



# Custom integration via: Zapier or Make

User's guide



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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.

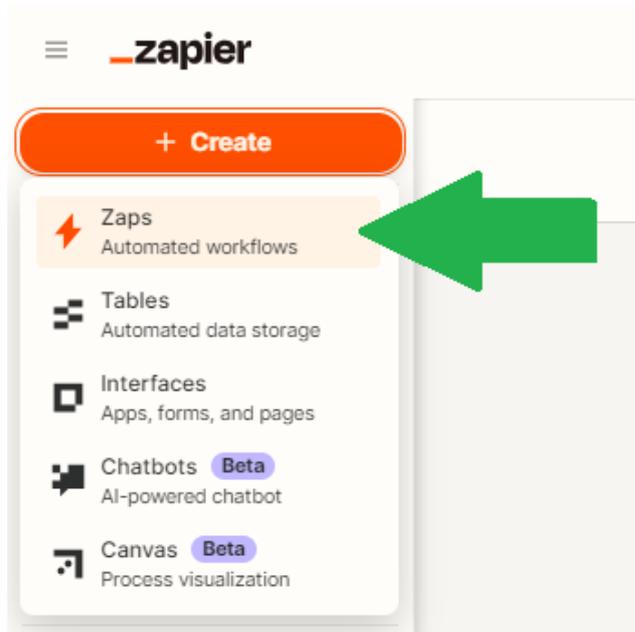
To create the accounts, please sign up here:

- Zapier: [sign-up](#)
- Make: [sign-up](#)

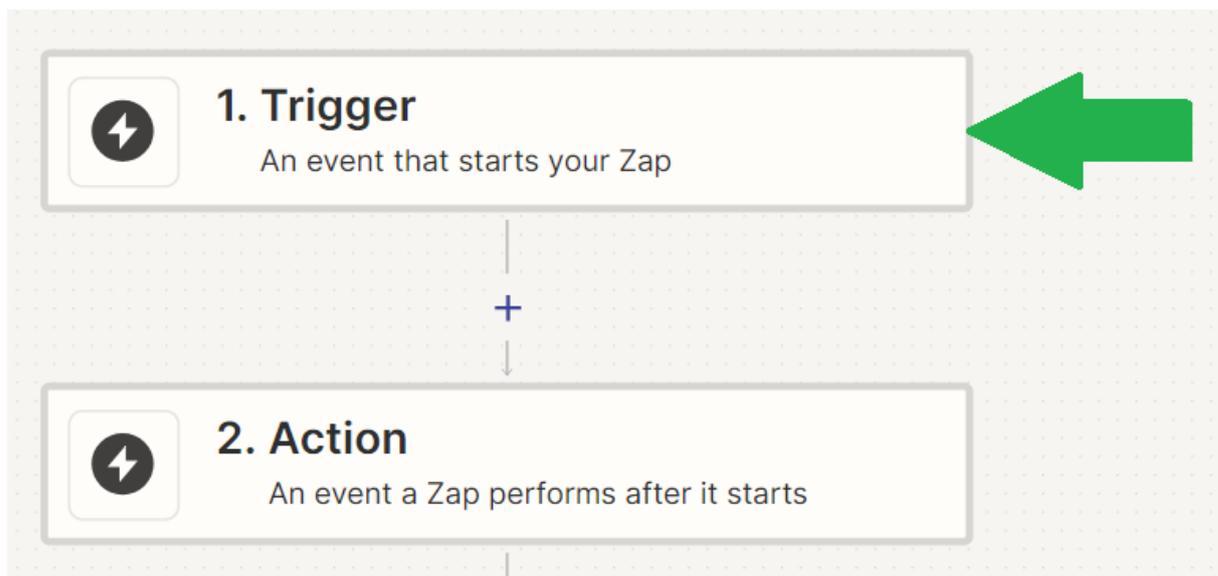
## 2 Custom integration via Zapier

### 2.1 Connecting to Keystone

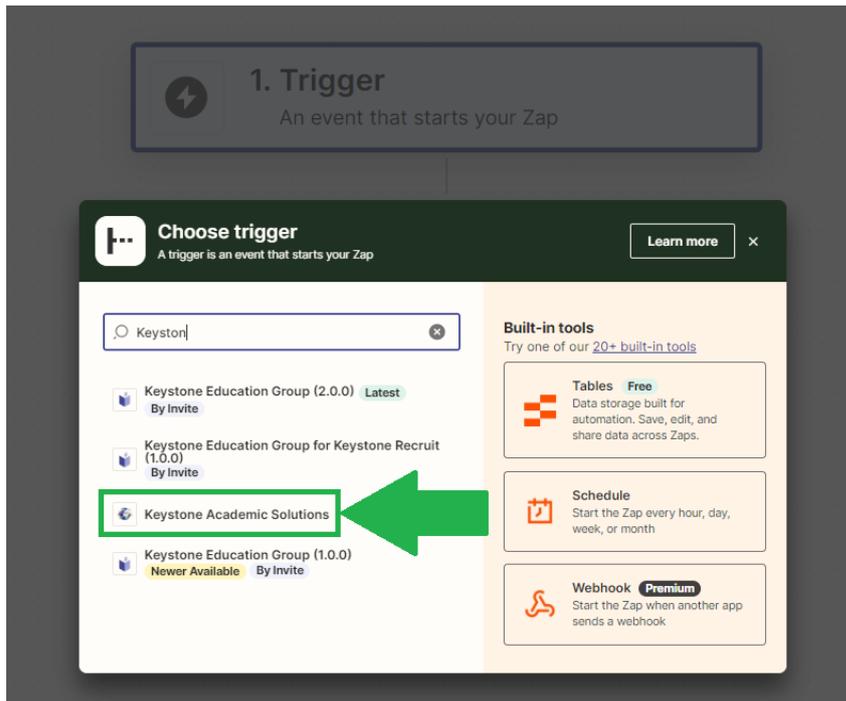
1. Log in to you *Zapier* account
2. Create a new zap:



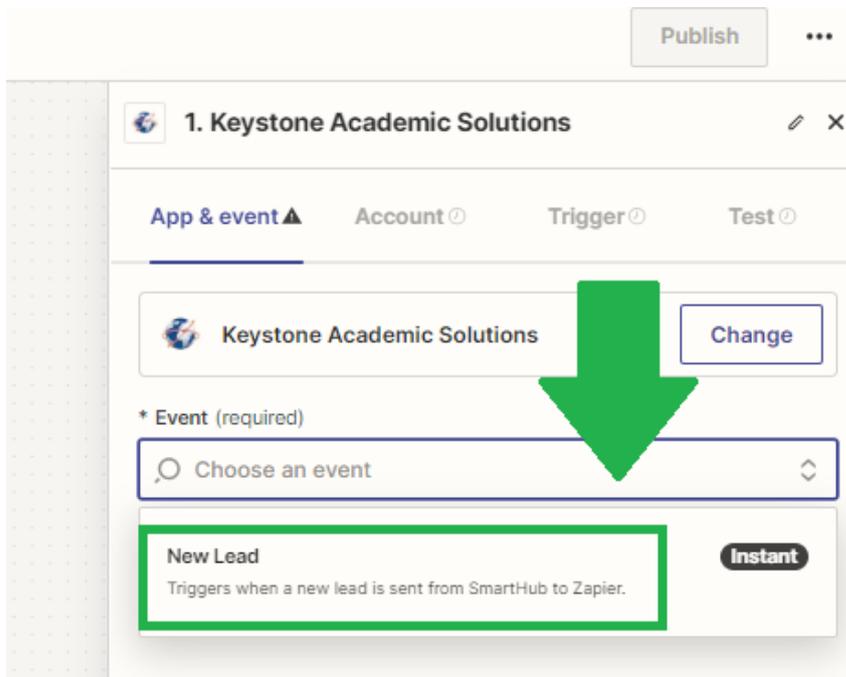
3. In the design window, click on the *Trigger* box:



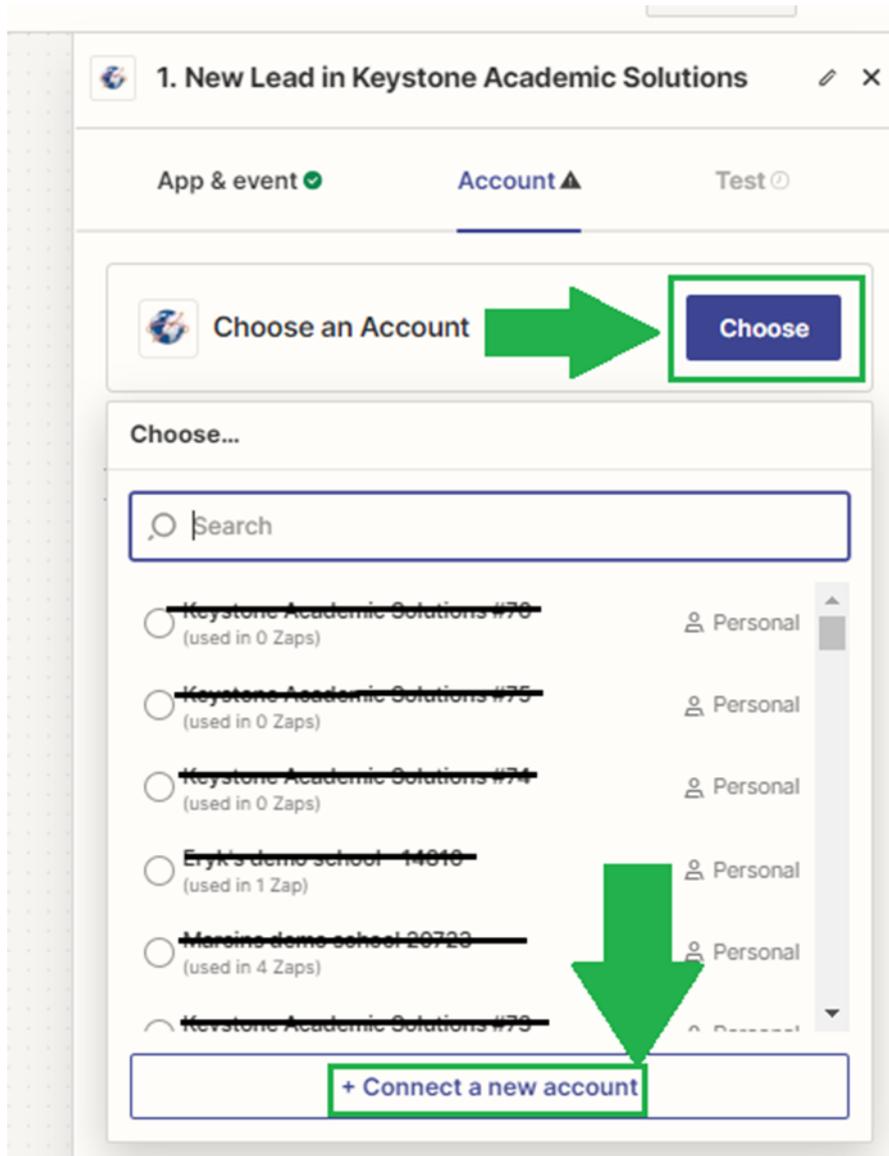
4. In the pop-up form start typing in: *Keystone* and pick **Keystone Academic Solutions** from the list:



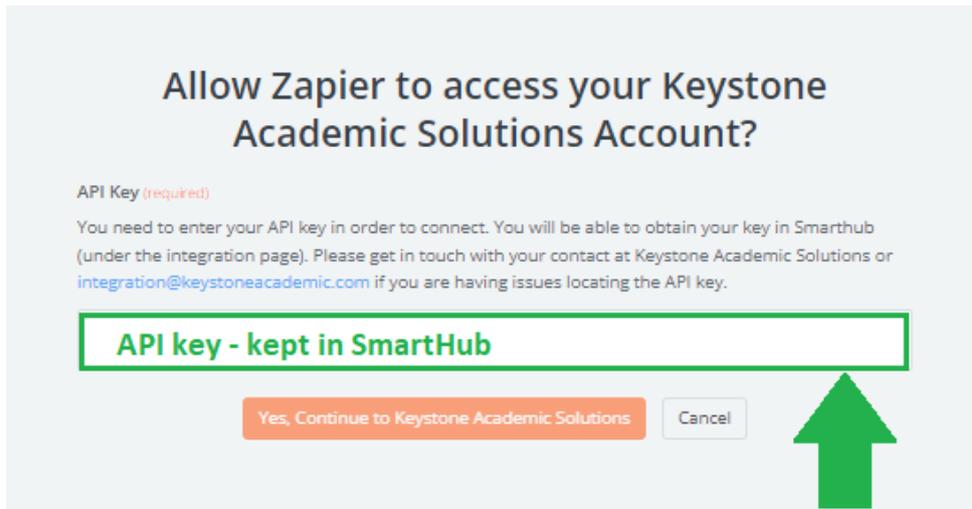
- In the right hand side menu, click on 'Event', next choose: **New Lead** and click on 'Continue' button at the bottom



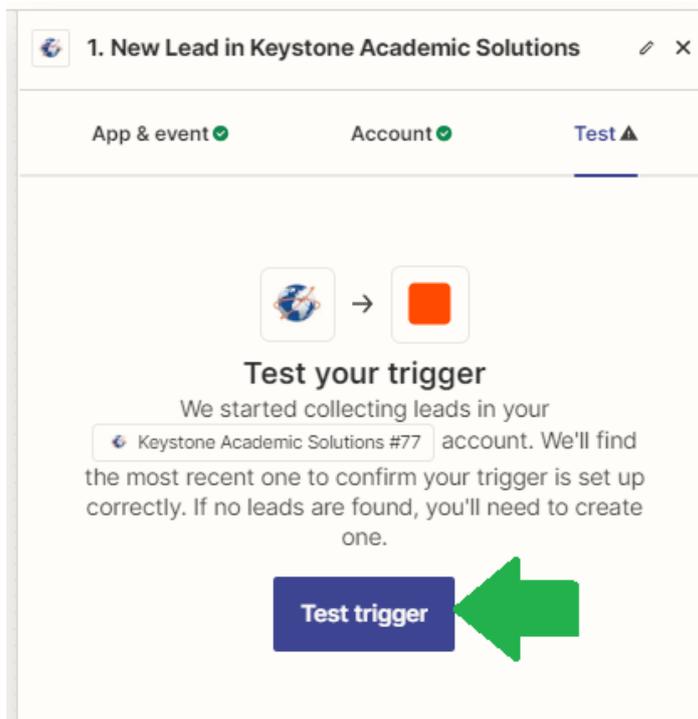
6. Click on 'Choose' button in this step and then on 'Connect a new account'



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'

**1. New Lead in Keystone Academic Solutions**

App & event ✓ Account ✓ Test ✓

We found records in your Keystone Academic Solutions account. We will load up to 3 most recent records, that have not appeared previously. [Learn more about test records.](#)

Search

**Lead A**  
original record pulled on May 20, 2024

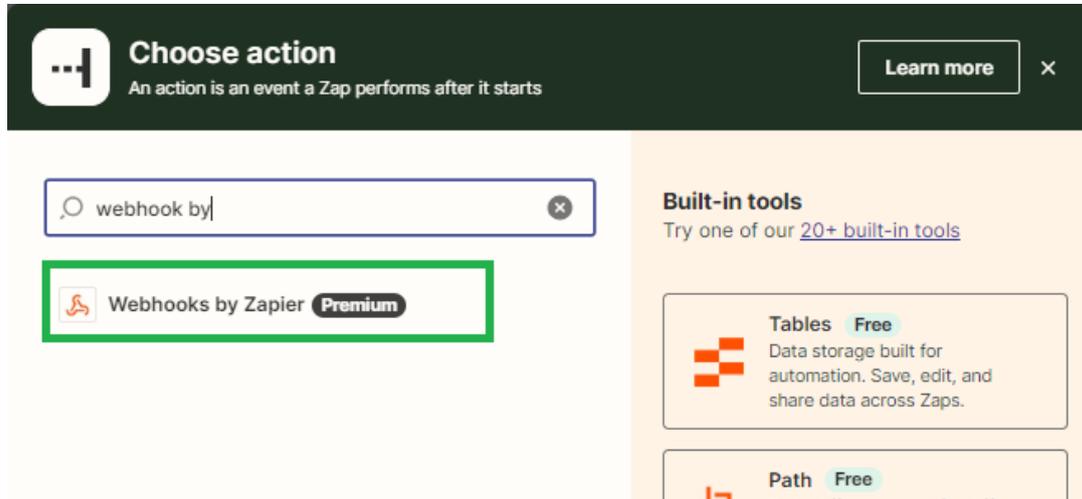
**Find new records**

ID 407312  
First Name Andre  
Last Name Gardner Molina  
Transliterated first name Andre  
Transliterated last name Gardner Molina  
Gender Male  
Gender ID 1  
Date Of Birth 2005-10-08T22:00:00.000000  
Date Of Birth Year 20

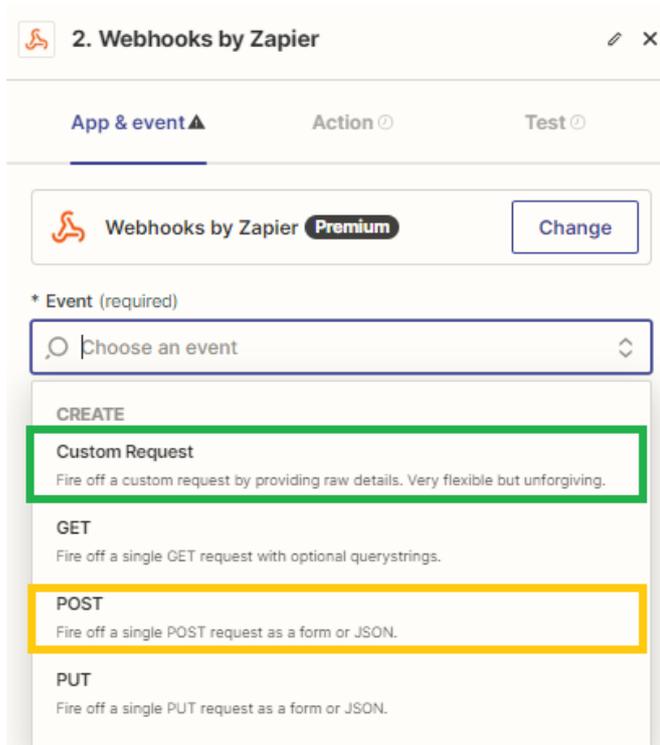
**Continue with selected record**

## 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:

2. Custom Request in Webhooks by Zapier

App & event ● Action ▲

Field search Refresh

Method (required)  
Choose value...

Method Custom

Search  
Type to search

You can search only within loaded results. Load more to search for more items. Res

All results were loaded.

GET  
GET

PUT  
PUT

POST  
POST

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

\* Method (required)  
POST

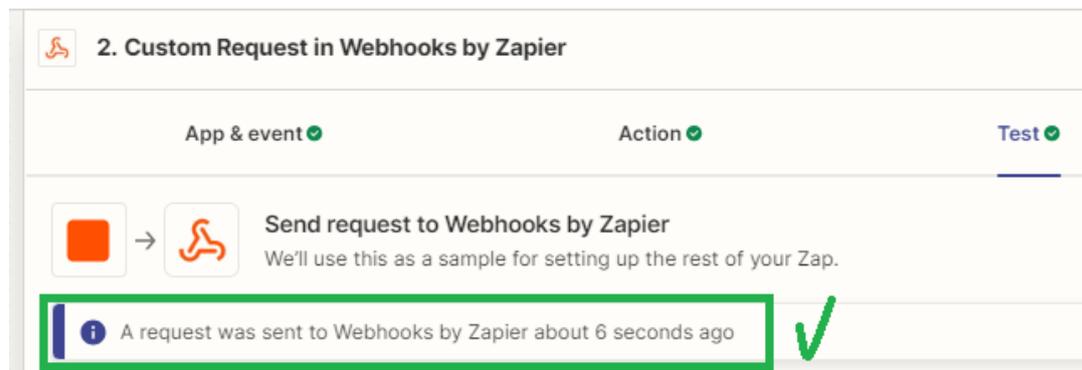
The HTTP method we'll use to perform the request.

\* URL (required)  
Enter text or insert data...

Any URL with a querystring will be re-encoded properly.



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:



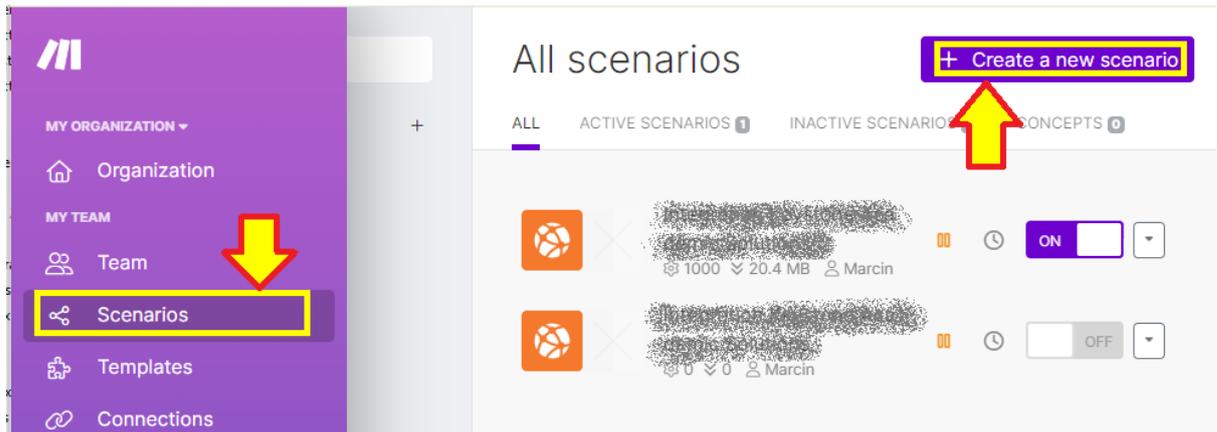
7. Eventually publish the Zap by clicking on the **Publish** button.

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](https://help.zapier.com/hc/en-us/articles/8496326446989-Send-webhooks-in-Zaps#h_01H91E6P2BEC84G2PWT4541P6Q)  
to discover more features.

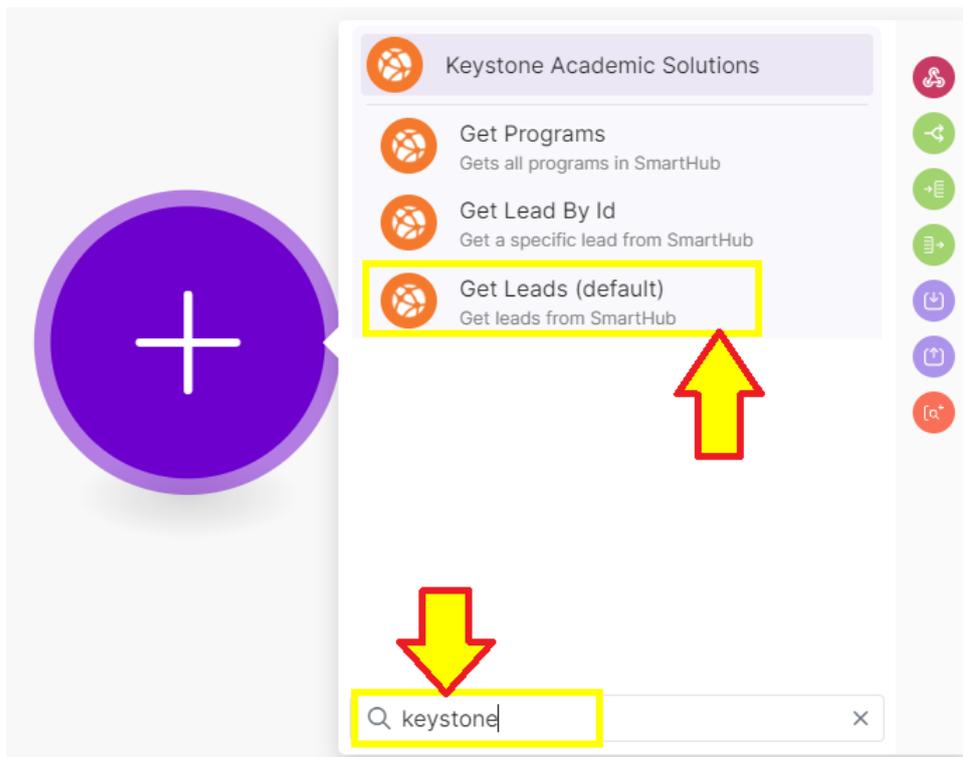
# 3 Custom integration via Make

## 3.1 Connecting to Keystone

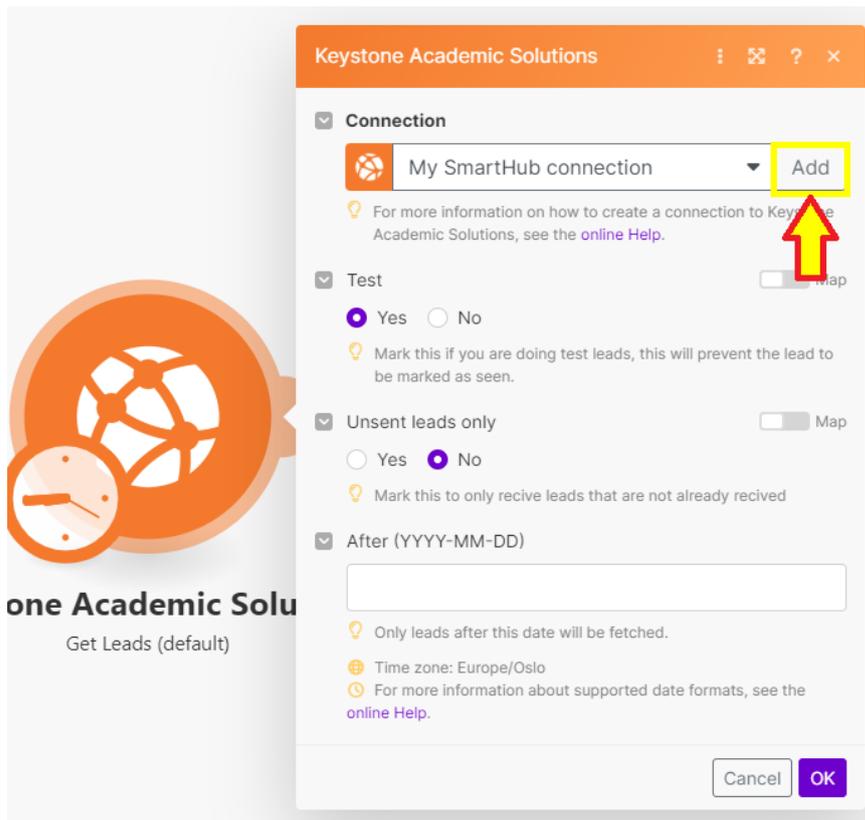
1. Log in to your Make account
2. Create a new scenario:



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

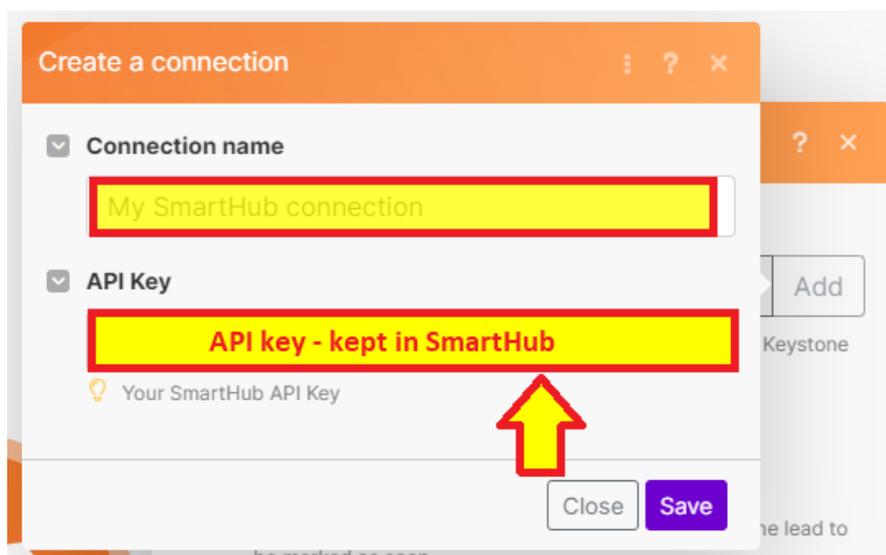


4. In this step click on 'Add' to define a new connection to Keystone:

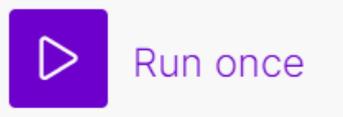


Paste own unique **API key** that can be found in **SmartHub** and click on 'Save'. In the initial window click on 'OK'.

Don't you have your API key? Contact your Keystone Customer Success Manager.

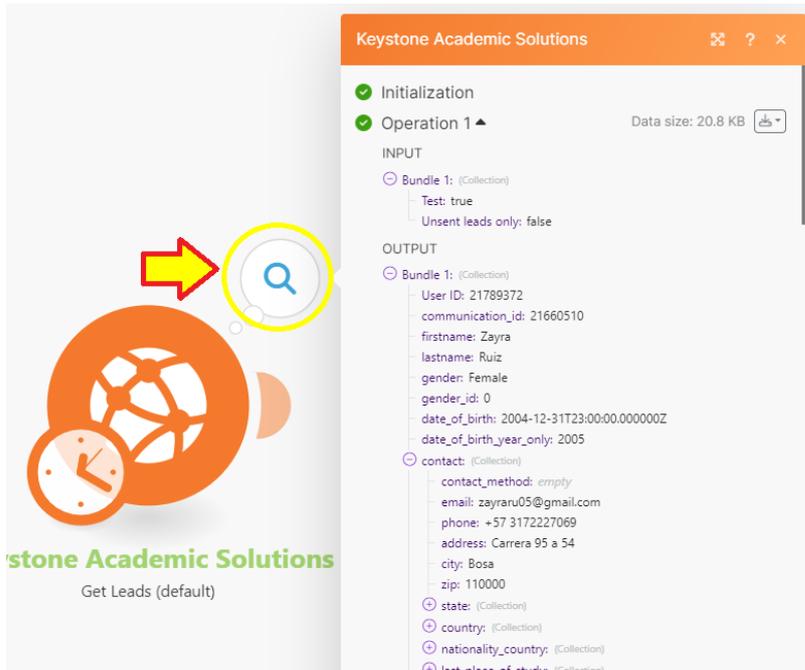


5. **Very important!** Click on 'Run once' button in the bottom left corner:



to pull the initial lead from Keystone.

When it's done, click on the bubble to open the details window:

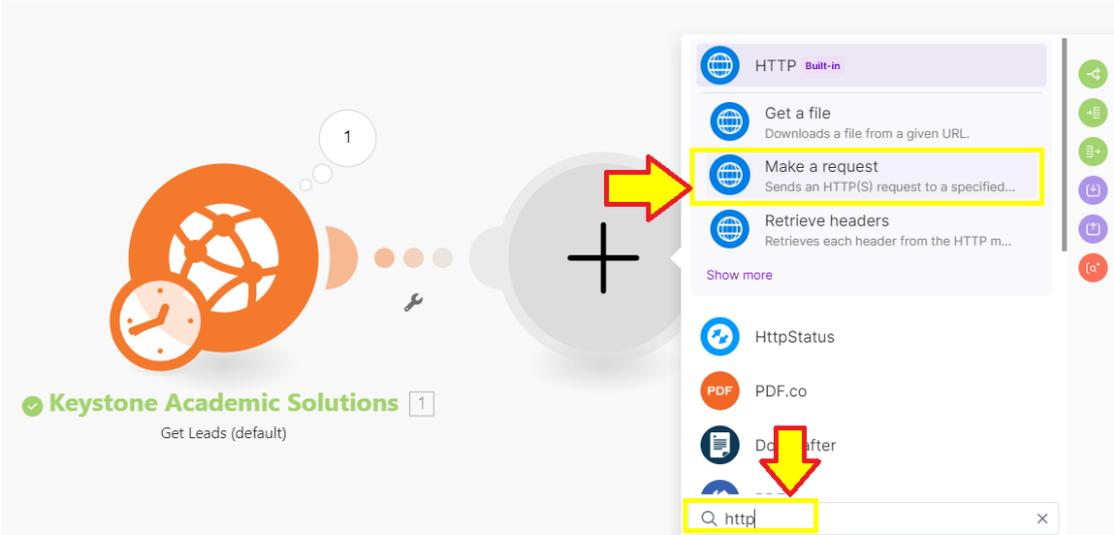


### 3.2 Connecting to the CRM endpoint Url

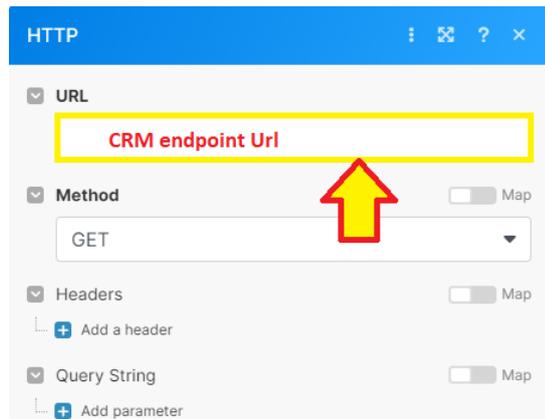
- 1. Next, add the webhook module:
  - a. Click here:



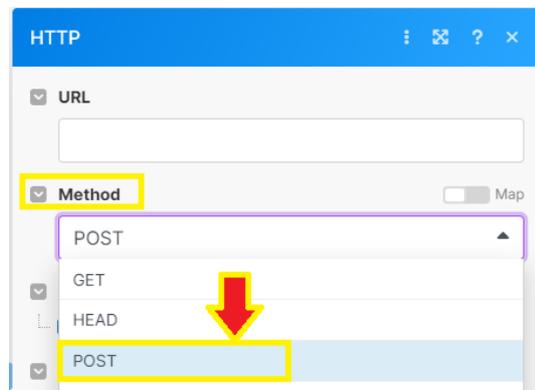
- b. Type in: **http** in the search bar, and select: *'Make a request'* option:



c. Add you CRM *endpoint Url*:



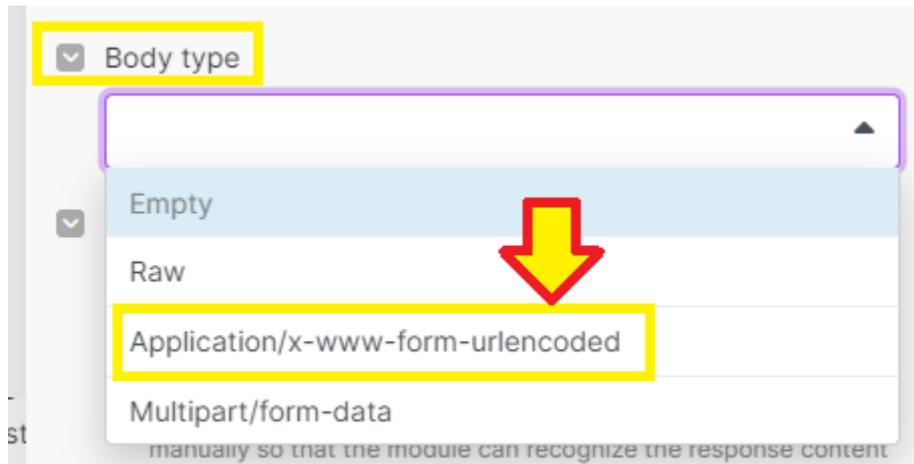
d. Pick the method (e.g.: **POST**):



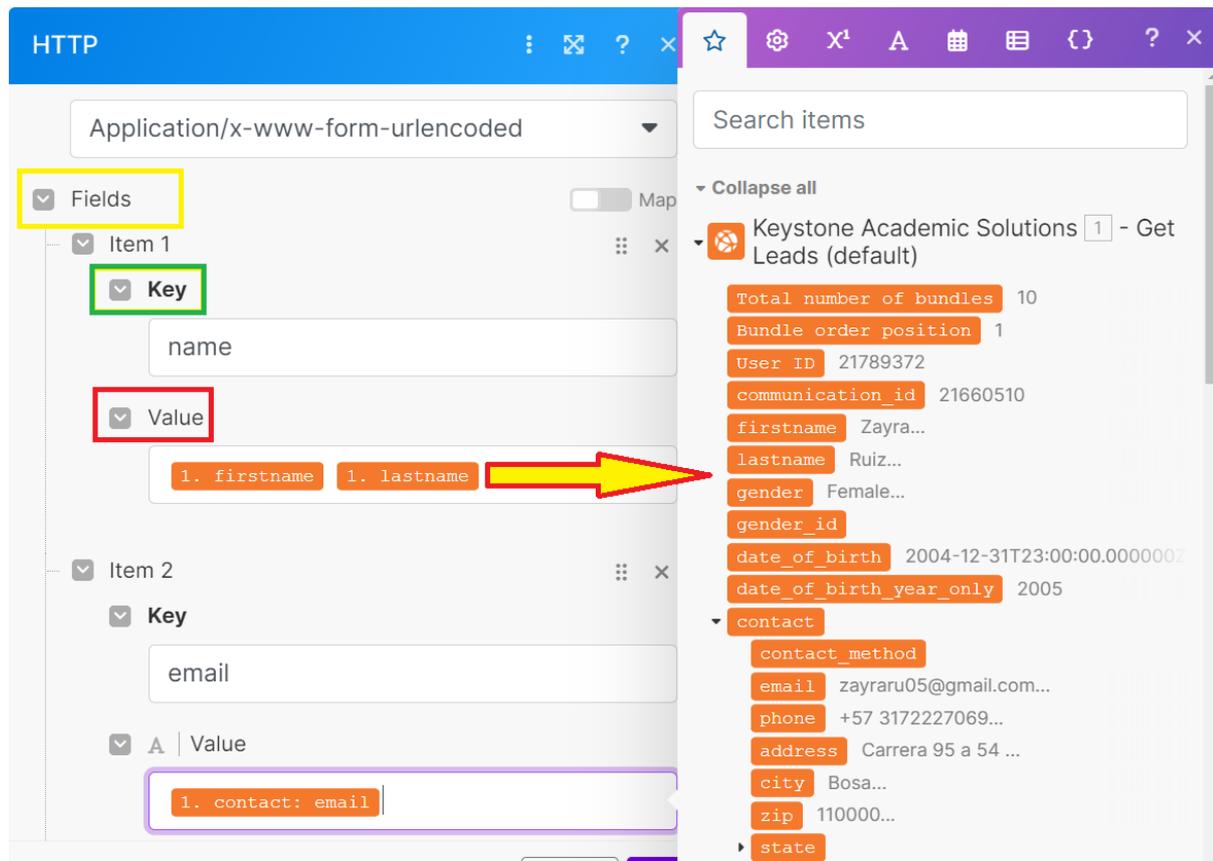
2. Add headers if necessary, given that you e.g. you'd like to use token to authorize the endpoint access:



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

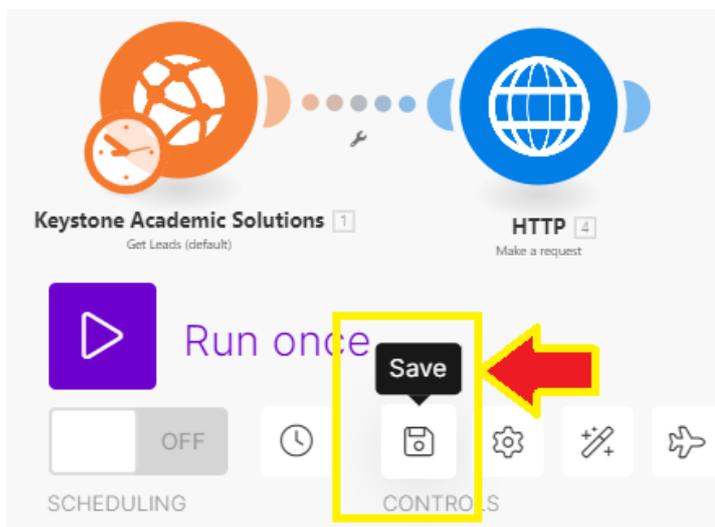


b. Add (form) fields. Remember to add **at least all required fields**:

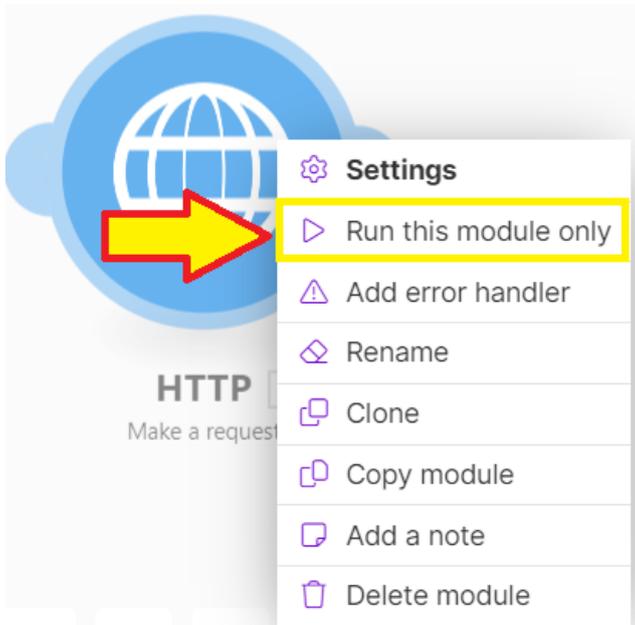


You can add either static/fixed values by typing them in the 'Key' field area or match them with the source fields' picker that shows up in a separate window.

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:



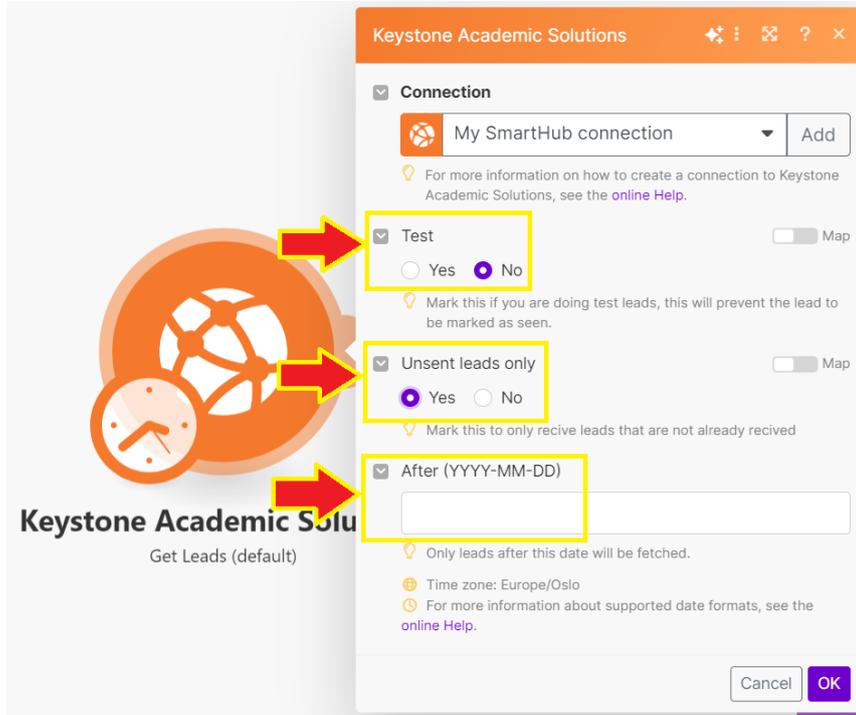
4. To test if it works, right click on the *HTTP* module and pick:



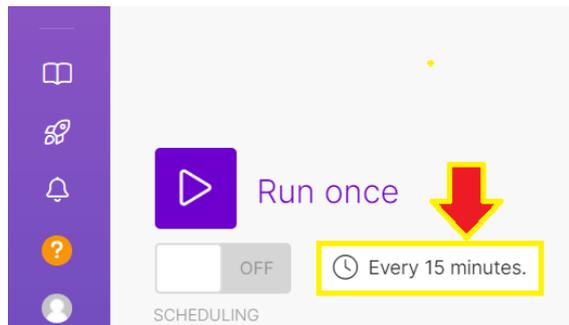
- Click on the bubble appearing on top of the HTTP module and a new window including more details will show up. If you can see status: 200 in the OUTPUT section, it confirms the data has been sent successfully to the endpoint:

The screenshot displays the HTTP module interface. On the left, a large blue globe icon is visible, along with a green checkmark and the text 'HTTP 4' and 'Make a request'. Below this are three icons: a red one with '[ ]', an orange one with a globe, and a blue one with a globe, labeled 'FAVORITES'. The main panel on the right is titled 'HTTP' and shows details for 'Operation 2'. The 'INPUT' section includes: 'Bundle 1: (Collection)' with 'Self-signed certificate: empty', 'Query String: (Array)' with 'URL: https://external-sandbox.generalassemb.ly/api/v1/affiliates/leads', 'Request compressed content: true', 'Method: post', 'Headers: (Array)', 'Timeout: empty', 'Use Mutual TLS: false', 'Password: empty', 'User name: empty', and 'Body type: x\_www\_form\_urlencoded'. The 'OUTPUT' section includes: 'Bundle 1: (Collection)' with 'Status code: 200' (highlighted by a yellow box and a red arrow), 'Headers: (Array)', and 'Cookie headers: (Array)'. The top right of the panel shows 'Data size: 1.2 KB' and a download icon.

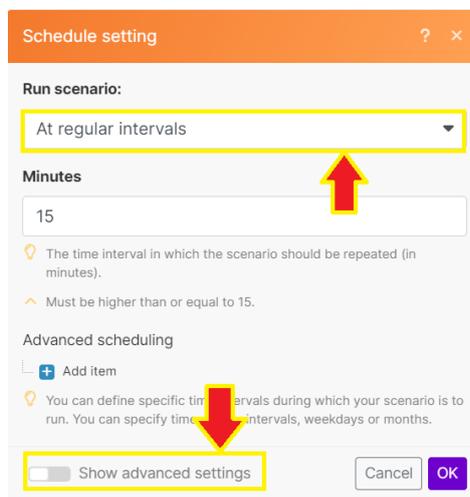
6. Make sure the connection to Keystone is set to production mode and adjust it if you find useful by changing. Click on **Keystone** module and decide on these settings:
  - a. *Test* – needs to be set to **No** to run in production mode
  - b. *Unsent leads only* parameter – set it to **Yes** to get 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



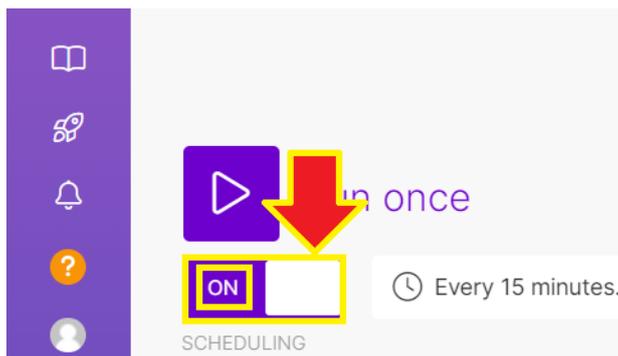
7. Schedule and publish the scenario:
  - a. Default scheduler settings – click on the scheduler in the bottom left corner:



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