

SwiftMerge

for Outlook

User's Guide

*Send personalized emails to multiple recipients
using your Outlook drafts*

© Lookout Software, LLC
swiftmerge.app

Table of Contents

Table of Contents.....	2
1. Introduction.....	4
1.1 Key Features.....	4
1.2 Free vs Pro Features.....	4
2. Getting Started.....	6
2.1 System Requirements.....	6
2.2 Installing SwiftMerge.....	6
2.3 Signing In.....	6
Sign in with Microsoft (Recommended).....	6
Sign in with Email.....	6
3. Creating Campaigns.....	7
3.1 Campaign Workflow.....	7
3.2 Creating a New Campaign.....	7
3.3 Campaign Status.....	7
4. Email Templates (Drafts).....	8
4.1 Creating a Draft Email.....	8
4.2 Using Merge Fields.....	8
4.3 Example Template.....	8
4.4 Selecting a Draft.....	9
5. Managing Recipients.....	10
5.1 Import Methods.....	10
Outlook Contacts.....	10
Excel File (Pro).....	10
CSV File (Pro).....	10
Manual Entry.....	10
5.2 Column Mapping.....	11
5.3 Duplicate Handling.....	11
6. Sending Campaigns.....	12
6.1 Preview Before Sending.....	12
6.2 Sending Options.....	12
Send Now.....	12
Schedule for Later (Pro).....	12
6.3 Advanced Options (Pro).....	12

Throttle Sending Speed	12
Send on Behalf Of.....	12
Enable Tracking.....	13
6.4 During Sending.....	13
7. Tracking & Statistics (Pro).....	14
7.1 Campaign Statistics.....	14
7.2 Recipient Details.....	14
7.3 How Tracking Works.....	14
8. Opt-Out Management	15
8.1 How Opt-Outs Work	15
8.2 Managing Your Opt-Out List	15
9. Account Management	16
9.1 Your Profile.....	16
9.2 Subscription Plans.....	16
Free Trial	16
Free Plan	16
Pro Plan.....	16
9.3 Upgrading to Pro	16
10. Troubleshooting	18
10.1 Common Issues.....	18
Emails not sending.....	18
Merge fields not working	18
Can't find my draft.....	18
Import errors	18
10.2 Getting Help	18

1. Introduction

SwiftMerge is a powerful mail merge add-in for Microsoft Outlook that allows you to send personalized emails to multiple recipients directly from your Outlook account. Each email is sent individually, appearing in your Sent Items folder, with personalized content for each recipient.

Unlike traditional mass email tools, SwiftMerge uses your existing Outlook drafts as templates, preserving all your formatting, images, and attachments while automatically personalizing each message with recipient-specific information.

1.1 Key Features


- Use Outlook drafts as email templates with full formatting support
- Personalize emails with merge fields ({{FirstName}}, {{Email}}, etc.)
- Import recipients from Outlook Contacts, Excel, or CSV files
- Preview merged emails before sending
- Background sending — close the add-in while emails are delivered
- Track opens, clicks, and unsubscribes (Pro)
- Schedule campaigns for future delivery (Pro)
- Throttle sending speed to avoid rate limits (Pro)

1.2 Free vs Pro Features

SwiftMerge offers both a free tier and a Pro subscription. Here's what's included in each:

Feature	Free	Pro
Create campaigns	✓	✓
Select draft as template	✓	✓
Basic merge fields (Name, Email)	✓	✓
Import from Outlook Contacts	✓	✓
Preview before sending	✓	✓
Daily sending limit	50/day	Account limit
Monthly sending limit	500/mo	Unlimited
Import from Excel/CSV	—	✓
Custom merge fields	—	✓
Scheduled sending	—	✓
Throttle sending speed	—	✓
Send on behalf of others	—	✓
Campaign statistics	—	✓

Open & click tracking	—	✓
Remove SwiftMerge footer	—	✓

 **Note:** New users receive a 7-day free trial with full Pro features. No credit card required.

2. Getting Started

2.1 System Requirements

- Microsoft Outlook (desktop or web version)
- Microsoft 365 subscription or Outlook.com account
- Internet connection for sending emails
- Modern web browser (for Outlook on the web)

2.2 Installing SwiftMerge

SwiftMerge is available from the Microsoft AppSource marketplace:

1. Open Outlook and navigate to the Add-ins section
2. Search for "SwiftMerge" in the Office Add-ins store
3. Click "Add" to install the add-in
4. Once installed, you'll see SwiftMerge in your Outlook ribbon or add-in panel

2.3 Signing In


SwiftMerge supports two sign-in methods:

Sign in with Microsoft (Recommended)

Click "Sign in with Microsoft" to authenticate using your Microsoft account. This is the fastest way to get started and automatically links your Outlook account.

Sign in with Email

Alternatively, you can sign in with an email address and password. This is useful if you need to use a different account than your Outlook account.

 **Tip:** Your first sign-in starts your 7-day free trial automatically.

3. Creating Campaigns

A campaign in SwiftMerge represents a single email send to multiple recipients. Each campaign consists of a draft email template and a list of recipients.


3.1 Campaign Workflow

Creating and sending a campaign involves four main steps:

1. Create a new campaign and give it a name
2. Select an Outlook draft to use as your email template
3. Import or add recipients
4. Preview and send your campaign

3.2 Creating a New Campaign

1. Open SwiftMerge from the Outlook ribbon or add-in panel
2. On the home screen, click "New Campaign"
3. Enter a descriptive name for your campaign (e.g., "April Newsletter" or "Q2 Sales Outreach")
4. Click "Create" to proceed to the campaign details page

 **Tip:** Use descriptive campaign names to easily identify them later. Include the date or purpose in the name.

3.3 Campaign Status

Campaigns can have the following statuses:

- Draft — Campaign is being prepared (you can still edit)
- Scheduled — Campaign is scheduled for future delivery (Pro)
- In Progress — Emails are currently being sent
- Completed — All emails have been sent
- Paused — Sending has been paused
- Cancelled — Campaign was cancelled before completion

4. Email Templates (Drafts)

SwiftMerge uses your Outlook drafts as email templates. This allows you to compose your email with full formatting, images, and attachments in Outlook's familiar editor.

4.1 Creating a Draft Email

1. In Outlook, create a new email (don't address it to anyone)
2. Write your email content, including any formatting you want
3. Add images, attachments, or HTML formatting as needed
4. Insert merge field placeholders where you want personalized content
5. Save the email as a draft (don't send it)

4.2 Using Merge Fields

Merge fields are placeholders that get replaced with recipient-specific data when the email is sent. Use double curly braces to create merge fields:

Merge Field	Description
{{FirstName}}	Recipient's first name
{{LastName}}	Recipient's last name
{{Email}}	Recipient's email address
{{Company}}	Recipient's company name (Pro)
{{Title}}	Recipient's job title (Pro)
{{Custom1}}	Custom field from import (Pro)
{{Custom2}}	Custom field from import (Pro)

4.3 Example Template

Here's an example of an email template with merge fields:

Subject: Following up on our conversation

Hi {{FirstName}},

Thank you for speaking with me about {{Company}}'s needs. I wanted to follow up on our discussion and share some additional information.


Please let me know if you have any questions. You can reach me at this email or reply directly.

Best regards,

Your Name

4.4 Selecting a Draft

1. From the campaign details page, click "Select Draft"
2. Browse your Outlook Drafts folder to find your template
3. Click on a draft to preview it, including any attachments
4. Verify the merge fields are detected correctly
5. Click "Use This Draft" to confirm your selection

 **Tip:** SwiftMerge automatically detects merge fields in your draft and shows them in the preview.

5. Managing Recipients

Recipients are the people who will receive your campaign emails. SwiftMerge offers multiple ways to add recipients to your campaign.

5.1 Import Methods

Outlook Contacts

Import recipients directly from your Outlook contacts:

- Click "Import Recipients" on the campaign details page
- Select "Outlook Contacts" as the import source
- Search or browse your contacts
- Select the contacts you want to add
- Click "Import" to add them to your campaign

Excel File (Pro)

Import recipients from an Excel spreadsheet:

- Prepare an Excel file with columns for Email, FirstName, LastName, etc.
- Click "Import Recipients" and select "Excel File"
- Upload your .xlsx file
- Map the Excel columns to merge fields
- Preview the import and click "Import"

★ **Pro Feature:** Excel import supports custom columns that become custom merge fields.

CSV File (Pro)

Import recipients from a CSV (comma-separated values) file:

- Prepare a CSV file with a header row
- Click "Import Recipients" and select "CSV File"
- Upload your .csv file
- Map the columns to merge fields
- Click "Import" to add recipients

Manual Entry

Add individual recipients manually:


- Click "Add Recipient" on the campaign details page
- Enter the recipient's email address

- Optionally add first name, last name, and other fields
- Click "Add" to save the recipient

5.2 Column Mapping

When importing from Excel or CSV, you'll need to map your columns to SwiftMerge fields:

- Email (required) — The recipient's email address
- FirstName — Used for {{FirstName}} merge field
- LastName — Used for {{LastName}} merge field
- Company — Used for {{Company}} merge field (Pro)
- Custom fields — Any additional columns become custom merge fields (Pro)

 **Note:** At minimum, each recipient must have a valid email address. Other fields are optional.

5.3 Duplicate Handling

SwiftMerge automatically detects duplicate email addresses during import. You can choose to:

- Skip duplicates (keep existing recipient data)
- Update duplicates (replace with new data)
- Add anyway (allow duplicate entries)

6. Sending Campaigns

Once you've prepared your draft and imported recipients, you're ready to send your campaign.

6.1 Preview Before Sending

Always preview your emails before sending:

- Click "Send" on the campaign details page
- Use the recipient dropdown to preview different recipients
- Verify that merge fields are replaced correctly
- Check that formatting, images, and attachments look correct

 **Tip:** Take time to preview several recipients, especially if you have custom fields.

6.2 Sending Options


Send Now

Click "Send Now" to start sending immediately. Emails are sent in the background, so you can close the add-in while delivery continues.

Schedule for Later (Pro)

Schedule your campaign for future delivery:

- Select a date and time for delivery
- Choose your timezone
- Click "Schedule" to queue the campaign
- The campaign will automatically start at the scheduled time

 **Pro Feature:** Scheduled campaigns require an active Pro subscription at the time of delivery.

6.3 Advanced Options (Pro)

Throttle Sending Speed

Control how fast emails are sent to avoid rate limits:

- Set a delay between each email (e.g., 5 seconds)
- Useful for large campaigns or strict email limits
- Helps maintain deliverability and avoid spam filters

Send on Behalf Of

Send emails from a shared mailbox or as a delegate:

- Select an email address you have permission to send from
- Emails will appear to come from that address
- Requires proper delegation permissions in your organization

Enable Tracking


Track email engagement:

- Track when recipients open your emails
- Track when recipients click links
- View statistics in the campaign dashboard

6.4 During Sending

While your campaign is sending:

- A progress indicator shows how many emails have been sent
- You can pause sending at any time
- You can cancel the remaining emails
- Closing the add-in won't stop delivery — sending continues in the background

 **Note:** Each email is sent individually from your Outlook account and appears in your Sent Items folder.

7. Tracking & Statistics (Pro)

SwiftMerge Pro includes powerful tracking and statistics features to measure your campaign's success.

7.1 Campaign Statistics

View overall campaign performance:

- Total emails sent
- Delivery success rate
- Open rate (percentage of recipients who opened)
- Click rate (percentage of recipients who clicked a link)
- Unsubscribe rate

7.2 Recipient Details

View engagement data for individual recipients:

- Delivery status (Sent, Delivered, Failed)
- Open timestamps (when they opened the email)
- Click details (which links they clicked)
- Unsubscribe status

7.3 How Tracking Works

SwiftMerge uses industry-standard tracking methods:

- Opens are tracked via a tiny transparent image (tracking pixel)
- Clicks are tracked by redirecting links through our tracking server
- Tracking is privacy-conscious and GDPR-compliant
- Recipients can opt out at any time using the unsubscribe link

 **Note:** Some email clients block tracking pixels by default, so open rates may be underreported.

8. Opt-Out Management

SwiftMerge automatically manages opt-outs (unsubscribes) to help you maintain a healthy sender reputation.

8.1 How Opt-Outs Work

When a recipient clicks the unsubscribe link in your email:

- They are immediately added to your opt-out list
- They will not receive any future campaigns from you
- Their opt-out status is preserved across all campaigns
- You cannot accidentally send to opted-out recipients

8.2 Managing Your Opt-Out List

Access your opt-out list from the menu:

- View all opted-out email addresses
- See when each recipient opted out
- Manually add addresses to the opt-out list
- Remove addresses if requested (with caution)

⚠ Warning: Be careful when removing opt-outs. Re-emailing someone who unsubscribed can result in spam complaints.

9. Account Management

9.1 Your Profile

Access your profile from the user menu to view:

- Account email and name
- Current subscription status
- Account creation date
- Sending limits

9.2 Subscription Plans

Free Trial

New accounts receive a 7-day free trial with full Pro features. No credit card required. After the trial ends, you can upgrade to Pro or continue with the Free plan.

Free Plan

The free plan includes:

- 50 emails per day
- 500 emails per month
- Basic merge fields
- Import from Outlook Contacts only
- SwiftMerge footer included in emails

Pro Plan

The Pro plan unlocks all features:

- Send up to your Outlook account limit
- Import from Excel and CSV
- Custom merge fields
- Scheduled sending
- Throttle sending speed
- Send on behalf of others
- Campaign statistics and tracking
- No SwiftMerge footer

9.3 Upgrading to Pro

To upgrade your account:

- Click "Upgrade" from any Pro feature prompt, or
- Go to your Profile and click "Upgrade to Pro"
- Choose monthly or annual billing
- Complete payment through our secure checkout
- Pro features activate immediately

10. Troubleshooting

10.1 Common Issues

Emails not sending

- Check that your draft is saved and selected
- Verify all recipients have valid email addresses
- Ensure you haven't exceeded your daily/monthly limit
- Check your internet connection

Merge fields not working

- Verify merge field syntax: use {{FieldName}} with double curly braces
- Check that field names match exactly (case-sensitive)
- Ensure recipient data includes the corresponding fields
- Preview the email to verify replacements

Can't find my draft

- Make sure the email is saved (not just composed)
- Check that you're signed into the correct Outlook account
- Try refreshing the drafts list
- Verify the draft hasn't been deleted or sent

Import errors

- Ensure your file has a header row with column names
- Check that email addresses are in a valid format
- Remove any special characters from column headers
- Save Excel files as .xlsx (not .xls)

10.2 Getting Help

If you need additional assistance:

- Visit our support center at swiftmerge.app/support
- Check the FAQ for common questions
- Contact support via the Help menu in the app
- Include your account email and campaign details when reporting issues

SwiftMerge for Outlook

© Lookout Software, LLC. All rights reserved.

swiftmerge.app