



ApplyPal x Slate Integration Guide

Proposed SAIS Configuration

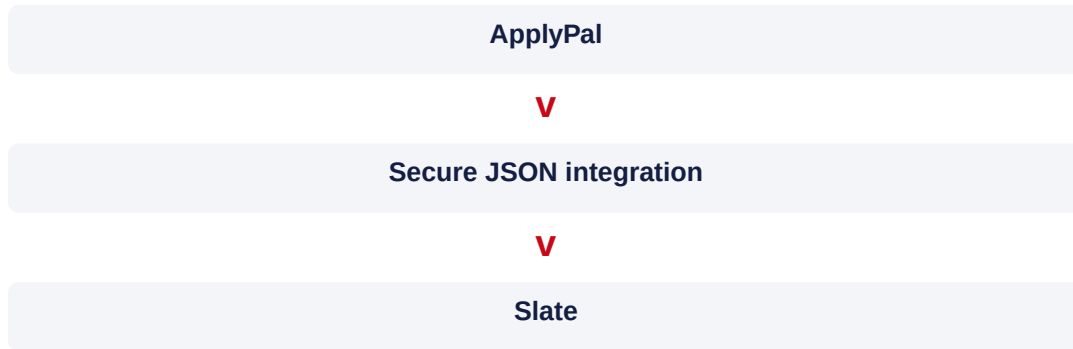
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Integration Overview

Phase 1: ApplyPal to Slate

ApplyPal sends agreed applicant and engagement information into Slate.



ApplyPal engagement data includes:

- Student profiles
- Admissions Fellow engagement
- Conversation activity
- Community participation
- Events and content engagement
- Confidence and concern indicators

Once received, Slate can provide:

- Applicant record updated
- Engagement visible to admissions teams
- Reporting and segmentation available
- Follow-up actions supported

Optional Phase 2: Slate to ApplyPal

Slate sends selected applicant information to ApplyPal so that students can be automatically invited into the correct experience.

This may include:

- Applicant identifier
- Email address
- Programme
- Campus



- Entry term
- Application stage
- Offer status
- Enrolment status

For example, when an applicant receives an offer, they could automatically be invited into the appropriate SAIS Offer Holder Community.

Part 1: Preparing Slate for ApplyPal

1. Confirm the Integration Scope

Before setup begins, SAIS and ApplyPal would agree:

- Which Slate records should be connected
- Which ApplyPal activities should be written to Slate
- Which teams require access
- How frequently data should be synchronised
- Whether conversation summaries or only engagement metrics should be transferred
- The retention and deletion requirements
- The agreed applicant-matching identifier

The initial integration can be deliberately limited to a small number of high-value fields and expanded later.

2. Prepare the ApplyPal Environment

Before testing begins:

- The SAIS ApplyPal environment should be active
- At least one test applicant account should be available
- At least one test Admissions Fellow or ambassador profile should be active
- The SAIS programme and campus structure should be configured
- The test applicant should complete one or more sample activities

Sample activities may include:

- Creating an account
- Viewing an Admissions Fellow profile
- Starting a conversation
- Receiving a reply
- Joining a community



- Attending an event
- Completing a confidence question

3. Create the ApplyPal Source Format in Slate

Within Slate, an authorised SAIS administrator would create a new Source Format for ApplyPal.

Recommended configuration

Setting	Value
Name	ApplyPal Student Engagement
Status	Active
Format	JSON
Delivery method	Web service
Remap date	Current implementation date

The Source Format enables the fields sent by ApplyPal to be mapped to the appropriate person, application, interaction or custom fields within Slate.

4. Agree the Applicant-Matching Method

ApplyPal and Slate need a reliable method of identifying the same person across both systems. The preferred order would normally be:

1. Slate applicant or person identifier
2. SAIS-provided external identifier
3. Verified email address
4. A controlled combination of identifying fields

Using an institutional identifier is preferable to relying solely on email addresses, particularly where applicants may use more than one email address during the admissions journey.

5. Agree the Field Structure

The following fields are examples of information that could be sent from ApplyPal into Slate. The final list would be agreed with SAIS.



Applicant Identity

ApplyPal Field	Purpose
<code>applicant_id</code>	Unique ApplyPal applicant identifier
<code>slate_person_id</code>	Slate person or applicant identifier
<code>email</code>	Applicant email address
<code>first_name</code>	Applicant first name
<code>last_name</code>	Applicant surname

Admissions Context

ApplyPal Field	Purpose
<code>programme</code>	Programme of interest
<code>campus</code>	Relevant SAIS campus
<code>entry_term</code>	Intended entry period
<code>degree_level</code>	Intended level of study
<code>country</code>	Applicant country
<code>domestic_region</code>	Applicant region, where applicable

Acquisition and Attribution

ApplyPal Field	Purpose
<code>signup_source</code>	Source of ApplyPal registration
<code>campaign</code>	Campaign or outreach source
<code>signup_location</code>	Page or channel where registration occurred
<code>referral_source</code>	Ambassador, event or campaign attribution

Engagement Activity



ApplyPal Field	Purpose
account_created_date	Date the ApplyPal account was created
first_engagement_date	First meaningful engagement
last_active_date	Most recent activity
profiles_viewed	Number of Fellow or ambassador profiles viewed
conversations_started	Number of conversations initiated
responses_received	Number of responses received
community_joined	Offer-holder or applicant community joined
events_attended	ApplyPal events attended
content_viewed	Relevant resources or content viewed

Conversation Intelligence

ApplyPal Field	Purpose
conversation_summary	Structured summary of key discussion themes
primary_question_theme	Main subject discussed
main_concern	Primary applicant concern
confidence_indicator	Applicant confidence response
confidence_driver	Factor influencing confidence
support_required	Whether further follow-up may be appropriate

Governance

ApplyPal Field	Purpose
marketing_consent	Applicant communication preference
active_status	Whether the account remains active
blocked_status	Safeguarding or moderation status
deletion_requested	Whether a deletion request has been made



6. Create a Dedicated Slate Service Account

SAIS would create a restricted service account specifically for the ApplyPal integration.

The service account should:

- Use a recognisable institutional name
- Be restricted to the minimum required permissions
- Be separate from individual staff accounts
- Be subject to SAIS password and access policies
- Be revocable without affecting other Slate services

Recommended service account name: ApplyPal Integration Service

Credentials should not be exchanged through ordinary email. ApplyPal would provide a secure method for entering or transferring the required connection details.

7. Obtain the Slate Service Endpoint

The SAIS Slate administrator would obtain the web-service endpoint associated with the ApplyPal Source Format.

Required connection information may include:

- Slate service endpoint
- Service-account username
- Service-account password or token
- Date format
- Time zone
- Test-environment details
- Any IP or security restrictions

ApplyPal would store secrets securely and restrict access to authorised technical personnel.

Part 2: Connecting ApplyPal to Slate

1. Establish the Secure Connection

ApplyPal would configure the SAIS Slate connection within the ApplyPal integration environment. The connection would be tested without activating the live sync.

Initial checks would confirm:



- Authentication is successful
 - The endpoint is reachable
 - The JSON payload is accepted
 - Dates and time zones are formatted correctly
 - Required fields are present
 - Error responses can be captured
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2. Send a Sample Applicant Record

ApplyPal would send a controlled sample dataset using the agreed test applicant. A representative sample might include:

- Applicant identity
- Programme and campus
- Signup source
- First engagement date
- Conversation activity
- Community participation
- Confidence indicator
- Conversation summary

No production-wide synchronisation would begin at this stage.

3. Map ApplyPal Fields Inside Slate

The SAIS Slate administrator would review the sample data and map each incoming ApplyPal field to the appropriate destination.

Fields may be mapped to:

- Person records
- Application records
- Interaction records
- Source or campaign fields
- Custom fields
- Notes or engagement summaries

SAIS retains control over where the information is stored and how it is made visible to users.



4. Configure Transformations

Where necessary, SAIS can apply transformations so that ApplyPal values match existing Slate conventions.

Examples include:

- Converting campus names to existing Slate codes
- Matching programme names
- Standardising country or region values
- Converting date formats
- Converting true-or-false values
- Mapping engagement stages
- Translating confidence responses into reporting categories

Transformations should be tested before the live remap is activated.

5. Validate the Test Record

Both teams would verify that:

- The correct Slate person has been identified
- No duplicate applicant has been created
- All required fields are populated
- Existing Slate data has not been overwritten incorrectly
- The interaction date is accurate
- Consent preferences are respected
- The engagement summary is visible only to authorised users
- The source attribution is retained

Any mapping issues would be corrected before activation.

6. Activate the Integration

Once testing has been approved, SAIS would activate the relevant remapping and ApplyPal would enable the scheduled or event-driven sync.

Possible sync options include:

- Near-real-time delivery after a significant activity
- Scheduled hourly synchronisation
- Daily batch synchronisation
- A hybrid model for priority and non-priority events

The recommended approach would depend on SAIS reporting and follow-up requirements.



7. Monitor and Reconcile

ApplyPal would provide integration monitoring covering:

- Successful records
- Failed records
- Retry attempts
- Authentication failures
- Mapping errors
- Duplicate detection
- Last successful synchronisation
- Volume of records transferred

Failed records should be retried safely without creating duplicates. A reconciliation report can be used during the pilot to compare ApplyPal activity with records received by Slate.

Suggested SAIS Engagement Events

The first version does not need to transfer every click or page view. It should prioritise events that are meaningful to admissions and yield.

Recommended initial events:

1. Applicant registered with ApplyPal
2. Applicant viewed an Admissions Fellow profile
3. Applicant started their first conversation
4. Applicant received a response
5. Applicant joined an Offer Holder Community
6. Applicant attended a virtual event
7. Applicant expressed a significant concern
8. Applicant reported increased or reduced confidence
9. Applicant became inactive after previously engaging
10. Applicant requested further support

These events would provide a clearer picture of applicant confidence and engagement without overwhelming Slate with low-value activity.



Optional Slate-to-ApplyPal Workflow

A second integration phase could allow applicant-status changes in Slate to trigger the appropriate ApplyPal journey.

Example Workflow



This phase would require separate technical scoping with SAIS because the method used to export or trigger data from Slate may differ from the inbound ApplyPal-to-Slate connection.



Security and Data Governance

The integration would be configured according to the agreed SAIS security and privacy requirements.

Key safeguards would include:

- Encrypted data transfer
- Restricted service-account permissions
- Secure credential storage
- Role-based access
- Audit logging
- Data minimisation
- Defined retention periods
- Deletion and correction workflows
- Controlled access to conversation summaries
- Separate test and production processes where available

Full conversation transcripts would not need to be sent to Slate by default. A structured summary, engagement status or selected themes may provide greater institutional value while reducing unnecessary data transfer.

The respective data-controller and data-processor responsibilities would be confirmed through the contractual and data-processing documentation.

Pilot Acceptance Criteria

The SAIS pilot integration would be considered technically successful when:

- A test applicant can be matched correctly between ApplyPal and Slate
 - New ApplyPal activity is received by Slate
 - Updated activity changes the existing record rather than creating a duplicate
 - Field mapping is accurate
 - Consent and governance rules are respected
 - Failed records are identifiable and can be retried
 - Admissions users can access the agreed engagement information
 - Synchronisation can be monitored
 - The connection can be disabled or credentials revoked safely
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Proposed Implementation Stages

Stage 1: Discovery

Confirm fields, identifiers, data ownership, frequency, security and reporting requirements.

Stage 2: Configuration

Create the Slate Source Format, service account, endpoint and ApplyPal connection.

Stage 3: Test Sync

Send controlled test records and complete field mapping.

Stage 4: Pilot Activation

Enable the integration for the agreed SAIS pilot audience.

Stage 5: Validation

Monitor synchronisation, user access, data quality and reporting value.

Stage 6: Wider Rollout

Expand the integration across agreed campuses, programmes or applicant groups.

Important: This document describes the proposed ApplyPal x Slate integration workflow for SAIS. Final fields, permissions, data flows and implementation requirements would be agreed with the SAIS Slate and technical teams before development and activation.