

# SwiftMerge for Gmail

## User's Guide

*Professional Mail Merge Email Campaigns for Gmail*

Version 1.0  
© 2025 Lookout Software, LLC

## Table of Contents

1. Introduction
2. Getting Started
3. Creating Your First Campaign
4. Data Sources
5. Using Merge Fields
6. Testing Your Campaign
7. Analytics & Tracking
8. Account Management
9. Pricing & Plans
10. Best Practices
11. Troubleshooting & FAQ

## 1. Introduction

Welcome to SwiftMerge, the professional mail merge email campaign solution built directly into Gmail. SwiftMerge transforms your Gmail account into a powerful mail merge email marketing engine, allowing you to send personalized emails to hundreds of recipients without leaving your inbox.

### What is SwiftMerge?

SwiftMerge is a Gmail add-on that enables you to create and send personalized mail merge email campaigns using data from Google Sheets or Google Contacts. Whether you're sending a newsletter, product announcement, or customer survey, SwiftMerge makes it easy to reach your audience with professional, personalized messages.

### Key Features

- **Personalized Merge Fields:** Customize emails with recipient names, companies, and custom data
- **Performance Tracking:** Monitor opens, clicks, and engagement in real-time
- **Data Privacy:** Your data stays in your Google account—no third-party sharing
- **Affordable Pricing:** Professional features at a fraction of the cost of other platforms

## 2. Getting Started

### Installing SwiftMerge

1. Open Gmail in your web browser
2. Click the + icon in the right sidebar to access Google Workspace Marketplace
3. Search for "SwiftMerge"
4. Click Install and grant the required permissions
5. The SwiftMerge  icon will appear in your Gmail sidebar

### Your Free Trial

SwiftMerge offers a 14-day free trial that includes:

- 500 emails per day
- All core features
- No credit card required
- Access to analytics and tracking

**Note:** Trial emails include a branded "Powered by SwiftMerge" footer that is removed when you upgrade to Pro.

## 3. Creating Your First Campaign

SwiftMerge uses a simple 5-step workflow to create and send email campaigns. This section walks you through each step.

### Step 1: Campaign Setup

Begin by providing basic information about your campaign:

- **Campaign Name:** Enter a descriptive name (e.g., "Q1 Product Launch" or "Monthly Newsletter")
- **Select Draft Email:** Choose an email from your Gmail Drafts folder to use as your template

**Pro Tip:** Create your email draft first with merge field placeholders like {{FirstName}} before starting the campaign wizard.

### Step 2: Data Source Selection

Choose where your recipient list is stored:

#### Google Sheets (Recommended)

- Supports unlimited custom fields
- Easy data management and updates
- Handles large recipient lists

#### Google Contacts

- Direct integration with your contact directory
- Auto-syncs with contact changes
- Standard contact fields (Name, Email, Company, etc.)

### Step 3: Field Mapping

Map your spreadsheet columns or contact fields to merge field variables:

#### Required Field

- **Email Address:** The column containing recipient email addresses

#### Optional Standard Fields

- **First Name:** Maps to {{FirstName}}
- **Last Name:** Maps to {{LastName}}

#### Custom Fields

Create additional merge fields for any column in your data. For example, map a "Company Name" column to {{Company}} for personalized business references.

### Step 4: Test Your Email

Before sending to your entire list, send test emails to verify everything looks correct:

- Enter one or more test email addresses
- Test emails use sample data to show how merge fields appear
- Test emails don't count toward your daily quota

Check for: correct merge field display, proper formatting, working links, and how it appears on mobile devices.

## Step 5: Send

Review the recipient analysis and press the **Launch Campaign** button when ready to send.

## 4. Data Sources

### Using Google Sheets

Google Sheets is the most flexible option for managing your recipient data. Here's how to set up your sheet:

#### Sheet Requirements

- Row 1 must contain column headers
- Include a column with email addresses
- Add columns for any personalization data you want to use

#### Example Sheet Structure

Email	First Name	Last Name	Company	City
john@acme.com	John	Doe	Acme Corp	Dallas
jane@tech.io	Jane	Smith	Tech Solutions	Austin

#### Connecting Your Sheet

You can either paste the Google Sheet URL directly or use the built-in browser to select a sheet from your Google Drive.

### Using Google Contacts

Google Contacts provides a quick way to send to your existing contact groups:

- Select a contact group (e.g., "Customers", "Newsletter Subscribers")
- Email, First Name, and Last Name are automatically imported
- Standard contact fields are available for merge

## 5. Using Merge Fields

Merge fields allow you to personalize each email with recipient-specific information. Fields are enclosed in double curly braces: {{FieldName}}

### Standard Merge Fields

Field	Description
{{Email}}	Recipient's email address
{{FirstName}}	Recipient's first name
{{LastName}}	Recipient's last name

### Custom Merge Fields

You can create custom merge fields for any column in your Google Sheet. For example:

- {{Company}} — Recipient's company name
- {{City}} — Recipient's city
- {{ProductName}} — A specific product for each recipient
- {{ExpirationDate}} — Account or offer expiration date

### Example Email Template

*Subject: Special Offer for {{Company}}*

Hi {{FirstName}},

We're excited to share a special offer with {{Company}}. As a valued partner in {{City}}, you're among the first to hear about our new services...

Best regards,

**Trial accounts:** Limited to 3 custom fields. Pro accounts have unlimited custom fields.

## 6. Testing Your Campaign

Always test your campaign before sending to your full recipient list. Test emails help you verify that everything looks correct.

### What to Check

- **Merge Fields:** Verify all personalization displays correctly
- **Formatting:** Check text styling, images, and layout
- **Links:** Click all links to ensure they work
- **Subject Line:** Confirm merge fields in subject render properly
- **Mobile Preview:** Check how it looks on mobile devices

### Test Email Details

- Enter one or more test email addresses (comma-separated)
- Test emails use sample data from Row 1 of your data source
- **Important:** Test emails do NOT count toward your daily quota

## 7. Analytics & Tracking

SwiftMerge provides real-time tracking to help you understand campaign performance.

### Key Metrics

- **Open Rate:** Percentage of recipients who opened your email
- **Click Rate:** Percentage of recipients who clicked a link
- **Delivery Rate:** Percentage of emails successfully delivered
- **Bounce Rate:** Percentage of emails that failed to deliver

### Dashboard Overview

Your SwiftMerge dashboard displays:

- Total campaigns sent
- Average open and click rates
- Daily email quota usage
- Recent campaign performance

**Pro Feature:** Advanced analytics with detailed engagement tracking and data exports are available with a Pro subscription.

## 8. Account Management

### Account Settings

Access your account settings to manage:

- Subscription status and billing
- Email notification preferences
- Default campaign settings
- Privacy and data export options

### Usage Statistics

Track your usage including:

- Total campaigns sent (lifetime)
- Total emails delivered
- Average open rate vs. industry benchmarks
- Daily quota status

### Daily Email Quotas

Plan	Daily Email Limit
Free Trial	40 emails/day
Pro (Monthly/Annual)	2,000 emails/day

## 9. Pricing & Plans

### Free Trial

Start with a 14-day free trial—no credit card required:

- 500 emails per day
- All core features
- 3 custom merge fields
- Small promotional footer on sent emails

### Pro Monthly

#### \$5 per month

- Up to 2,000 emails per day (subject to your Gmail sending limits)
- Unlimited custom merge fields
- Advanced analytics
- No promotional footer
- Priority support

### Pro Annual (Best Value)

**\$48 per year** (\$4.00/month)

Save **\$12 per year** compared to monthly billing. Includes all Pro features.

### Feature Comparison

Feature	Trial	Pro
Daily email limit	40	<b>2,000</b>
Custom merge fields	3	<b>Unlimited</b>
Advanced analytics	—	✓
Throttle sending	—	✓
Remove branding	—	✓
Priority support	—	✓

## 10. Best Practices

### Email Deliverability

- **Use a professional "From" name** that recipients will recognize
- **Write clear subject lines** that accurately describe your content
- **Avoid spam trigger words** like "FREE!!!", "Act Now", or excessive punctuation
- **Use throttle sending** for large campaigns to maintain good sender reputation
- **Clean your list regularly** to remove invalid or bouncing addresses

### Content Tips

- **Personalize thoughtfully:** Use merge fields to make emails feel personal, not creepy
- **Keep it concise:** Respect your recipients' time with focused messaging
- **Include a clear call-to-action:** Tell recipients what you want them to do
- **Test before sending:** Always send test emails to catch errors

### Data Management

- **Verify email addresses** before adding them to your list
- **Keep data up to date:** Regularly update contact information in your source sheet
- **Respect opt-outs:** Remove unsubscribed recipients promptly
- **Back up your data:** Keep copies of important contact lists

# 11. Troubleshooting & FAQ

## Common Issues

### Merge fields show as {{FieldName}} instead of actual values

- Check that field names in your email exactly match your column headers
- Verify the field mapping in Step 3 is configured correctly
- Ensure there are no extra spaces in field names

### My sheet isn't loading

- Verify you have permission to access the Google Sheet
- Check that the sheet URL is complete and correct
- Try using the sheet browser instead of pasting the URL

### Campaign shows fewer recipients than expected

- Some recipients may be filtered due to invalid email addresses
- Check if any recipients are on your opt-out/suppression list
- Ensure Row 1 contains headers (it won't count as a recipient)

## Frequently Asked Questions

### Q: How many emails can I send per day?

A: Trial accounts can send 40 emails per day. Pro accounts can send up to 2,000 emails per day. These limits are also subject to Gmail's own sending limits.

### Q: Do test emails count toward my daily quota?

A: No, test emails do not count toward your daily sending quota.

### Q: Can I use SwiftMerge with a free Gmail account?

A: Yes, SwiftMerge works with both free Gmail accounts and Google Workspace accounts.

### Q: Is my data secure?

A: Yes. SwiftMerge keeps all your data within your Google account. We do not store or share your contact lists, email content, or campaign data with third parties.

### Q: Can I cancel my subscription anytime?

A: Yes, you can cancel your Pro subscription at any time. You'll continue to have access until the end of your billing period.

### Q: What happens when my trial ends?

A: After your 14-day trial, you can continue with limited free functionality or upgrade to Pro for full access.

## Need More Help?

Visit [swiftmerge.app](https://swiftmerge.app) for tutorials, updates, and support.  
Contact us: [support@swiftmerge.app](mailto:support@swiftmerge.app)

*Thank you for choosing SwiftMerge!*