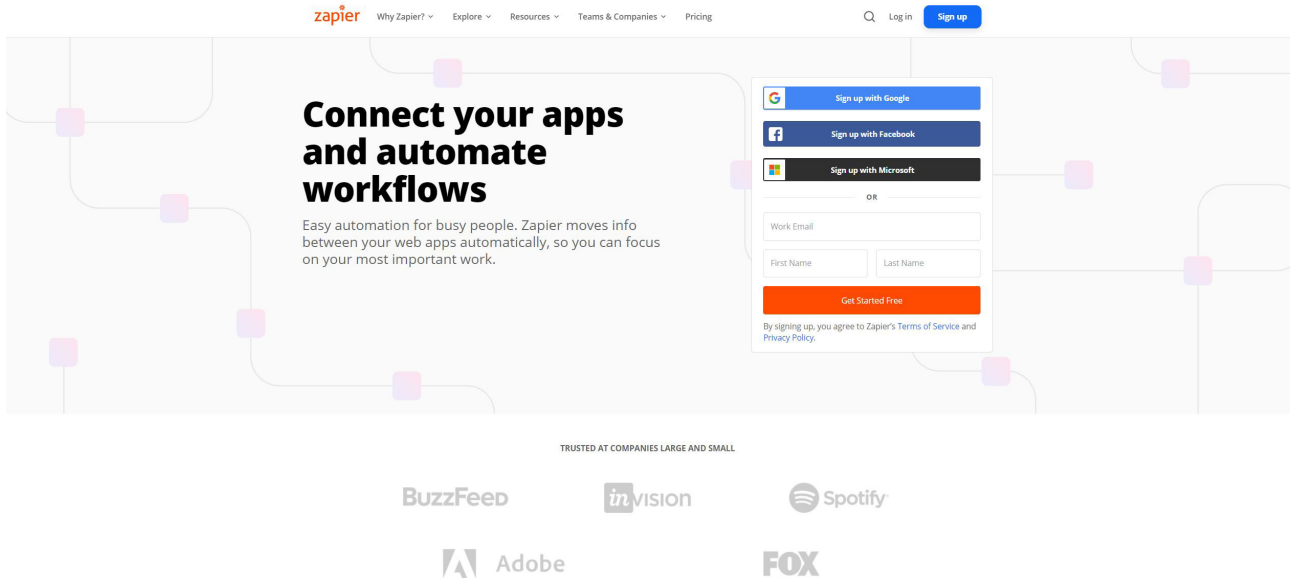




Zapier Integration

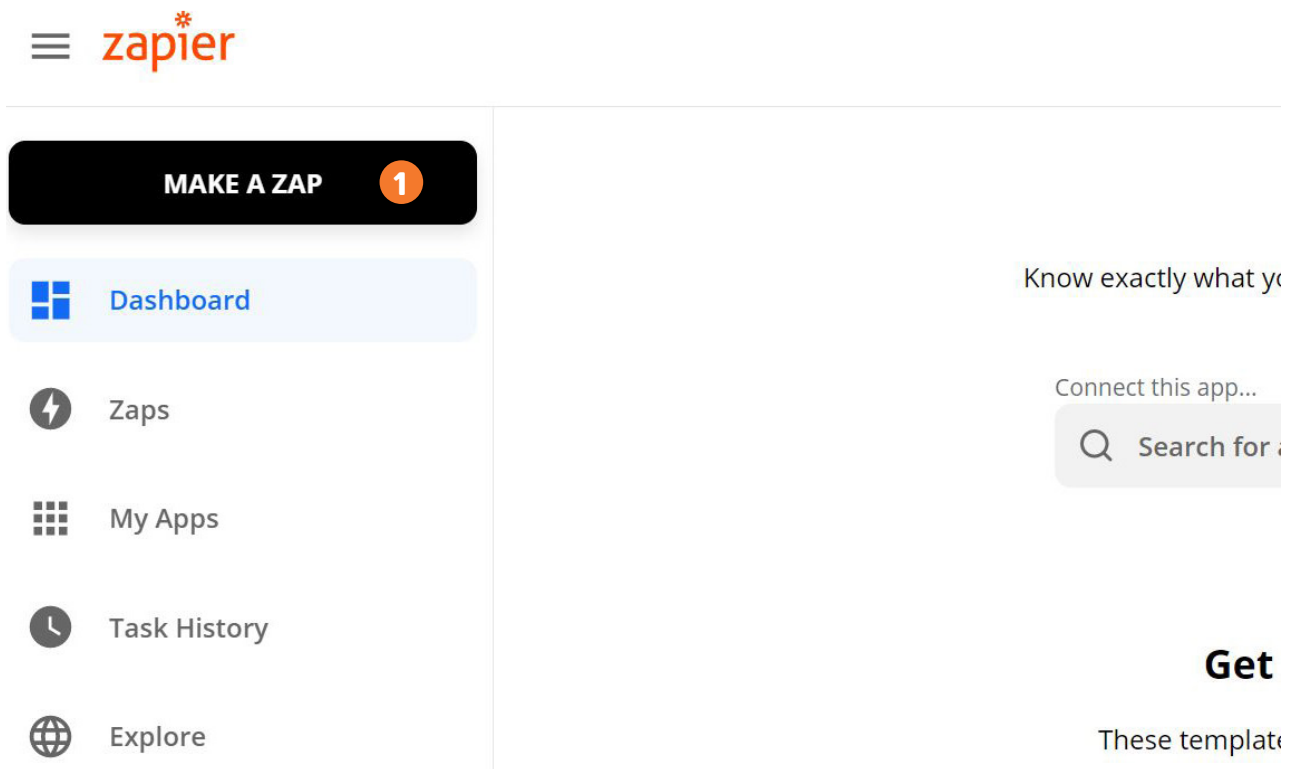
1

1 Create an account at www.zapier.com.



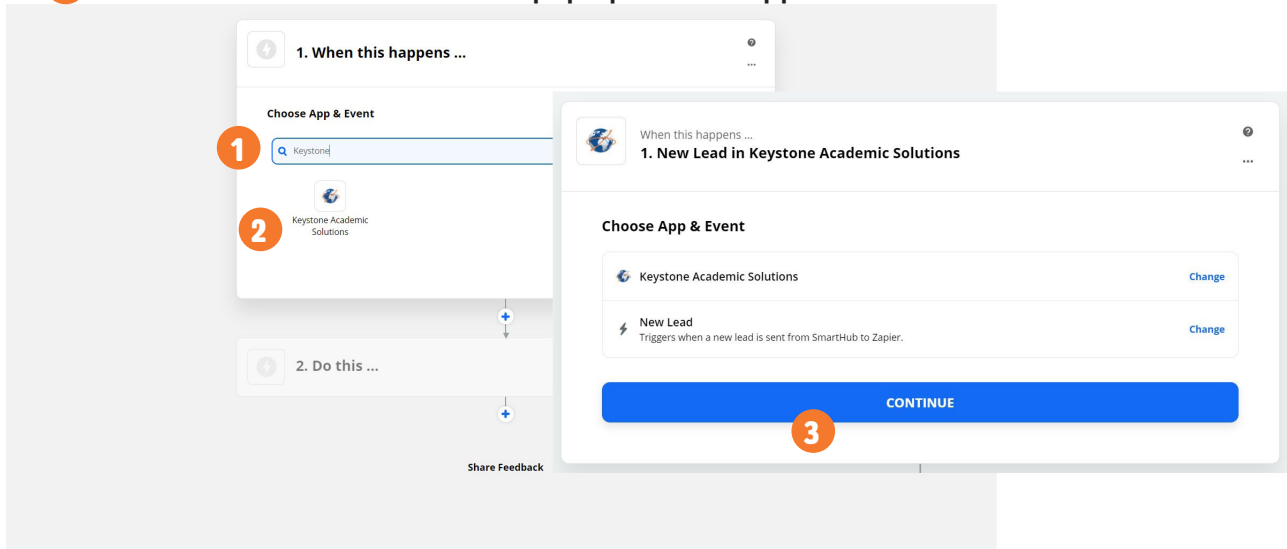
2

1 Click on "MAKE A ZAP":



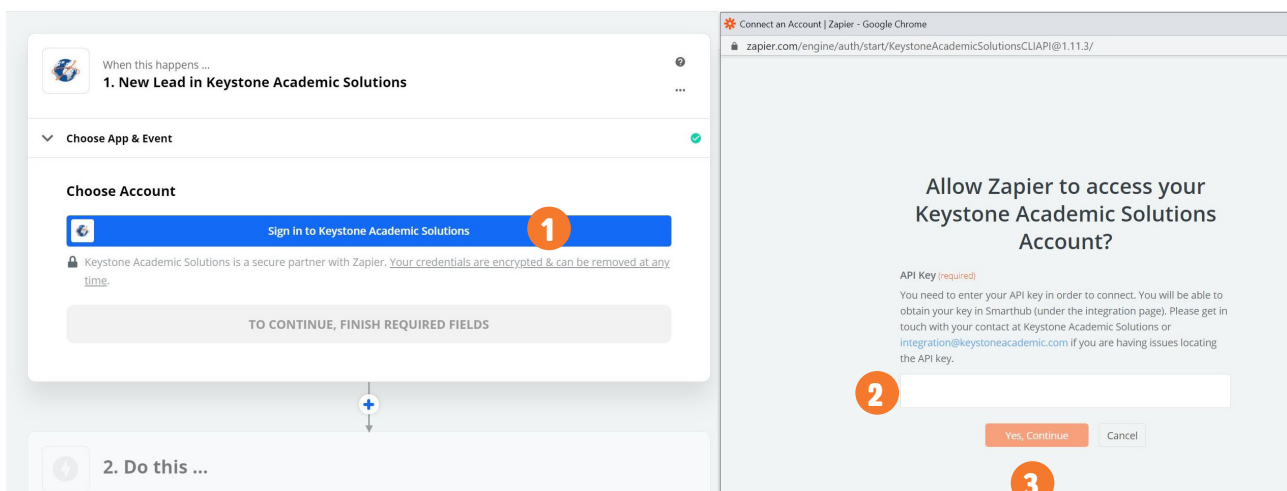
3

- 1 Type in "Keystone" .
- 2 Click on the Keystone logo.
- 3 Click "Continue" when the new pop up window appears.



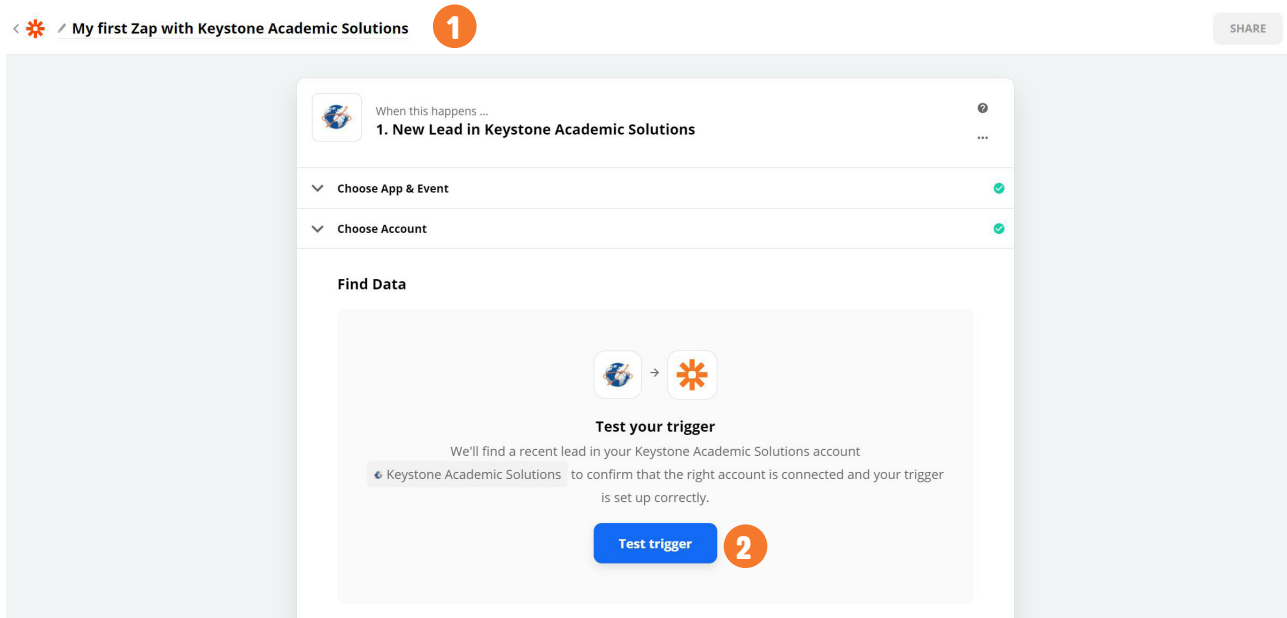
4

- 1 Click "Sign in to Keystone Academic Solutions", a new pop up window appears.
- 2 Insert the API key located in SmartHub or provided by your Keystone Account Manager.
- 3 Click "Yes, Continue".
- 4 **Important!** Don't have your API key? Contact your Keystone Account Manager.



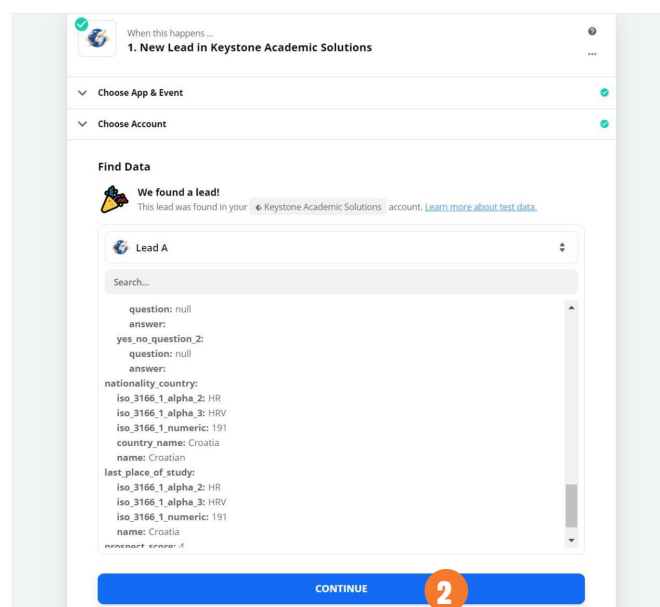
5

- 1 (optional) Give your Zap a name
- 2 Click “Test trigger” to make sure your account is set up correctly.



6

- 1 Test the connection by pulling a sample lead from SmartHub (the test lead is created automatically)
- 2 If the test is a success, you can click “Continue”.

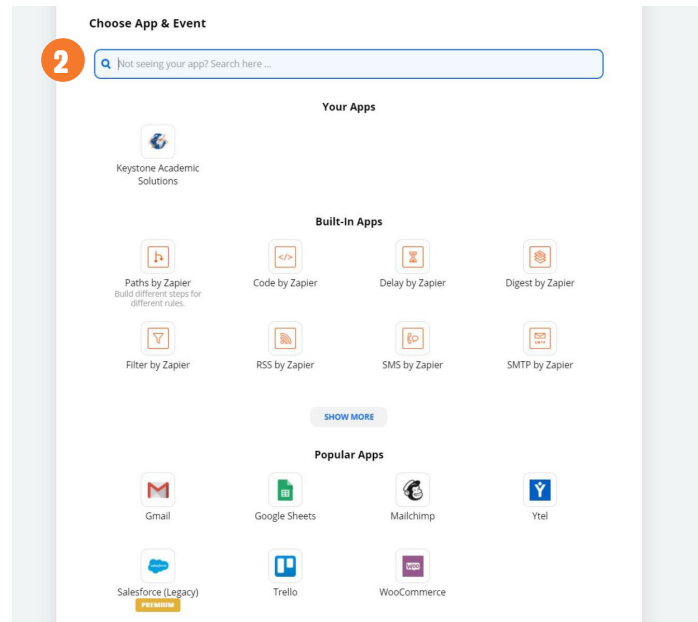




7

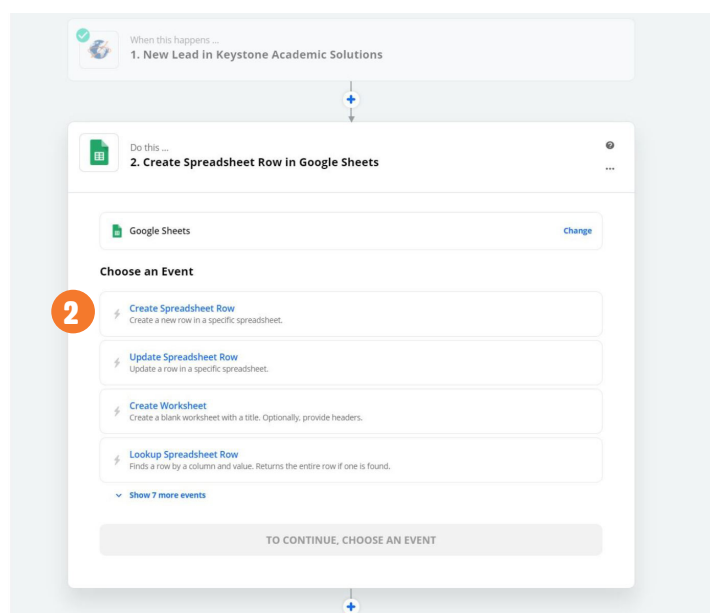
PART 2: ACTION

- 1 You should now select the system with which you want to integrate. This would normally be your CRM system.
- 2 Find your system using the search box.



8

- 1 We will be using Google Sheets in this example, but the process is similar for other apps.
- 2 Select the task that best represents what you'd like to do. For most CRM systems, you'd probably choose "New Leads". With Google, we are creating a new row.
- 3 Click "Continue" in the next window.





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- 1 Follow the steps needed for your system to connect to your account.
- 2 Click “Continue” when the account is setup correctly.

When this happens ...
1. New Lead in Keystone Academic Solutions

Do this ...
2. Create Spreadsheet Row in Google Sheets

Choose App & Event

Choose Account

Google Sheets account: (required) [Edit Accounts](#)

Google Sheets example@gmail.com

Google Sheets is a secure partner with Zapier. Your credentials are encrypted & can be removed at any time.

CONTINUE

Share Feedback

10

- 1 In this step we will be matching the Keystone variables with those in your system. The variables you see here are the variables from your CRM (e.g. First Name).
- 2 Click into the text field to assign a Keystone variable to this field.
- 3 You can see a list of our variables in the last two pages in this document.

Choose App & Event

Choose Account

Customize Spreadsheet Row

Drive
Choose value...

The Google Drive where your spreadsheet resides. If nothing is selected, then your personal Google Drive will be used. If you are connected with any Google Team Drives, you can select it here.

Spreadsheet
Zapier Integration

Worksheet
Sheet1

First Name
Type or insert...

Last Name
Type or insert...

Phone
Type or insert...

Email
Type or insert...

Refresh Fields

CONTINUE



Zapier Integration

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- 1 In this box you will be presented with the variable name and an example (gray).
- 2 Select the variable that best fits your current variable, in this case it would be "Firstname".

Drive

Choose value...

The Google Drive where your spreadsheet resides. If nothing is selected, then your personal Google Drive will be used. If you are connected with any Google Team Drives, you can select it here.

Spreadsheet (required)

Zapier Integration

Worksheet (required)

Sheet1

First Name

Type or insert...

Insert Data ...

Search...

1. New Lead in Keystone Academic Solutions

1. First Name Lakeith

1. Last Name

1. Program Name Program 1

Show All Options

12

- 1 You also have the option of entering text that will show for every lead. In this example we want the field "Source" to always contain the text "Keystone".
- 2 Some of our variables can be displayed in several ways. For example work experience can be displayed either as "0 years" or "0".

Spreadsheet (required)

Zapier Integration

Worksheet (required)

Sheet1

First Name

1. First Name: Lakeith

Last Name

1. Last Name: Nzinga

Email

1. Contact Email: cderoove@comcast.net

Source

1 Keystone

Work Experience

Type or insert...

Insert Data ...

work experience

1. Work Experience 0 years

1. Work Experience Int 0



Zapier Integration

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- 1 If you require a specific identifier for your program you should select “**Program Custom Program ID**” rather than “**Program Name**”. Be advised that “**Program Custom Program ID**” are empty by default.
- 2 In order to ensure these values are submitted correctly, you will need to put the postavlues in into SmartHub.

1

14

- 1 To put the identifiers in please access your SmartHub, go to the “**Integrations**” tab and into the “**Setup**” section.
- 2 Click on the “**Manage Custom identifiers**” and enter the identifiers into the corresponding programs.

1



Zapier Integration

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- 1 You can combine several variables and free text in one field. For instance, if you do not have fields for all the information but you still need to store it, or if you only have one field for name and want to combine first and last name (remember to add a space).
- 2 When you are satisfied with your match-making you can click “Continue”.

16

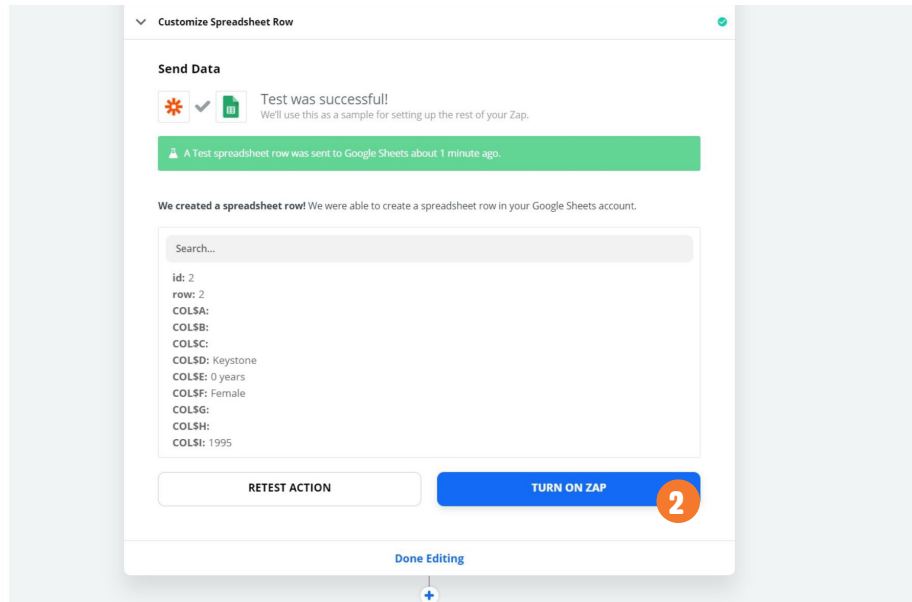
- 1 Check if everything is setup correctly. If variables are empty this could be because the field's are optional or that we do not currently track this variable for you.
- 2 Please let your Keystone Account Manager know if you are having issues.
- 3 When you click “Test & Continue” the current data will be added to your system.



Zapier Integration

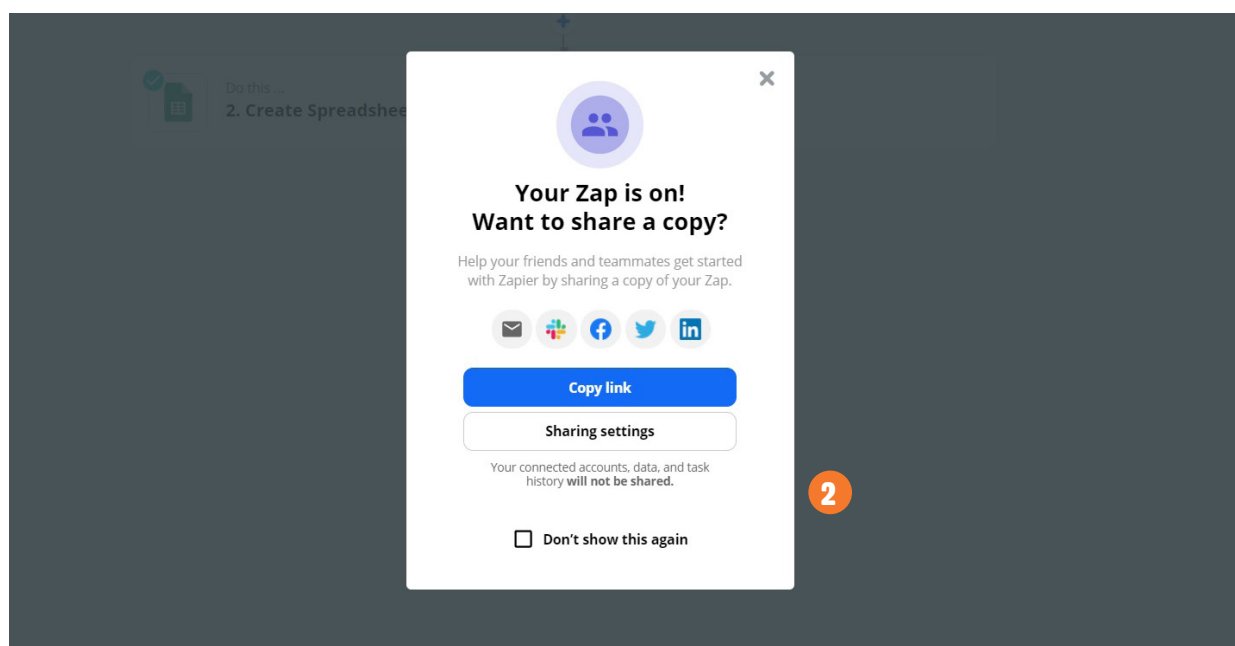
17

- 1 Check that your lead appeared in your system and that everything is okay.
- 2 **Important!** Make sure to turn your “Zap” on.



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- 1 Your Zapier integration should now be working and you should get leads directly into your system. Please let us know if you have any questions.





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- 1 Please note that if your action app is “premium” you will need to have a paid plan with Zapier. Contact Zapier for more information.
- 2 Keep in mind that every time you edit your Zap it will need to be turned on again after you made your changes.

Lead Variable List

XML NAME	ZAPIER NAME	WHAT IT MEANS FOR YOU	FORMAT	VALUE EXAMPLE
providerID	ID	Our internal ID for you	Integer	1234
providerName		The name of your school on our website	String	Dummy School
productID	Program ID	Our internal ID for your programs	Integer	60663
productName	Program Name	Name of the program	String	MSc Business
productActive		If your program is active or not	Integer	1
customProductID	Program Custom Program ID	Identifier for program (post-value)	String	MSC_BUS
registered	Registered	Date lead was registered	Date	2014-08-31 19:29:19
startPeriod	Start Period		String	13 to 24 months
startPeriodID	Start Period ID		Integer	1
startPeriodMin	Start Period Min	Calculated based on "start period"	Date	2014-09-31
startPeriodMax	Start Period Max	Calculated based on "start period"	Date	2015-09-31
funding	Funding	Student's funding type	String	Self funding
fundingID	Funding ID	Student's funding type as ID	Integer	1
comment	Comment	Free String comment from user	String	Where is this school located?
fesired_campus	Desired Campus		String	Barcelona
xml_posted		If the lead has been posted or not	Boolean	yes
firstname	Firstname	Student's first name	String	John
lastname	Lastname	Student's last name	String	Doe
gender	Gender	Student's gender	String	Male
genderID	Gender ID	Student's gender as Int	Integer	1
dateOfBirth	Date of Birth	Date of birth of student	Date	1977-07-12
dateOfBirthYear	Date of Birth Year Only	Year of birth of student	Integer	1977
nationalityCountryCode	National Country iso	Country code of students nationality	ISO String	NO
nationalityCountry	Nationality Country Name	Country of student	String	Norway
contactMethod	Preferred Contact Method	Preferred contact method	String	Email
email	Contact Email	Email address	String	Student22@gmail.com
phone	Contact Phone	Phone Integer (including country code)	String	+1 1717755953
skypeID	Skype ID	The ID of their skype account	String	
streetAddress	Contact Address	Student's street address	String	1100 Gervais St
city	Contact City	Student's current living city	String	Columbia
zip	Contact Zip	Students Zip/postal code.	Integer	29201



Lead Variable List

state	Contact State	Student's current living state	String	South Carolina
stateAbbr	Contact State Code	Student's current living state short	String	SC
countryCode	Contact Country iso	Code of current country	ISO String	US
country	Contact Country Name	Current Country	String	USA
workExperience	Work Experience	Length of previous work experience	String	13 years
workExperienceInt	Work Experience Int	Work experience as number only	Integer	13
managerExperience	Manager Experience	Length of previous manager experience	String	1 year
managerExperienceInt	Manager Experience Int	Manager experience as number only.	Integer	1
lastPlaceOfStudyCountryCode	Last Place Of Study iso		ISO String	US
lastPlaceOfStudyCountry	Last Place Of Study Name		String	USA
highestDegreeID	Highest Degree ID		Integer	1
highestDegree	Highest Degree	Highest education	String	Master
credits	Credits		String	
link	Communication Link	Communication Link		

Values

FUNDING

VARIABLE:	<i>funding</i>	<i>fundingID</i>
VALUES:	Self funding	0
	Business or Government funding	1

HIGHEST EDUCATION

VARIABLE:	<i>highestDegree</i>	<i>highestDegreeID</i>
VALUES:	High School	2
	Bachelor	1
	Master	3

GENDER

VARIABLE:	<i>gender</i>	<i>genderID</i>
VALUES:	Female	0
	Male	1

DESIRED START

VARIABLE:	<i>startPeriod</i>	<i>startPeriodID</i>
VALUES:	0 to 6 Months	0
	7 to 12 Months	1
	13 to 24 Months	2