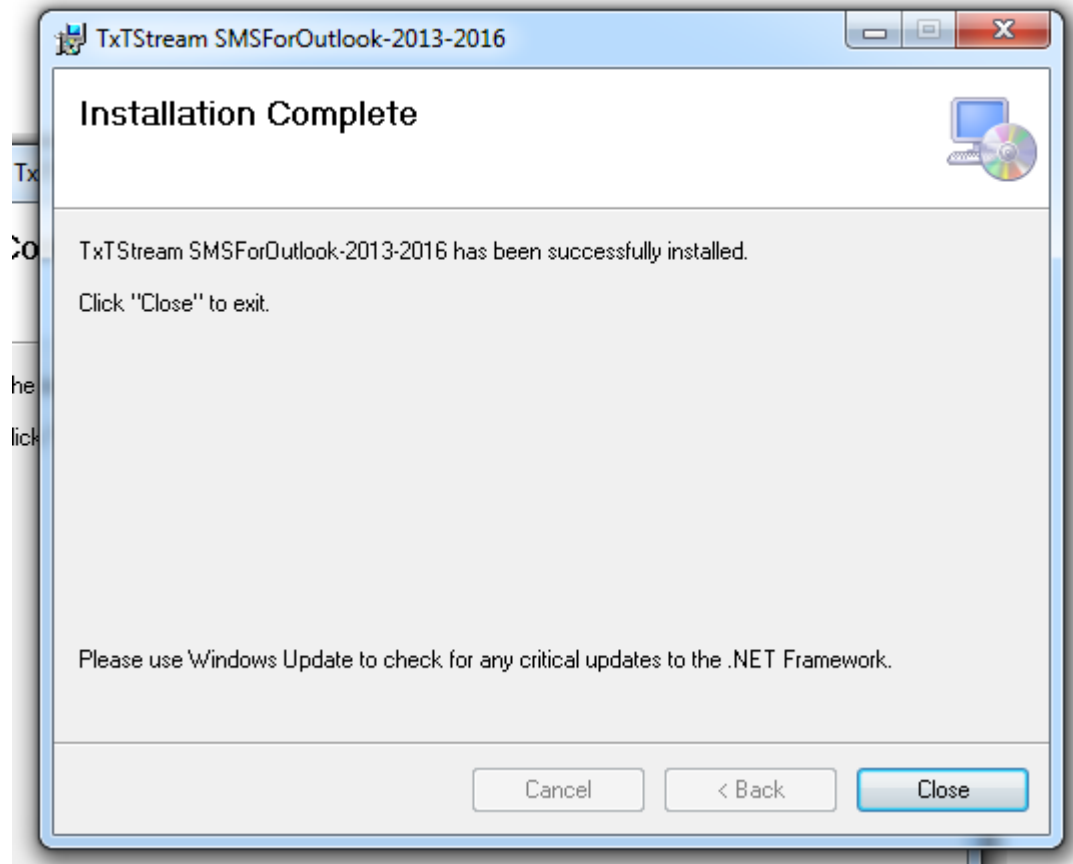


Click Next to select the defaults...



Click Next...

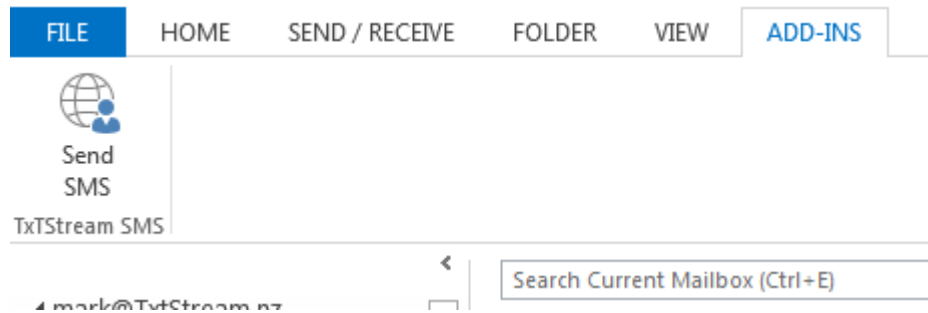
And you're done! The completed installation confirmation shows...



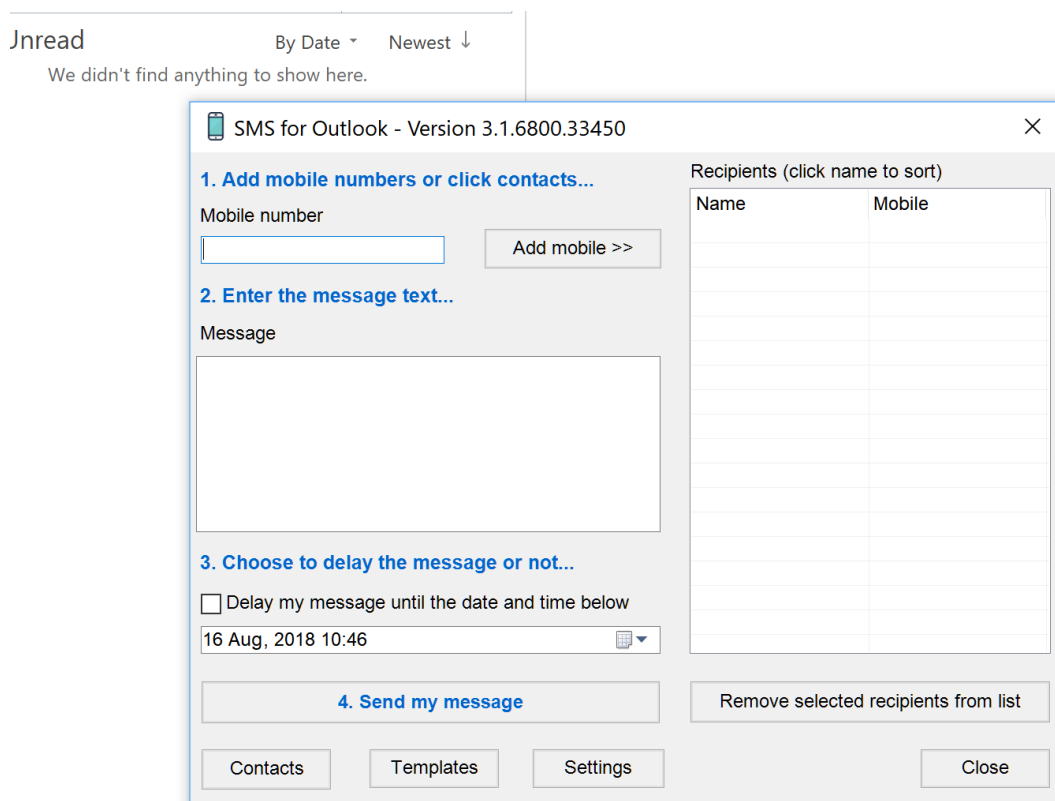
And now you can restart Microsoft Outlook.

STEP 3 : CONFIGURATION AND USAGE

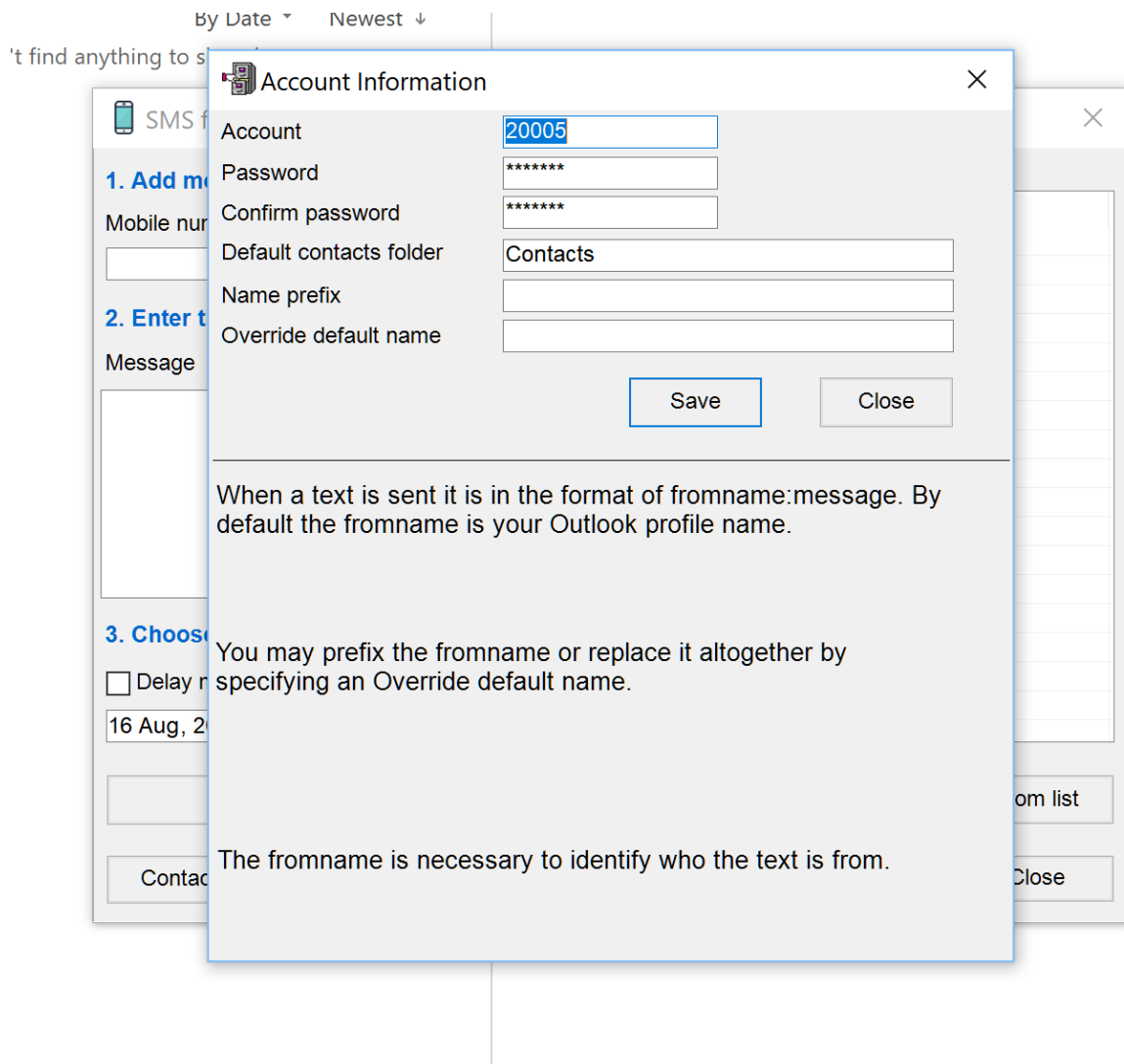
When you start Microsoft Outlook, a new menu tab will have been added : Add-Ins. Click on this tab and then click on Send SMS to start the SMS app.



You will see the following screen...



The first thing we need to do the first time around is enter the account and setup information, so click on Settings. (Even before entering your account information, you can try an Evaluation message.)



Account

The default value for a new installation is Evaluation. If you are trialing TxTStream leave this field as is. If you have a TxTStream account, enter your account number here.

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 TxTStream looks at when you click the Contacts button. Most users would accept 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 characters here.

Override Default Name

This will override the name from your Outlook profile as the FromName. For example, your Outlook profile might have a name of Joe Blogs, but you want your Texts to come from Blogs and Co. You would enter Blogs and Co in this field

Make sure you click on Save when done!

STEP 4: SENDING A TEXT

To send an SMS text message from Outlook, click the Add-Ins tab, and then the Send SMS button.

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.

Note: If sending to just one mobile there is no need to add to recipients. Just type in the number and press tab.

Message

Type the message to be sent. This is limited to 430 characters plus your from name. A counter at the top of the message box will show you how many characters you have left and how many SMS texts will be sent.

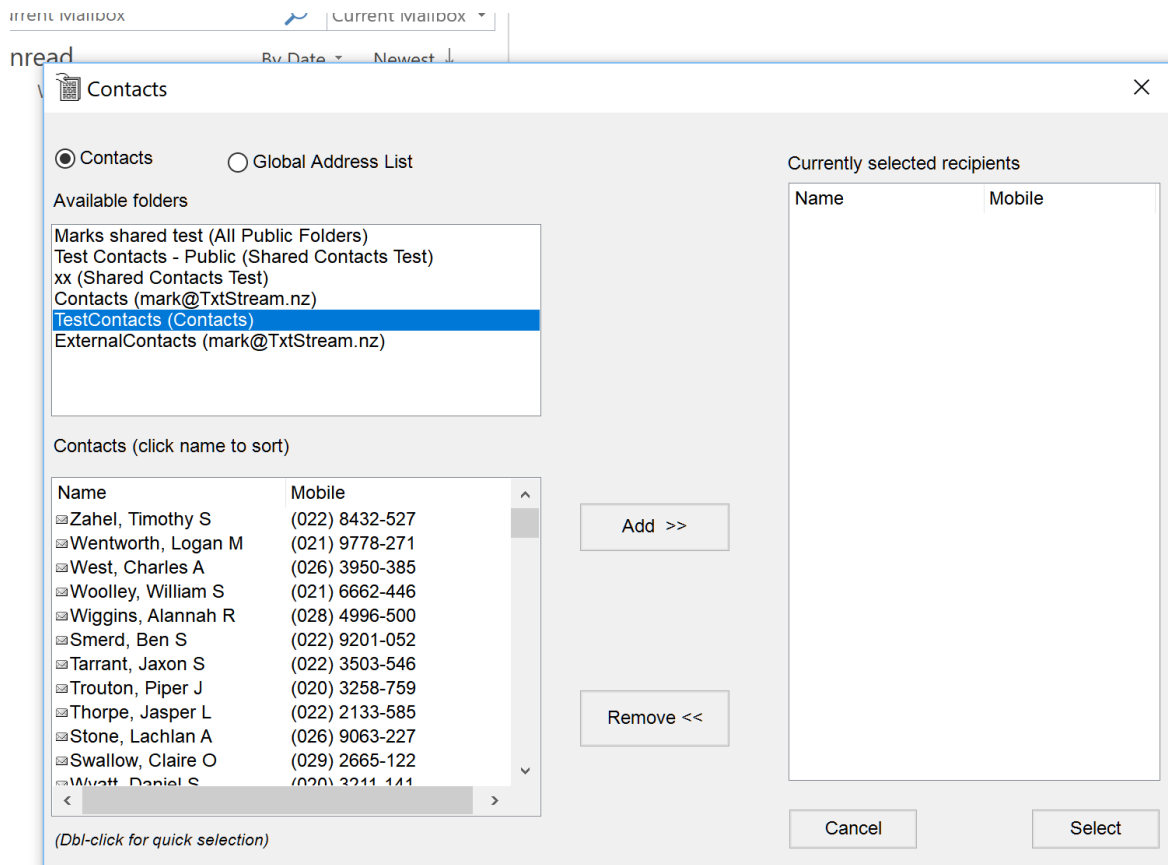
Send

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.

Contacts

Click on the Contacts button to select a Contact or Contacts from Outlook. This will show a list of all your contacts that have an entry in the Mobile Number field. Double click to add a contact to the recipients list, or highlight and click Add.

We recommend you create a group in Outlook Contacts for frequently texted groups of people. You could then simply add the group each time. All editing of Contacts is done through Outlook.



Templates

We recommend you use Templates for frequently sent texts.

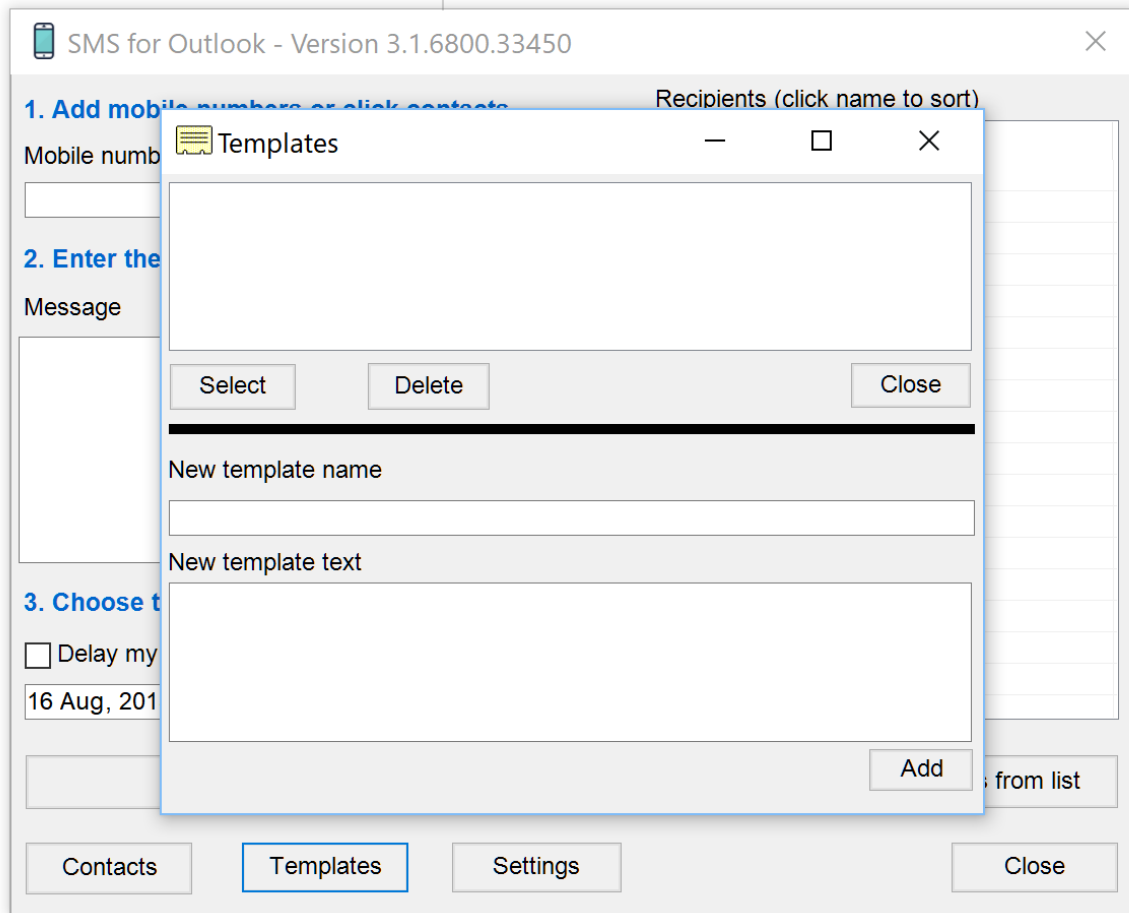
Click on the Templates button.

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.

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) 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.

Message length

Messages are charged in 160 character blocks. The first block will include the of the from name that precedes the message. You can send up to 430 characters of typed text. TxTStream SMS for Outlook will show you how many characters are left in the current block as per the screenshot below.

Find anything to show here.

SMS for Outlook - Version 3.1.6800.33450

1. Add mobile numbers or click contacts...

Mobile number Add mobile >>

2. Enter the message text...

Message 1 SMS, 110 chars left

3. Choose to delay the message or not...

Delay my message until the date and time below

4. Send my message

Recipients (click name to sort)

Name	Mobile
Unknown	021999999

YOUR ACCOUNT

To view and edit your account information, simply go to the TxTStream website at www.txtstream.co.nz and click on the logins tab top right, then click on My Account.

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

In the My Account section, 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

CONTACT TXTSTREAM

Freecall: 0800 277 272

Email: support@TxTStream.co.nz