

MAKE INTEGRATION

STEP 1.

CREATING THE INTEGRATION TASK IN MAKE.

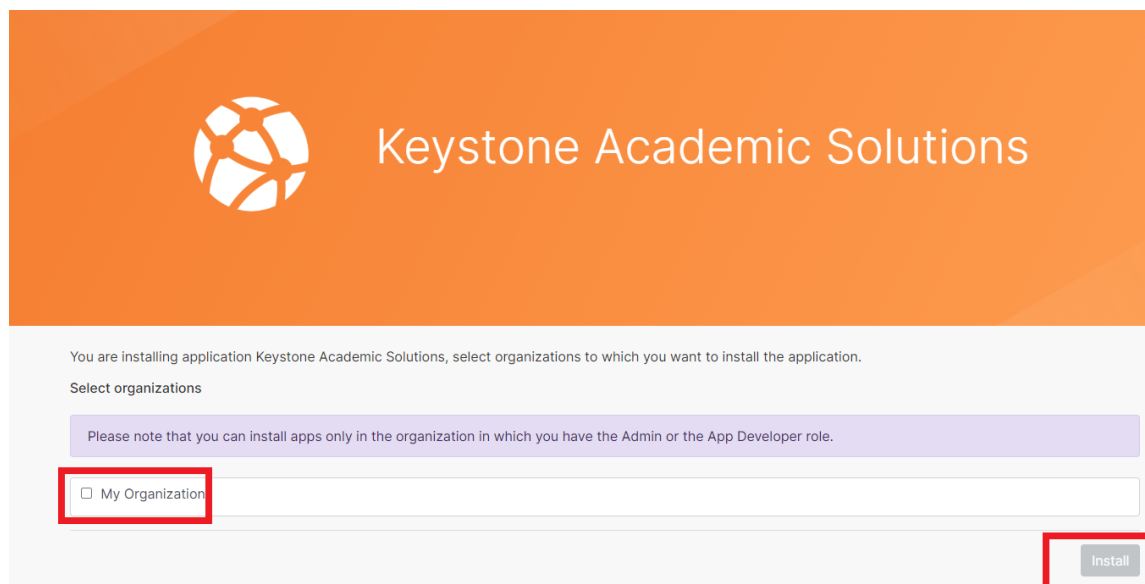
Click on the invitation link, add Keystone Academic Solutions to your inventory, and create an account in Make

<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.

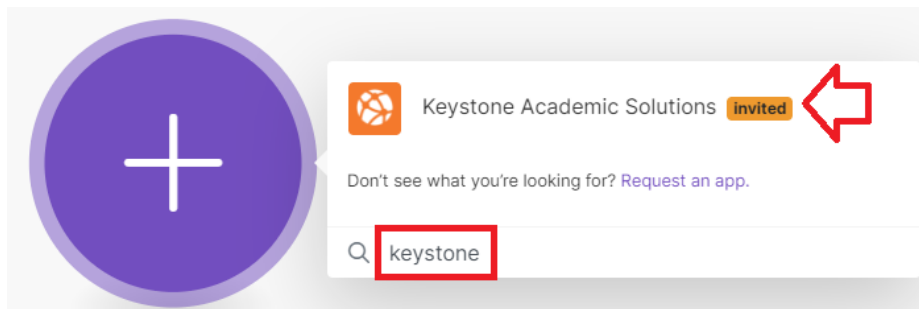
STEP 2.

CHOOSE THE INTEGRATION TASK TRIGGER.

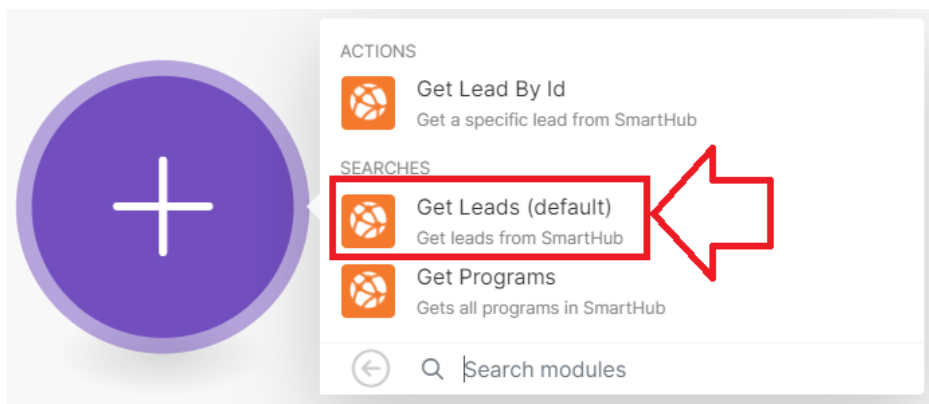
Click on the 'Create a new scenario' button in the top right corner of the webpage:

+ Create a new scenario

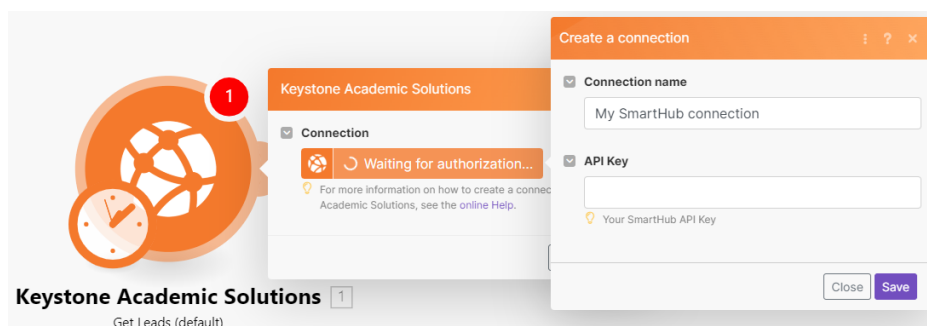
Click on the '+' icon, search for Keystone module and add it:



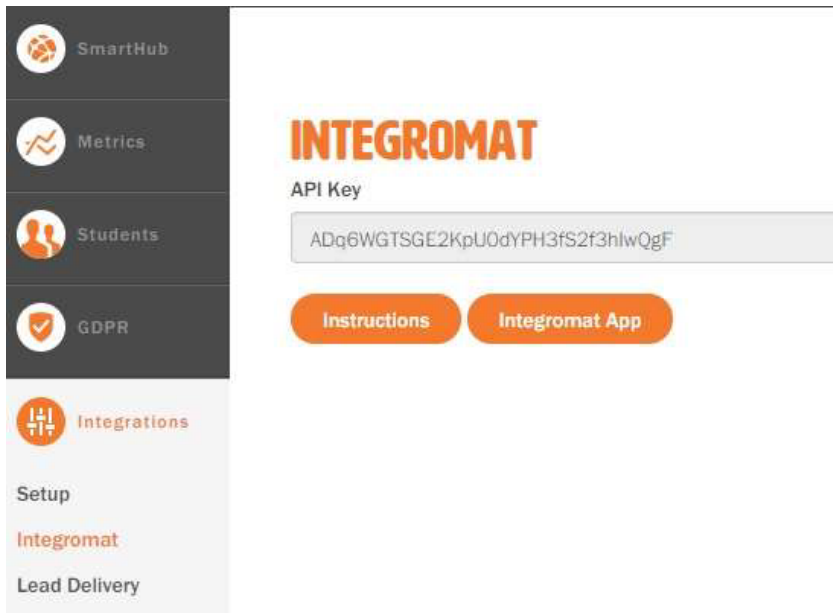
Choose: Get Leads (default):



And configure the connection by applying your API Key *



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



SmartHub

Metrics

Students

GDPR

Integrations

Setup

Integromat

Lead Delivery

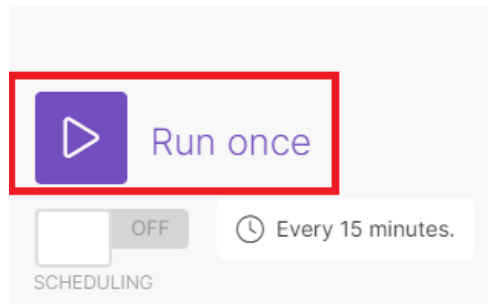
INTEGROMAT

API Key

ADq6WGTSGE2KpU0dYPH3fS2f3hlwQgF

Instructions Integromat App

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



Run once

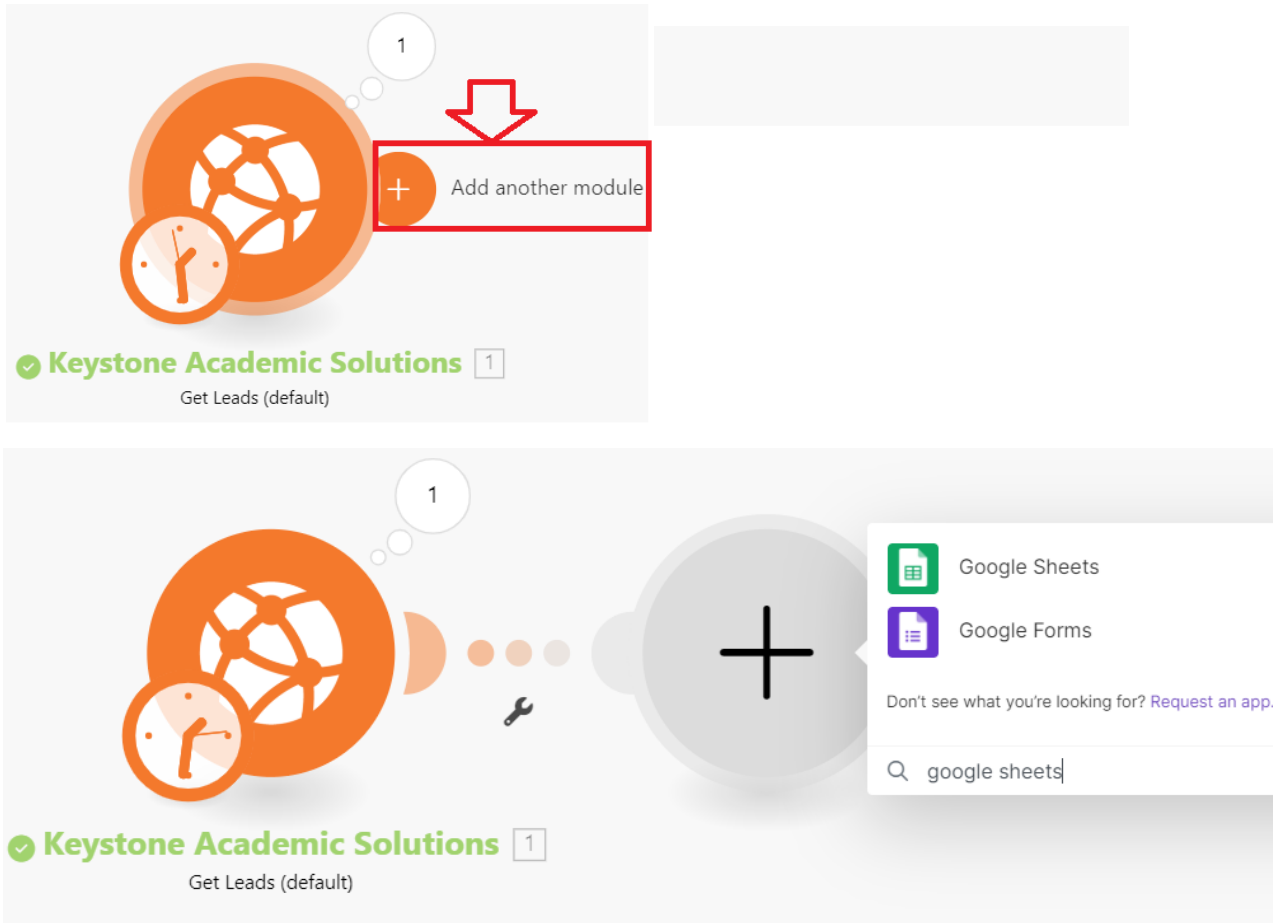
OFF

Every 15 minutes.

SCHEDULING

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.

ACTIONS

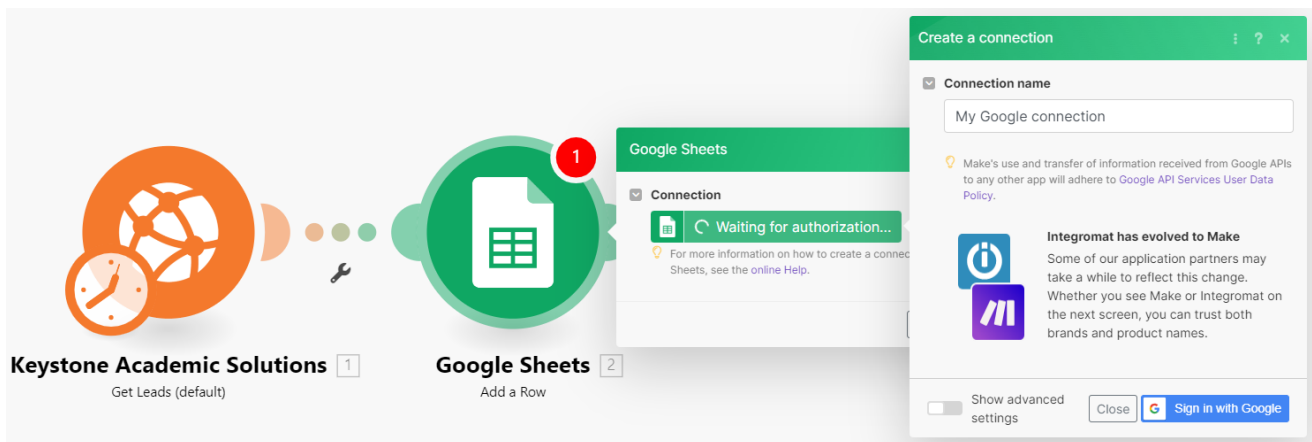
-  **Add a Row**
Appends a new row to the bottom of the table.
-  **Update a Row**
Updates a row.
-  **Clear a Row**
Clears values from a specific row.
-  **Delete a Row**
Deletes a specific row.
-  **Get a Cell**
Gets a specific cell.
-  **Update a Cell**
Updates a specific cell.
-  **Clear a Cell**
Clears a specific cell.
-  **Add a Sheet**
Adds a new sheet.
-  **Create a Spreadsheet**
Creates a new spreadsheet.
-  **Perform a Function - Responder**
Returns processed data as a result of the INTEGROMAT function. Sheets Add-On required.

SEARCHES

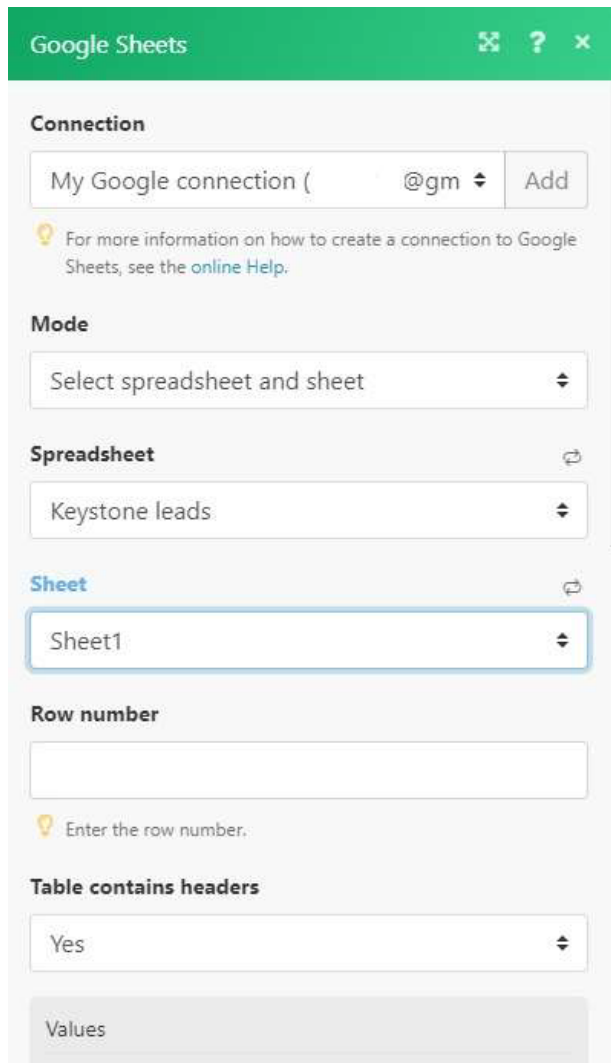
-  **Search Rows**
Returns results matching the given criteria.
-  **Search Rows (Advanced)**
Returns results matching the given criteria. This module doesn't return a row number.
-  **Get Range Values**
Gets a range content.

 Search

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.



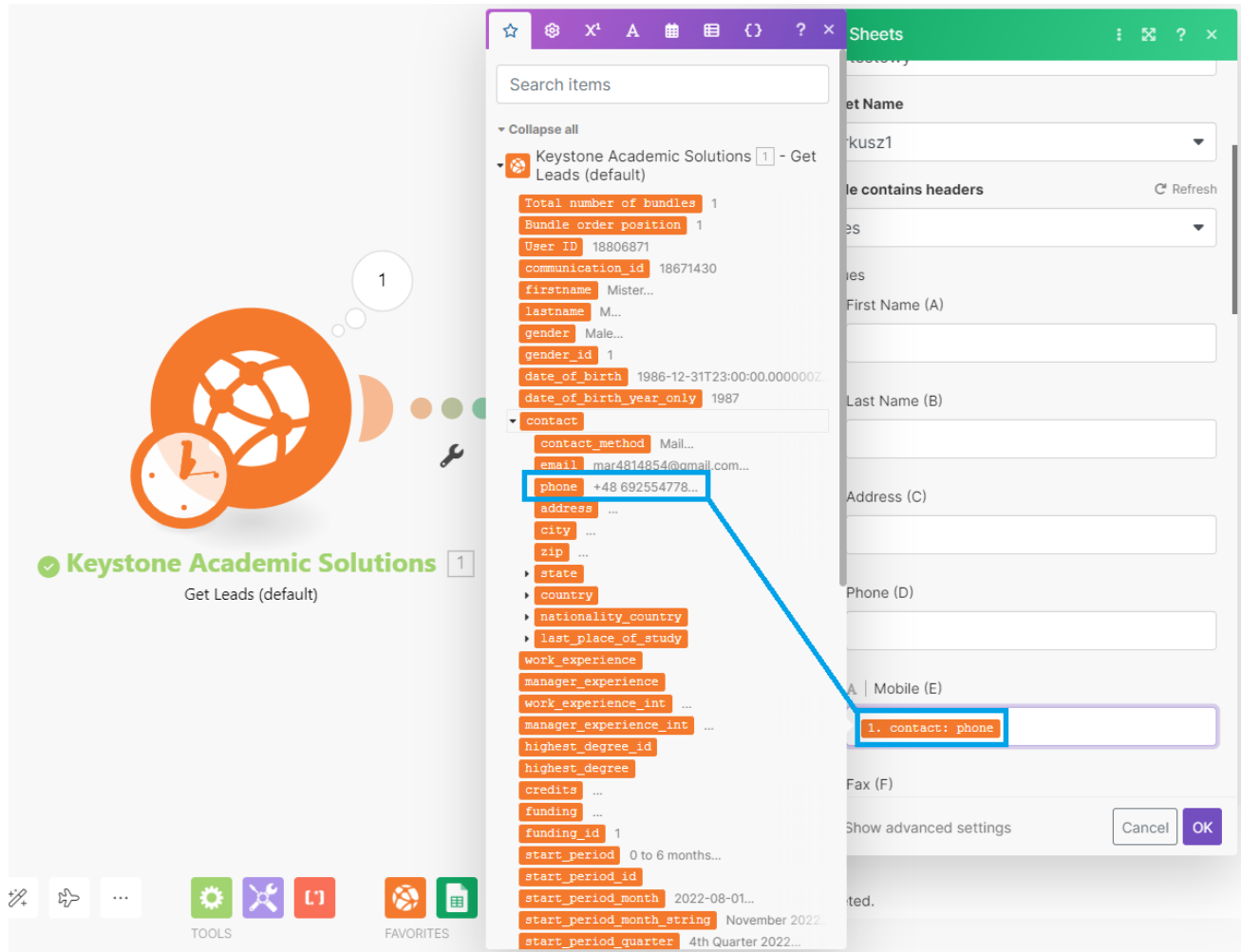
The screenshot shows the 'Google Sheets' configuration panel. It has a green header with the title 'Google Sheets' and standard window controls. The panel is divided into several sections:

- Connection:** A text input field containing 'My Google connection (' followed by a dropdown menu showing '@gm' and an 'Add' button. Below this is a help icon and text: 'For more information on how to create a connection to Google Sheets, see the [online Help](#).'
- Mode:** A dropdown menu currently showing 'Select spreadsheet and sheet'.
- Spreadsheet:** A dropdown menu showing 'Keystone leads'.
- Sheet:** A dropdown menu showing 'Sheet1'.
- Row number:** An empty text input field. Below it is a help icon and text: 'Enter the row number.'
- Table contains headers:** A dropdown menu showing 'Yes'.
- Values:** A greyed-out section at the bottom.

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:



The screenshot displays the Make integration interface. On the left, a workflow is shown with a trigger 'Keystone Academic Solutions' (Get Leads (default)) and a subsequent action 'CRM' (Contact). A variable selection menu is open, showing a list of properties from the 'Keystone Academic Solutions' integration. The 'phone' property is highlighted, and a blue arrow points to the '1. contact: phone' field in the CRM action configuration. The CRM configuration also shows other fields like 'First Name (A)', 'Last Name (B)', 'Address (C)', and 'Phone (D)'.

Keystone Academic Solutions [1] - Get Leads (default)

- Total number of bundles 1
- Bundle order position 1
- User ID 18806871
- communication_id 18671430
- firstname Mister...
- lastname M...
- gender Male...
- gender_id 1
- date_of_birth 1986-12-31T23:00:00.000000Z
- date_of_birth_year_only 1987
- contact
 - contact_method Mail...
 - email mar4814854@gmail.com...
 - phone +48 692554778...
 - address ...
 - city ...
 - zip ...
 - state ...
 - country ...
 - nationality_country ...
 - last_place_of_study ...
 - work_experience ...
 - manager_experience ...
 - work_experience_int ...
 - manager_experience_int ...
 - highest_degree_id ...
 - highest_degree ...
 - credits ...
 - funding ...
 - funding_id 1
 - start_period 0 to 6 months...
 - start_period_id ...
 - start_period_month_string 2022-08-01...
 - start_period_month_string November 2022...
 - start_period_quarter 4th Quarter 2022...

CRM [1] - Contact

- First Name (A)
- Last Name (B)
- Address (C)
- Phone (D)
- Mobile (E)
 - 1. contact: phone
- Fax (F)

Buttons: Show advanced settings, Cancel, OK

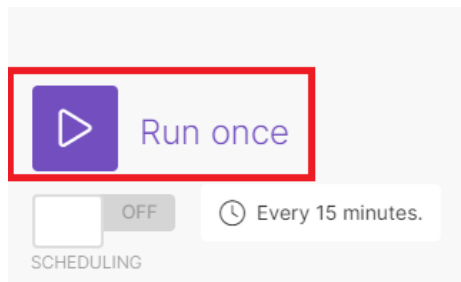
Some properties might be located under a parent object, like 'phone' in this example: To see it you have to click on the arrow next to 'contact'.

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.

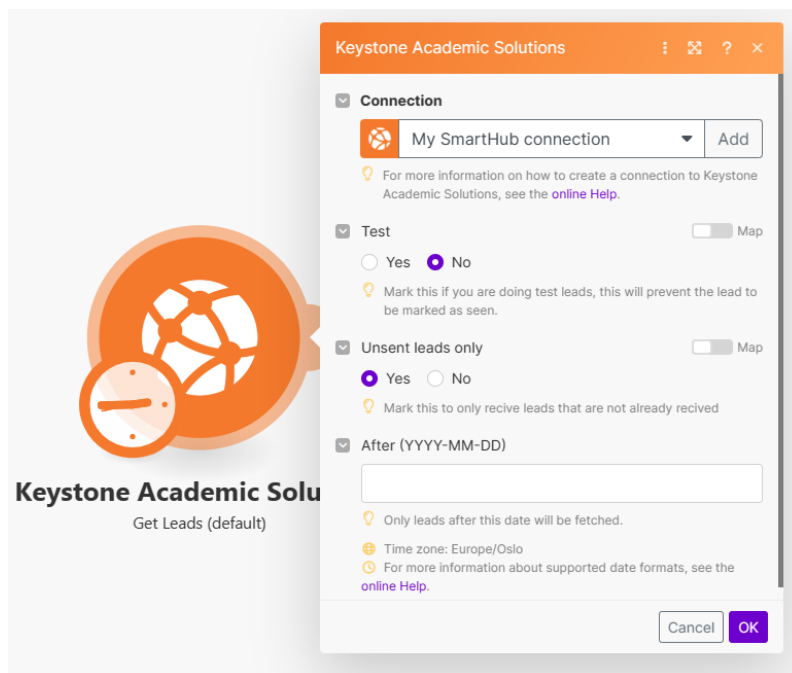
STEP 5.

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

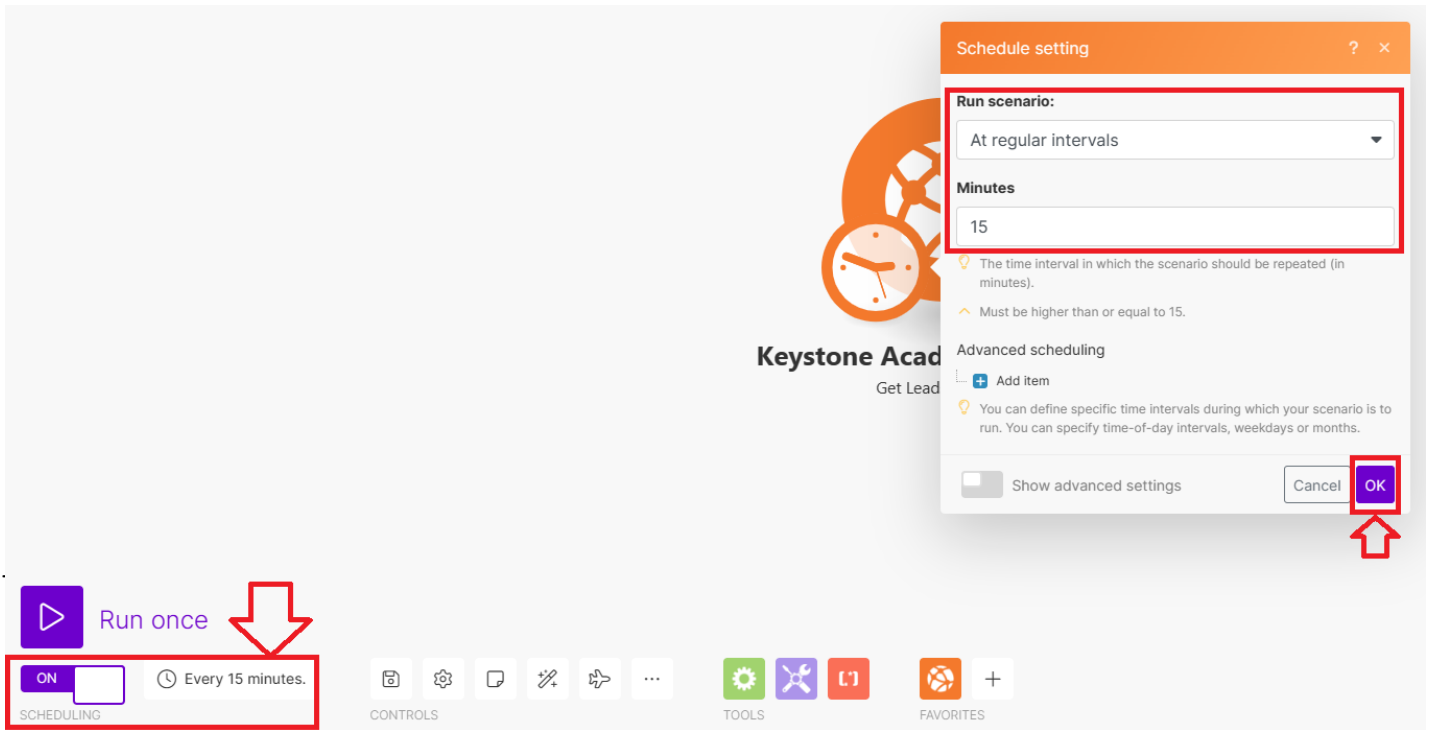
Now you can send the test leads over to your Google Sheets to see if they appear correctly:



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':



The screenshot shows the Keystone Academic Solutions interface. In the bottom left corner, there is a 'Run once' button with a play icon. Below it, a 'SCHEDULING' section is highlighted with a red box, containing an 'ON' toggle switch and a clock icon with the text 'Every 15 minutes.'. A red arrow points from the 'Run once' button to the 'SCHEDULING' section. On the right side, a 'Schedule setting' dialog box is open. The 'Run scenario:' dropdown is set to 'At regular intervals', and the 'Minutes' field is set to '15'. The dialog also includes a 'Show advanced settings' checkbox, a 'Cancel' button, and an 'OK' button. A red arrow points to the 'OK' button. The background of the interface shows the 'Keystone Academic' logo and a clock icon.

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