



Marketo Integration API Developer's Guide

API Version 1.0, Document Version 1.0

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Purpose

The Cloudingo Marketo Integration Web Service API provides enterprise customers the ability to use the Cloudingo platform from their own Marketo instances. The power to find duplicates, merge data into record, and manage their data no longer has to be done from the Cloudingo website alone.

System Design

The Cloudingo platform runs in its own cloud, separate from Salesforce. The setup and configuration involves connecting Cloudingo to your Salesforce cloud and creating endpoints in Cloudingo for your Marketo instance to connect to.

Proprietary Indexing

Cloudingo leverages its own indexes for finding duplicates. These proprietary indexes allow for more complex duplicate scenarios than can be supported in Salesforce Apex and SOQL. The Cloudingo system also is unrestricted by Salesforce governance (CPU limits, query result sizes, looping maximums) because we search these indexes on our own cloud servers.

Newly created, or modified, records in Salesforce result in index updates in the Cloudingo platform. The speed of these updates is dependent on the system load for the Salesforce and Cloudingo servers, and the Cloudingo synchronization mode being used for your account. An understanding of index updates is fundamental to explaining results. Usually the timing of index updates is not an issue, but when data is flowing into your account from multiple sources simultaneously, duplicate detection will depend on the indexes being up-to-date.

Web Service Technologies

The Cloudingo Web Service API is provided to customers via standard web services technologies. We support both REST and SOAP technologies, though for Marketo integration we recommend REST and provide examples below using REST as a result.

Dual Support for REST/JSON and SOAP/XML

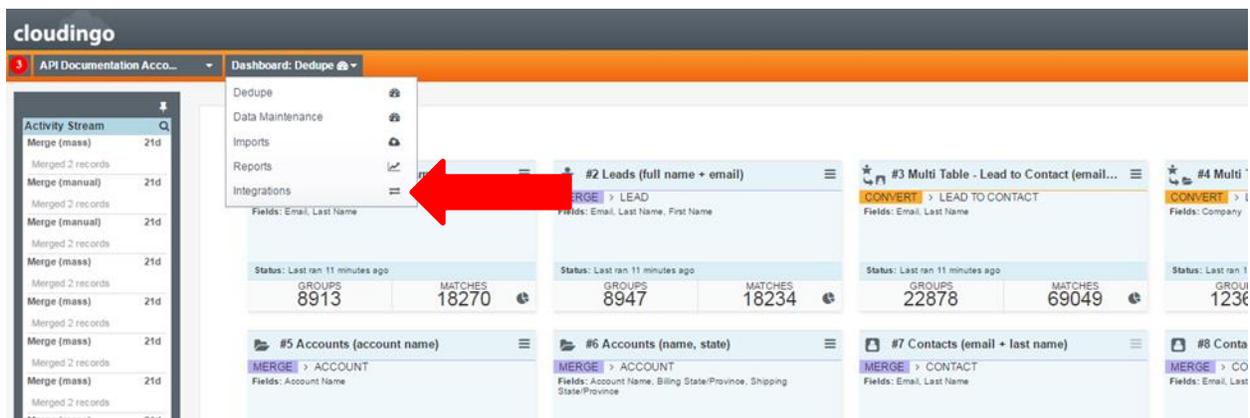
The dual support for both REST and SOAP allows our customers to program against our platform in the way that is most comfortable for that customer. The REST endpoints use JSON as the data format, as is the most common convention in modern web programming. The SOAP endpoints use XML as the data format. SOAP provides WSDL definitions of the web service interface which can be used by tools to generate proxy code. These proxies are convenient for interacting with the web service in a way that is natural to the programming language being used by our customers.

Setup & Configuration

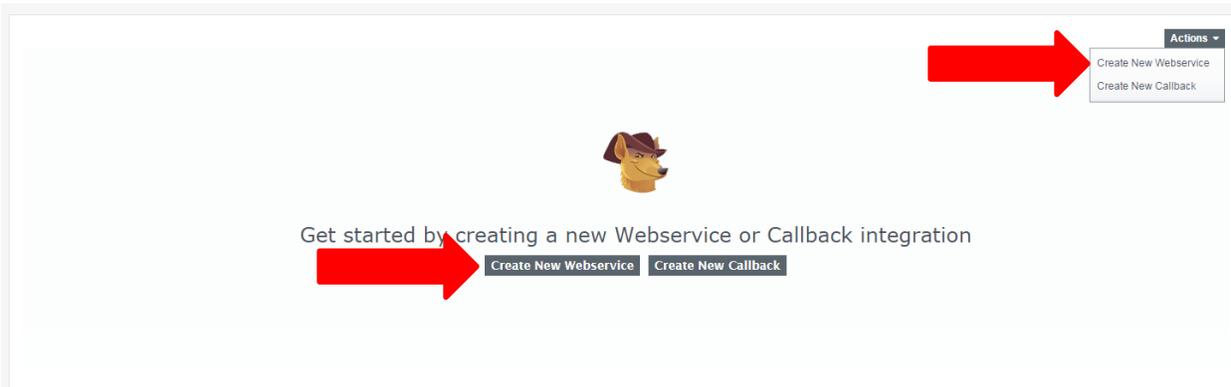
Access to the Cloudingo Marketo Integration API is limited to Cloudingo customers with an Enterprise level license. To establish a Cloudingo license, visit <http://cloudingo.com/>. Once an organization has an Enterprise level Cloudingo license, Data Integration can be setup and configured via the Cloudingo web portal.

Integration Dashboard

The Cloudingo Integration dashboard can be accessed by logging into <http://cloudingo.com>. Once logged in the user is presented with the Dedupe dashboard by default. To access the Cloudingo Integration dashboard, select as shown below.



Assuming that no integrations have previously been created, the following screen will show and a new Web service integration can be created by clicking on one of the 2 locations shown below:



The next screen displayed will be the Web service integration create screen as shown below where the connecting system "Marketo Integration" should be selected.

Create a new Webservice



Connecting System

Marketeto Integration

Marketeto Client Id

Marketeto Authorized User

Marketeto Client Secret

Merge all dupes in Marketeto

Use Master Lead Score in Marketeto

Marketeto API Call Limit

10000

Marketeto Identity Endpoint

Marketeto API Endpoint

Marketeto Token

Marketeto Token Expiration

Confirm Client Connection



Integration Name in Cloudingo

Enable Integration in Cloudingo

Cloudingo Integration Key:
96be07a9-d7c0-49bb-aea7-8b527e5c759c

Generate New Key

Cloudingo Integration Password:

Cloudingo API Call Limit:

10000

Allowed API Actions:

Check For Duplicates



Salesforce Account

Duplicate Search and Update Rules

Validate Addresses

Use Company Clean

Append Account Info to Marketeto Records

Check for Lead duplicates

Check for Contact duplicates

Check for Account duplicates

Show Marketeto Payload Template

Connecting System

The first column on the Web service integration screen provides the ability to select what type of system will be connecting to Cloudingo. In this scenario Marketo should be selected as the connecting system. While we support both REST and SOAP with Marketo integration, we recommend using REST.

For Marketo integration, this section will provide some initial details for setup:

1. **Marketeto Client Id** – The Client Id provided from Marketeto when a new Custom service has been added inside the Marketeto instance. Additional details provided in the Marketeto Setup and Configuration section.

2. **Marketo Authorized User** – The Authorized user provided in Marketo when a new Custom service has been added inside the Marketo instance and associated with a User Account. Additional details provided in the Marketo Setup and Configuration section.
3. **Marketo Client Secret**– The Client Secret provided from Marketo when a new Custom service has been added inside the Marketo instance. Additional details provided in the Marketo Setup and Configuration section.
4. **Merge all dupes in Marketo** – Under the standard behavior, Cloudingo will merge the incoming Marketo record with a Master record based on the duplicates found (if any). This option will tell Cloudingo to also merge any other duplicates found with the Master record.
5. **Use Master Lead Score in Marketo** – Under the standard Marketo merge behavior, the lead score of two merged records will be the sum of both records' lead scores. This option will override that behavior and will update the merged record with the lead score of the Master record.
6. **Marketo API Call Limit** – This option can be adjusted if it is desired to limit the API calls Cloudingo can make to Marketo during a 24 hour period. If exceeded the Cloudingo API will respond appropriately.
7. **Marketo Identity Endpoint** – The REST API Identity Endpoint as provided in Marketo under the Web Services Integration. Additional details provided in the Marketo Setup and Configuration section.
8. **Marketo API Endpoint** - The REST API Endpoint as provided in Marketo under the Web Services Integration Additional details provided in the Marketo Setup and Configuration section.
9. **Marketo Token** – The latest Marketo Identity Token from the last successful Marketo connection established for the Cloudingo Integration. This value is read-only.
10. **Marketo Token Expiration** – The current expiration for the latest Marketo Identity Token. This value is read-only.
11. **Confirm Client Connection** – This button will cause Cloudingo to attempt a connection to Marketo with the identity endpoint and credentials provided. If a successful connection is established the Marketo Token and Marketo Token Expiration will be updated.

Cloudingo Integration Details

The middle column will provide some initial details for general integration setup.

1. **Integration Name** – This will provide a description which will display on the Integration dashboard to allow you to distinguish easily between multiple integrations.
2. **Enable Integration in Cloudingo** – Will either enable or disable the API service integration. If disabled, the API will respond back with an error code.
3. **Cloudingo Integration Key** – This is a unique identifier for your integration which should be sent as a part of the headers when calling the Cloudingo integration API. One will be populated by default, but the key can also be regenerated to provide a new key if desired.
4. **Cloudingo Integration Password** – This is a password you can enter which will also need to be passed in the headers when calling the Cloudingo Integration API. In combination with the Cloudingo Integration Key, the Password will authenticate any incoming calls to the API. When initially entered, the password will be encrypted. The encrypted value is what should be passed to the API when called. The plain text version of the password is never shown, however a new password can be entered at any time. Once the password is saved, the encrypted version will not be shown by default, but can be viewed by clicking on the 'Show Password' button.
5. **Cloudingo API Call Limit** – This is a value that can be adjusted downward in case you want to limit the number of calls in any 24 hour period. While the number of calls can be adjusted, they cannot exceed the default maximum established for your account.
6. **Allowed API Actions** – In this section you can choose which actions you would like to be available in the API. At present, there is only one option for Marketo integrations and must be selected.

Salesforce Account and Integration Configuration

The last column on the Web service integration screen allows you to select which of your connected accounts the new integration will apply and also provide you options in order to customize the API behavior to your needs.

The Duplicate Search and Update rules consists of the following:

1. **Validate Addresses** – This option will cause the API to validate the incoming address and/or billing address and provide the validated address as a part of the API response so that it can be mapped to update the Marketo record. In order to use this option, sufficient Address Validation credits should be purchased within Cloudingo.
2. **Use Company Clean** – Selecting this option will cause the API to use company clean when evaluating account names.
3. **Append Account Info to Marketo Records** – Selecting this option will cause the API to add any available account data from Salesforce based on the company name provided and the Account search options selected.
4. **Check for Object duplicates** – This option will determine which objects should be evaluated when performing the Check for duplicates actions as well as which objects can be sent to the Determine Master and Merge Duplicates actions. It is here that you will either select a pre-existing filter from your dedupe dashboard or determine the fields to match on, the match options, as well as specify any filters that may be relevant. When selected for a particular object and clicking on the  icon, the following screen will be displayed.
5. **Show Marketo Payload Template** – This will provide a JSON string which can be used when setting up the Marketo Webhook. The template is built on the basis of the duplicate search rules and filters selected.

Filter Account ✕

Filter

Custom
▼

Automation Rule

Default Account rule
▼

Current Selections

Match: None

Limit: None

Fields 🔍

Field	Options
Account Description	<input type="checkbox"/> Match <input type="checkbox"/> Limit
Account Fax	<input type="checkbox"/> Match <input type="checkbox"/> Limit
Account ID	<input type="checkbox"/> Match <input type="checkbox"/> Limit
Account Name	<input type="checkbox"/> Match <input type="checkbox"/> Limit

Ok

Cancel

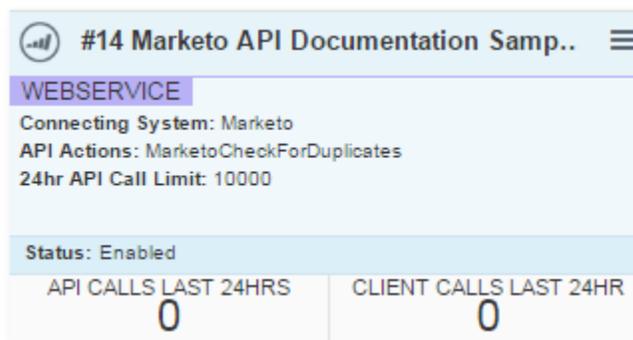
On the screen shown above, you can select the following:

- a. The filter from your dedupe dashboard to use for the integration. If Custom is selected you can define custom settings for the integration. Otherwise, the filter selected along with the corresponding automation rule will be used for the integration.
- b. If custom is selected in (a), the automation rule to use for this particular object. The automation rule is considered when using the Determine Master method to determine which record should be considered the master (for instance, the most recent record updated) and also when using the Merge Duplicates for both determining the master and determining the values for the master record.
- c. If custom is selected in (a), which fields to use for matching criteria during the Check for Duplicates action. Each field selected will be expected during the Check for Duplicates call and the system will attempt to match existing records based on these fields. When using a custom filter for the API, the following matches are available:
 - i. Exact match with the option to ignore case

- ii. First Name synonyms
- d. If custom is selected in (a), filters for which records should be evaluated. Here you can evaluate any field to determine if a record should not be included when performing the Check for Duplicates action. When using a custom filter for the API, the following filter criteria is available:
 - i. Field is equal to a specific value
 - ii. Field is not equal to a specific value
 - iii. Field has a value
 - iv. Field does not have a value

Marketo Integration Dashboard Display

After a Web service Integration has been created, it will display on the Integration dashboard similarly to the following:



This will provide a brief summary of the configured integration including the following:

1. The name of the integration
2. The connecting system type
3. The actions that have been selected
4. The current status of the integration
5. The current API call limit for the integration
6. The number of calls made for the integration in the last 24 hours
7. The number of calls made to the connection system in the last 24 hours

Endpoints

The Cloudingo Integration API is currently available via SOAP (XML based) or REST (JSON based) service endpoints. The functionality and methods available for both are identical, however the end point as well as the manner for initiating the call and handling return values will vary based on the type of service. All endpoints are handled over SSL.

REST Endpoints

Production Environment: <https://api.cloudingo.com/rest/MarketoCheckForDuplicates>

SOAP Endpoints

Prod Environment: <https://api.cloudingo.com/soap/>

Prod Environment WSDL: <https://api.cloudingo.com/wsd1>

Security

As mentioned, only SSL (https) communication is available for the Cloudingo Integration API. Security for the Cloudingo Integration API is handled via a combination of the Cloudingo Integration Key and the Cloudingo Integration Password which should be added to the headers of any REST or SOAP service call. The following headers should be applied as HTTP headers.

Service Call Headers

- CloudingoIntegrationKey – The auto-generated GUID provided by the Cloudingo Integration Dashboard within the Cloudingo web portal.
- CloudingoIntegrationPassword – The supplied password to be used to authenticate the caller in combination with the integration key. The password can be entered on the Cloudingo Integration Dashboard and the value will be encrypted. The encrypted value should be passed in the header.
- CloudingoApiVersion (optional) – the version of the API to call. If you are planning on continuing with the version available during setup, this should be supplied with all calls. If not provided, this will default to the latest version of the API. Therefore, if not provided, a new API version release will result in all calls automatically upgrading to the latest API. If this is not desired, the version can be supplied so when to upgrade the API version is controlled by the caller.
- Content-type – applicaton/json

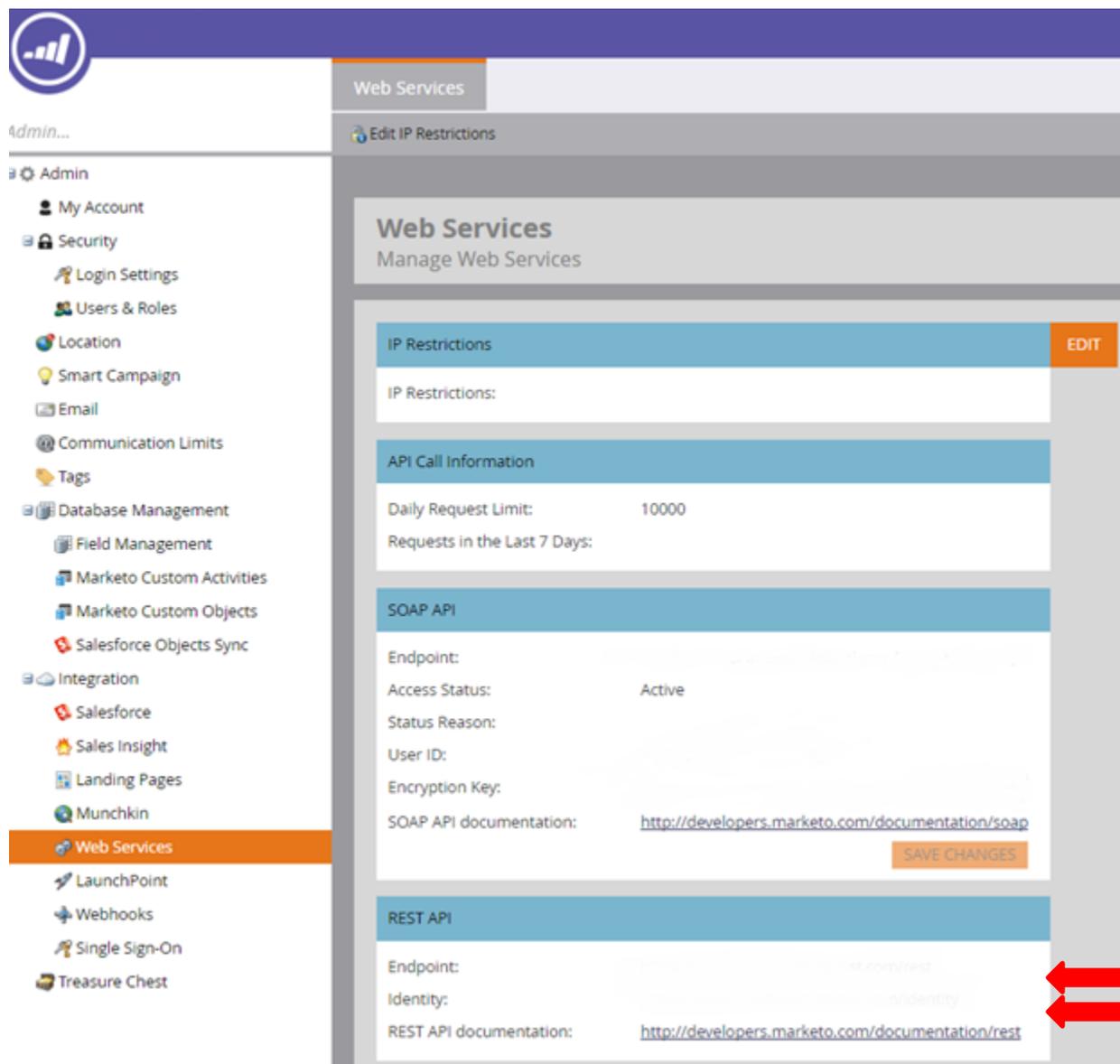
Marketo Setup & Configuration

There are a couple of Marketo components required for the Cloudingo Integration to be configured. This includes the REST API details, a custom Web Service, a Webhook to be called as a part of a Lead creation workflow, and adjusting your current workflows to take advantage of Cloudingo duplicate prevention. These options are primarily under the Admin menu in Marketo.

Marketo Web Service

The following information should be captured in Marketo Administration under the Admin->Integration->Web Services as shown in the screenshot below:

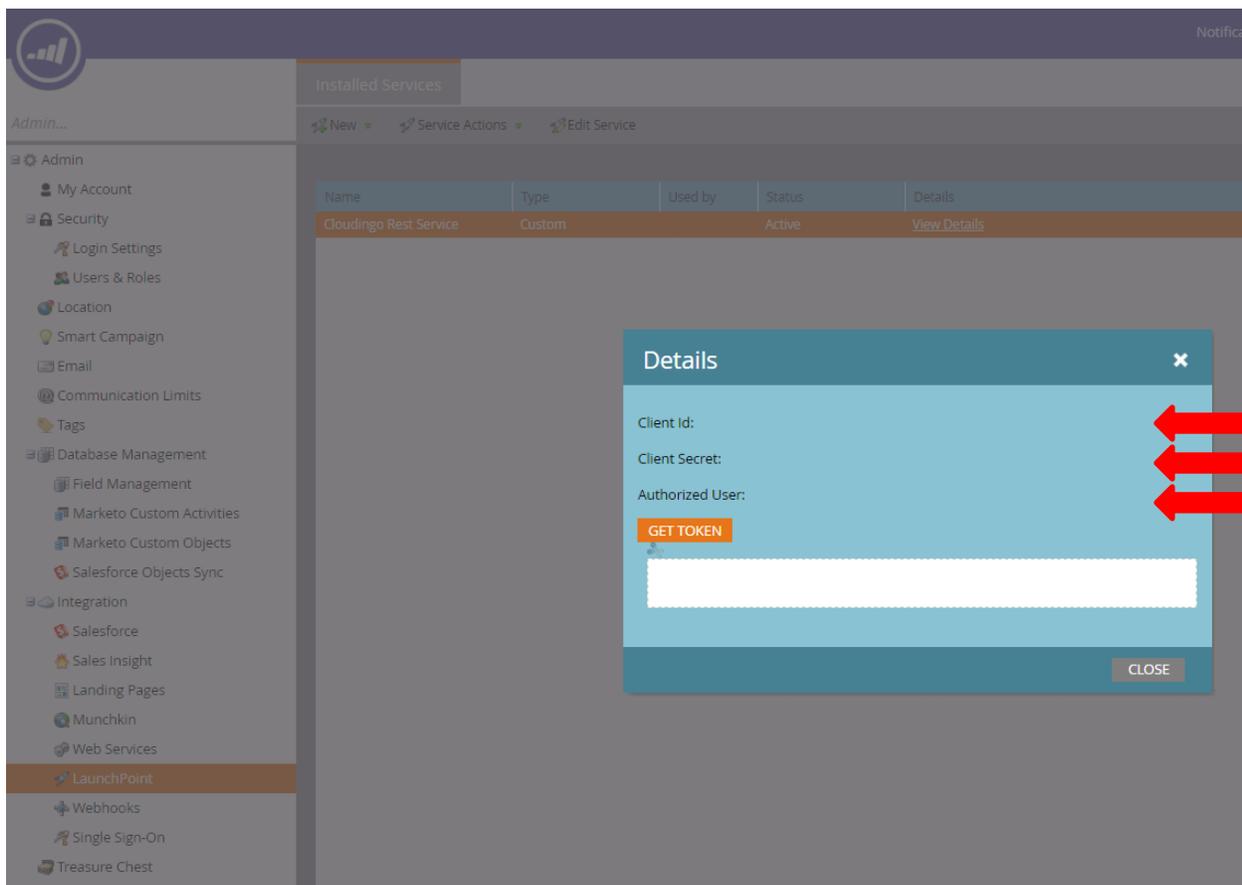
1. REST API Endpoint which will be added to the Cloudingo Integration under the Connecting System section above #8.
2. REST API Identity Endpoint which will be added to the Cloudingo Integration under the Connection System section above #7.



Marketo Custom Service

Under the Admin->Integration->LaunchPoint as show in the screenshot below, create a new Custom Webservice and capture the following details:

1. Client Id which will be added to the Cloudingo Integration under the Connecting System section above #1.
2. Authorized User which will be added to the Cloudingo Integration under the Connecting System section above #2.
3. Client Secret which will be added to the Cloudingo Integration under the Connecting System section above #3.



Marketo Webhook

Creating a Marketo Webhook will initiate the call to the Cloudingo Integration and will provide a record level check to allow for Cloudingo duplicate prevention as a part of Marketo workflows. Prior to creating the Webhook, a custom field should be created in Marketo which will allow for the Webhook to update the lead record confirming if the record is a duplicate or unique. This can be done under the Admin->Database Management->Field Management-> New Custom Field option. The custom field can be any name of your choosing, but should be a **Boolean** field type. Under the Admin->Integration->Webhooks, create a new Webhook to call the Cloudingo MarketoCheckForDuplicates service as shown below:

New Webhook ✕

Webhook Name: *

Description:

URL: *

Request Type: *

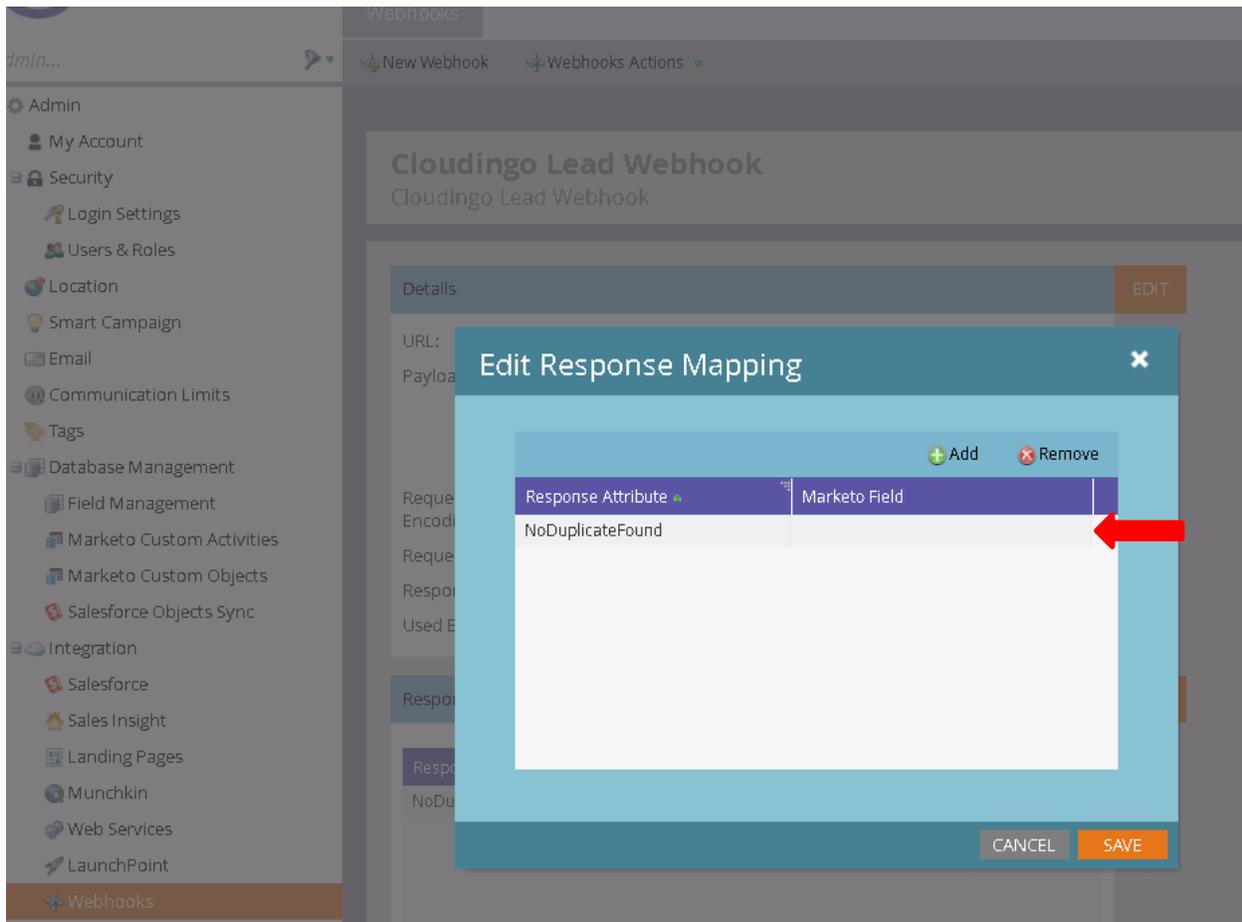
Template:

Request Token Encoding:

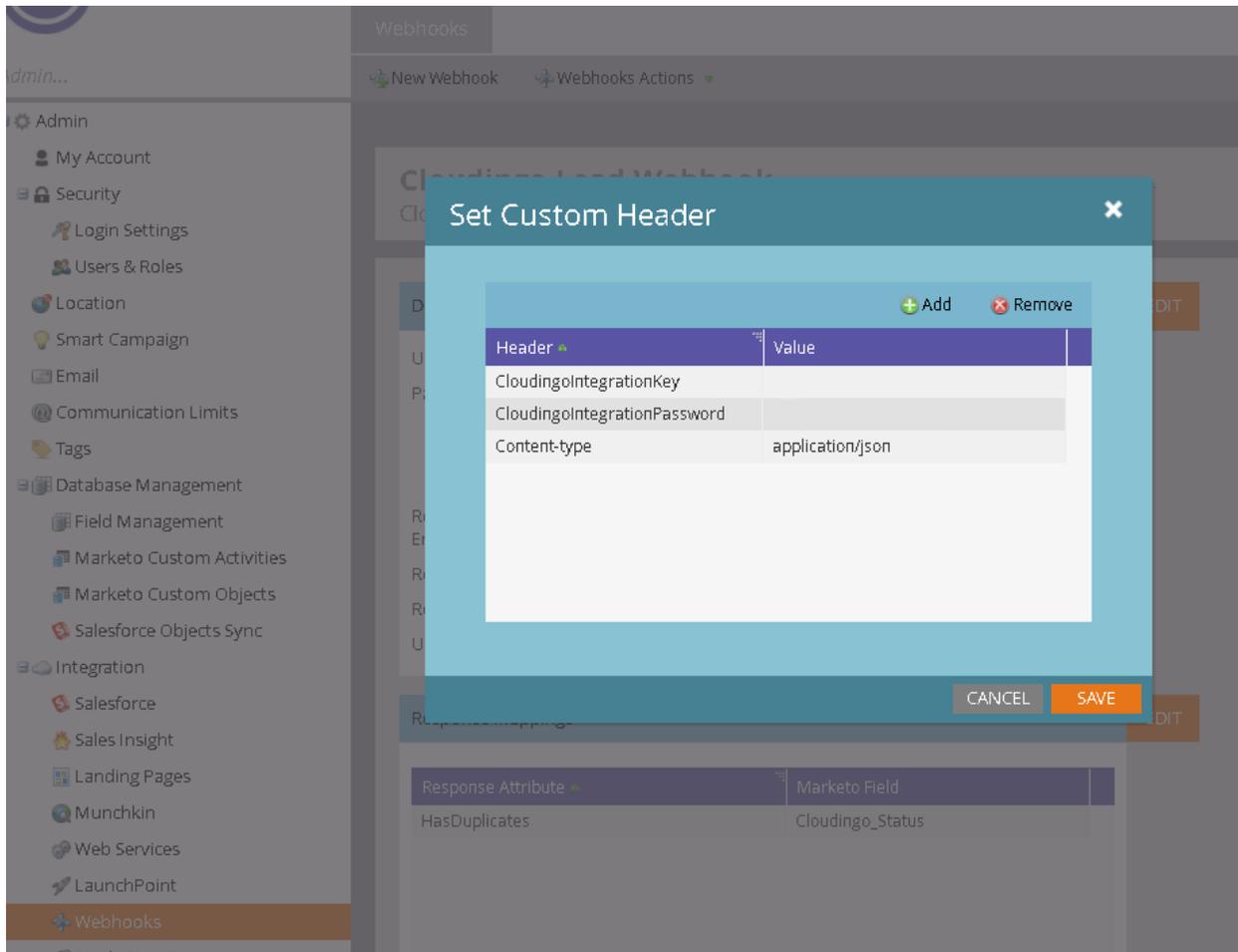
Response type:

The template will be customized for the filters you wish to use, but should follow the structure of the input for the Marketo CheckForDuplicates method shown in section below. In order for the duplicate check to work as expected, at a minimum the required information for the filters selected should be sent to the webhook as well as the MarketId. Using the “Show Marketo Payload Template” option on the integration setup page within Cloudingo should provide most of the content for this template.

Once the webhook has been created, a response mapping should be added to update the Boolean custom field created in Marketo to identify if a duplicate was found for the record being evaluated as shown below. In addition, if using the Validate Addresses option, you will include additional response mappings for the Lead address and/or Company billing address.



In addition to the webhook and response mapping, the proper headers will also need to be set to allow for proper authentication between Marketo and Cloudingo. This can be done through Admin -> Integration -> Webhooks -> Webhook Actions -> Set Custom Header which will present the following screen:



In this screen the following 3 headers should be added:

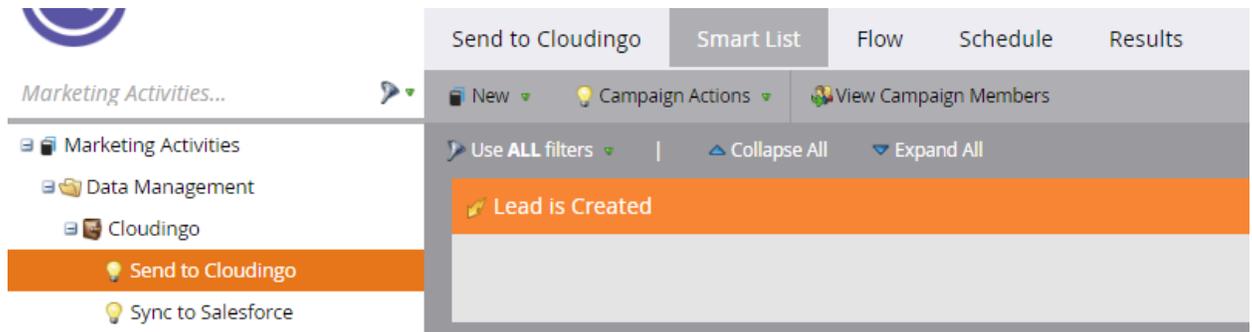
1. Cloudingo Integration Key – This will be displayed in the Cloudingo Integration setup screen.
2. Cloudingo Integration Password – This will also be displayed in the Cloudingo Integration setup screen.
3. Content-Type – this should be set to application/json assuming that JSON is the communication option chosen.

Marketo Workflows

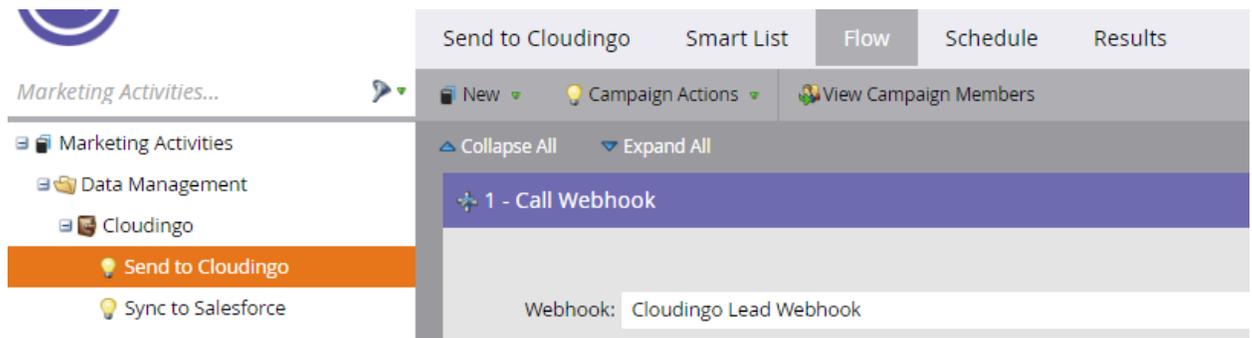
For the overall duplicate prevention process, 2 Smart Campaigns should be created to provide duplicate prevention. The first will initiate the call to the Webhook and perform the duplicate check as well as respond with if an existing duplicate record was found. The second will allow for the sync to Salesforce if no duplicate is found. We recommend that you create a separate Program in Marketo for these Smart Campaigns. The following is just a sample setup to use the dedupe integration with Cloudingo. Other workflows can be established with similar behaviors as desired.

1. Send to Cloudingo:

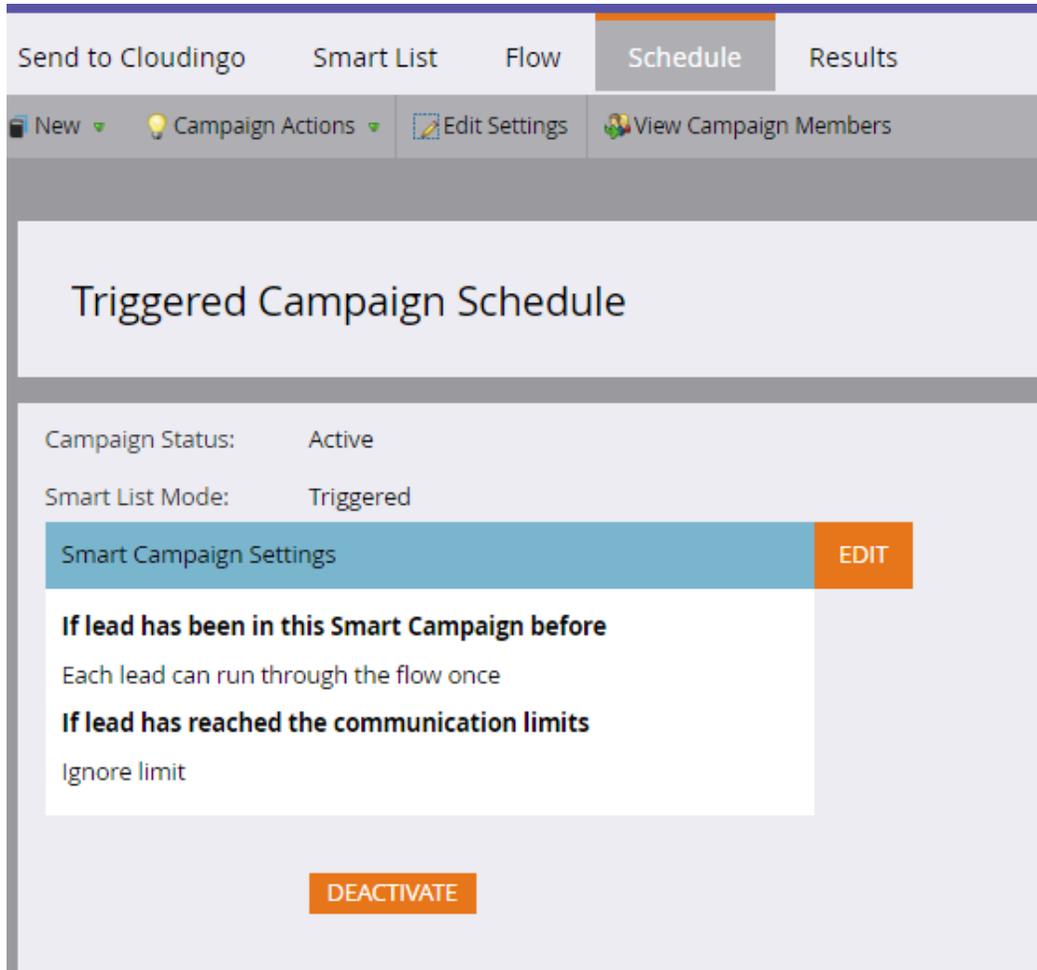
In the Smart List option, select the Lead is Created option to determine the Leads that qualify to be sent to Cloudingo. This will cause any newly created Lead to initiate the workflow.



On the Flow option, select the option to Call Webhook and select the Webhook created to call Cloudingo in order to dedupe the new Lead record.

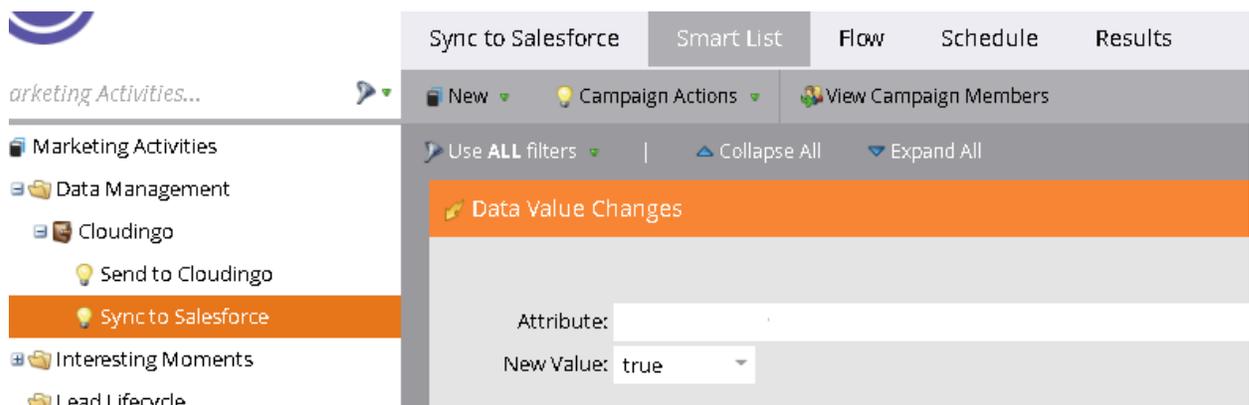


On the Schedule option, set for each Lead to run through the workflow once in order to avoid unnecessary overhead on Leads that have already been deduped, and activate the campaign workflow.

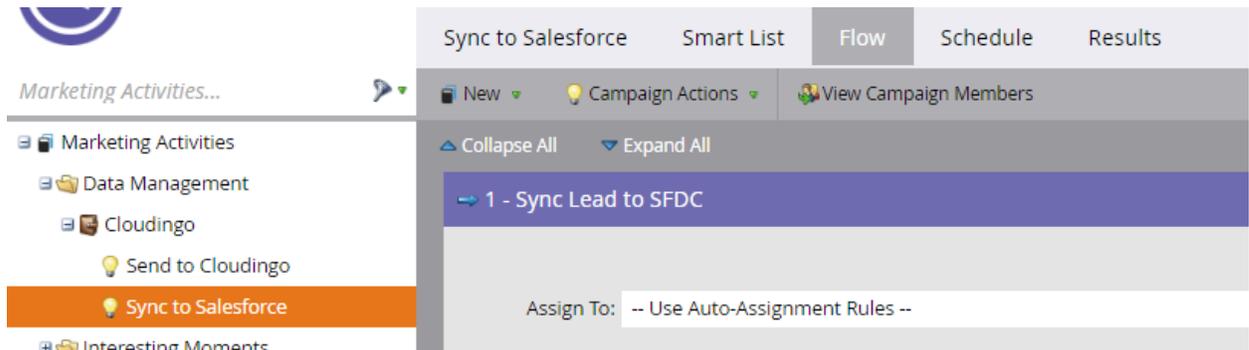


2. Sync to Salesforce:

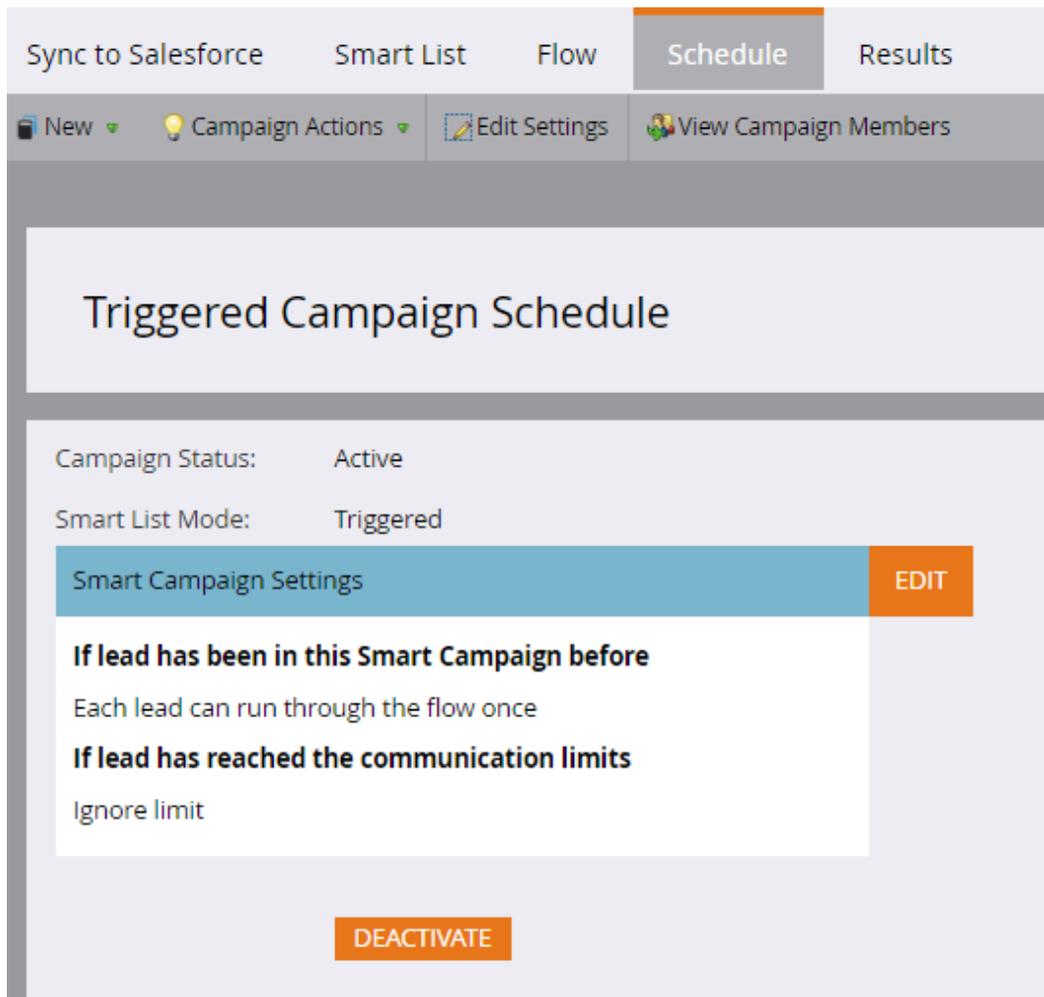
Once the Cloudingo API call completes, the custom Boolean field will be updated with a True/False to indicate if a duplicate was found according to the response mapping for the Marketo Webhook. In the Smart List option, a Data Value Changes trigger should be added to initiate the workflow when the custom Boolean value is changed. If the value is True (No duplicate found), then the record has been deduped by Cloudingo and the record qualifies to be synced to Salesforce.



In the Flow option, the Sync Lead to SFDC option should be added to move the record to Salesforce since the record does not have a current duplicate in Salesforce.



On the Schedule option, set for each Lead to run through the workflow once in order to avoid unnecessary overhead on Leads that have already been deduped, and activate the campaign workflow.



Available Actions

The following section details the available actions for consumption in the Cloudingo Marketo Integration API. All of the actions listed below are enabled by default when a new Cloudingo Marketo Integration has been created, but the available actions for a particular integration can be limited via the Cloudingo Integration Dashboard as mentioned in the Setup & Configuration section above. HTTP POST should be used for all actions.

Action	Input	Output	Version
MarketoCheckForDuplicat es	Set of fields and values for the record to evaluate. The duplicate criteria can be setup on the Cloudingo Integration Dashboard.	Integration Action Status Code, Provides a list of potential duplicates per object based on the configuration. Also responds with if a duplicate was found along with address information if configured.	1.0

MarketoCheckForDuplicat es

Will evaluate the current data in your organization based on the inputs to determine any possible duplicates using configured duplicate definition. If configured,

- Inputs:
 - Marketo RecordInfo – Name value pairs of fields and their corresponding values for the new record along with the current Marketold being evaluated.
 - JSON Example:

```

{
  "Marketold" : "1",
  "Fields" : [
    {
      "Field" : "Company",
      "Data" : "ExampleCompany"
    },
    {
      "Field" : "FirstName",
      "Data" : "John"
    },
    {
      "Field" : "LastName",
      "Data" : "Doe"
    }
  ]
}

```

- }

- Outputs

- An Integration status code and message for the overall operation.
- The inputs provided for the duplicate check
- A list of potential duplicates.
- Marketo Result Info object providing values from address validation if configured to validate addresses.
- Boolean flag to identify if a duplicate was found
- JSON Example:

```

• {
•   "DuplicateCount" : 2,
•   "Duplicates" : [{
•     "DuplicateItems" : [{
•       "Details" : [{
•         "Data" : "003610000jMM7nAAG",
•         "Field" : "Id"
•       }
•     ],
•     "PrimaryId" : "003610000jMM7nAAG",
•     "Reason" : "AccountName:Exact,FirstName:Exact,LastName:Exact",
•     "SecondaryId" : ""
•   }, {
•     "Details" : [{
•       "Data" : "003610000jMM7oAAG",
•       "Field" : "Id"
•     }
•   ],
•     "PrimaryId" : "003610000jMM7oAAG",
•     "Reason" : "AccountName:Exact,FirstName:Exact,LastName:Exact",
•     "SecondaryId" : ""
•   }
• ],
•   "ObjectName" : "Contact"
• }
• ],
•   "InputRecord" : {
•     "Fields" : [{
•       "Data" : " ExampleCompany",
•       "Field" : "Company"
•     }, {
•       "Data" : "John",
•       "Field" : "FirstName"
•     }, {
•       "Data" : "Doe",
•       "Field" : "LastName"
•     }, {
•       "Data" : "1000058",
•       "Field" : "MarketId"
•     }
•   ]
• },
•   "MarketoResultInfo" : {
•     "Address" : null,
•     "BillingCity" : null,
•     "BillingPostalCode" : null,

```

```
• "BillingState" : null,  
• "BillingStreet" : null,  
• "City" : null,  
• "PostalCode" : null,  
• "State" : null  
• },  
• "NoDuplicateFound" : false,  
• "Status" : "SuccessNoActionNeeded",  
• "StatusMessage" : ""  
• }  
•
```

- Method Specific Response Codes (Detailed below)
 - SuccessNoActionNeeded
 - ActionCannotBeCompleted
 - ErrorMergeFailed

Action Workflows

The following section provides details on the overall workflows for particular Cloudingo API actions. While separate actions are provided, in some scenarios the actions work together in order to provide overall functionality depending on each client's usage pattern.

Marketo Duplicate Check and Merge Workflow



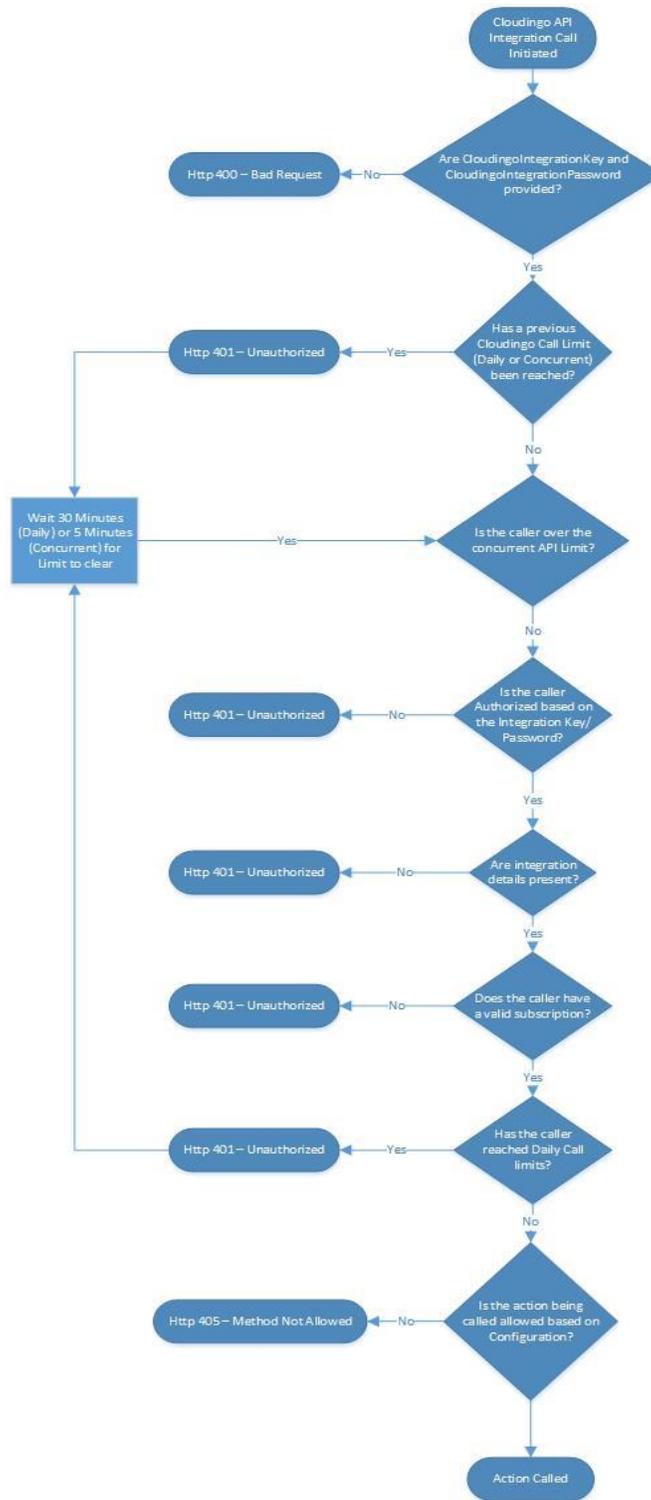
Limits and Conditions

There are a number of checks that occur with each API call as well as Cloudingo API limits and Salesforce API limits. As a result, there is an overall process flow involved with performing actions through the Cloudingo Integration API when these checks come into play and a number of potential return messages if limits or conditions are met.

The following is a list of the primary call limits:

- Daily API Call Limit - based on a 24 hour rolling period. The exact value will depend on the level purchased.
- 5 minute period – limited to 1000 API calls in any 5 minute period.
- Concurrent API Calls – limited to 100 API calls processing at any given time.

Limits and Conditions - Workflow



Return Statuses

The return details will be provided with each return method. Those listed below without a corresponding action apply to any action.

Any method level error response will have the same structure as shown below. Non-method level errors will be listed in the corresponding status and status message as a part of the response object for the specific method.

General Error Response JSON:

```
{
  "Message": "Invalid Request",
  "ReferenceNumber": 20160112111511,
  "Status": "ErrorIntegratorConfigurationProblem"
}
```

For SOAP, exceptions will all be `WebFaultExceptions` of type `CloudingoApiError` which will include a `Message`, `ReferenceNumber`, and `Status`.

Action	Reason	Http Status	Status	Message
Any	Missing Integration Key	400	ErrorIntegratorConfigurationProblem	Invalid Request
Any	Missing Integration Password	400	ErrorIntegratorConfigurationProblem	Invalid Request
Any	Concurrent API Limit Exceeded	401	ErrorCloudingoConcurrentApiLimitReached	Interval Request Limit Exceeded
Any	Cloudingo Daily API Limit Exceeded	401	ErrorCloudingoApiLimitReached	Cloudingo API Call Limit Exceeded
Any	Cloudingo Subscription Expired	401	ErrorContactCloudingoSupport	Cloudingo Subscription Expired
Any	Unable to Authenticate	401	ErrorIntegratorConfigurationProblem	Unauthorized Request

	Integration Key or Password			
Any	Success – The requested action was not needed.	200	SuccessNoActionNeeded	
Any	Success Action Complete	200	SuccessActionComplete	
CheckRecordForD uplicates, CheckForDuplicate s	Success – Record inserted	200	SuccessRecordAdded	
CheckRecordForD uplicates, CheckForDuplicate s	Success – Existing record updated	200	SuccessRecordUpdated	
Any	Error during the requested process. Contact Cloudingo for assistance	400	ErrorContactCloudingoSupport	Corresponding error message.
CheckForDuplicate s	More records passed to the requested action than are allowed	400	ErrorInputLimitReached	Max Inputs (#) Reached
Any	Requested action is not configured as accessible.	400	ErrorActionDisabled	Action Not Allowed
Any	Error during requested method	500	ErrorCloudingoSystemProblem	Corresponding error message.
CheckRecordForD uplicates, CheckForDuplicate s	Missing Data prevented record from being created	200	ErrorRecordCreateFailedMissingData	Required fields causing the issue
CheckRecordForD uplicates, CheckForDuplicate s	Invalid field prevented record from being created	200	ErrorRecordCreateFailedInvalidField	Invalid fields causing the issue.

CheckRecordForD uplicates, CheckForDuplicate s	Permission denied for creating or updating record	200	ErrorRecordCreateFailedPermissionDen ied	Failure message
CheckRecordForD uplicates, CheckForDuplicate s	Record create failed for general reason	200	ErrorRecordCreateFailed	Failure message
Any	Configured filter information could not be found	200	ErrorProvidedFilterNotFound	
DetermineMaster	Unable to determine a master for provided duplicates	200	ErrorUnableToDetermineMaster	
CheckRecordForD uplicates, CheckForDuplicate s	Invalid field prevented record from being updated	200	ErrorRecordUpdateFailedInvalidField	Invalid fields causing the issue.
CheckRecordForD uplicates, CheckForDuplicate s	Record update failed for general reason	200	ErrorRecordUpdateFailed	Failure message
MergeDuplicates	Merge not allowed based on automation rules or exceptions	200	ErrorMergeNotAllowedBasedOnRules	
MergeDuplicates	Merge Failed for general reason	200	ErrorMergeFailed	Failure message