KEYSTONE
EDUCATION GROUP

Custom integration via: Zapier or Make

User’s guide

Keystone Education Group
Version 1.0
2024-06-12

Table of Contents

1 Overview

If your CRM is not supported directly via ***Zapier*** or ***Make*** (legacy name: ***Integromat***) integration platforms there is a chance you can build the integration inside either of these services with the help of a universal module using webhooks.

All you need to start with is to own ***Zapier*** or ***Make*** account that will be managed directly by you.

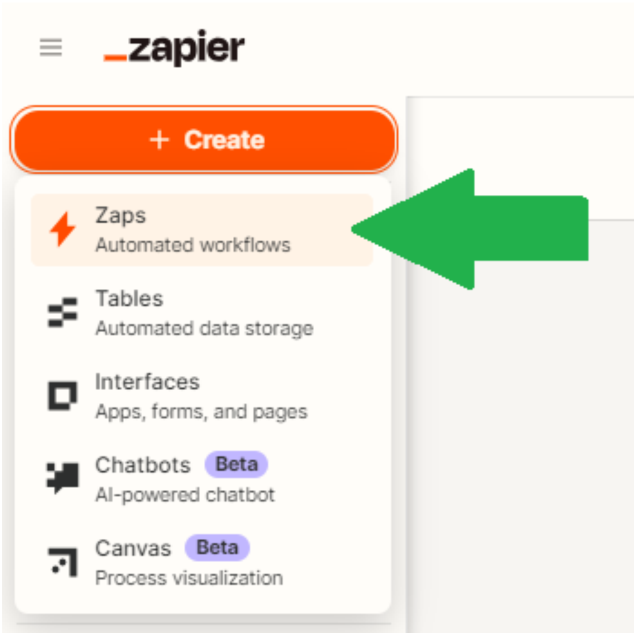
To create the accounts, please sign up here:

- Zapier: sign-up
- Make: sign-up

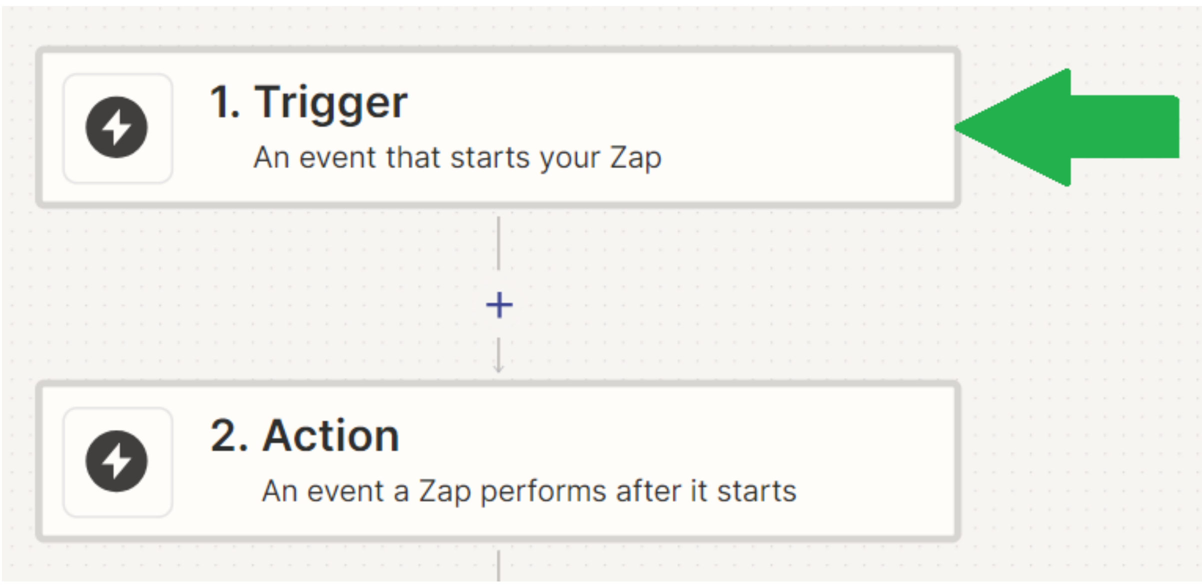
2 Custom integration via Zapier

2.1 Connecting to Keystone

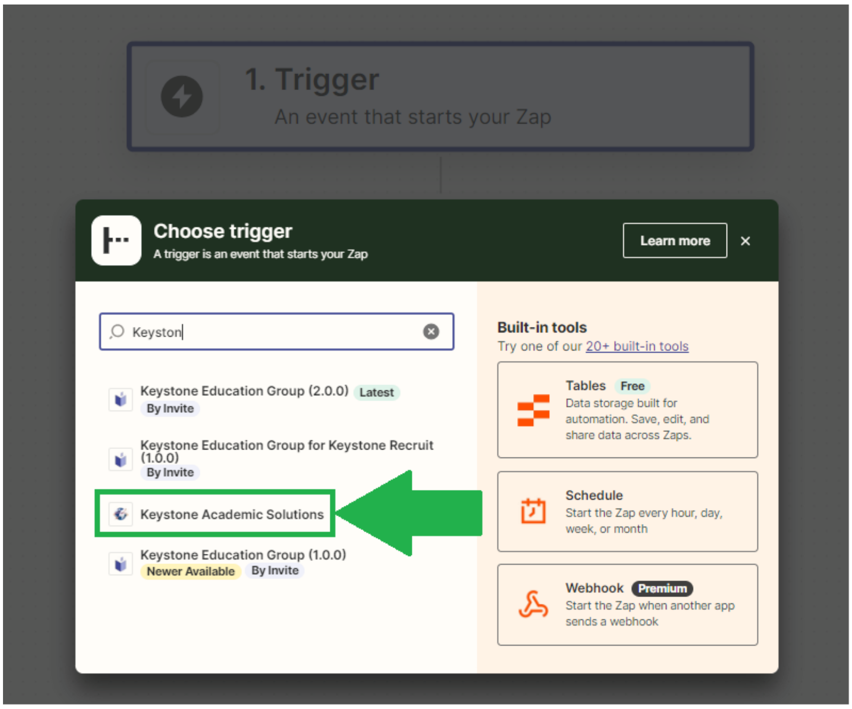
1. Log in to you *Zapier* account
2. Create a new zap:



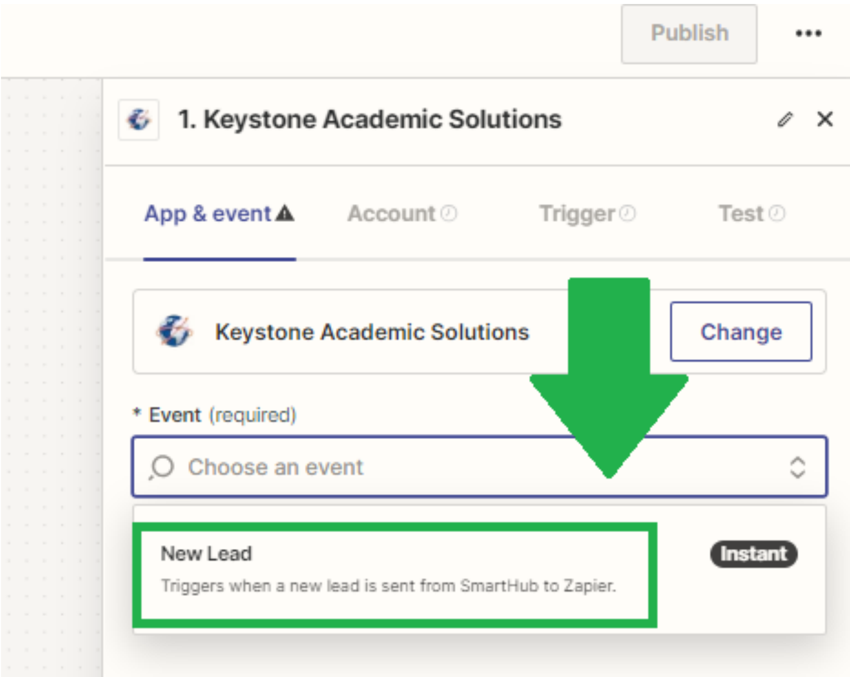
3. In the design window, click on the *Trigger* box:



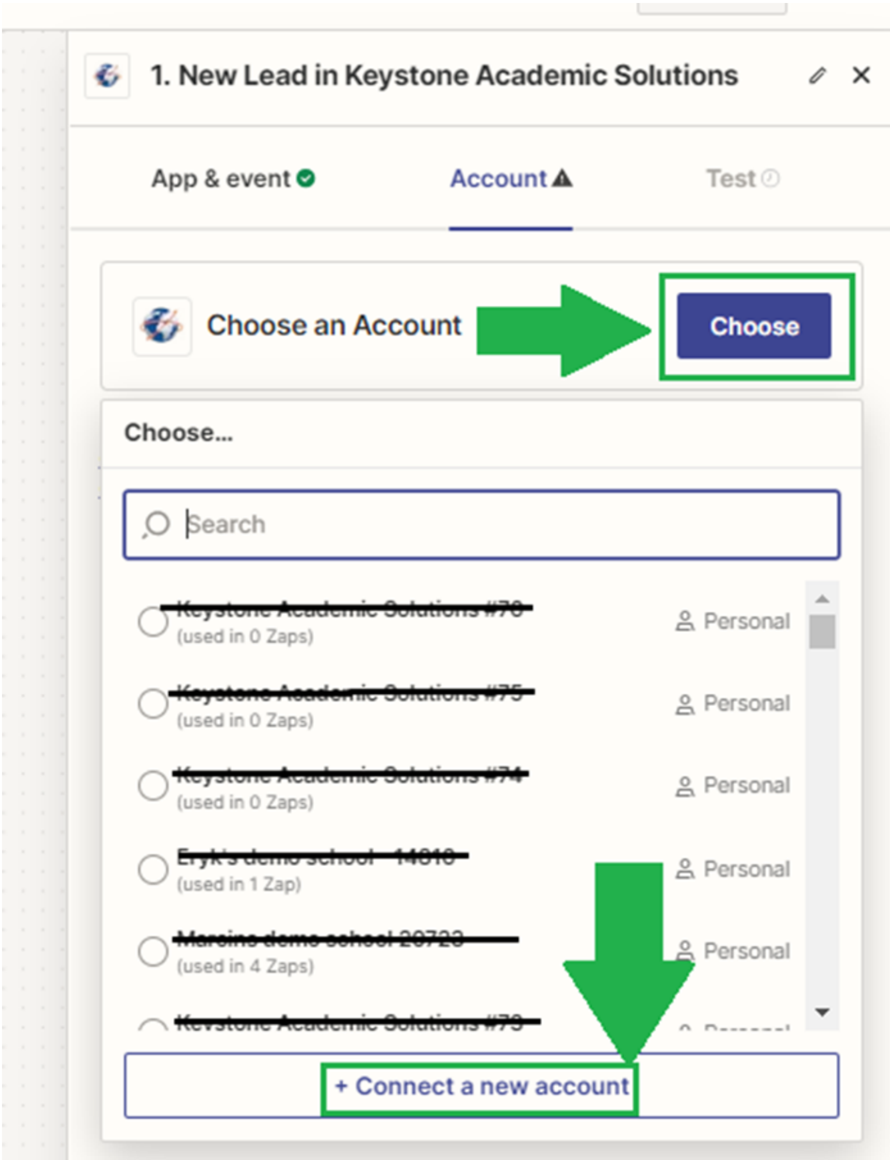
4. In the pop-up form start typing in: *Keystone* and pick **Keystone Academic Solutions** from the list:



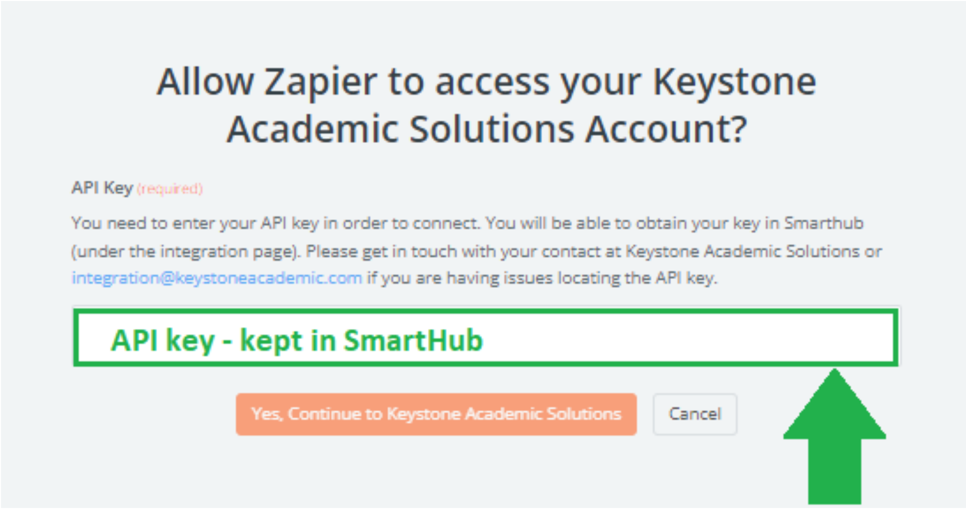
5. In the right hand side menu, click on *'Event'*, next choose: ***New Lead*** and click on '*Continue'* button at the bottom



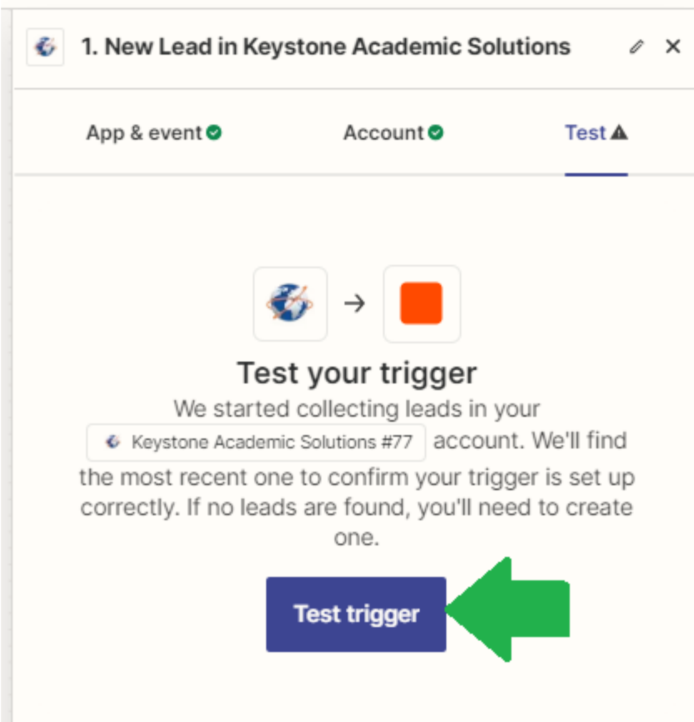
6. Click on ‘*Choose’* button in this step and then on *‘Connect a new account*’



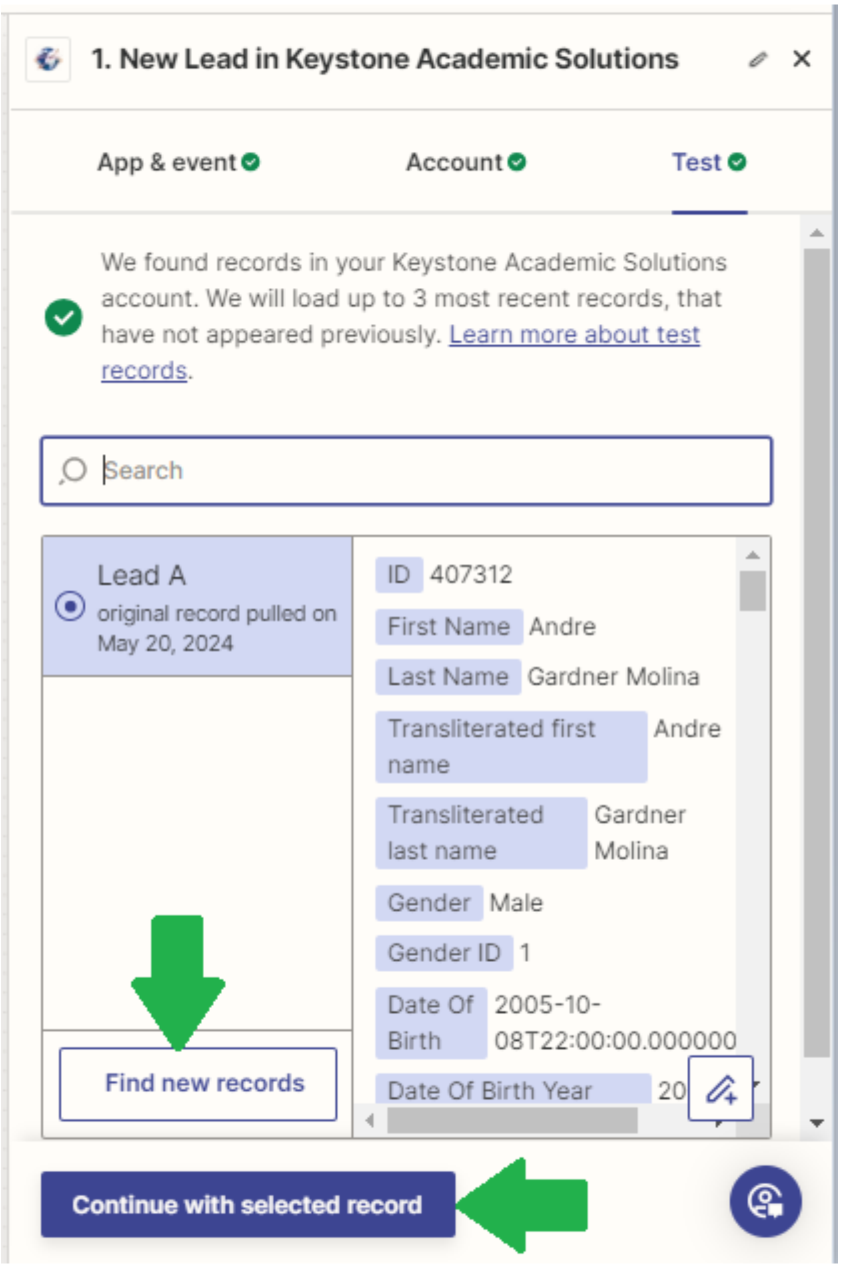
7. In the pop-up window please paste own unique **API key** that can be found in **SmartHub** and click on *‘Yes. Continue to Keystone Academic Solutions’*.
Don’t you have your API key? Contact your Keystone Customer Success Manager.



8. Click on *'Continue'* to move to the next step: *'Test'*. Click on *'Test trigger'*

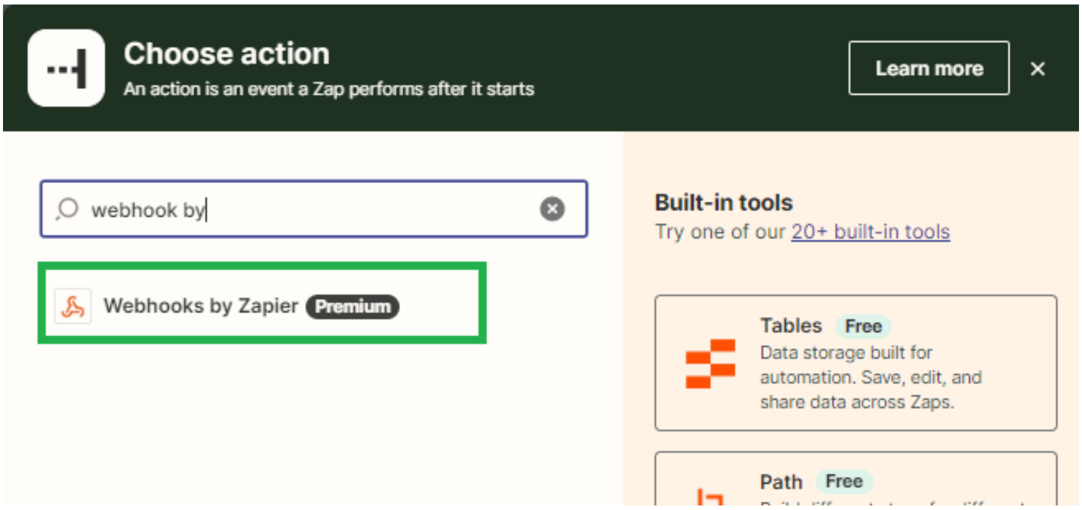


Zapier will now pull a test lead from your **SmartHub** profile – you can use the default one or pull a different one by clicking on *'Find new records'*. Eventually click on *'Continue with selected record'*

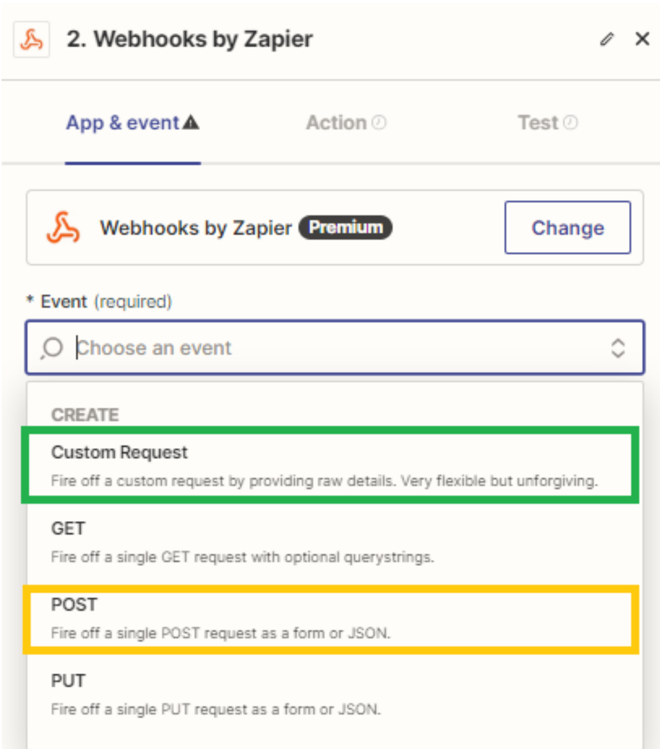


2.2 Connecting to the CRM endpoint Url

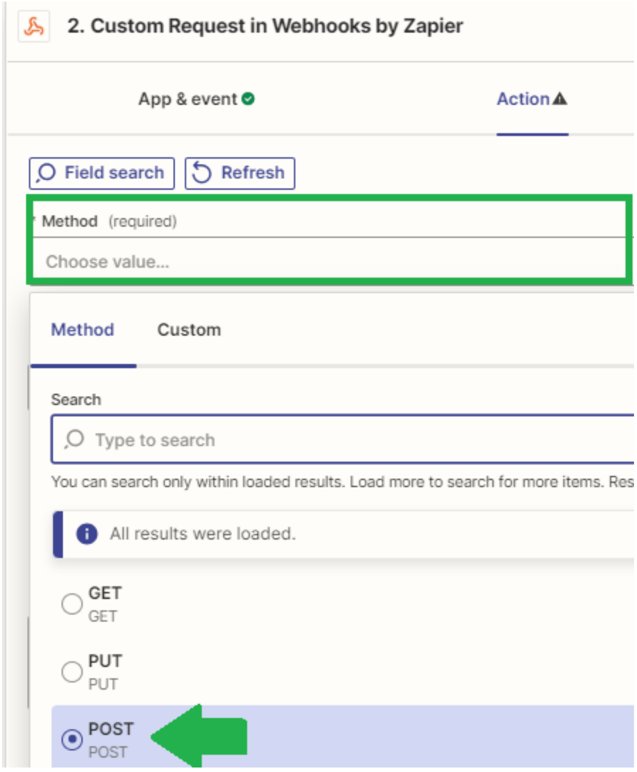
1. In the pop-up window that will show up on completion of the *'Connecting to Keystone'* step, type in: *Webhook by Zapier* and pick it:



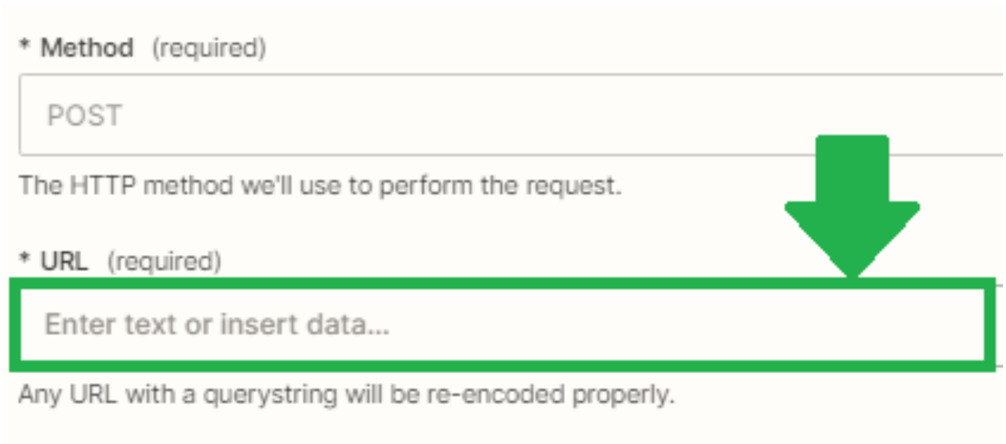
2. On the right hand side menu pick the *'Event'*. The *'Custom Request'* event is a preferred one as it's more customizable in the next steps but the *'POST'* one might be chosen as well. We'll continue here with the *'Custom Request'* option:



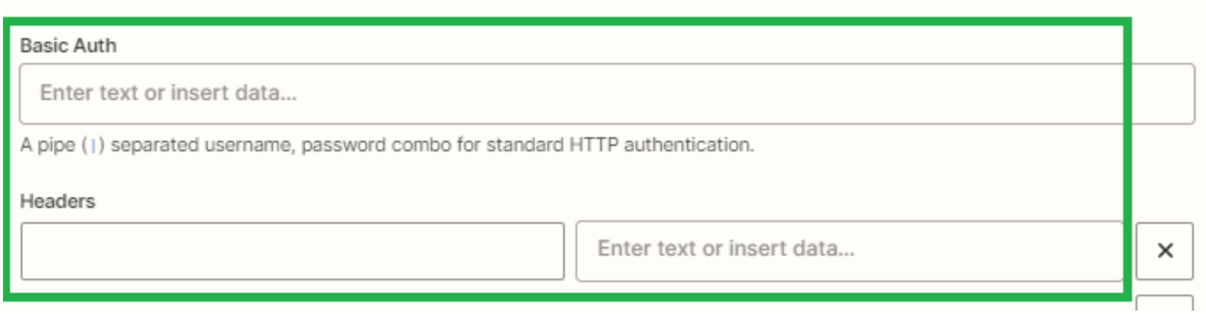
3. Now pick the ***POST*** method from the drop-down list:



…and enter the **endpoint Url** of your CRM here:

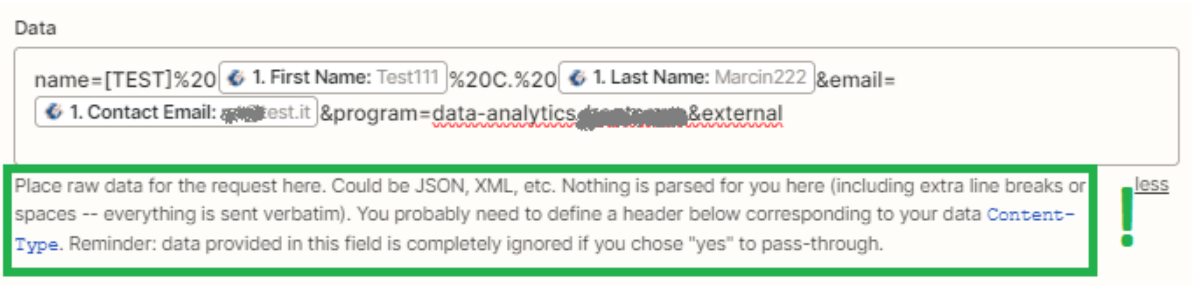


4. **Authentication**. You can authenticate either via basic auth (providing user and password) or use other authentication methods in the header (e.g. token):

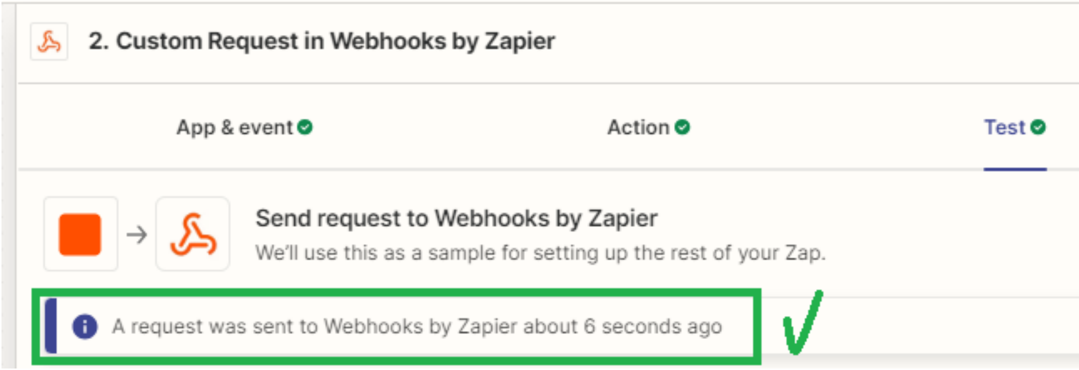


For instance:

5. **Data to transfer**. In the *Data* field, you need to input the data to transfer in the format accepted by your API. According to the example given above (*Content-type* header), this is *form-urlencoded:*



6. Once the endpoint Url, headers and the data structure is provided click on ***Continue*** and on the ***Test*** button in the next screen. If everything was set up correctly, a confirmation message will show up:



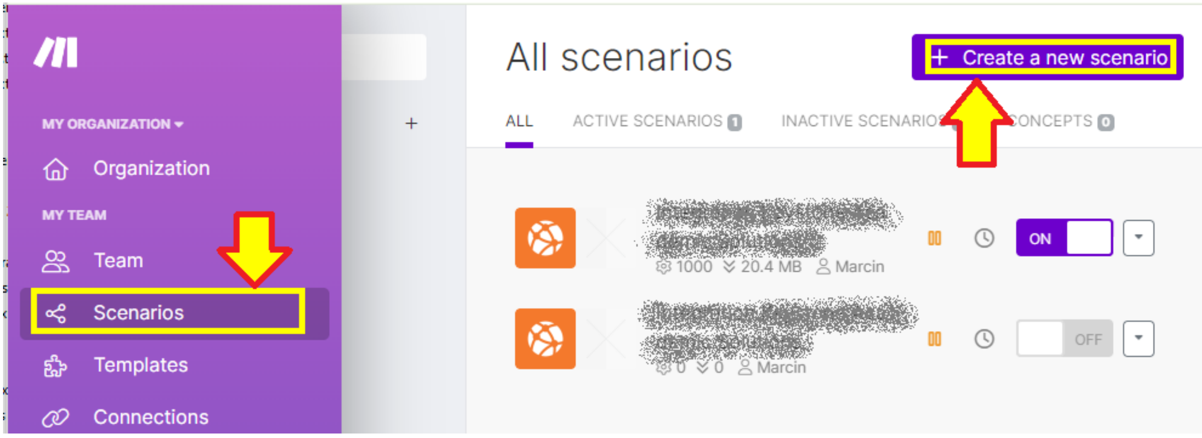
7. Eventually publish the Zap by clicking on the  button.

Please find the full description of this module at Zapier's help webpage:
https://help.zapier.com/hc/en-us/articles/8496326446989-Send-webhooks-in-Zaps#h_01H91E6P2BEC84G2PWT4541P6Q
to discover more features.

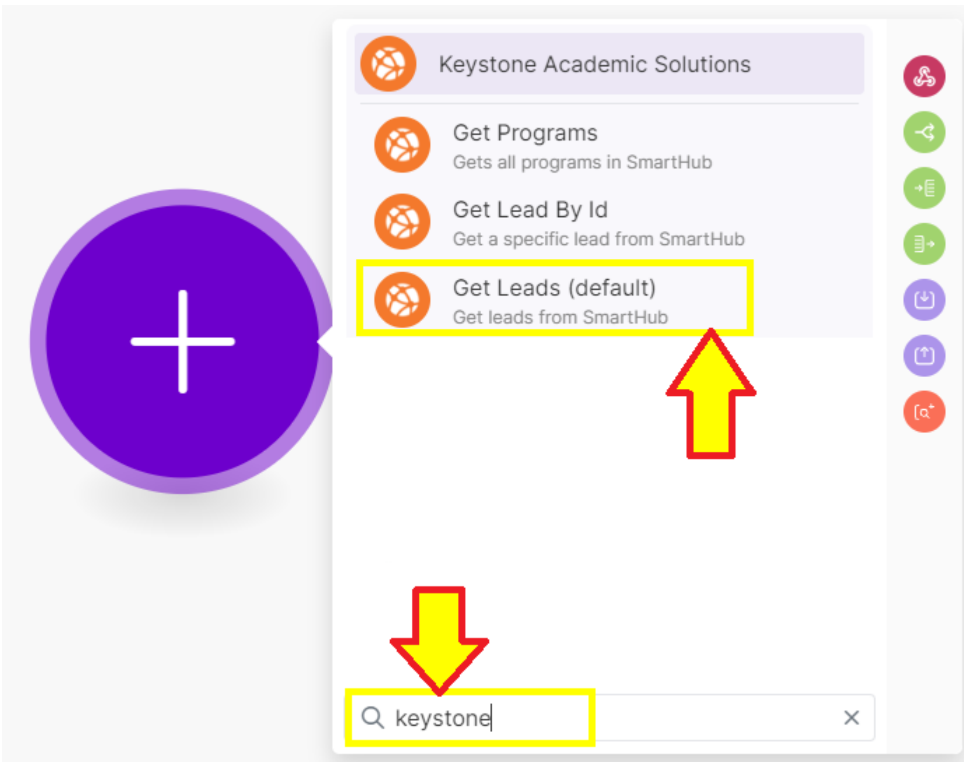
3 Custom integration via Make

3.1 Connecting to Keystone

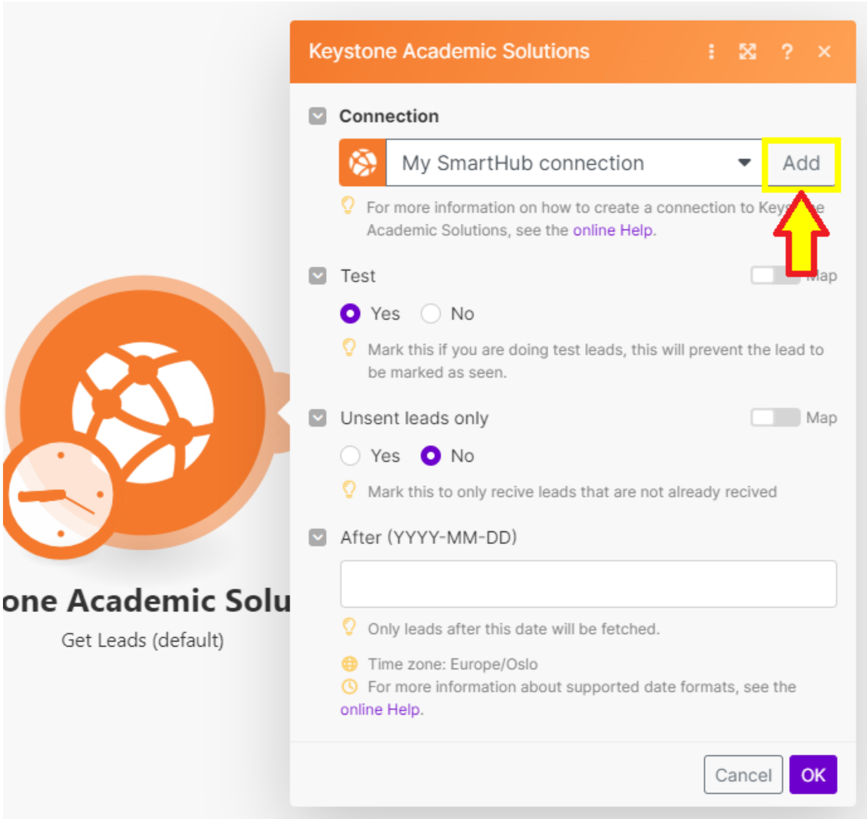
1. Log in to your Make account
2. Create a new scenario:



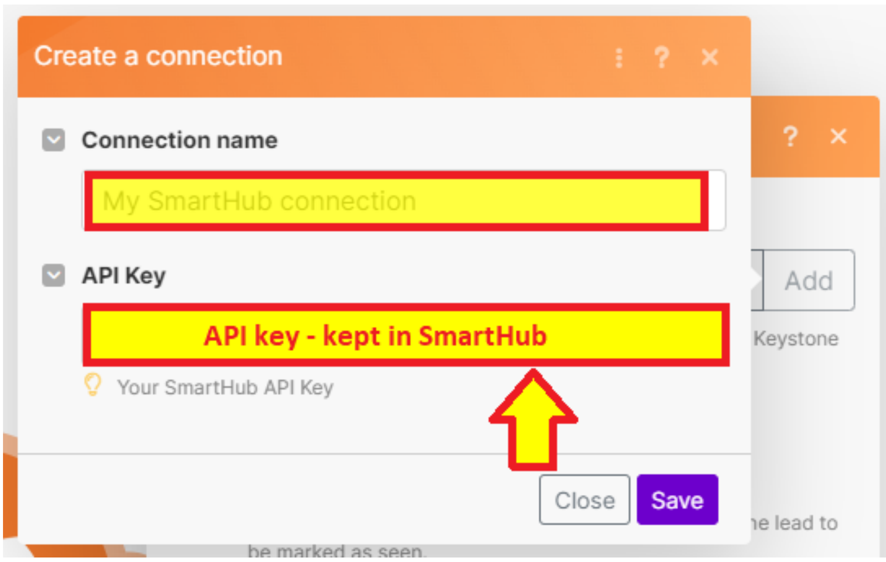
3. Pick Keystone module - start typing: *Keystone* and choose: **Get Leads (default)**



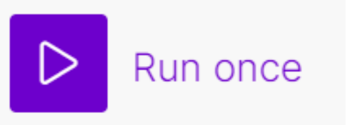
4. In this step click on *'Add'* to define a new connection to Keystone:



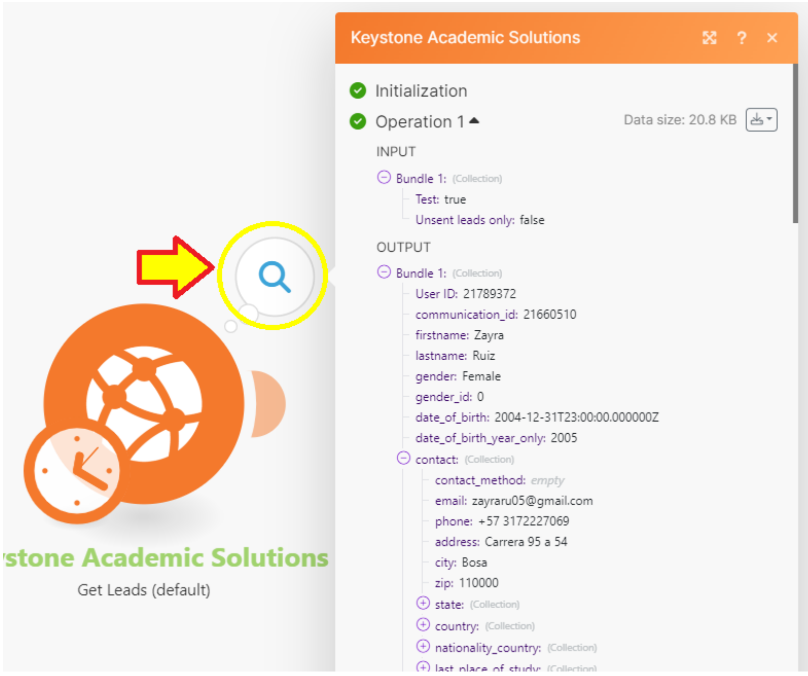
Paste own unique **API key** that can be found in **SmartHub** and click on *'Save'*. In the initial window click on *'OK'*.
Don't you have your API key? Contact your Keystone Customer Success Manager.



5. **Very important!** Click on *'Run once'* button in the bottom left corner:



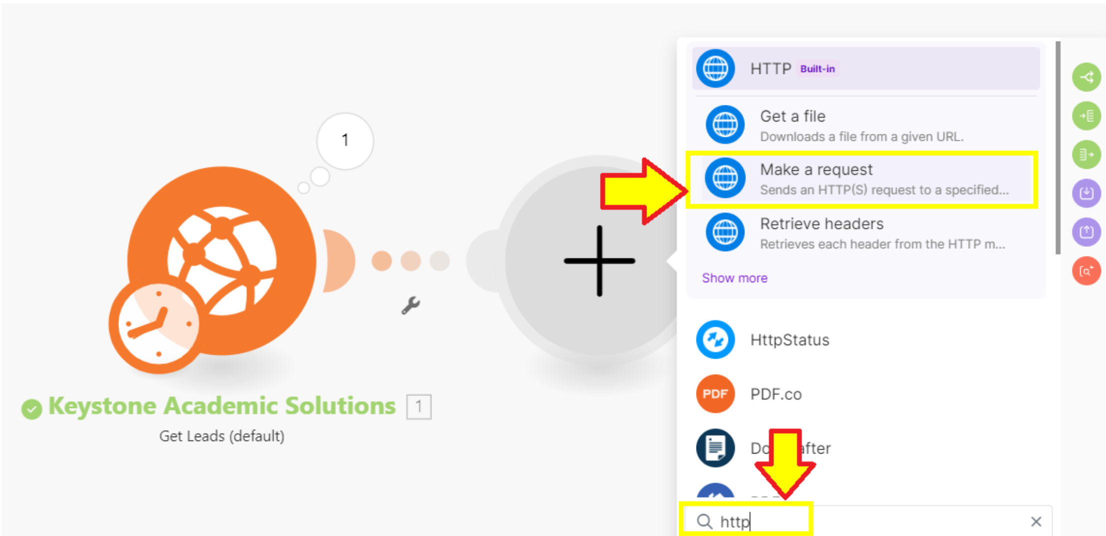
to pull the initial lead from Keystone.
When it's done, click on the bubble to open the details window:



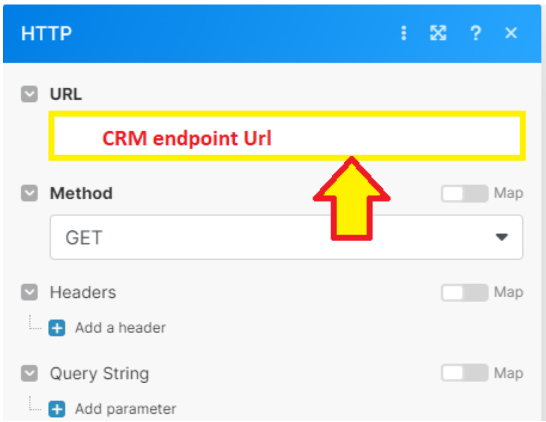
3.2 Connecting to the CRM endpoint Url

1. Next, add the webhook module:
    a. Click here:

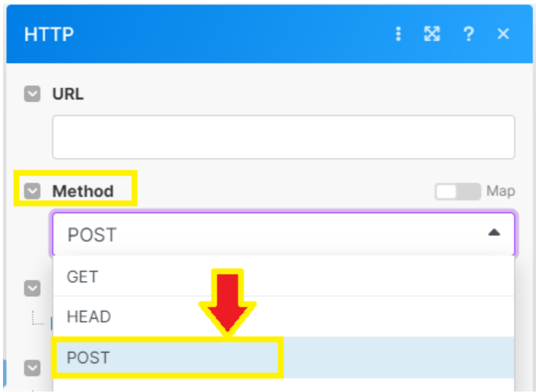
    b. Type in: ***http*** in the search bar, and select: *'Make a request'* option:



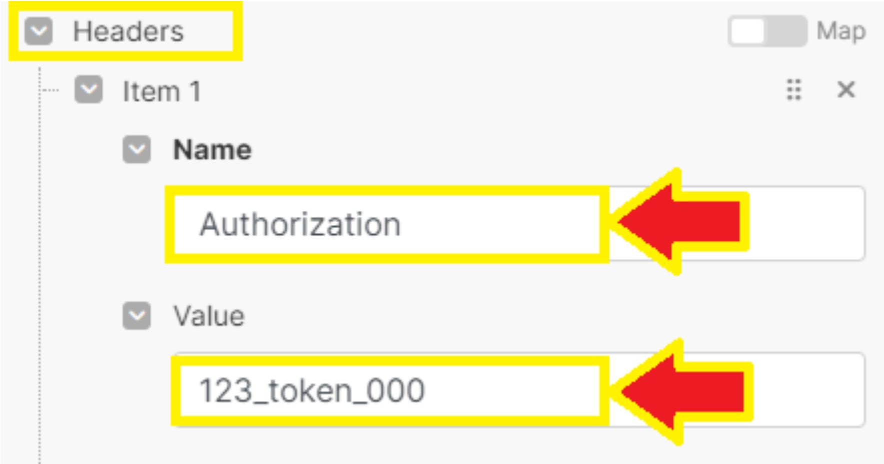
c. Add you CRM ***endpoint Url***:



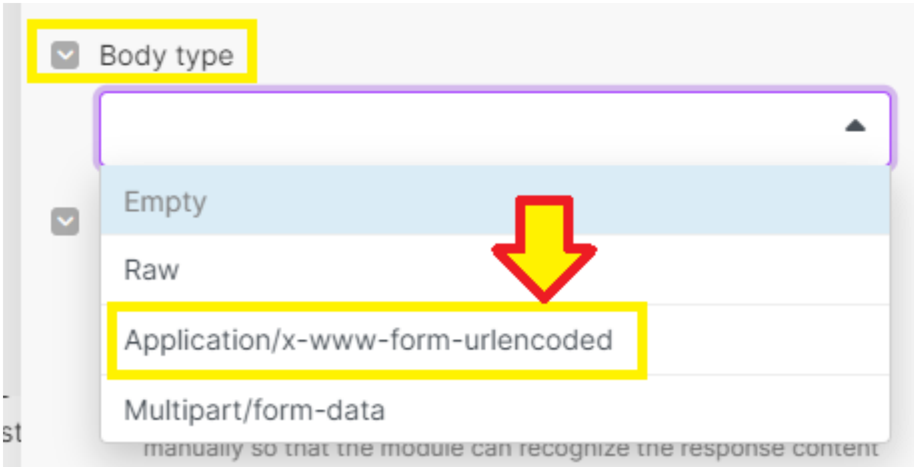
d. Pick the method (e.g.: **POST**):



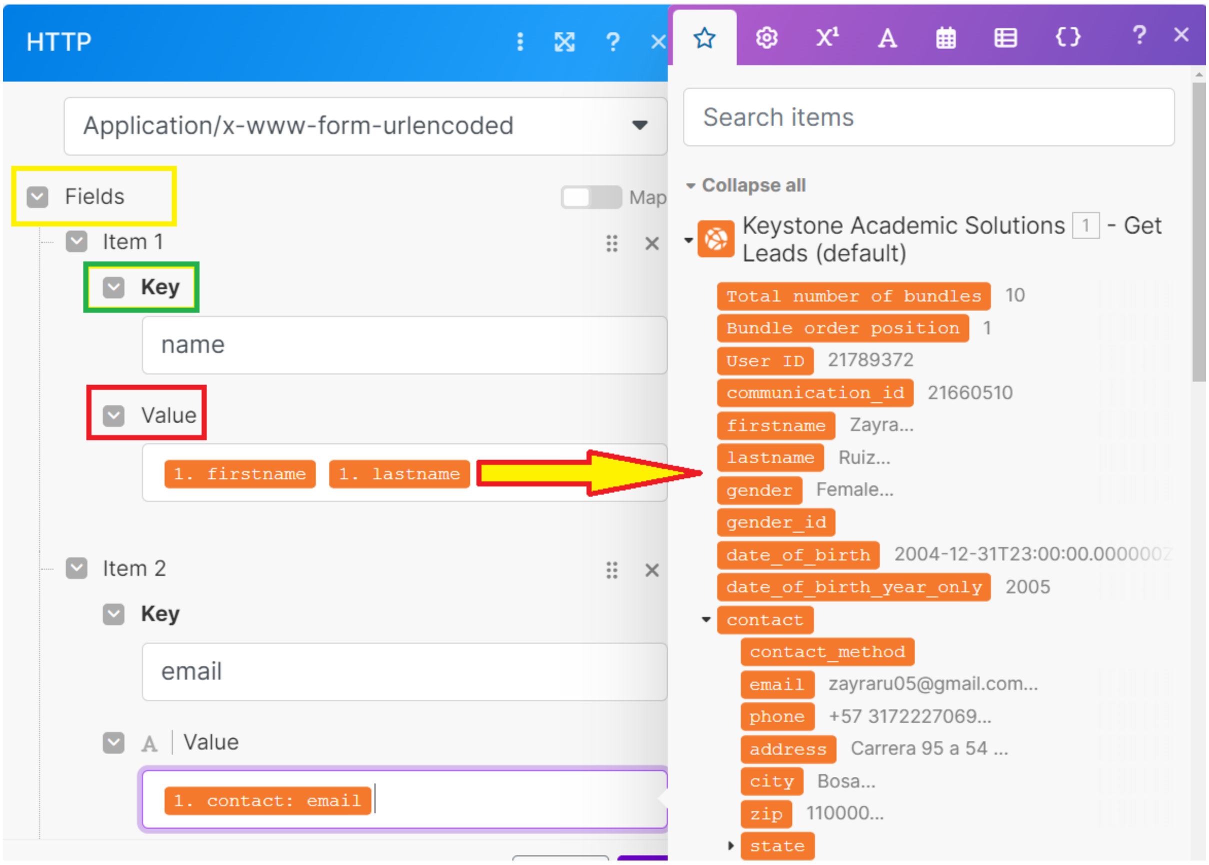
2. Add headers if necessary, given that you e.g. you'd like to use token to authorize the endpoint access:



a. Next, choose the body type, e.g: **application/x-www-form-urlencoded**:

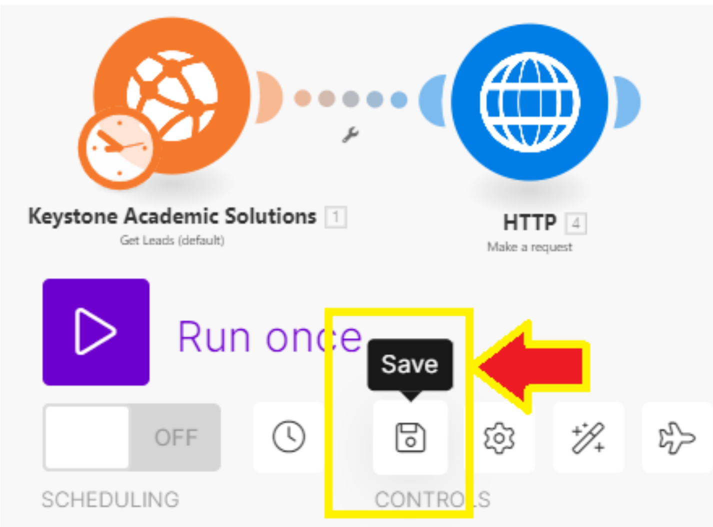


b. Add (form) fields. Remember to add **at least all required fields**:

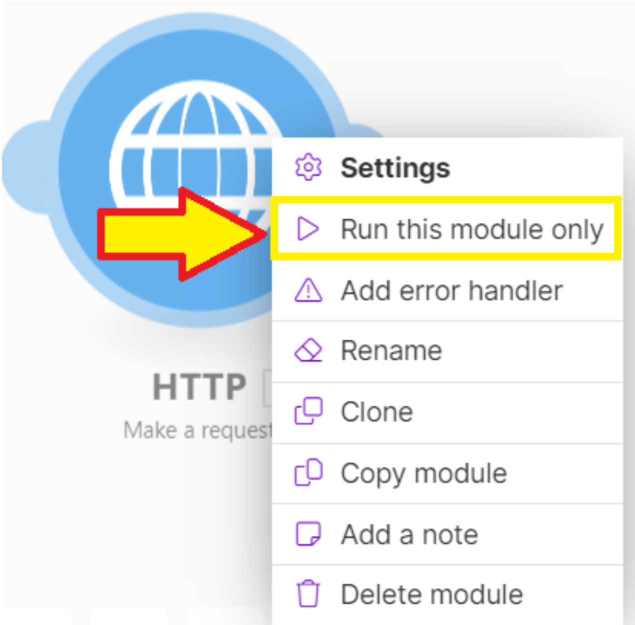


You can add either static/fixed values by typing them in the *'Key'* field area or match them with the source fields' picker that shows up in a separate window.

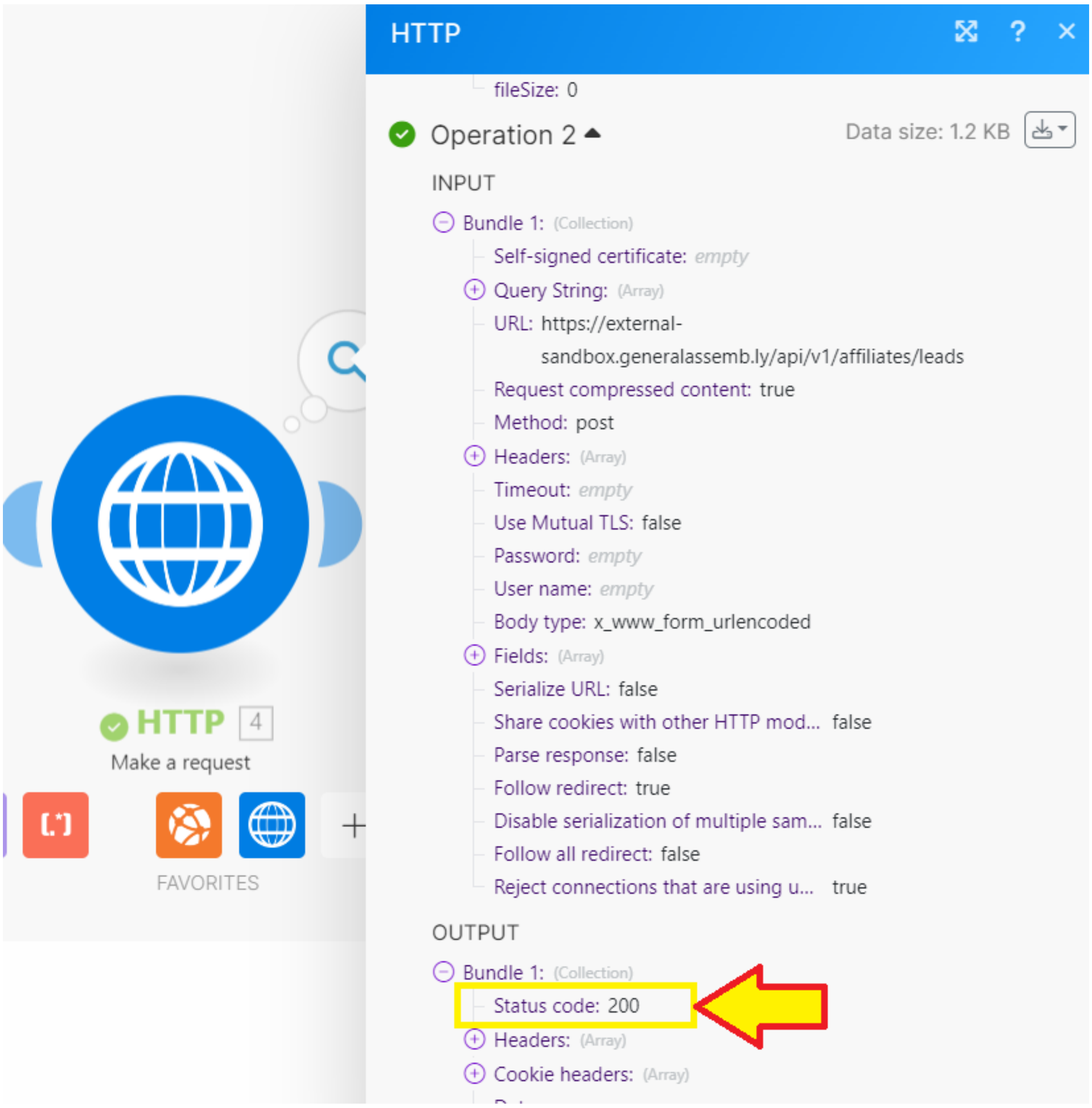
3. All the parameters above are in most cases required to run the webhook module. So, you can save this setup at this stage and test it:



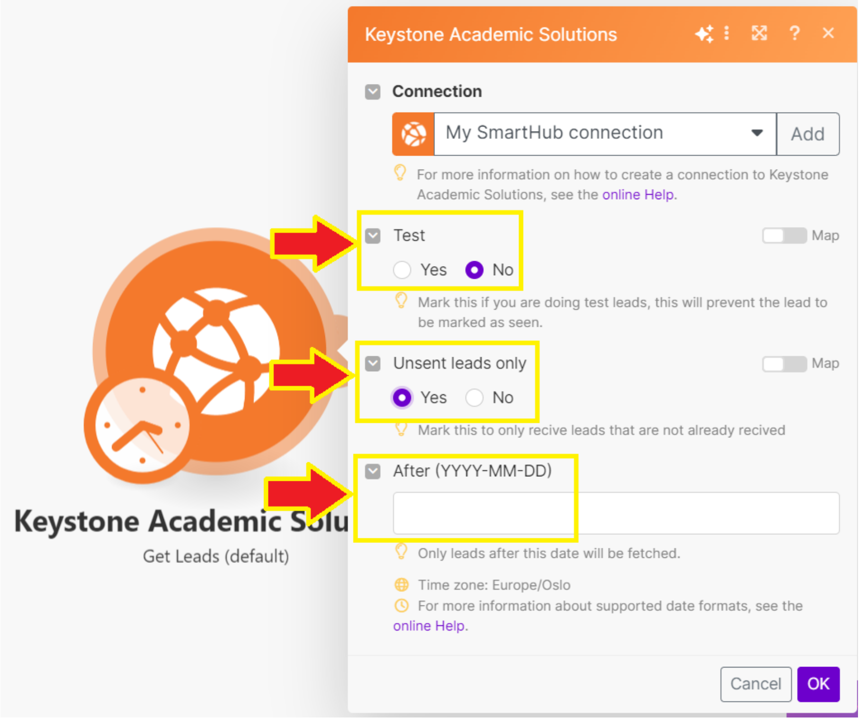
4. To test if it works, right click on the *HTTP module* and pick:


Settings
Run this module only
Add error handler
Rename
Clone
Copy module
Add a note
Delete module
HTTP
Make a request

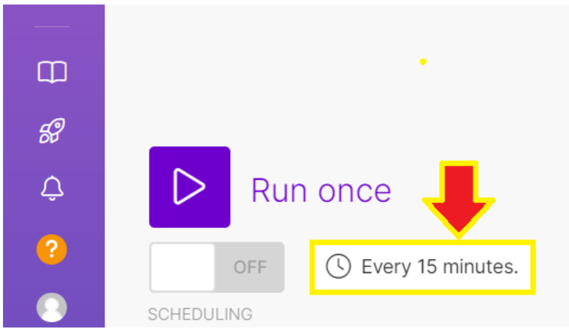
5. Click on the bubble appearing on top of the HTTP module and a new window including more details will show up. If you can see status: 200 in the OUTPUT section, it confirms the data has been sent successfully to the endpoint:



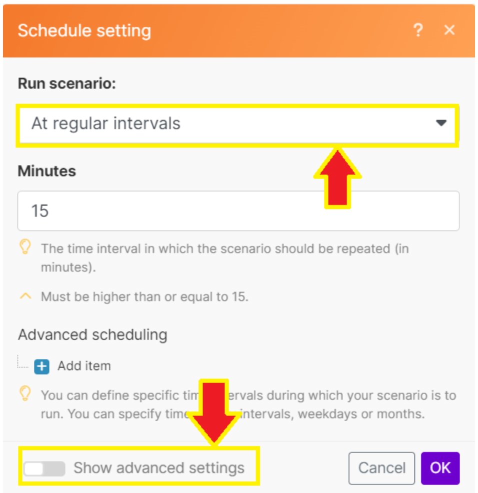
6. Make sure the connection to Keystone is set to production mode and adjust it if you find useful by changing. Click on **Keystone** module and decide on these settings:
    a. *Test* – needs to be set to ***No*** to run in production mode
    b. *Unsent leads only* parameter – set it to ***Yes*** to get only new leads (otherwise it will pull all the leads each and every time)
    c. *After date* - to include leads only registered after this date



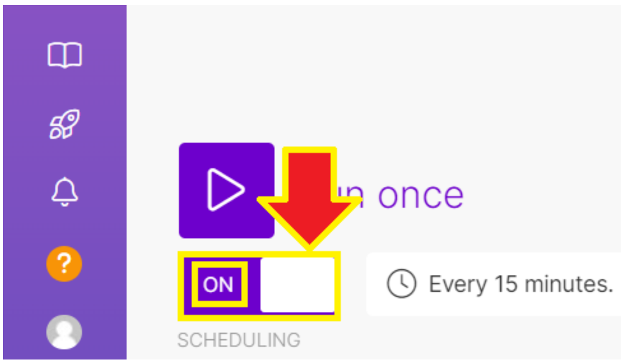
7. Schedule and publish the scenario:
    a. Default scheduler settings – click on the scheduler in the bottom left corner:



In the pop-up window you may decide on the scheduling settings:



8. Finally switch the scenario ON to get it running in production mode:



Please find the full description of this module at Make’s help webpage: https://www.make.com/en/help/tools/http to discover more features