

Custom integration via: Zapier or Make

User's guide

Keystone Education Group Version 1.0 2024-06-12

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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:



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

	Publish	
1. Keystone Academic Solutions		∕ ×
App & event ▲ Account ☉ Trigge	er⊘ Tes	st Ø
Weystone Academic Solutions	Char	ige
* Event (required)		
O Choose an event		0
New Lead Triggers when a new lead is sent from SmartHub to Zapie	er.	tant





6. Click on 'Choose' button in this step and then on 'Connect a new account'

 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.



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API Key (required)	
under the integrat ntegration@keyste API key	ion page). Please get in touch with your contact at Keystone Academic Solutions of oneacademic.com if you are having issues locating the API key.

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:

Choose action An action is an event a Zap performs after it starts	Learn more ×
O webhook by	Built-in tools Try one of our <u>20+ built-in tools</u> Tables Free Data storage built for automation. Save, edit, and share data across Zaps.
	Path Free

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:

Solution 2. Webhooks by Zapier	î	×			
App & event▲ Action ⊙ Test ⊙					
S Webhooks by Zapier Premium Change]]			
* Event (required)					
O Choose an event	$^{\circ}$				
CREATE					
Custom Request Fire off a custom request by providing raw details. Very flexible but unforgiving.					
GET Fire off a single GET request with optional querystrings.					
POST Fire off a single POST request as a form or JSON.					
PUT Fire off a single PUT request as a form or JSON.					



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

S 2. Custom Request in Webhooks by Zapier				
App & event 🛛	Action A			
O Field search				
Method (required)				
Choose value				
Method Custom Search				
,O Type to search				
You can search only within loaded results. Load more	to search for more items. Res			
All results were loaded.				
⊖ GET GET				
O PUT				
POST				

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

* Method (required)
POST
The HTTP method we'll use to perform the request.
* URL (required)
Enter text or insert data
Any URL with a querystring will be re-encoded properly.



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

ic Auth	
nter text or insert data	L
A pipe (1) separated username, password combo for standard HTTP authentication.	
ders	
Enter text or insert data	×
ders Enter text or insert data	

For instance:

ŀ	leaders		_	
	Authorization	abcdxyz12345678		Autorization token
	Content-Type	application/x-www-form-urlencoded		Data type

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*:

Data





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:

	5 2. Custom Request in Webhooks by Zap	vier	
	App & event 🛛	Action O	Test 🛛
	→ Send request to Webhoo We'll use this as a sample for	ks by Zapier r setting up the rest of your Zap.	
	A request was sent to Webhooks by Zapier	about 6 seconds ago	
7.	Eventually publish the Zap by clicking	a on the Publish butt	on.

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

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ల్లు Team		© 1000 ¥ 20.4 MB ≧ Marcin
© Connections		

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

Keystone Academic Solutions	ß
Get Programs Gets all programs in SmartHub	3
Get Lead By Id Get a specific lead from SmartHub	
Get Leads (default) Get leads from SmartHub	۲
Q keystone ×	





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:





Custom integration via: Zapier or Make Keystone Education Group Page **16** of **23** Version 1.0 2024-06-12 c. Add you CRM endpoint Url:

нттр	×	×
URL URL		
CRM endpoint Url		
Method		Мар
GET		•
Headers		Мар
🛨 Add a header		
Query String		Мар
Add parameter		

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

нт	ТР				:	×	?	×
	URL							
	Method							Мар
	POST							•
	GET							
	HEAD	◀	7					
	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**:

HTTP :	×	?	×	☆	¢	χı	A	₿	₿	()	?	×
Application/x-www-form-urlencoded			•	Se	arch	items						
 Fields Item 1 Key name Value 1. firstname 			Map	- Col	lapse a Keys Lead Jotal Jser I commun firstn astna	tone A s (def number order b 217 icatio ame Z me Ru	Acade ault) of b posi 89372 m_id Zayra	undle. tion 21660	Solutic 10 10510	ons 1]- Ge	t
 Item 2 Key email A Value 1. contact: email 		**	×		gender late_o late_o contac cont emai phon addr city zip	_id f_birt f_birt t l zay e +57 ess (Bosa 11000	h 20 h_yea ethod raru05 7 31722 Carrera I 0	04-12- r_on1; @gmai 227069 95 a 5	-31T23: y 200 il.com 9 i4	:00:00.)5	000000	

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:



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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

Ke	eystone Academic Solutions 🛛 🚓 🗄 🔀 📍 🗙
	Connection
	My SmartHub connection - Add
	For more information on how to create a connection to Keystone Academic Solutions, see the online Help.
	Test
	🔿 Yes 💿 No
	Mark this if you are doing test leads, this will prevent the lead to be marked as seen.
	Unsent leads only
	O Yes ○ No
	V Mark this to only recive leads that are not already recived
	After (YYYY-MM-DD)
demic Solu	
(default)	Only leads after this date will be fetched.
	Time zone: Europe/Oslo
	O For more information about supported date formats, see the online Help.
	Cancel



- 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:

Schedule setting ?		
Run scenario:		
At regular intervals	•	
Minutes 🔶		
15		
O The time interval in which the scenario should be repeated (in minutes).		
 Must be higher than or equal to 15. 		
Advanced scheduling		
+ Add item		
You can define specific time ervals during which your scenari run. You can specify time intervals, weekdays or months	o is to	
Show advanced settings	ОК	

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: <u>https://www.make.com/en/help/tools/http</u> to discover more features



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