

INTEGRATION GUIDE

# Lead Validation International and Marketo Engage Integration Guide

May 2021

# Introduction

Today integrating Service Objects DOTS Services into Marketo Engage couldn't be any easier.

By using Webhooks in Marketo Engage, your company could be validating leads in a few short moments.

This guide will walk you through setting up a Webhook for Lead Validation International.

This guide can serve as a reference for integrating any of our services into Marketo Engage Webhooks.

There are a lot of steps, but rest assured, they are simple and fast. We have broken the process down into its smallest parts.

## First Things First...

To get started you will need to go to [www.serviceobjects.com](http://www.serviceobjects.com) and request a trial license key or obtain a live production license key.

Here you can request a free API trial License key:

<https://www.serviceobjects.com/products/lead-validation/lead-validation-international>

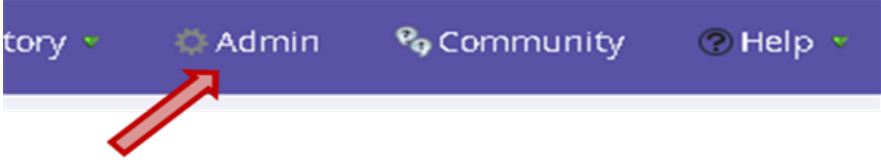
Once you have made the request, your trial key will be emailed to you immediately.

Be sure to check your email accounts junk folder just in case it landed there.



# Step 1

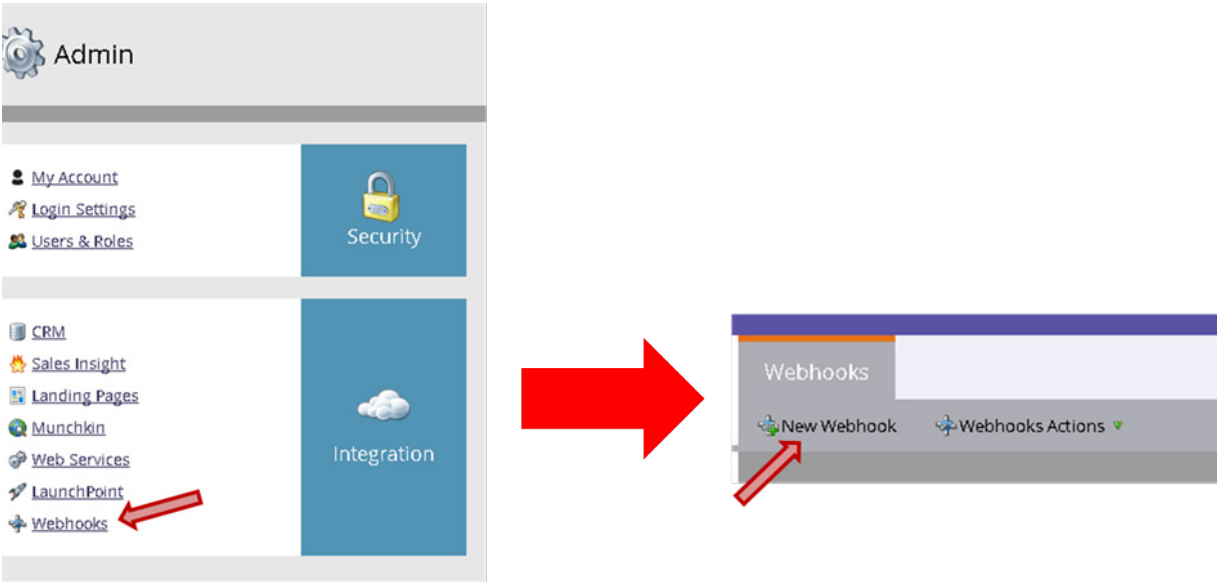
Log in to your Marketo Engage account and select "Admin" in the top navigation bar.



# Step 2

In the Admin menu select "Webhooks"

Then, select "New Webhook"



# Step 3

In the New Webhook creation screen fill in the details for the new Webhook

Webhook Name: **DOTS Lead Validation International**

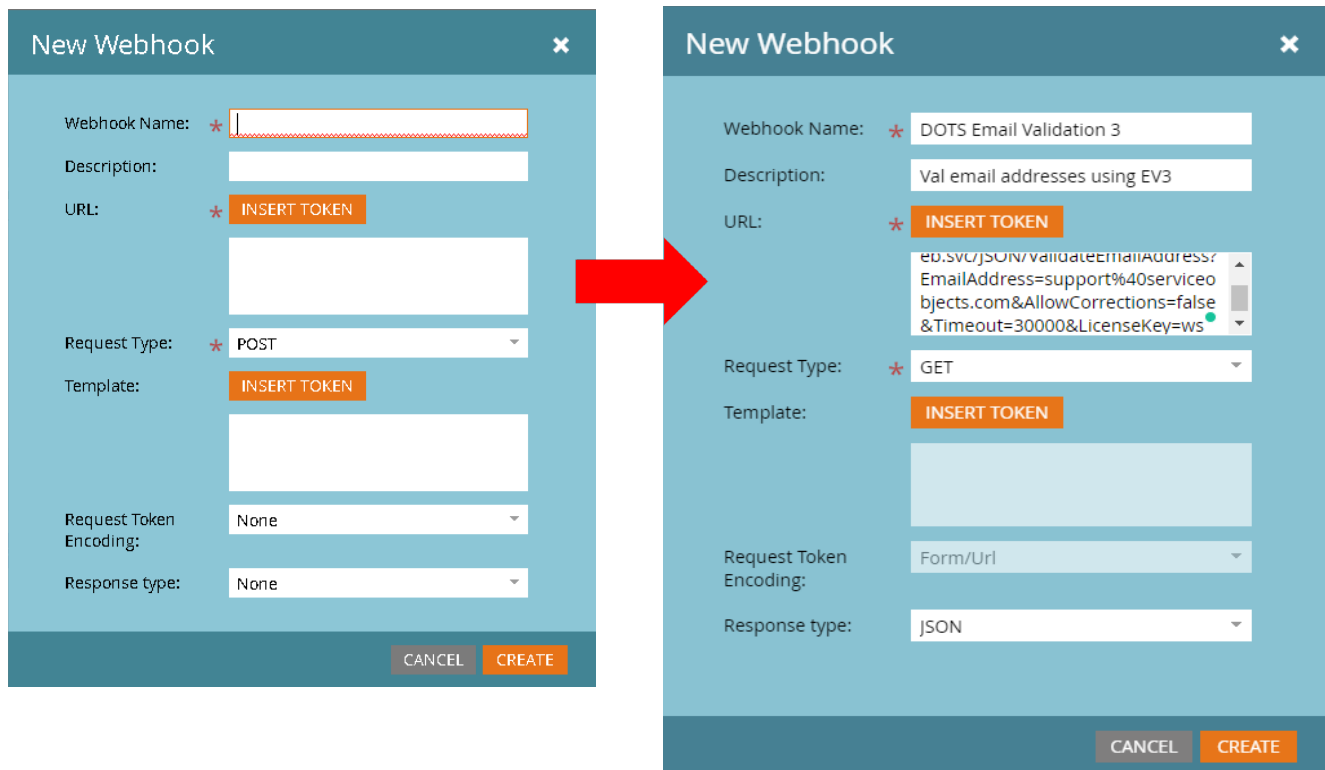
Description: **Validate lead information with DOTS LVI**

URL:

<https://ws.serviceobjects.com/lvi/api.svc/JSON/ValidateLeadInternational?FullName=Mike+Wilson&Salutation=&FirstName=&LastName=&BusinessName=&BusinessDomain=&BusinessEIN=&Address1=136+W+Canon+Perdido+%23D&Address2=&Address3=&Address4=&Address5=&Locality=Santa+Barbara&AdminArea=CA&PostalCode=93101&Country=USA&Phone1=8059631700&Phone2=&Email=mwilson%40serviceobjects.com&IPAddress=8.8.8.8&Gender=&DateOfBirth=&UTCaptureTime=&OutputLanguage=&TestType=business&LicenseKey=wsxx-xxxx-xxxx>

Request Type: **GET**

Response Type: **JSON**



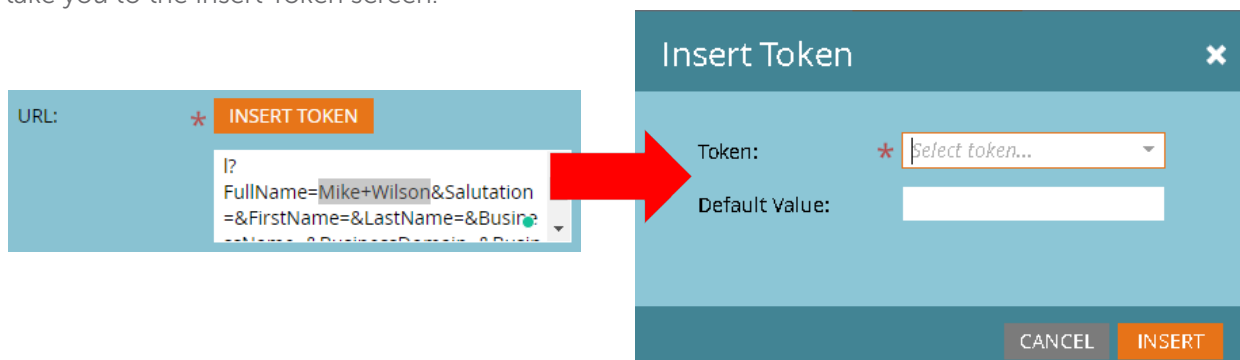
# Step 4

In the URL text box we are going to have to make some replacements so that we can populate the URL query parameters with the appropriate Marketo Engage fields. I have highlighted the vales that will need updating and in the next couple of steps you will see how they can be updated.

```
https://ws.serviceobjects.com/lvi/api.svc/JSON/ValidateLeadInternational?
FullName=Mike+Wilson
&Salutation=
&FirstName=
&LastName=
&BusinessName=
&BusinessDomain=
&BusinessEIN=
&Address1=136+W+Canon+Perdido+%23D
&Address2=
&Address3=
&Address4=
&Address5=
&Locality=Santa+Barbara
&AdminArea=CA
&PostalCode=93101
&Country=USA
&Phone1=8059631700
&Phone2=
&Email=mwilson%40serviceobjects.com
&IPAddress=8.8.8.8
&Gender=
&DateOfBirth=
&UTCCaptureTime=
&OutputLanguage=
&TestType=business
&LicenseKey=wsxx-xxxx-xxxx
```

# Step 5

First select "support%40serviceobjects.com" and hit delete on your keyboard. Leaving the cursor in the position of the text that was just removed click on "Insert Token" to take you to the Insert Token screen.

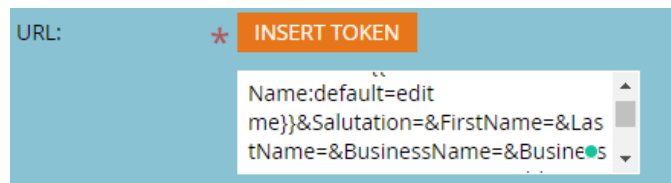
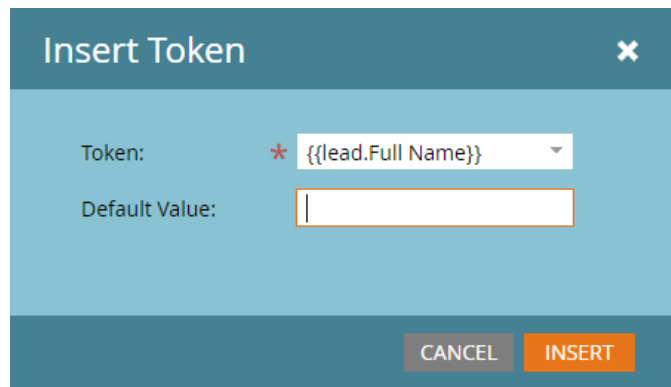
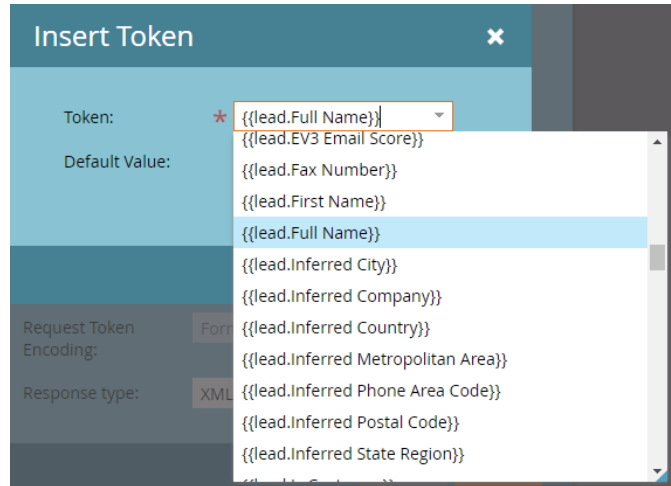


# Step 6

Now, in the Token drop down select the value that you want to populate the URL Name parameter with. In our case, we are choosing the lead FullName field.

Add the appropriate default value in the Default Value field. We are leaving it empty. Then click "Insert"

Finally, if you chose to leave the Default Value empty, like us, you will need to remove the following text from the resulting URL in the URL text box "edit me".



# Step 7

We just finished performing the URL parameter update for the FullName field.

Repeat steps 6 and 7 for the necessary fields.

For the following example, we have used the Name, BusinessName, Address1, Locality, AdminArea, PostalCode, Country, Phone1, Email, and IPAddress. You may want to have the [test type](#) be a different field depending on the lead data you have present. Refer to our test type documentation to view the different test types we have available. We can also create a custom test type based on your specific needs

```
https://ws.serviceobjects.com/lvi/api.svc/JSON/ValidateLeadInternational?
FullName={{lead.Full Name:default=}}
&Salutation=
&FirstName=
&LastName=
&BusinessName={{campaign.name:default=}}
&BusinessDomain=
&BusinessEIN=
&Address1={{lead.Address:default=}}
&Address2=
&Address3=
&Address4=
&Address5=
&Locality={{lead.City:default=}}
&AdminArea={{lead.State:default=}}
&PostalCode={{lead.Postal Code:default=}}
&Country={{lead.Country:default=}}
&Phone1={{lead.Phone Number:default=}}
&Phone2=
&Email={{lead.Email Address:default=}}
&IPAddress=
&Gender=
&DateOfBirth=
&UTCCaptureTime=
&OutputLanguage=
&TestType=business
&LicenseKey=wsxx-xxxx-xxxx
```

**IMPORTANT NOTE:** If you are using a trial license key you URL should begin with <http://trial.serviceobjects.com>. Instead of <http://ws.serviceobjects.com>. Not making this change will cause errors.



# Step 8

At this point the Webhook is defined so it is time to click on "Create"

The image shows two screenshots of a web application interface. The left screenshot is titled "New Webhook" and contains the following fields:

- Webhook Name: \* DOTS Lead Validation International
- Description: Validate lead information with DOTS LV
- URL: \* INSERT TOKEN
- Request Type: \* GET
- Template: INSERT TOKEN
- Request Token Encoding: Form/Url
- Response type: JSON

At the bottom of the "New Webhook" form are two buttons: "CANCEL" and "CREATE". A red arrow points from the "CREATE" button to the right screenshot.

The right screenshot is titled "Details" and shows the following information:

- URL: `https://ws.serviceobjects.com/lvi/api.svc/JSON/ValidateLeadInternational?FullName={{lead.Full Name:default=edit me}}&Salutation=&FirstName=&LastName=&BusinessName={{campaign.name:default=edit me}}&BusinessDomain=&BusinessEIN=&Address1={{lead.Address:default=edit me}}&Address2=&Address3=&Address4=&Address5=&Locality={{lead.City:default=edit me}}&AdminArea={{lead.State:default=edit me}}&PostalCode={{lead.Postal Code:default=edit me}}&Country={{lead.Country:default=edit me}}&Phone1={{lead.Phone Number:default=edit me}}&Phone2=&Email={{lead.Email Address:default=edit me}}&IPAddress=&Gender=&DateOfBirth=&UTCCaptureTime=&OutputLanguage=&TestType=business&LicenseKey=wsxx-xxxx-xxxx`
- Payload Template:
- Request Token: Form/Url
- Encoding:
- Request Type: GET
- Response Format: JSON
- Used By: 0

An "EDIT" button is located in the top right corner of the "Details" view.





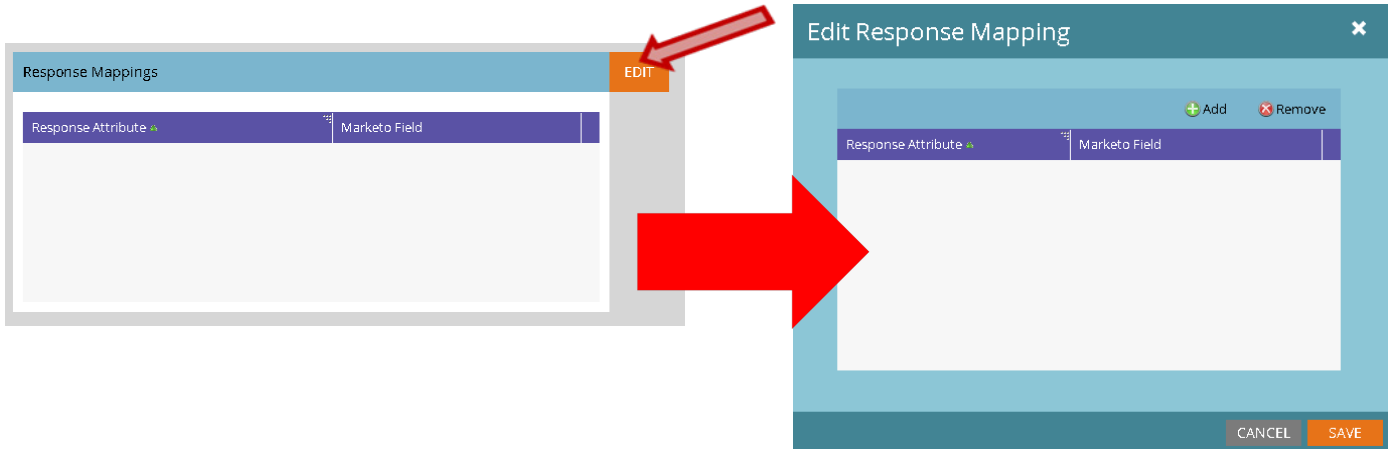
# Step 9

The second part of creating the Webhook is to process the response from the Service and do something with the returned values.

To do that, you will need to pull the desired data points back into Marketo Engage from the response.

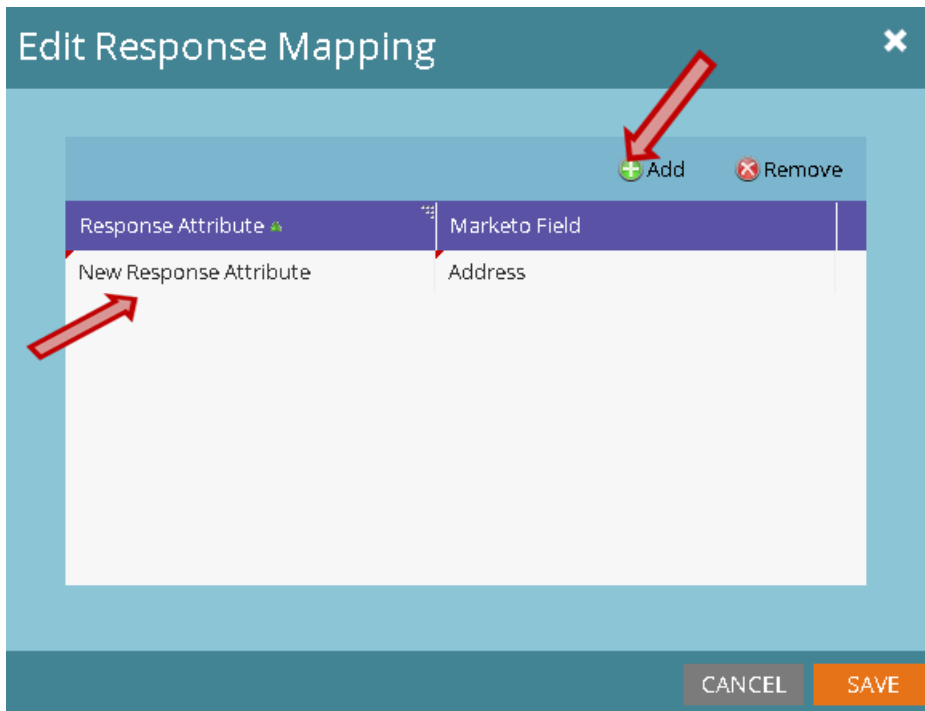
This is done by mapping parts of the response to Marketo Engage fields as you will see in the next few steps.

Click on the "Edit" button in the "Response Mappings" section just below the "Details" section of your newly created Webhook. This will bring you to the "Edit Response Mapping" screen.



# Step 10

Click on the "Add" button in the top right of the screen to add a new mapping. Then double click the "New Response Attribute" to edit the field.



# Step 11

To get the values back from the response of the service we need to map elements in the response to fields in Marketo Engage.

The following link is some documentation on how to do JSON and XML mappings. For this service you will be interested in the XML mappings.

<http://developers.marketo.com/documentation/webhooks/response-mappings/>



The Response attribute is going to look like the following for the OverallCertainty field.

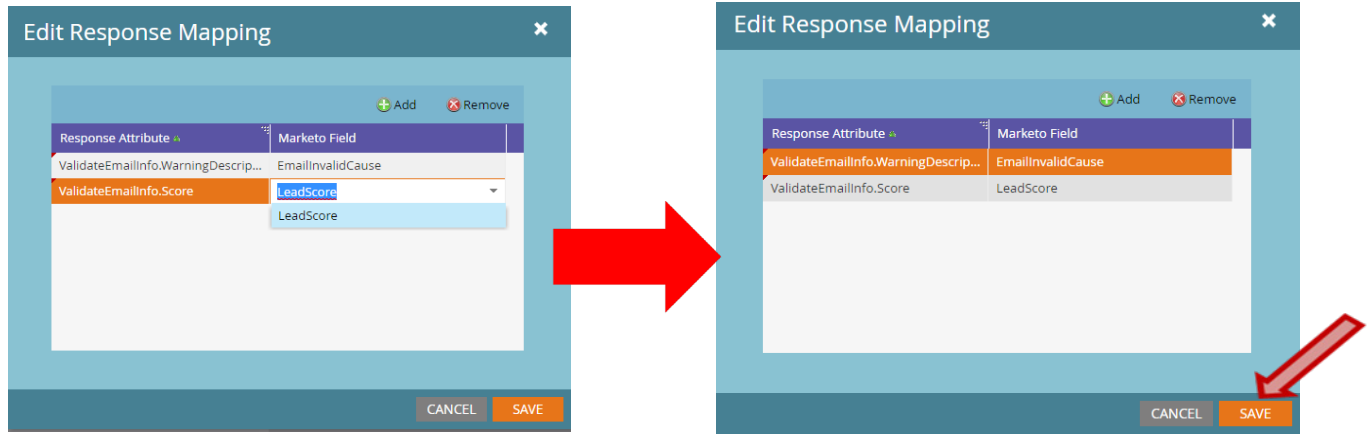
## OverallCertainty

```
{
  "OverallCertainty": "100",
  "OverallQuality": "Accept",
  "LeadType": "BUSINESS",
  "LeadCountry": "US",
  "NoteCodes": "101,102,103,106,107,108,124",
  "NoteDesc": "IsNamePhoneMatch,IsPhoneAddressMatch,IsNamePhoneAddressMatch,IsNameEmailMatch,IsPhoneEmailMatch,IsBusinessEmailMatch,IsPhoneAddressLocationMatchLOW",
  "NameCertainty": "100",
  "NameQuality": "Accept",
  "FirstNameLatin": "",
  "LastNameLatin": "",
  "FirstName": "Mike",
  "LastName": "Wilson",
  "NameNoteCodes": "102,103,104,110,111",
  "NameNoteDesc": "IsFirstNameKnown,IsLastNameKnown,IsMaleGender,IsCommonFirstName,IsCommonLastName",
  "AddressCertainty": "80",
  "AddressQuality": "Accept",
  "AddressResolutionLevel": "DPV",
  "AddressLine1": "136 W Canon Perdido St Ste D",
  "AddressLine2": "Santa Barbara, CA 93101-8207",
  "AddressLocality": "Santa Barbara",
  "AddressAdminArea": "CA",
  "AddressPostalCode": "93101-8207",
  "AddressNoteCodes": "102,107",
  "AddressNoteDesc": "IsDeliverable,IsBusinessAddress",
  "EmailCertainty": "90",
  "EmailQuality": "Accept",
  "EmailConnected": "mwilson@serviceobjects.com",
  "EmailNoteCodes": "101,107",
  "EmailNoteDesc": "IsGoodMailBox,IsBusinessEmail",
  "IPCertainty": "0",
  "IPQuality": "Accept",
  "IPLocality": "",
  "IPAdminArea": "",
  "IPCountry": "",
  "IPNoteCodes": "",
  "IPNoteDesc": "",
  "Phone1Certainty": "100",
  "Phone1Quality": "Accept",
  "Phone1Locality": "San Luis Obispo",
  "Phone1AdminArea": "Ca",
  "Phone1NoteCodes": "106,111,112",
  "Phone1NoteDesc": "IsVOIP,IsBusiness,IsPorted",
}
```



# Step 12

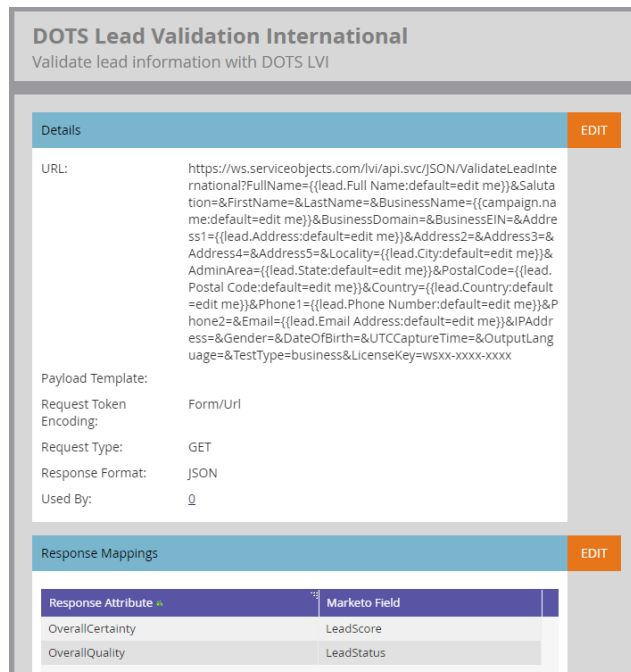
Next, select the Marketo Engage field to map the response element to. Do this for the rest of the desired elements. We mapped OverallQuality and OverallCertainty for this example. You will likely want to have other fields to use as the outputs. Then click "Save".



# Step 13

Your Response Mappings will look like this and the Webhook is complete

Now you can start using Lead Validation International in your campaigns, forms and workflows.



# Marketo Engage Webhook Testing Tip

Until you have been able to test the flow of a campaign that uses the Webhook it is recommended that you edit the schedule to limit the possibility of unintended transactions against the service.

In the Schedule section of a campaign, form or other Marketo Engage process, be sure to select the "only once" radio button and a low limit.

Once you are sure everything is working properly you can adjust those options to suit the needs of the campaign.



**Edit Qualification Rules**

Qualification Rules determine how many times each lead can run through the Smart Campaign flow

**Run each lead through the campaign flow:**

- only once
- once every  Days
- every time

**If lead is over communication limits**

- Block non-operational emails

CANCEL SAVE



**Edit Qualification Rules**

**Run each lead through the campaign flow:**

- only once
- once every  Days
- every time

**If lead is over communication limits**

- Block non-operational emails

**Abort campaign if qualified leads exceed limit:**

Limit:

CANCEL SAVE



# About Service Objects

Founded in 2001, Service Objects is the leading provider of contact validation solutions, validating online transactions in real-time, including contact name, address, phone, email, and device. Using Service Objects' global validation and location web services, businesses can identify potentially fraudulent contact records, append additional contact information, and process transactions in a more efficient manner. Service Objects has validated nearly 5 billion contacts, and major brands such as American Express, Microsoft, and Amazon rely on Service Objects for their data validation needs.

To obtain a free trial of any Service Objects product or to view a demo visit [serviceobjects.com](http://serviceobjects.com) or contact [sales@serviceobjects.com](mailto:sales@serviceobjects.com).

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