MAKE INTEGRATION

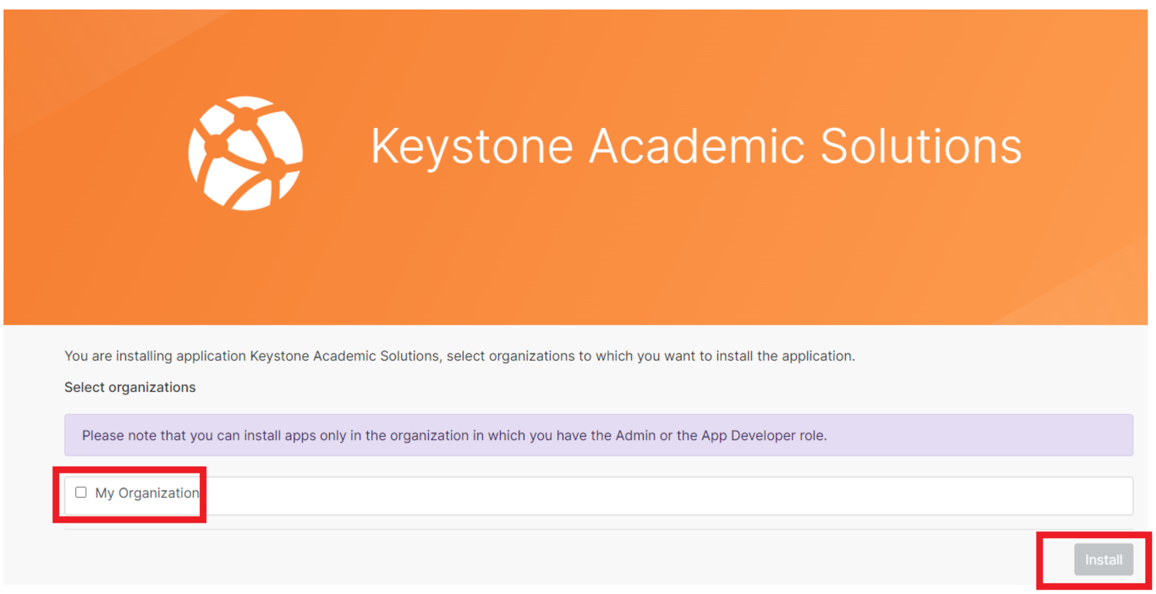
STEP 1.

CREATING THE INTEGRATION TASK IN MAKE.

Click on the invitation link, add Keystone Academic Solutions to your inventory, and create an account in Make
https://www.make.com/en/hq/app-invitation/7e8ab4055f622f3f76924689bd943c56

and click on the 'Install' button

On the next screen select: My organization and again, click on the 'Install' button



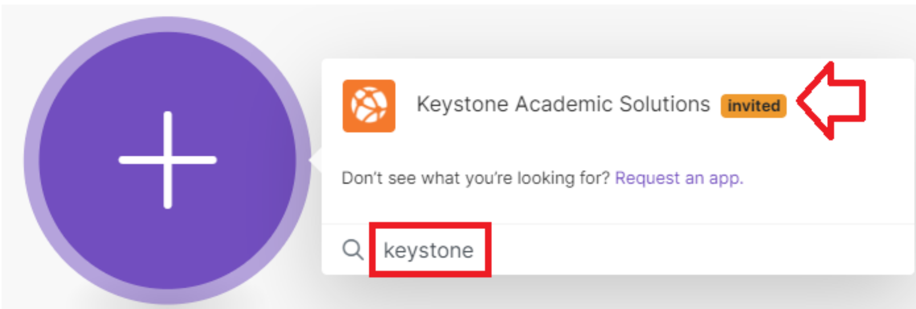
And eventually click on the Finish wizard button.

STEP 2.

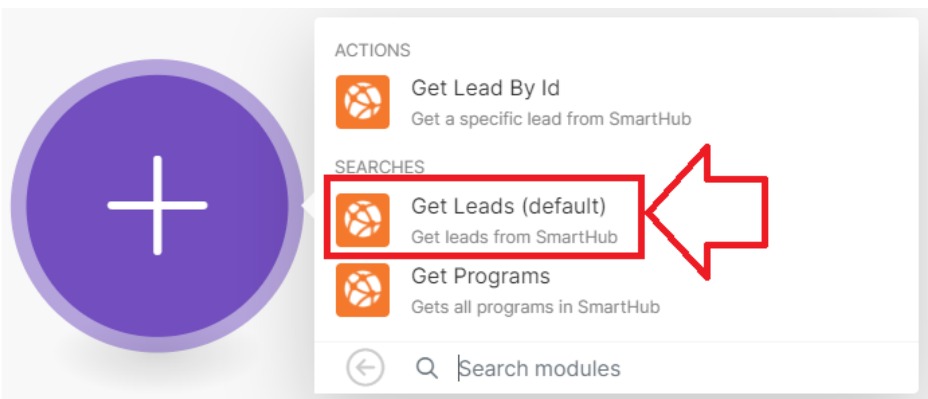
CHOOSE THE INTEGRATION TASK TRIGGER.

Click on the 'Create a new scenario' button in the top right corner of the webpage:

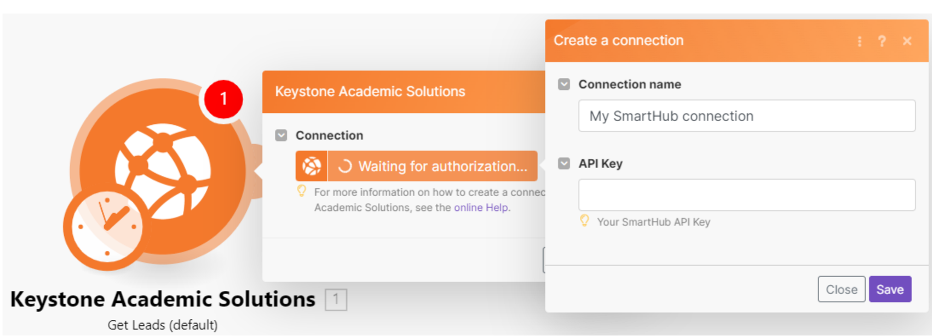
Click on the '+' icon, search for Keystone module and add it:



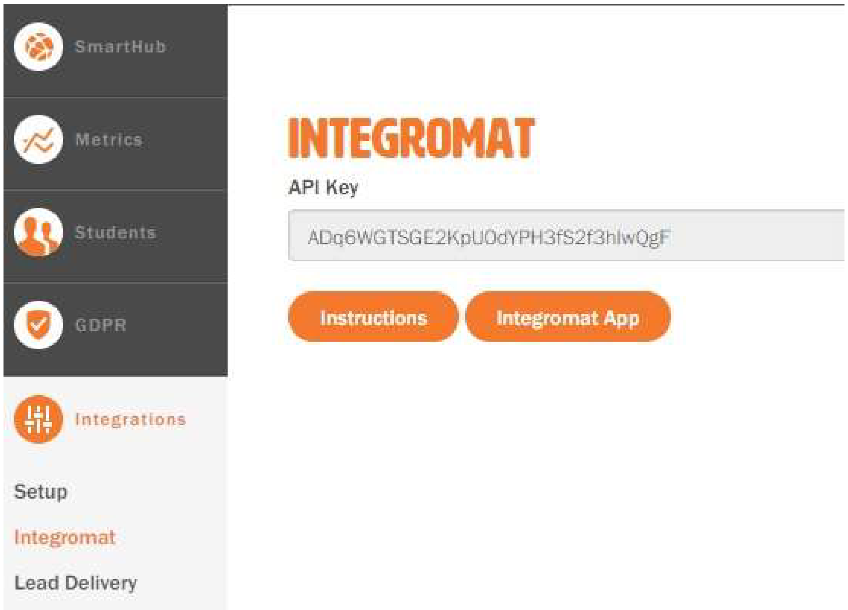
Choose: Get Leads (default):



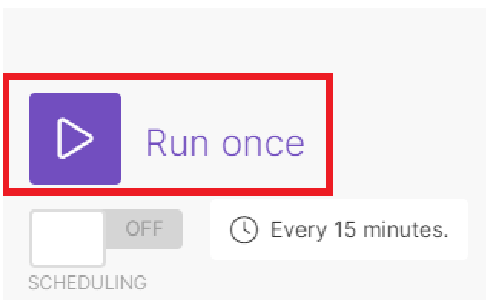
And configure the connection by applying your API Key *



*The API key can be found in your SmartHub profile under Integrations > Make:



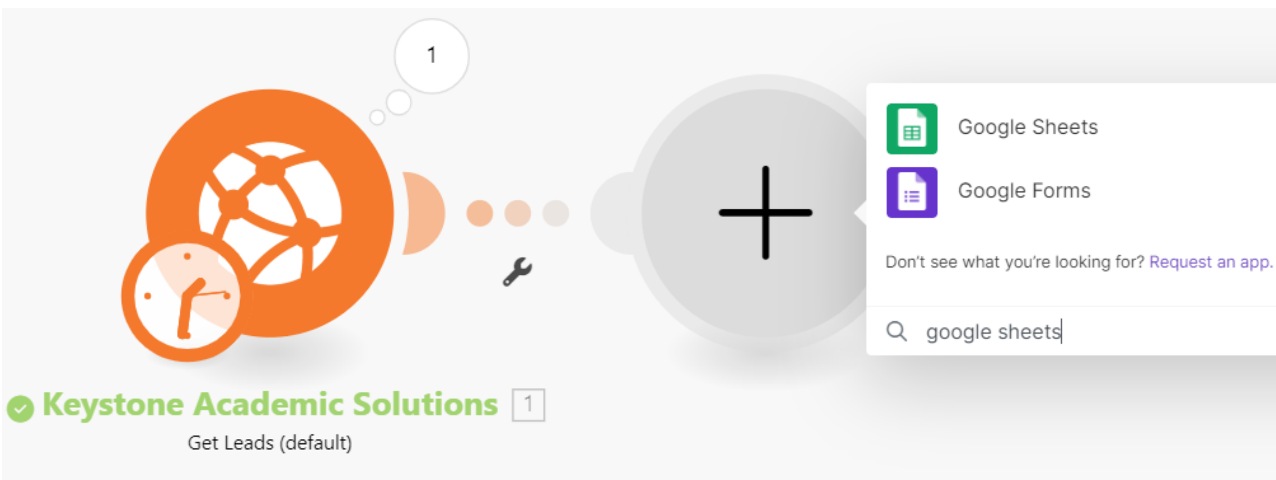
Once this is done, we want Make to pull sample leads. This can be done by running the scenario once:



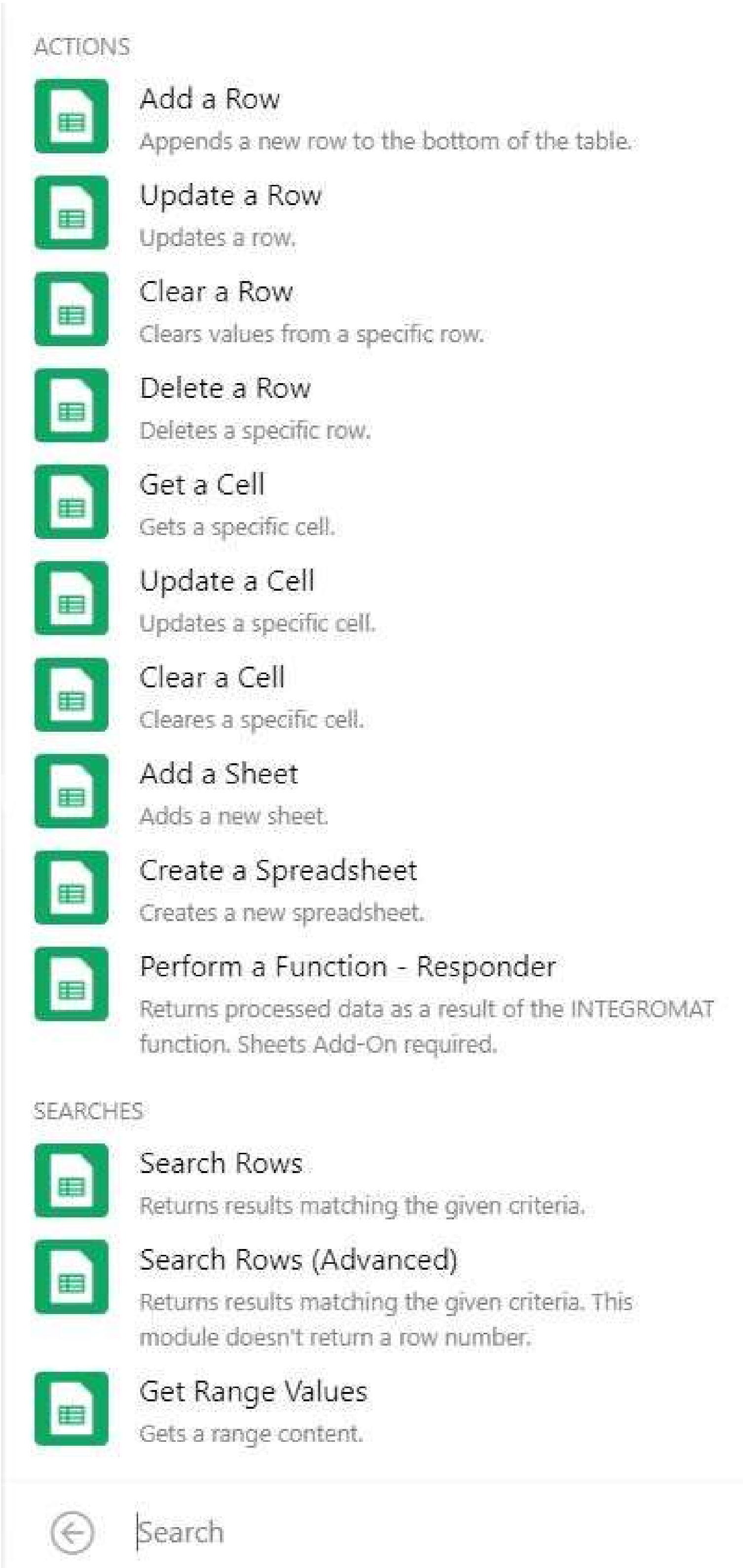
Step 3.

CONFIGURING THE TARGET MODULE

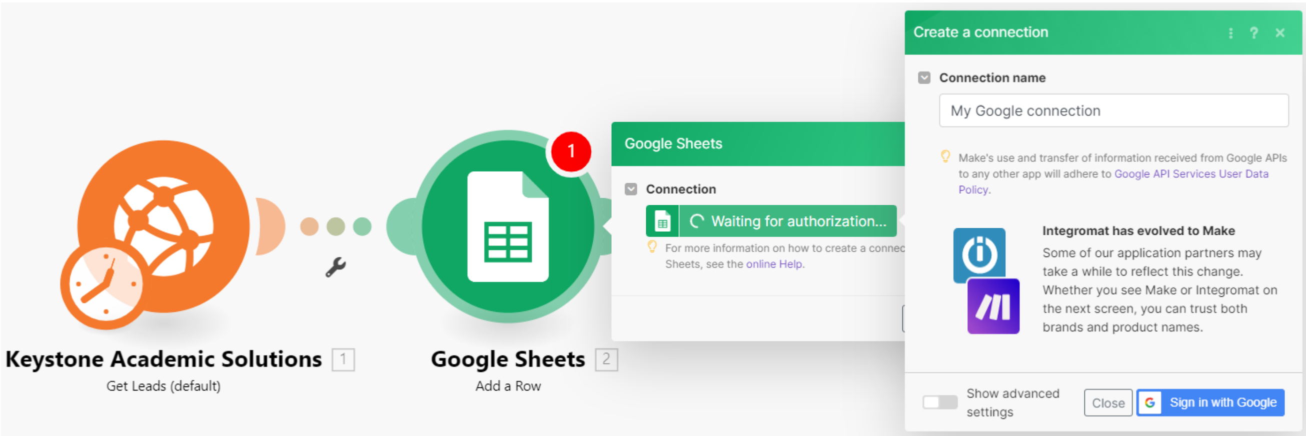
To choose the target system, please click on the plus(+) symbol next to the Keystone Academic Solutions bubble:



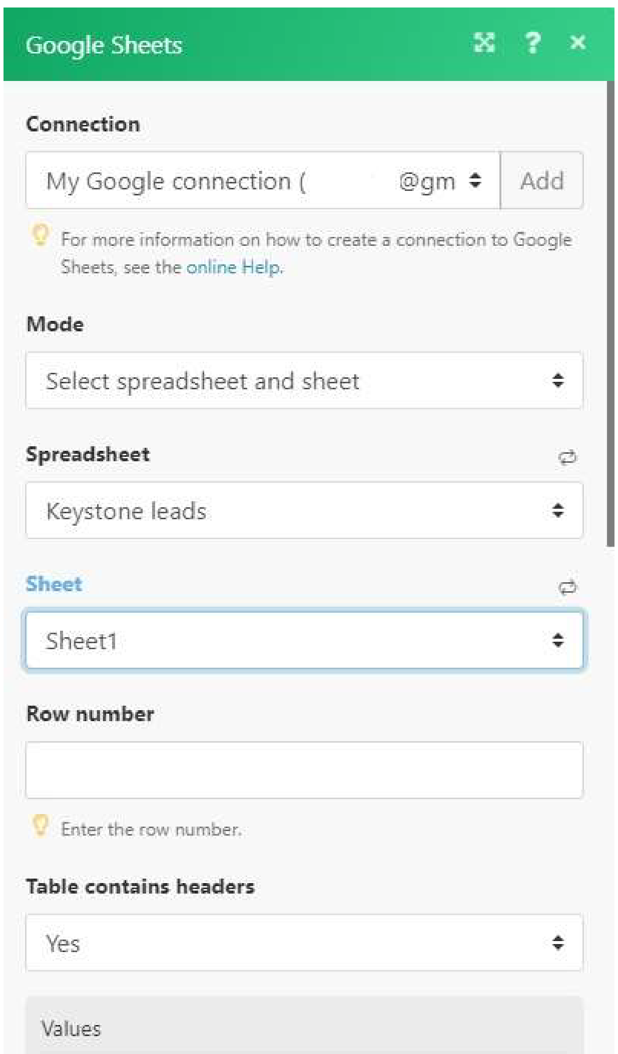
For this instruction, we will configure an integration to Google Sheets so that every lead sent will populate a row in the sheet with relevant properties under the correct columns. Type in 'Google Sheets' to choose the service.
We will choose 'Add a Row' as an action in this case.



Similar to configuring the connection to Keystone Academic Solutions, the same must be done for the target system (in most cases an admin account is required). In this case, normal google account credentials suffice. Provide it into the new window.



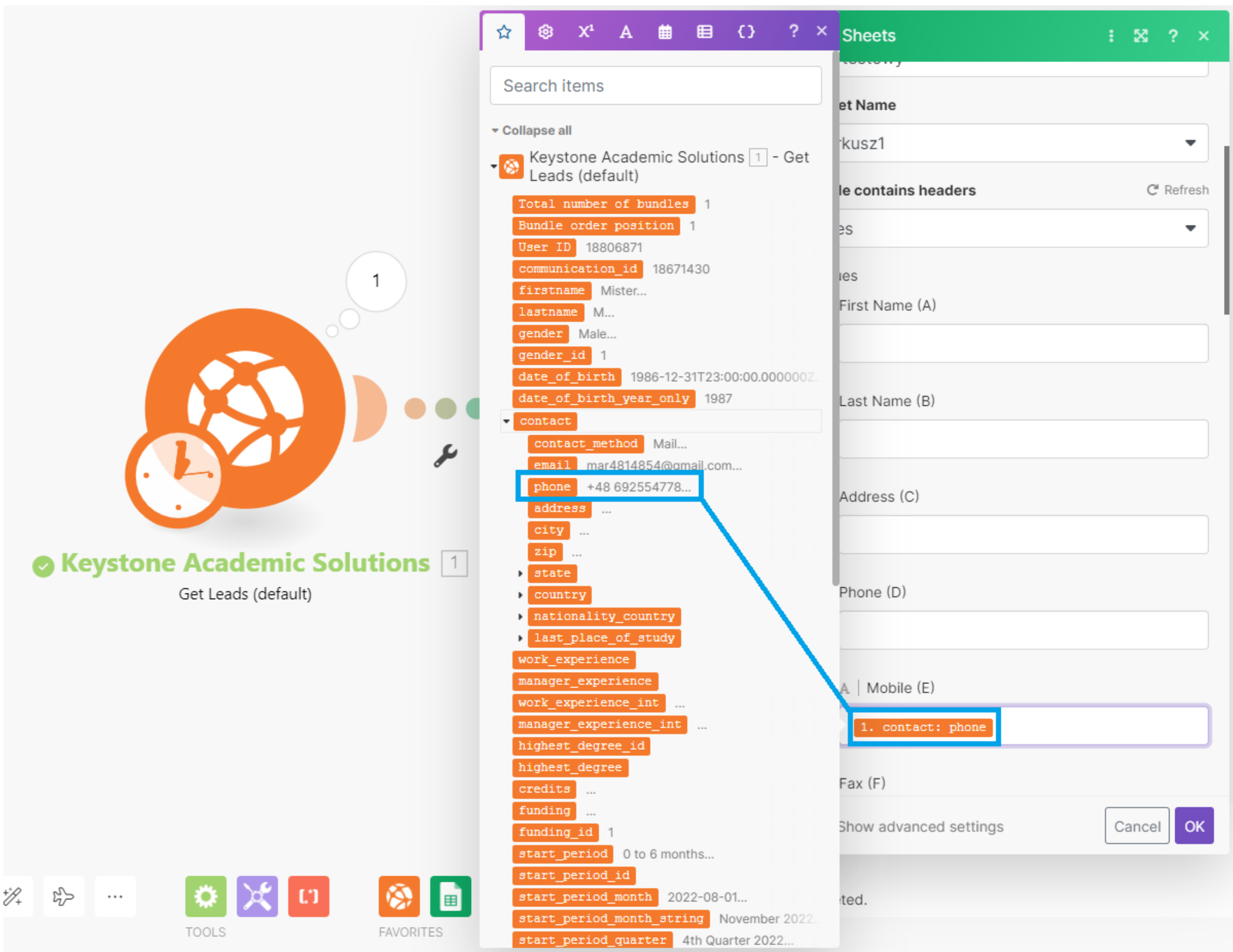
After the connection is set up, we have the option to choose which Spreadsheet will be updated and which sheet within it.



STEP 4.

MAPPING VARIABLES

Now comes the most important part of mapping the lead values that we gather in SmartHub to those that you have in your CRM system. Make will list all the properties that your system accepts (First Name, Country, Zip code, Phone number etc.). For these properties, you need to decide what would be its counterpart in the lead information:

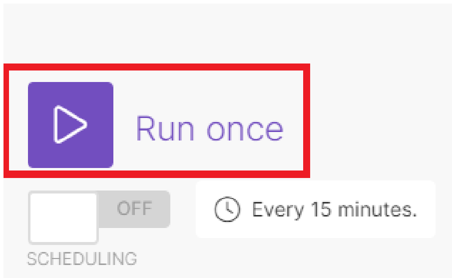


Some properties might be located under a parent object, like 'phone' in this example: To see it you have to click on the arrow next to 'contact'.
You can map all properties that you have in your CRM this way. If some properties are empty it might mean that your lead form in SmartHub does capture that data. Click OK when you're done.

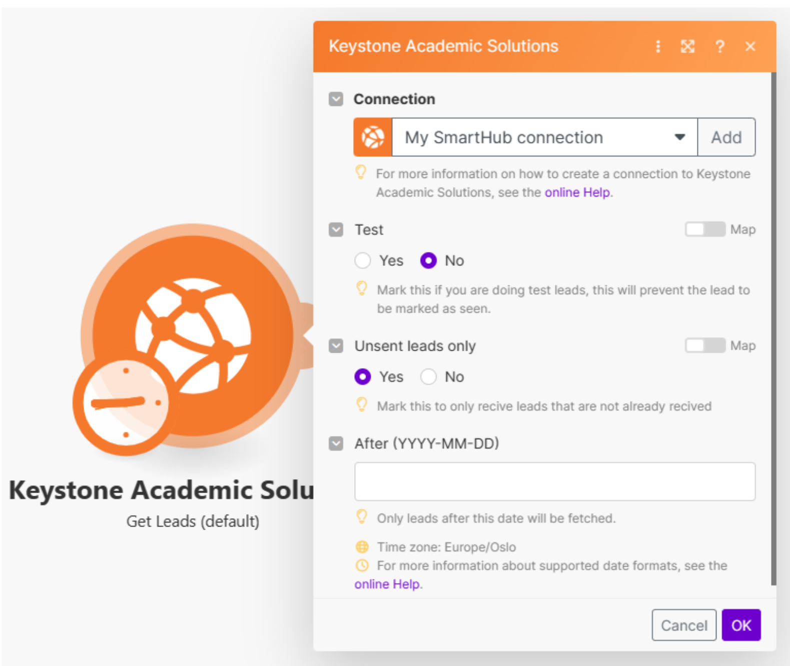
STEP 5.

SEND A TEST LEAD AND CONFIGURE THE INTEGRATION TO GO LIVE.

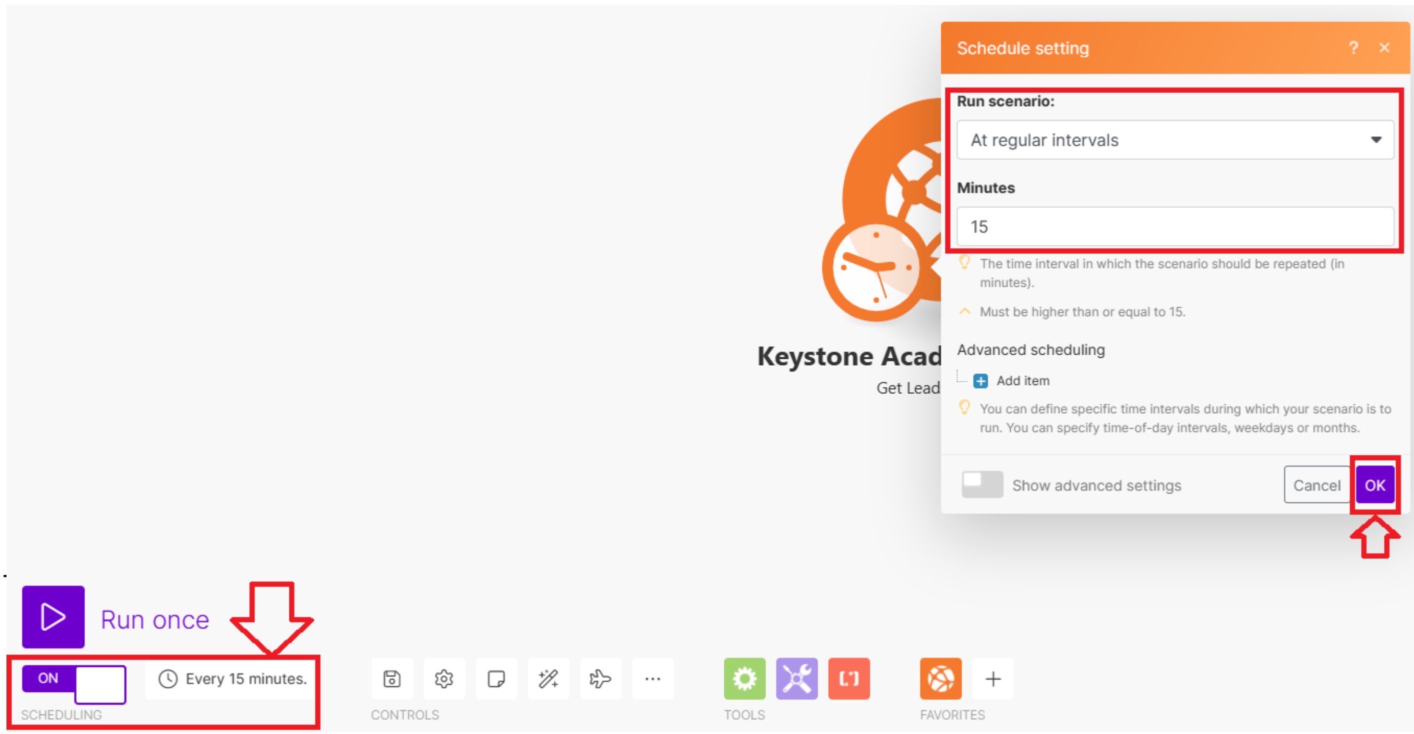
Now you can send the test leads over to your Google Sheets to see if they appear correctly:



When that has been confirmed, we can configure the system to send new leads each time they appear in SmartHub. To do that, please click on the Keystone Academic Solutions Bubble and reconfigure it as shown below:



All that remains now is to make the integration work automatically. Turn the scheduler on (bottom left corner of the webpage), change the default settings if necessary and click ‘OK’:



That’s it! You just completed the integration between Keystone and your CRM!