



TxtStream for Outlook

Installation, Configuration
and Usage Guide

Step 1: Download

To download the latest version, go to our website below

<http://www.txtstream.co.nz/outlook.html>

Click on the download button. It is recommended you click “open” when prompted.

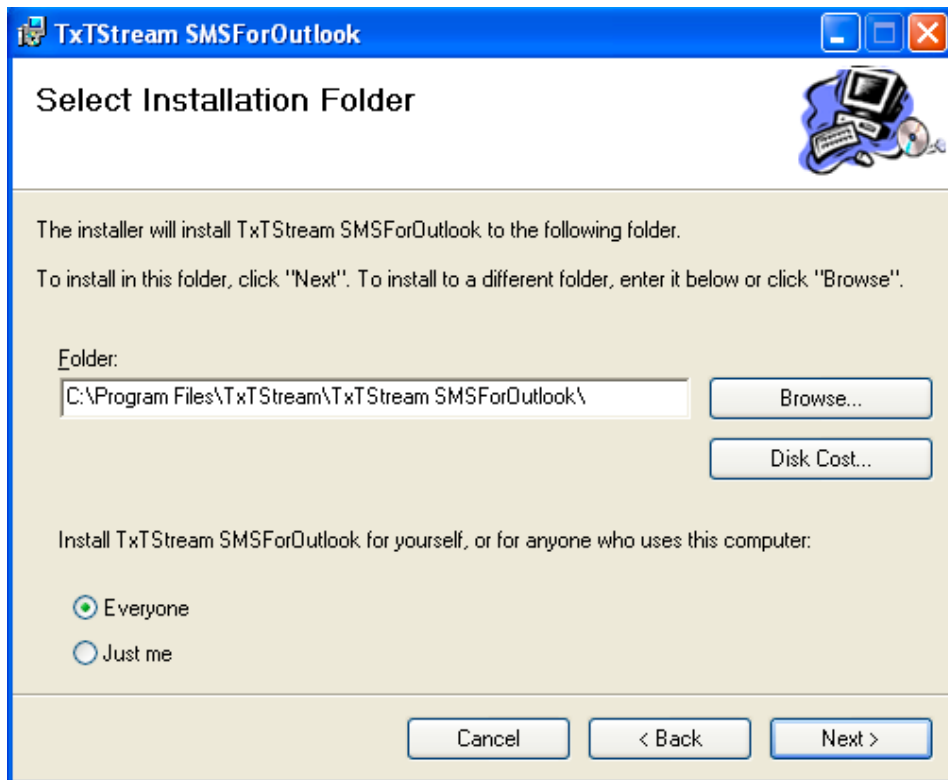
Once downloaded, double click the file SMSForOutlook which will have appeared on your screen.

If a security warning appears, click “run”.

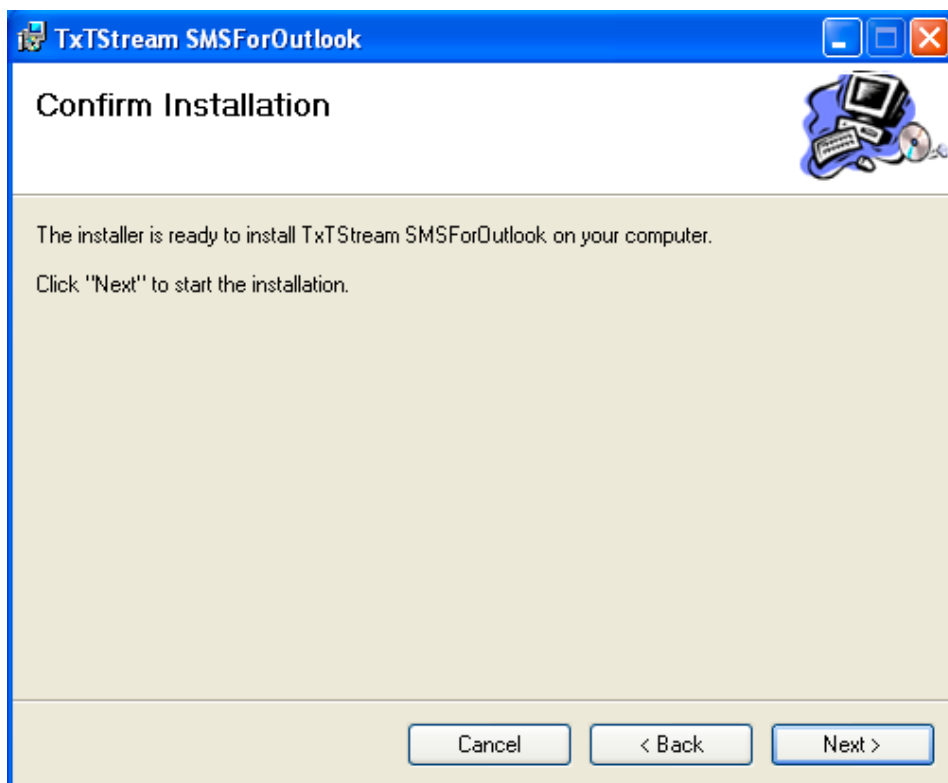
Step 2: Installation



Click Next



To accept the default location click Next



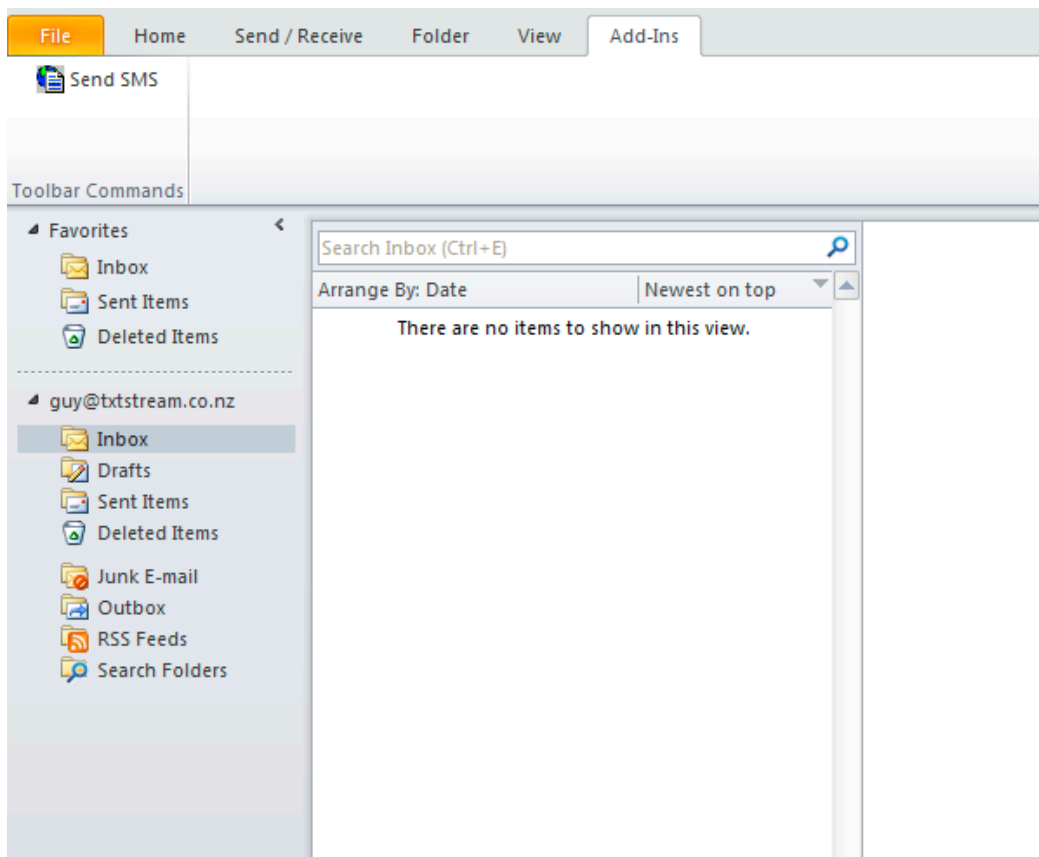
Click Next to start the installation

Step 3: Configuration

Once the installation has completed, start Microsoft Outlook.

Note: If you had Outlook open while doing the TxtStream installation, you will need to close and reopen Outlook.

You should now have a new Toolbar in Outlook called “Add-Ins”. By clicking on this, you will see the button “Send SMS”



Click the Send SMS button

- **Account**
The default value 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 a 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 1 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 160 characters (including spaces). A counter at the top of the screen will show you how many characters you have left.

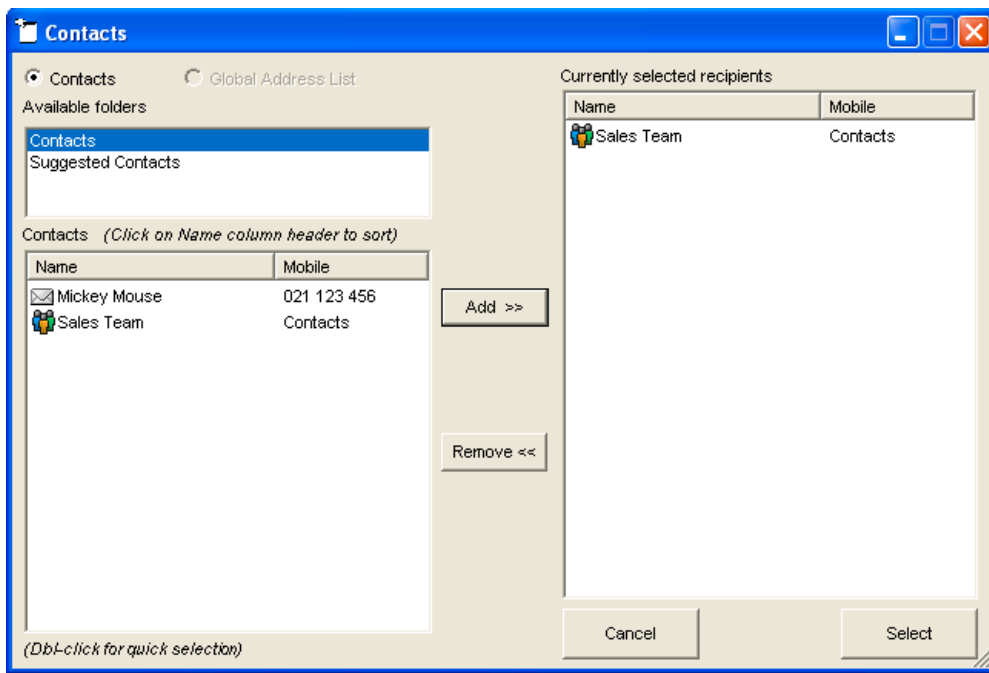
- **Send**

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 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.

Template Setup

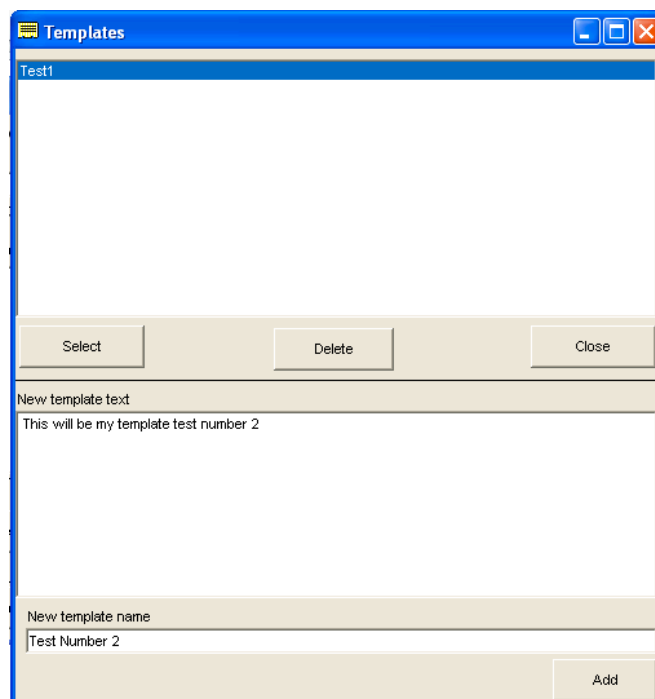
Click on the Templates Button.

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.

Note: Your 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 7 days to reply (this is an estimate only and we do not guarantee 7 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 7 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.

Your Account

To view and edit your account information, simply go to our website <http://www.txtstream.co.nz> and click on the My Account button at the top.

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

In the My Account section, you can:

- Access current and historical usage 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