

GetSwift & Google Sheets Integration Quick Start Guide

[Google Sheets](#) is a free and simple way to create and edit spreadsheets online, allowing you to store your customer and order information in the cloud. GetSwift can be integrated with Google Sheets via Zapier. The integration setup process is simple and takes only 30 minutes to set up.

[Zapier](#) allows you to move information between your web apps automatically, so you can focus on your running your business instead of on administrative tasks. With Zapier you can send new orders from Google Sheets directly to your GetSwift account, which will then appear on your map as a new delivery! If you do not have web developers who can create help you create direct connections between your different systems, then this is the perfect solution for you.

Before we get started, be sure you've created a Google Sheet spreadsheet with all the necessary column headers that you'll need to dispatch a job. Typical columns include: customer name, customer address, customer suburb, customer zipcode/postal code, customer phone & customer email.

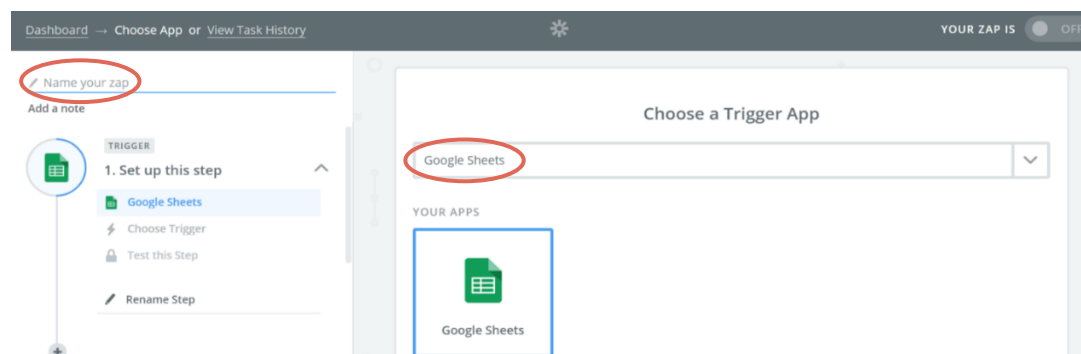
Also make sure you create accounts with both GetSwift and Zapier. Get started with Zapier here: <https://zapier.com/sign-up/>.

Step 1: The first thing we want to do is set up a workflow with Zapier by clicking "MAKE A ZAP" in the header of the webpage.

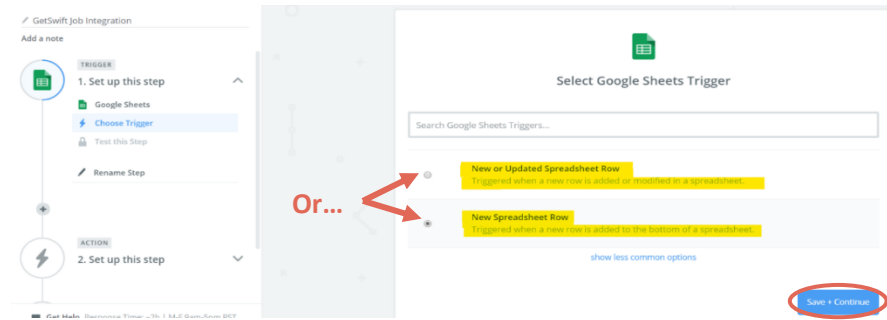


Step 2: Name your Zap and begin the workflow by setting up the 'Trigger'.

Step 2.1: Choose App > Google Sheets.

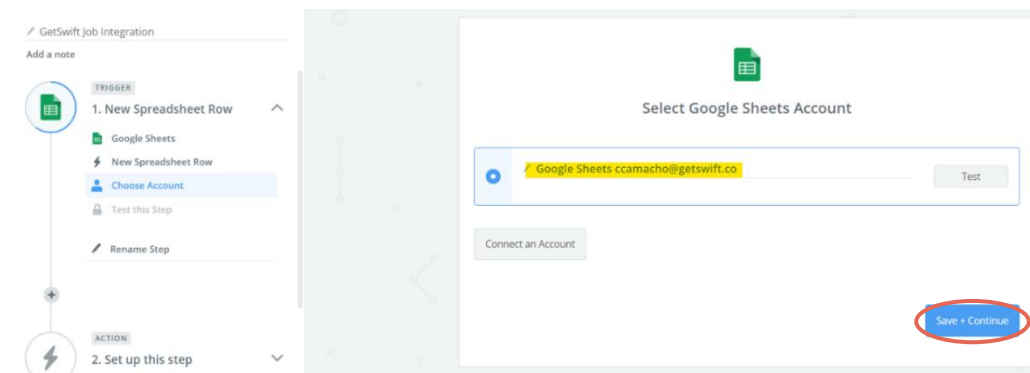


Step 2.2: Choose Trigger > Choose the trigger that best suits your current workflow and click “Save + Continue”.



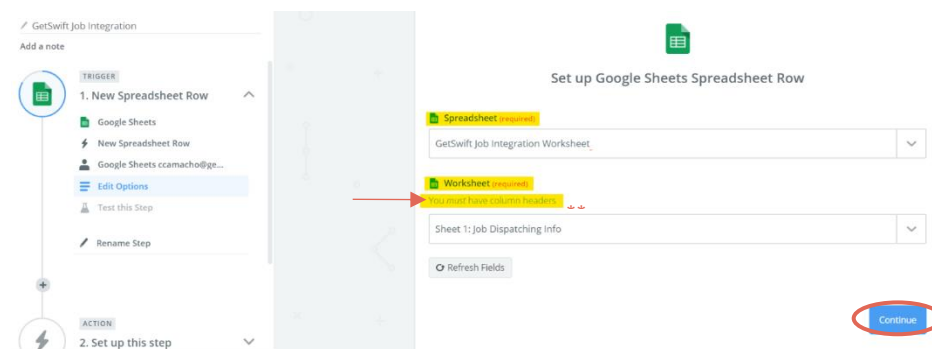
Step 2.3: Choose Account > Connect your Account.

Keep in mind, you must click “Allow” Zapier to view and manage the files & your spreadsheets in your Google Drive so that your spreadsheet may be accessed.



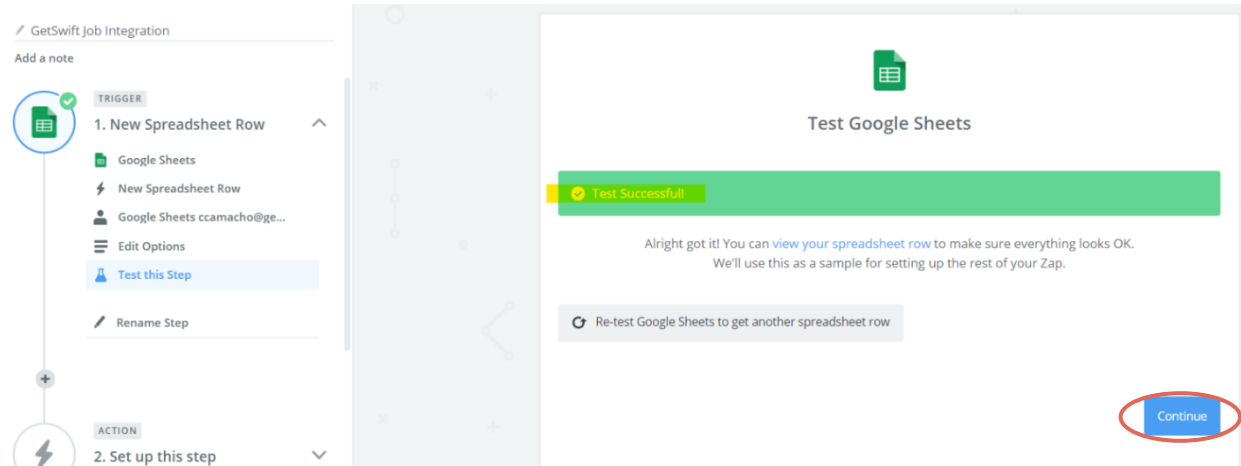
Step 2.4: Set up Options > Now go ahead and choose the Spreadsheet and Worksheet from the selected account that houses the job data that you wish to integrate with the GetSwift platform.

Here is where those column headers mentioned previously are important!



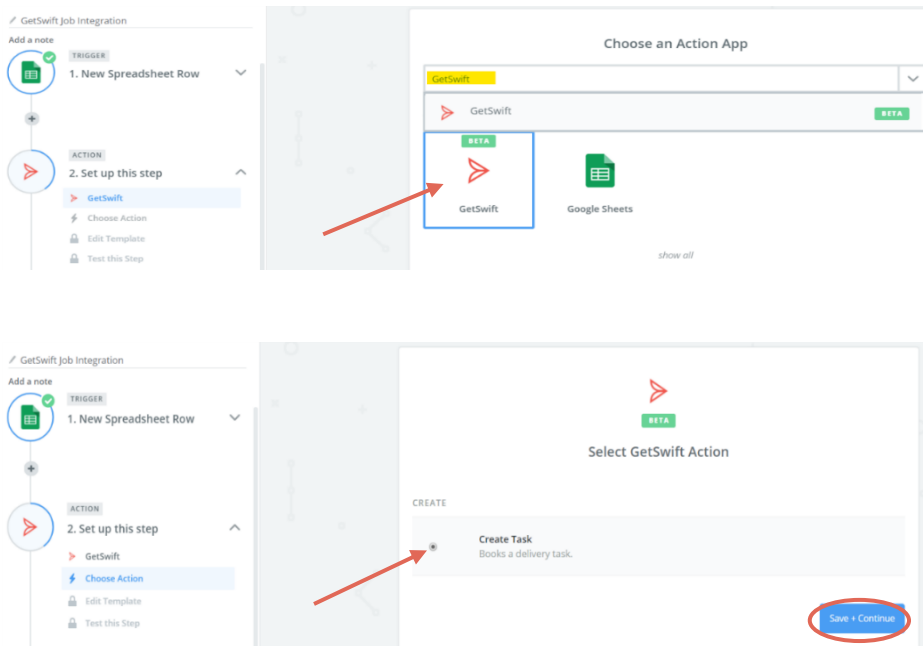
Step 2.5: Test this Step > Once you click “Continue” from the ‘setup options’, your sheet will be tested by the Zapier interface to be sure everything is readable.

If you run into any errors at this point, you’ll need to review the excel sheet. Be sure to remove any formatting, all row content is valid and consistent to the column header, and remove spaces that are not part of the cell value.



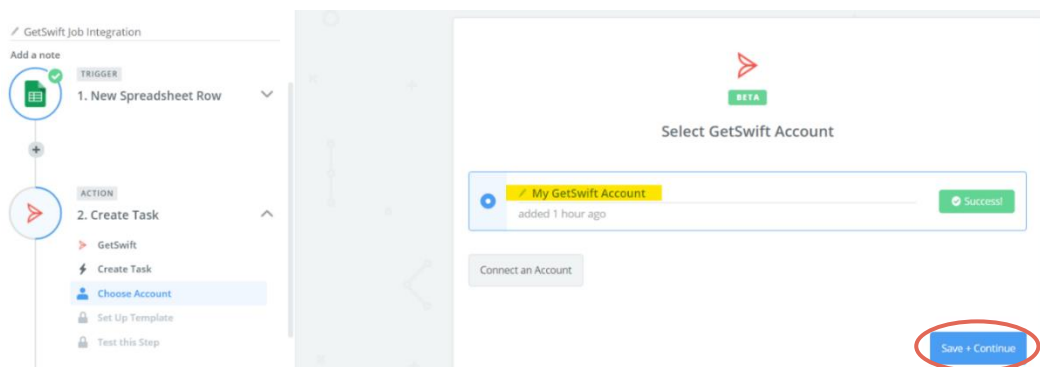
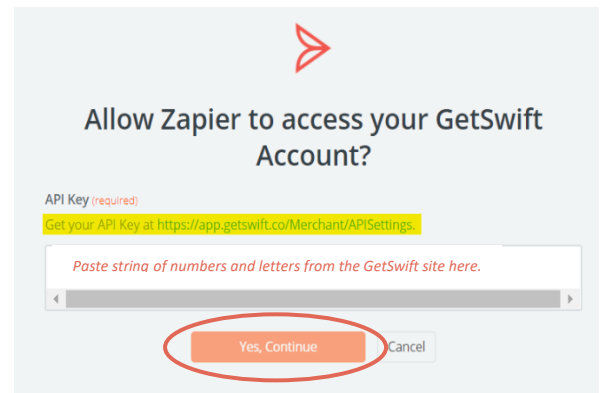
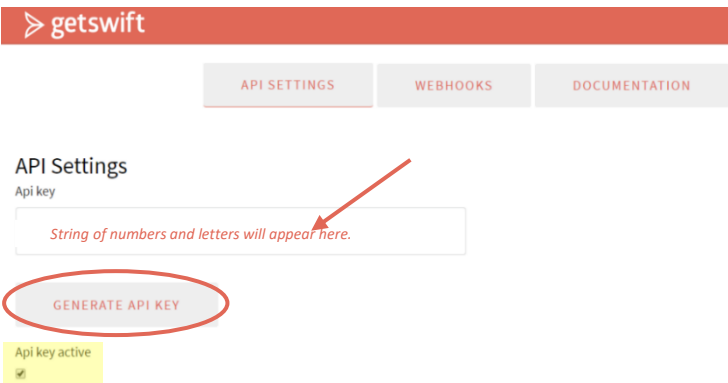
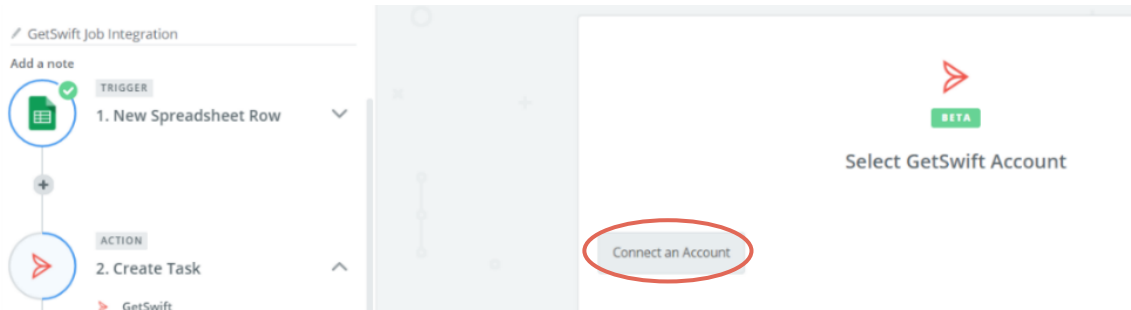
Step 3: Now you’re ready for the final step of setting up an Action.

Step 3.1: Choose Action & Create Task > Type “GetSwift” as the Action and click the icon that appears. You’ll then select “Create Task” and “Save + Continue”

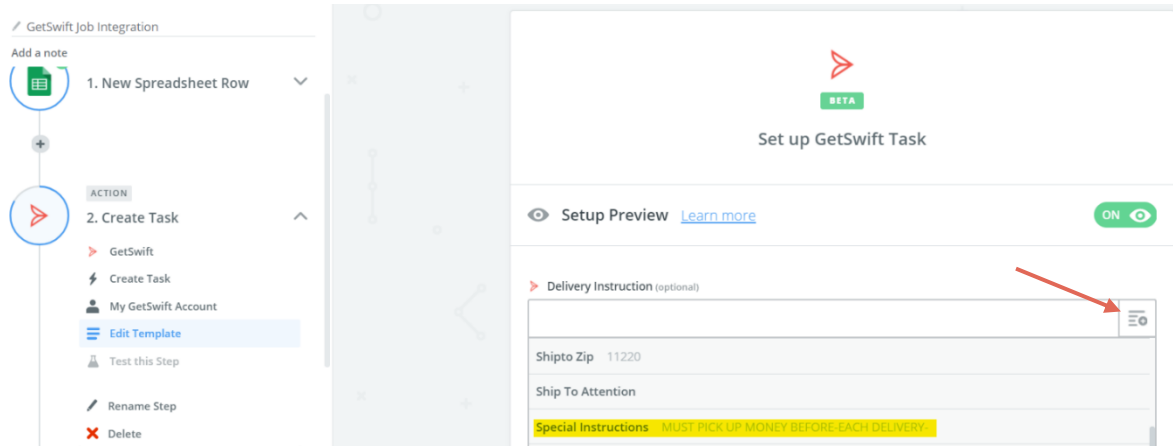


Step 3.2: Select GetSwift Account > Click “Connect Account”. You'll need the API key associated with your GetSwift account, which you can find here: <https://app.getswift.co/Merchant/APISettings>.

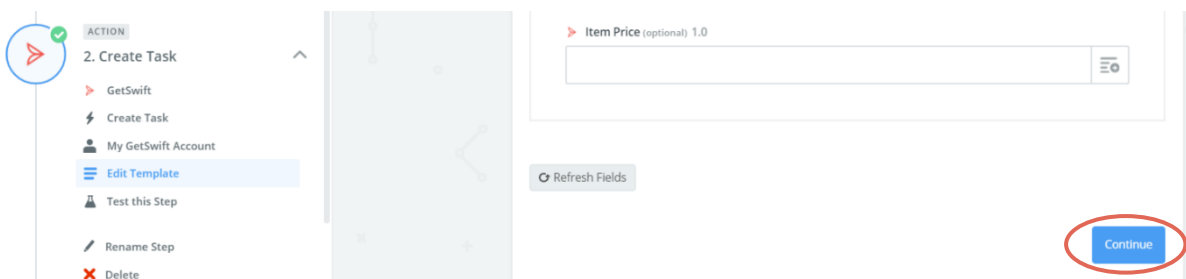
Generate an API Key in GetSwift if you haven't done so already, make sure “API Key Active” is checked, and click “Update” at the bottom of the screen. Copy and paste the API key back into Zapier and your GetSwift account should now be linked. Select “Save + Continue” to move on.



Step 3.3: Edit Template > We are almost there! Now we just need to align the GetSwift tasks with our column headers so the correct information can be transferred to your GetSwift Account. You can click the ‘+’ next to each empty field to begin and a drop down will appear with your column headers.



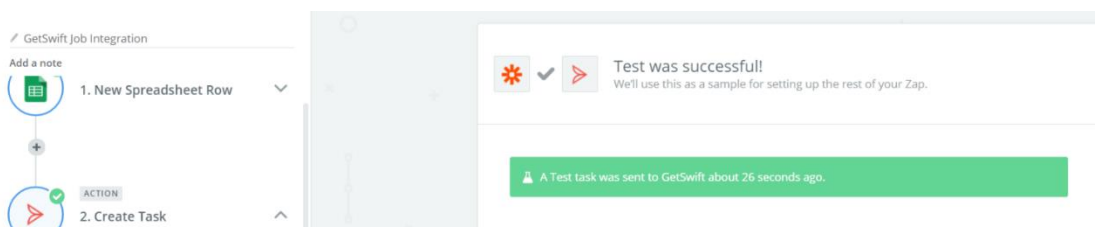
Once you're done filling in this template, you can click "Continue" to test this Zap.

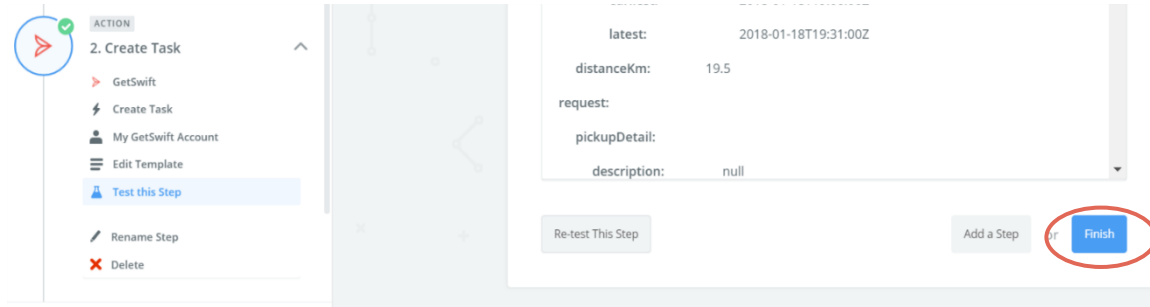


Step 3.4: Test > You'll be directed by Zapier to test task you just created. Go ahead and press 'Send Task to GetSwift'.

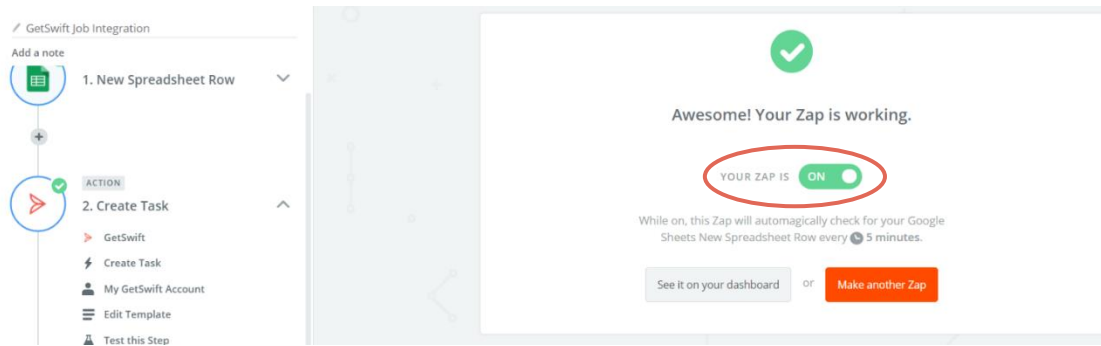
If you receive an error at this point you may have to go back to the sheet that you triggered to make sure all formatting is clear, data is valid (i.e. pick-up/drop off address), and unnecessary spaces have been removed

If you see "Test was successful!" then you are ready to turn on your Zap by clicking finish at the bottom of your screen.





Once you have clicked “Finish” click your Zap from ‘OFF’ to ‘ON’, and you are good to go! You should now see the jobs within your Google Sheet in your Merchant Account Map view, which will be uploaded in 5 or 15 minutes intervals (depending on your Zapier plan).



A few things to keep in mind:

- If you are always picking up from the same location, simply write the address into the field. This will cause the pickup address to remain the same for every order. (This applies to all fields)
- For pickup and destination address fields - you must use either Full Address AND/OR Street Address + City + Zip Code (the more information the better)
- 'Future Tasks' are based on the pickup time (not delivery time).

If you need any additional guidance you can review this helpful link:

<https://zapier.com/help/getswift/> or [contact us today](#).