Google Sheets Integration with Alchemer Workflow

Overview

Google Sheets is a cloud-based spreadsheet platform used by organizations to store, manage, and collaborate on structured data. It enables teams to organize information, automate workflows, and analyze data in real time.

The Alchemer integration with Google Sheets supports retrieving rows, updating rows, and adding new rows directly within a workflow. The Alchemer Google Sheets integration allows workflows to use information stored in Google Sheets to get data, personalize workflow paths, enrich routing logic, create merge codes, and update or add to Google Sheets without manual intervention.

Common uses for the Alchemer Google Sheets integration

- Personalize emails and workflow steps using values from Google Sheets
- Use Google Sheets row values inside workflow logic
- Automatically retrieve and update rows between Alchemer and Google Sheets
- Reduce manual spreadsheet edits and ongoing record maintenance
- Keep Google Sheets synchronized with information collected during workflow execution
- Add a new row to a Google Sheet each time a workflow runs
- Automate decisions or branching based on spreadsheet values

What can the Alchemer Google Sheets integration do?

- Get data
- Update data
- Push data

You will need

- Google Sheets API access and credentials (Google login)
- An Alchemer plan that includes integrations and the Integration Manager permission enabled.
    - Contact us if you are unsure if your plan includes integrations.

Setup Alchemer Google Sheets integration in workflows

Google Sheets | Get data

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You will need:

- Google login associated with your Google Sheets
- Fields in your workflow containing the lookup value used to find a specific row
- Row 1 of the worksheet populated with column headers for all fields you plan to retrieve

Configure the action

1. Open your workflow in **Workflow builder**.
2. On the right side, drag and drop the **Google Sheets** connection where you want the action to trigger.
3. In the connection box, click the **pencil icon** in the top-right corner.
4. Select **Google Sheets | Get data**.
5. **Google Sheets | Authentication:** Select an existing authentication or create a new one.
6. **Google Sheets | Sheet ID:** Enter the ID of the Google Sheet. You can find the sheetID in the Google Sheet URL. Paste the string of characters between /d/ and /edit into the SheetID box (the below highlighted portion only).
   - Example: https://docs.google.com/spreadsheets/d/<sheetID>/edit
7. **Google Sheets | Select worksheet:** Choose the worksheet you want to query.
   - **Note**: If you see a continuous loading gray bar and no dropdown list appears, you either put in the incorrect sheetID or the sheetID is not associated with the Google Sheets account you authorized
8. **Google Sheets | Get row:** Select the workflow fields you want to use to find a specific Google Sheets row.
9. **Google Sheets | Set field format:** Map each lookup field to its expected data type using the dropdowns. The left dropdown lists your lookup fields, and the right dropdown lists the type:
   - Text
   - Number
   - Date
   - Boolean
10. **Google Sheets | Get data back:** Select which Google Sheets row fields should be returned to your workflow (for routing, actions, or merge codes).
11. Save the action.

Status codes

- 200: A row was successfully found
- 400: The integration returned an error or no row was found

Google Sheets | Update data

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You will need:

- Google login associated with your Google Sheets
- Workflow fields containing the lookup value used to find the row to update
- Row 1 of the worksheet filled with the column header names for all fields you want to update

Configure the action

1. Open your workflow in **Workflow builder**.
2. Drag and drop the **Google Sheets** connection onto the workflow timeline at the position where the update should occur.
3. Click the **pencil icon** in the connection box.
4. Select **Google Sheets | Update data**.
5. **Google Sheets | Authentication:** Select or create an authentication.
6. **Google Sheets | Sheet ID:** Enter the ID of the Google Sheet. You can find the sheetID in the Google Sheet URL. Paste the string of characters between /d/ and /edit into the SheetID box (the below highlighted portion only).
    - https://docs.google.com/spreadsheets/d/**<sheetID>**/edit
7. **Google Sheets | Select worksheet:** Select the worksheet containing the row you want to update.
    - **Note**: If you see a continuous loading gray bar and no dropdown list appears, you either put in the incorrect sheetID or the sheetID is not associated with the Google Sheets account you authorized
8. **Google Sheets | Get row:** Select the fields used to identify the row you want to update.
9. **Google Sheets | Set field format:** Map each lookup field to its expected data type using the dropdowns. The left dropdown lists your lookup fields, and the right dropdown lists the type:
    - Text
    - Number
    - Date
    - Boolean
10. **Google Sheets | Update data:** Choose the workflow fields whose values will update the corresponding Google Sheets columns.
11. **Google Sheets | Get data back:** Select metadata fields, such as status code or message, for debugging.
12. Save the action.

Status codes

- 200: A row was successfully found and updated
- 400: The integration returned an error or the row could not be found

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Google Sheets | Push data

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You will need:

- Google login associated with your Google Sheets
- The Sheet ID for the Google Sheet where you want to push the data
- At least one worksheet
- Row 1 of the worksheet filled in with the column header names for the columns you want to push data into

Configure the action

1. Open your workflow in **Workflow builder**.
2. Drag and drop the **Google Sheets** connection onto the workflow timeline at the position where the push should occur.
3. Click the **pencil icon** in the connection box.
4. Select **Google Sheets | Push data**.
5. **Google Sheets | Authentication:** Select or create an authentication.
6. **Google Sheets | Sheet ID:** Enter the ID of the Google Sheet. You can find the sheetID in the Google Sheet URL. Paste the string of characters between /d/ and /edit into the SheetID box (the below highlighted portion only).
   - https://docs.google.com/spreadsheets/d/**<sheetID>**/edit
7. **Google Sheets | Select worksheet:** Select the worksheet you want to push data into.
   - **Note**: If you see a continuous loading gray bar and no dropdown list appears, you either put in the incorrect sheetID or the sheetID is not associated with the Google Sheets account you authorized
8. **Google Sheets | Select the data to push:** Click **Add a new mapping** to map each workflow field to the Google Sheets column it should populate. Add one mapping per column.
   - The values in row 1 of the worksheet are shown as the column headers. The right-most column you want to use must have a header value.
   - Each time the action runs, data is added (appended) to the end of the sheet in a new row, matched by column letter. If you add, remove, or reorder columns in your sheet, you must run this setup again.
   - **Data prep options:** Optionally transform values before they are pushed. **Strip HTML tags from inputs** is selected by default.

9. **Google Sheets | Get data back:** (Optional) Select metadata fields, such as status code or message, for debugging. Metadata is also available as merge codes.
10. Save the action.

Status codes

- 200: The data was successfully pushed to Google Sheets
- 400: The Google Sheets integration returned an error

Testing and Troubleshooting

Testing and Validation

How to test

- Trigger the workflow and monitor runs using the **Monitor** tab.
- Click into individual workflow runs to see metadata outputs.
- Confirm that the expected Google Sheets row was retrieved, updated, or added.
- Use returned metadata values for verification and debugging.

How to verify results

- Check the impacted row directly in Google Sheets.
- Ensure retrieved, updated, or pushed values match expected behavior.
- For Push data, confirm the new row appears at the bottom of the worksheet with values in the correct columns.

Monitoring Integration Activity

Where to find logs

- Go to **Results → Monitor**.
- Select the Google Sheets integration step you want to inspect.

What logs display

- Input/Output values

Troubleshooting

Lookup failures

- Invalid identifier values
- No matching rows found
- Incorrect type assigned to a lookup filter (e.g. searching a date as Text)

Push data issues

- Data lands in the wrong columns: the worksheet columns were changed after setup. Run the Push data setup again.
- A column is missing from the mapping list: make sure row 1 has a header value for every column you want to use, including the right-most one.

FAQs

What permissions do I need?
Integration Manager in Alchemer and Google Sheets API access.

When does the integration run?
When the workflow reaches the step containing the Google Sheets integration action.

Can I use multiple Google Sheets actions in one workflow?
Yes. Actions can be used independently or work together.

Why isn't my data updating?
Check the monitor logs for lookup issues, mapping errors, or Google Sheets API failures.

What if I need additional functionality?
Contact Alchemer Support for enhancement requests.

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