



# D&B Direct

## *Install Guide for Marketo Connectors*

Includes Match and Append Webhook, Contact Append Webhook and Lead Form

Prepared on Friday, July 18, 2014

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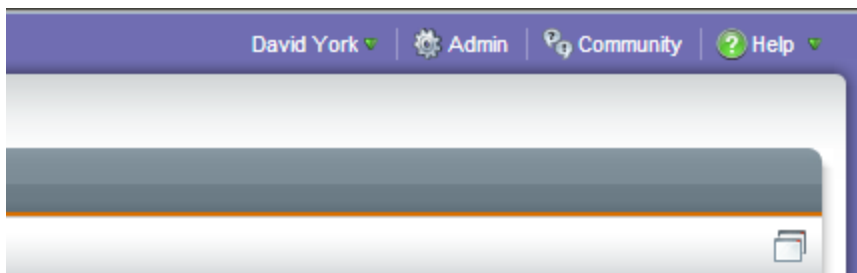
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## Before Registration

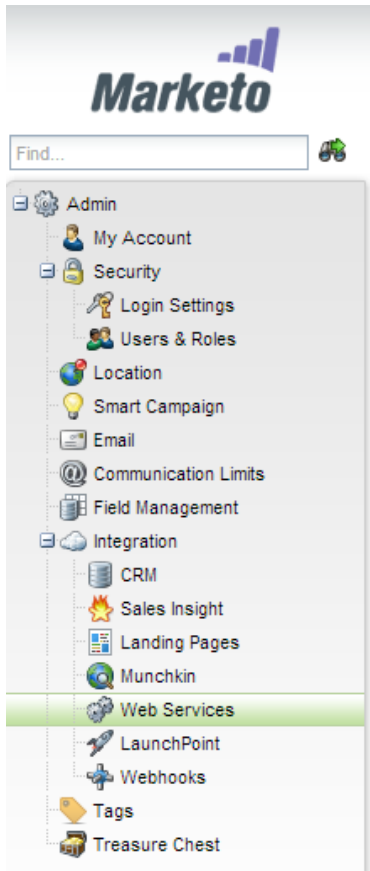
The D&B Direct Marketo Lead Form, D&B Direct Marketo Contact Append Webhook, and D&B Direct Marketo Match and Append Webhook each require you to have already set up an API account with D&B for their services. The Lead Form integration also requires that a Landing Page and Form have already been set up in Marketo. The Webhooks also require access to your Marketo instance.

The following instructions will guide you through retrieving the Marketo SOAP API credentials that are required for configuration.

1. At the top of your Marketo menu, click on the link that says Admin.



2. Click on the Integration > Web Services link.



3. In the SOAP API section, copy the values for the Endpoint, User ID, and Encryption Key. These values will be used when registering an account.

## Web Services

### Manage Web Services

#### API Call Information

Daily Request Limit:

Requests in the Last 7 Days: 0

#### SOAP API

Endpoint:

Access Status:

Active

Status Reason:

User ID:

Encryption Key:

SOAP API documentation:

<http://developers.marketo.com/documentation/soap>

 Save Changes

# Registration

You will first need to register an account with the D&B Direct platform. Follow this link to begin the registration process: <https://dnb.sureshotmedia.com/Home/Register>, and then perform the these steps:

1. Fill in the Account, User, and Marketing System sections of the Registration page.

## Account Details

Company Name

## Create Your Personal User

Email Address

Password

First Name

Confirm Password

Last Name

D&B Rep

Title

## Select Marketing System



By creating an account, you agree to the [Terms of Service](#).

2. After submitting the registration form, you will be directed to a page to create your Marketo SOAP Credentials. Use the values from your Marketo Web Services account.

Description

Endpoint

User ID

Encryption Key

**Description:** Label used to identify the Credentials

**Endpoint:** SOAP API endpoint for your Marketo Instance

**User ID:** User ID listed for your Marketo SOAP API account

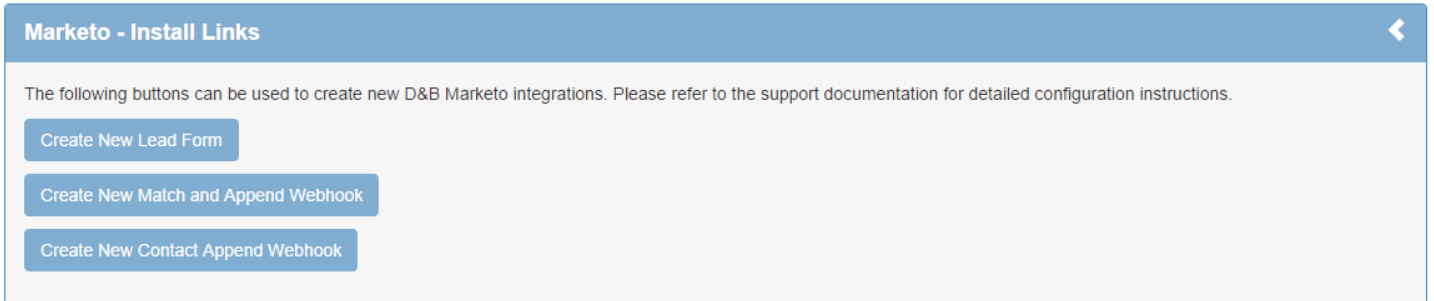
**Encryption Key:** Encryption Key listed for your Marketo SOAP API account



3. Once you have clicked “Create Credentials”, your account is registered and your Marketo SOAP API Credentials have been created.

# Match and Append Webhook Setup

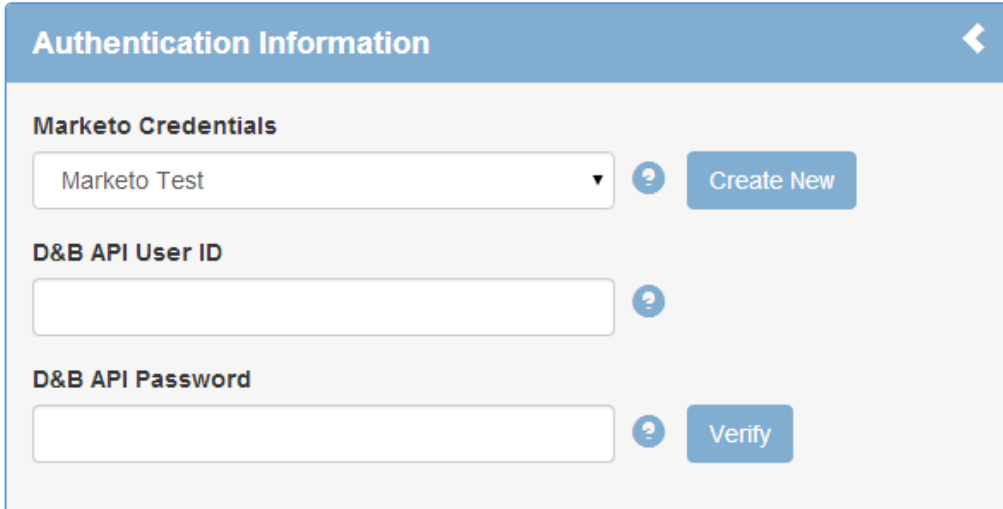
New Marketo Webhooks are first configured through the D&B Direct Dashboard. Click the “Create New Match and Append Webhook” button to start the setup process.



## Authentication Information

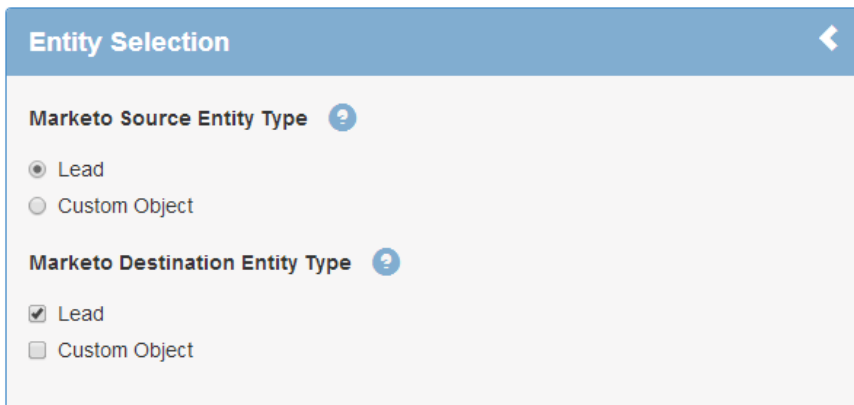
1. Select which Marketo Credentials you would like to use in relation to the Webhook.

Additionally, you will need to provide your D&B Direct API User ID and API. A “Verify” button is available to test the API authentication.



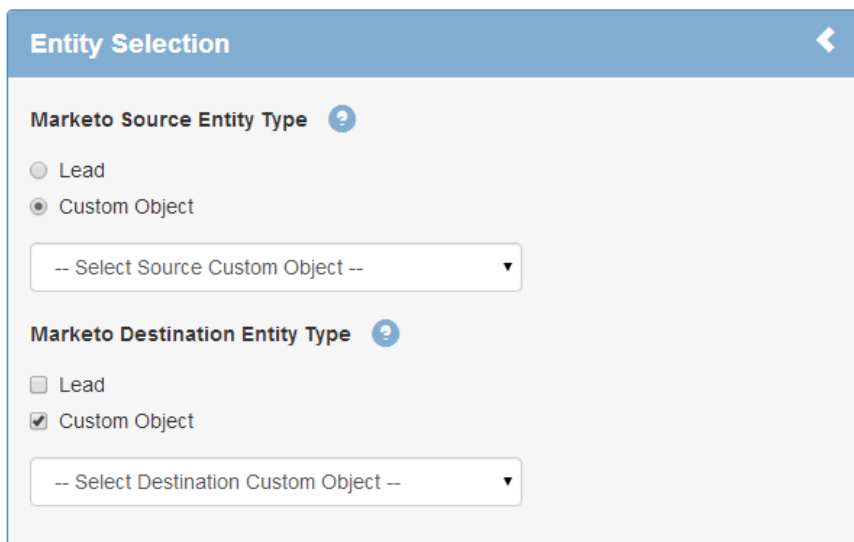
## Entity Selection

2. The following selections identify Source and Destination objects for the Webhook.
  - a. Marketo Source Entity Type
    - i. Lead
      1. Select this option if Leads will be processed by this Webhook.
    - ii. Custom Object
      1. Select this option if Custom Objects will be processed by this Webhook.
  - b. Marketo Destination Entity Type
    - i. Lead
      1. Select this option to update Marketo Leads with D&B data.
    - ii. Custom Object
      1. Select this option to update Marketo Custom Objects with D&B data.



The screenshot shows a dialog box titled "Entity Selection" with a back arrow in the top right corner. It contains two sections: "Marketo Source Entity Type" and "Marketo Destination Entity Type". Each section has a question mark icon to its right. Under "Marketo Source Entity Type", the "Lead" radio button is selected, and "Custom Object" is unselected. Under "Marketo Destination Entity Type", the "Lead" checkbox is selected, and "Custom Object" is unselected.

Another example:



The screenshot shows a dialog box titled "Entity Selection" with a back arrow in the top right corner. It contains two sections: "Marketo Source Entity Type" and "Marketo Destination Entity Type". Each section has a question mark icon to its right. Under "Marketo Source Entity Type", the "Custom Object" radio button is selected, and "Lead" is unselected. Below this is a dropdown menu with the text "-- Select Source Custom Object --". Under "Marketo Destination Entity Type", the "Custom Object" checkbox is selected, and "Lead" is unselected. Below this is a dropdown menu with the text "-- Select Destination Custom Object --".

## Settings

3. The following section includes several options to customize the D&B Company Match lookups.
  - a. Webhook Description
    - i. This field is used to uniquely identify the configuration on the D&B Dashboard for future reference.
  - b. Minimum Confidence Code
    - i. Select a confidence value from 1 to 10. Ten is the highest confidence code. The Confidence Code is determined by how similar the name of the business in the input file is to the D&B record.
  - c. Match Grades
    - i. Optionally, Match Grades can be supplement the Confidence Code. Multiple values can be separated with commas. The Match Grade is a 7 or 11 digit code that denotes the similarity between your record and D&B information. Please consult with your D&B representative to configure Match Grades.

### Settings

**Webhook Description**

**Minimum Confidence Code**

(1-10, 10 being highest Confidence Code)

Use Match Grades in addition to Confidence Code

**Match Grades**

(Separate with commas, no spaces)

**Settings** ←

**Step Description**

**Minimum Confidence Code**

6 ▼

(1-10, 10 being highest Confidence Code)

Use Match Grades in addition to Confidence Code

Match Grades

(Separate with commas, no spaces)

4. Click the “Next” button to continue to Mapping.

## About Match Grades

The following example is for a 7-digit Match Grade:

<p>The letter indicates the level of match on data within the record in this order:</p> <ul style="list-style-type: none"> <li>Business Name</li> <li>Street #</li> <li>Street Name</li> <li>City Name</li> <li>State Name</li> <li>Mailing Address</li> <li>Phone Number</li> </ul>	<p>A = Same: ABC WIDGET MFG vs. ABC Widget Manufacturing</p> <p>B = Similar: ABC Widget MFG vs. ABC MFG</p> <p>F = Different: ABC Widget MFG vs. XYZ MFG</p> <p>Z = Null: One or Both records are Blank</p>
--	---

For example, if you have Match Grade: BAAAZZAZZZ. this means that the Business name in the input file is similar to the D&B record. The Street number, Street name and City were exact matches. You can also enter multiple match grades by using a comma delimiter, for example, BAAAZZAZZZ,AAAAZZAZZZ,BBBAZZAZZZ.

---

## Source vs. Destination Mapping

In order to properly setup a Marketo webhooks, both the Marketo items being sent to D&B (i.e. source) and the D&B items being delivered into Marketo items (i.e. destination) require mapping. While the setup screens allow all available fields to be mapped, customers can map simply the fields which are appropriate for their business needs.

## Marketo Source Mapping

5. This section configures search options and source mapping.
  - a. Search Type
    - i. Select between Match and Append, Match Only, or Append Only. The Match options will perform a Match and return the D-U-N-S Number. The Append options will include additional firmographic data. The Append only will require a D-U-N-S Number as part of the source mapping.
  - b. Cleanse Address if no Match is found
    - i. When enabled, this will cleanse the mapped Source fields if no Match is found.
  - c. Match and Append or Match Only
    - i. The following fields are available to map from the chosen Marketo Source Entity type.
      1. Company Name (Required)
      2. Country (Required)
      3. State
      4. Address
      5. City
      6. Zip
  - d. Append Only
    - i. For Append Only, the DUNS number is the only required field.
      1. DUNS Number (Required)

**Marketo Source Mapping** ←

**Search Type** ?

Match and Append ▼

---

Cleanse Address if no Match is found.

**Company Name** ?

-- Required -- ▼

**Country** ?

-- Required -- ▼

(two letter ISO code)

**State** ?

▼

(two letter ANSI code)

**Address** ?

▼

**City** ?

▼

**Zip** ?

▼

or

**Marketo Source Mapping** ←

**Search Type** ?

Append Only ▼

---

**DUNS Number** ?

-- Required -- ▼

## Marketo Destination Mapping

6. For each configured Destination Entity, the following mapping section will appear.
  - a. If Match and Append or Append Only, the section will offer all D&B Company fields.
  - b. If Match Only, the section will offer a limited number of D&B Match fields.
  - c. Custom Object Destinations will require the DUNS Number to be mapped. This value is used for the unique identifier for custom objects.

**Marketo Destination Lead Mapping** <

**Default Fields** ?

DUNS Number

Company Name

Address

City

State ANSI

Country ISO

Zip/Postal Code

Phone

International Dialing Code

Year Started

Hoovers Industry Description

D&B Industry Code

Primary SIC Code

**Marketo Destination Custom Object Mapping** <

DUNS Number (Unique) -- Required -- ?

**Default Fields** ?

Company Name

Address

City

State ANSI

Country ISO

Zip/Postal Code

Phone

International Dialing Code

Year Started

Hoovers Industry Description

D&B Industry Code



## Data Dictionary for Match and Append Webhook

Name	Description	Field Name on Mapping Screens
Boneyard Organization Indicator	When TRUE indicates that data on the company is no longer collected and was covered by Hoover's Editorial staff before being acquired or going out of business.	Boneyard Status
Business Legal Structure	Text recording the legal form or structure of a business as registered with government authorities e.g. partnership corporation private limited company government department proprietorship.	Legal Status
Continent Code (World Region ID)	Text recording the name of the region as defined by D&B for this address i.e. Africa, Australia/Asia, Europe, Middle East, South & Central America, North America.	Location Country Name
Control Year	The date when the current owners took over this business.	Control Ownership Date
Country Code	The two-letter country code, defined by the International Organization for Standardization (ISO) ISO 3166-1 scheme identifying the country of the business entity.	Country ISO
County Name	Text recording the name of the county in which the business is located.	Location County Name
D&B Industry Code	An alphanumeric value identifying a business activity based on the scheme specified by the Standard Industrial Classification (SIC) Code. The first four digits are external codes created by the U.S. Government. D&B has created extensions to more precisely	D&B Industry Code
D&B Industry Code Description	Text that describes the business activity based on the scheme specified by the attribute type, e.g., 'highway and street construction' is the description of industry code 1611 in the U.S. SIC (Standard Industrial Classification) system.	D&B Industry Description
Domestic Ultimate Business Name	Text recording the name of the highest business in the family tree that is in the same country as the subject.	Domestic Ultimate DUNS Name
Domestic Ultimate Business Name	Text recording the name of the highest business in the family tree that is in the same country as the subject.	Domestic Ultimate DUNS Name

Name	Description	Field Name on Mapping Screens
Domestic Ultimate Country Code	The two-letter country code, defined in the ISO 3166-1 scheme published by International Organization for Standardization (ISO) identifying the country of the domestic ultimate company.	Domestic Ultimate DUNS Country
Domestic Ultimate D-U-N-S Number	The DUNS Number for the Domestic Ultimate, which is the highest family member in the same country as this business entity. A subject may be its own Domestic Ultimate. The D-U-N-S Number is D&B's identification number, which provides unique identification	Domestic Ultimate DUNS Number
Domestic Ultimate Postal Code	An identifier used by the local country postal authority to identify where the domestic ultimate is located.	Domestic Ultimate DUNS Zip/Postal Code
Domestic Ultimate Street Address	Text recording the address number, or post office box number and street name where the domestic ultimate is located.	Domestic Ultimate DUNS Address
Domestic Ultimate Territory Abbreviated Name	Text recording the shortened name of the locally governed area which forms part of a centrally governed nation to identify where the domestic ultimate is located.	Domestic Ultimate DUNS State
Domestic Ultimate Town Name	Text recording the name of a city, town, township, village, borough, etc. where the domestic ultimate is located.	Domestic Ultimate DUNS City
D-U-N-S Number	The D-U-N-S Number is D&B's identification number, which provides unique identification of this organization, in accordance with the Data Universal Numbering System (D-U-N-S). This DUNS Number represents the business entity.	DUNS Number
Employee Quantity Growth Rate	The annual rate at which total number of employees in a firm's has been or is expected to grow.	Employee Growth Rate
Employees Here Quantity	The total number of employees at this location.	Employees Here

Name	Description	Field Name on Mapping Screens
Employees Here Quantity Reliability	Text that describes the integrity of the employee figures, e.g. audited, actual, estimated, or modeled.	Location Employee Reliability
Ethnicity Type Text	Text that records the racial, national, tribal, or cultural classifications that are applied to an organization based on the ethnicity of a majority of its ownership.	Ownership Ethnicity
Export Indicator	When TRUE it indicates that the subject company exports goods to other countries.	Export Indicator
Family Tree Member Role	Text recording of various parts that the Subject plays as a member of an ownership structured family tree.	Family Tree Member Roles
FEIN Assignment Method	Text that identifies how the inquiry DUNS was assigned based on a direct source such as an Agency or if assigned based on the branch process which utilizes the HQ linkage to assign the HQ FEIN to each Branch.	Registration ID Type
FEIN Collection Date	The date the FEIN information was received.	Registration ID Start Date
FEIN Issuer D-U-N-S Number	The DUNS Number assigned to the entity that provided the FEIN number to D&B.	Registration ID Issuer DUNS Number
FEIN Issuer Organization Name	Text recording the name of the entity that provided the FEIN Number to D&B.	Registration ID Issuer Name
FEIN Registration Business Name	Text recording the filing name for the unique nine-digit number assigned by the U.S. Internal Revenue Service to business entities (and in some cases individuals) operating in the United States for the purposes of conducting business.	Registration ID Filing Organization
FEIN Registration Postal Code	An identifier used by the local country postal authority to identify where the identification number provider is located.	Registration ID Zip/Postal Code
FEIN Registration Street Address	Text that records the street address components as it would be presented on an address label. This includes, but is not limited to, details such as street name, street number, building name, estate name.	Registration ID Address
FEIN Registration Town Name	Text recording the mailing address town or city name that is recorded in the FEIN registration.	Registration ID City

Name	Description	Field Name on Mapping Screens
FEIN Tax ID Number	A number recording a unique nine-digit FEIN number assigned by the U.S. Internal Revenue Service to business entities (and in some cases individuals) operating in the United States for the purposes of identification.	Registration ID Number
Geographical Precision Text	Text that identifies the accuracy of the match used for an address.	Location Geographical Precision
Global Ultimate Business Name	Text recording the primary name of the Global Ultimate business.	Global Ultimate Name
Global Ultimate Country Code	The two-letter country code, defined in the ISO 3166-1 scheme published by International Organization for Standardization (ISO) identifying the country of the inquired subject.	Global Ultimate DUNS Country
Global Ultimate D-U-N-S Number	The D-U-N-S number of the highest parent of a corporate family.	Global Ultimate DUNS Number
Global Ultimate Postal Code	An identifier used by the local country postal authority to identify where the global ultimate is located.	Global Ultimate DUNS Zip/Postal Code
Global Ultimate Street Address	Text recording the address number, or post office box number and street name where the global ultimate is located.	Global Ultimate DUNS Address
Global Ultimate Territory Abbreviated Name	Text recording the shortened name of the locally governed area which forms part of a centrally governed nation to identify where the global ultimate is located.	Global Ultimate DUNS State
Global Ultimate Town Name	Text recording the name of a city, town, township, village, borough, etc. where the global ultimate is located.	Global Ultimate DUNS City

Name	Description	Field Name on Mapping Screens
Import Indicator	When TRUE it indicates that the subject company imports a quantity of goods from other countries.	Import Indicator
Incorporation Year	The year the business incorporated - The year the business entity incorporated or registered as the current legal structure.The Incorporation Year may or may not be the same as the year the business started.	Registration Incorporation Year
Last Update Date	The date when the record was last updated in D&B's system.	Last Updated
Line of Business	Text that records the description of operations continued by a business.	Business Description
Location Ownership Text	Text specifying the terms under which this subject occupies the premises (i.e., one or more facilities) at the primary address, e.g., owned, rented or leased.	Location Usage Tenure
Major Industry Category	A narrative description of the operations or activities of the business. Relates to the primary four-digit 1987 US SIC. In English.	Major Industry Category
Market Value Date	The date on which the Capital Amount was first registered.	Share Capital Start Date
Marketability Indicator	When TRUE it indicates that the record satisfies D&B marketability rules. When FALSE it indicates that the record does not satisfy D&B marketability rules; however, there is no requirement to create this tag to represent this fact.	Marketability Indicator
Marketing Prescreen Score	Prescreen score is a D&B marketing tool that predicts the likelihood of a company's ability to pay all its bills on time over the next 12 months. Updated monthly, it shows the likelihood that a company may become a collection problem. Scores are calculate	Marketing Risk
Metropolitan Statistical Area Code	A code describing a geographical region with a relatively high population density at its core and close economic ties throughout the area.	Location Census Code
Minority Owned Indicator	When set to TRUE indicates that this organization is certified as a business that is greater than 50% owned by and whose management and daily business operations are controlled by one or more minority group members.	Minority Owned
NAICS Code	The industry code for the North American Industry Classification System was introduced in 1997 as a replacement for SIC Codes and now serves as the standard for the three NAFTA countries of Mexico, Canada and the U.S.	Primary NAICS Code

Name	Description	Field Name on Mapping Screens
NAICS Code Description	Text that describes the business activity based on the scheme specified by the attribute type, e.g., 'highway and street construction' is the description of industry code 1611 in the U.S. SIC (Standard Industrial Classification) system.	Primary NAICS Description
NIXIE Code	When TRUE it indicates that it is not possible to deliver mail to this address. When FALSE it indicates that mail to this address can be delivered; however, as this is the assumed condition there is no requirement to create this tag to represent thi	Location Undeliverable Status
Non Marketable Reason Text	Text specifying the reason why the subject's data is not considered marketable by D&B.	Non Marketable Reason
Operations Text	Text that describes detailed information regarding a business operation.	Business Operations
Organization History Text	Text that indicates if D&B has any information that may reflect unfavorably on this organization, e.g. clear, incomplete, management and business.	History Rating
Organization Start Year	The year when operations undertaken by the organization commenced.	Year Started
Organization Summary Text	Text that records a brief statement or account of this organization.	Company Synopsis
Out of Business Indicator	Text that records the operating status of the business.	Operating Status
Ownership Control Type	Text that describes the type of controlling ownership e.g. publicly owned, privately owned, state owned.	Control Ownership Type
Parent Business Name	Text recording the business name of the parent company. A parent is a corporation that owns more than 50% of another corporation's capital stock; these owned companies are subsidiaries to the parent company.	Parent Name
Parent Country Code	The two-letter country code, defined in the ISO 3166-1 scheme published by International Organization for Standardization (ISO) identifying the country of the parent company.	Parent DUNS Country
Parent D-U-N-S Number	The D-U-N-S number of the parent company. A parent is a corporation that owns more than 50% of another corporation's capital stock; these owned companies are subsidiaries to the parent company.	Parent DUNS Number

Name	Description	Field Name on Mapping Screens
Parent Postal Code	An identifier used by the local country postal authority to identify where the parent company is located.	Parent DUNS Zip/Postal Code
Parent Street Address	Text recording the address number, or post office box number and street name where the parent company is located.	Parent DUNS Address
Parent Territory Abbreviated Name	Text recording the shortened name of the locally governed area which forms part of a centrally governed nation to identify where the parent company is located.	Parent DUNS State
Parent Town Name	Text recording the name of a city, town, township, village, borough, etc. where the parent company is located.	Parent DUNS City
Postal Code	An identifier used by the local country Postal Authority to identify where the business is located.	Zip/Postal Code
Premises Area Measurement	Text that records the measurement of the premises.	Location Premises Area
Premises Area Measurement Reliability Text	Text that describes the accuracy of the measurement found in Premises Area Measurement; e.g., actual, estimated, modeled.	Location Premises Reliability
Premises Area Unit of Measurement	Text that records the measurement unit used to express the Premises Area Measurement; e.g. acre, square meters, square feet.	Location Premises Units
Primary Address Latitude	The angular distance of the organization's primary physical address north or south from the Earth's equator measured through 90 degrees expressed in decimal numbers.	Latitude
Primary Address Longitude	The angular distance of the organization's primary physical address east or west from an imaginary line (called the prime meridian) that goes from the North Pole to the South Pole measured through 90 degrees expressed in decimal numbers.	Longitude
Primary Business Name	Text recording of a single name by which the organization is primarily known or identified.	Company name
Primary SIC Code	A four digit numeric value identifying the primary business activity of this company based on the Standard Industrial Classification system.	Primary SIC Code

Name	Description	Field Name on Mapping Screens
Primary SIC Description	Text that describes the business activity based on the scheme specified by the attribute type, e.g., 'highway and street construction' is the description of industry code 1611 in the U.S. SIC (Standard Industrial Classification) system.	Primary SIC Description
Profit or Loss Amount	A monetary figure that shows the difference between sales revenue and cost of sales before the deduction of selling, distribution, administration and other costs.	Profit/Loss Amount
Profit or Loss Growth Rate	The rate of change in the difference between sales revenue and cost of sales before the deduction of selling, distribution, administration and other costs.	Profit/Loss Growth Rate
Registered Address Indicator	When TRUE it indicates that the Primary Address which has been presented is also the Registered Address. When FALSE it indicates that the Primary Address which has been presented is not a Registered Address.	Location Registered Address
Residential Address Indicator	When TRUE it indicates that the Primary Address which has been presented is also the Residential Address. When FALSE it indicates that the Primary Address which has been presented is not a Residential Address.	Location Residential Address
Sales Revenue Amount	The monetary value of income received from customers from the sale of the business' goods and/or services. This means it is the gross sales minus any returns, rebates/discounts, allowances for damages or shortages, shipping expenses passed on to the custo	Sales
Sales Turnover Growth Rate	The amount by which sales turnover increases over a given period of time as a percentage of its previous value.	Sales Turnover Growth Rate
Secondary SIC Code	An alphanumeric value identifying a business activity based on the scheme specified by the Standard Industrial Classification (SIC) Code. Clarification Note: These are generally external codes created by an external authoritative body like the U.S. Offic	2nd SIC Industry Code
Secondary SIC Code (2)	An alphanumeric value identifying a business activity based on the scheme specified by the Standard Industrial Classification (SIC) Code. Clarification Note: These are generally external codes created by an external authoritative body like the U.S. Offic	3rd SIC Industry Code
Secondary SIC Code (3)	An alphanumeric value identifying a business activity based on the scheme specified by the Standard Industrial Classification (SIC) Code. Clarification Note: These are generally external codes created by an external authoritative body like the U.S. Offic	4th SIC Industry Code
Secondary SIC Code (4)	An alphanumeric value identifying a business activity based on the scheme specified by the Standard Industrial Classification (SIC) Code. Clarification Note: These are generally external codes created by an external authoritative body like the U.S. Offic	5th SIC Industry Code
Secondary SIC Code (5)	An alphanumeric value identifying a business activity based on the scheme specified by the Standard Industrial Classification (SIC) Code. Clarification Note: These are generally external codes created by an external authoritative body like the U.S. Offic	6th SIC Industry Code



Name	Description	Field Name on Mapping Screens
Secondary SIC Description	Text that describes the business activity based on the scheme specified by the attribute type, e.g., 'highway and street construction' is the description of industry code 1611 in the U.S. SIC (Standard Industrial Classification) system.	2nd SIC Description
Secondary SIC Description (2)	Text that describes the business activity based on the scheme specified by the attribute type, e.g., 'highway and street construction' is the description of industry code 1611 in the U.S. SIC (Standard Industrial Classification) system.	3rd SIC Description
Secondary SIC Description (3)	Text that describes the business activity based on the scheme specified by the attribute type, e.g., 'highway and street construction' is the description of industry code 1611 in the U.S. SIC (Standard Industrial Classification) system.	4th SIC Description
Secondary SIC Description (4)	Text that describes the business activity based on the scheme specified by the attribute type, e.g., 'highway and street construction' is the description of industry code 1611 in the U.S. SIC (Standard Industrial Classification) system.	5th SIC Description
Secondary SIC Description (5)	Text that describes the business activity based on the scheme specified by the attribute type, e.g., 'highway and street construction' is the description of industry code 1611 in the U.S. SIC (Standard Industrial Classification) system.	6th SIC Description
Share Capital Amount	A monetary value representing the amount of Share Capital. Calculation is Price X Total Shares Outstanding.	Share Capital Amount
Small Business Indicator	When TRUE indicates that this organization is certified as a small business, and has been certified by a federal, state or local government agency or organization as having met all of the government standards that award eligibility.	Small Business Indicator
Standalone Organization Indicator	When true indicates that this organization is not a member of a legal family tree. The Subject has no Parent Company, no subsidiaries or no branch/division locations.	Standalone Organization Indicator
Stock Exchange Country Code	The two-letter country code, defined by the International Organization for Standardization (ISO) ISO 3166-1 scheme identifying the country for this stock exchange.	Stock Exchange CountryISO
Stock Ticker Name	Text that identifies the subject at the Stock Exchange for share trading purposes, e.g., DNB.	Stock Exchange Ticker Name
Street Address	Text recording the address number, or post office box number and street name where the business is located.	Address
Telephone Disconnected (TIXIE) Indicator	When TRUE it indicates that telecommunication number cannot be connected to successfully. When FALSE it indicates that telecommunication number can be connected to successfully. When set to NULL, it indicates that D&B does not know whether the telecommuni	Phone Unreachable Indicator

Name	Description	Field Name on Mapping Screens
Telephone Number	The telephone number of the business.	Phone
Telephone Number International Dial Code	The telephone number international dial code of the business.	International Dialing Code
Territory Abbreviated Name	Text recording the shortened name of the locally governed area which forms part of a centrally governed nation to identify where the business is located.	State ANSI
Territory Name	Text recording the name of the locally governed area which forms part of a centrally governed nation to identify where the business is located.	Location State Name
Third Party Assessment	An alpha code assigned by a third party to define the kind of appraisal/opinion that was assigned to this subject by the third party, e.g. Moody's Long Term Obligation Rating, FICO score, Vantage Score.	Third Party Assessment
Third Party Assessment Rank	Company's rank on a ranking list, such as number 100 on the Fortune 500	Third Party Assessment Rank
Total Employee Quantity	A number that defines how many people are directly engaged and paid by the organization to perform or support its business operations.	Total Employees
Total Employee Quantity Reliability	Text that describes the integrity of the employee figures, e.g. audited, actual, estimated, or modeled.	Total Employee Reliability
Town Name	Text recording the name of a city, town, township, village, borough, etc. where the business is located.	City
Transferred D-U-N-S Number	This is the D-U-N-S number of the subject that was deleted or transferred.	Transferred from DUNS Number
Web Site Address	The Internet URL (Uniform Resource Locator) which uniquely identifies the proprietary website of the subject or the website preferred by the subject which gives more information on the subject.	Web Page Address
Woman-Owned Indicator	When set to TRUE it indicates that this organization is certified as a business that is greater than 50% owned by and whose management and daily business operations are controlled by one or more female persons. The percentage of ownership requirement may	Female Owned

---

## Setup Complete

7. Congratulations, you have configured the Marketo Webhook! After completing the configuration, the final step will contain the URL that should be copied to a new Marketo Webhook. Further instructions are included later in the document.

The D&B Data Match & Append Webhook has been configured successfully.

To test the setting configuration and field mapping, please visit the [Test](#) page.

**Install the configuration by copying and pasting the following URL into a new Marketo Webhook.**

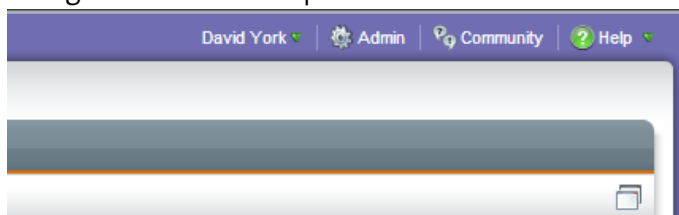
```
https://dnb.sureshotmedia.com/Marketo/MatchAndAppend/Process?Id=0ccccfc93-658f-4dc7-a4a0-91db821a1411&email={{lead.Email Address}}
```

Open the [Dashboard](#) to view all configured Marketo Webhooks.

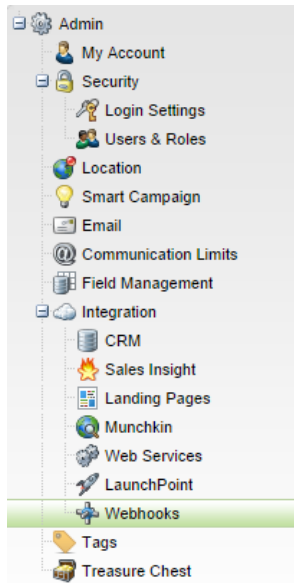
## Marketo Installation (Webhook)

After configuring the D&B Direct Webhook, the last steps involve adding it to your Marketo instance.

1. Navigate to Marketo and log in: <https://login.marketo.com/>
2. Navigate to the Admin portal



3. Open the Webhooks page



4. Select “New Webhook”



5. Title the Webhook and paste in the previous URL

A screenshot of the 'New Webhook' dialog box in Marketo. The dialog box has a title bar with a close button. It contains several fields and buttons:

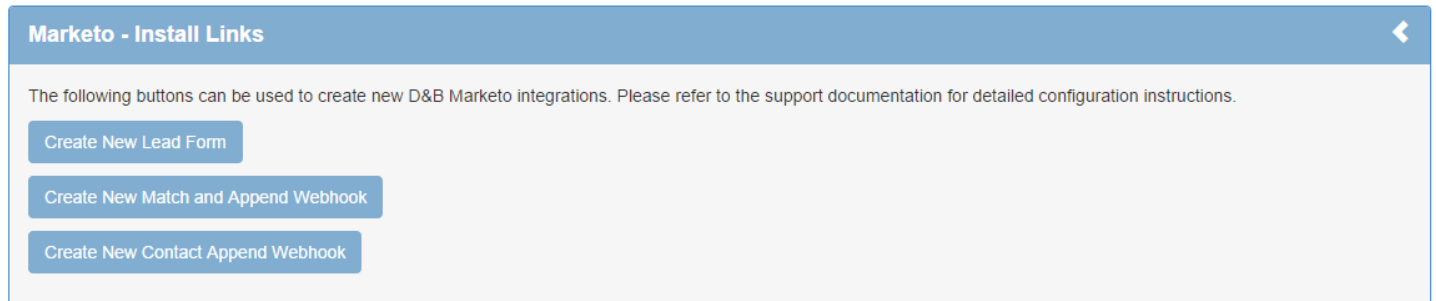
- Webhook Name:** A text field containing 'D&B Match and Append Webhook'.
- Description:** An empty text field.
- URL:** A text field with an 'Insert Token' button next to it.
- Request Type:** A dropdown menu set to 'POST'.
- Template:** A text field with an 'Insert Token' button next to it.
- Request Token Encoding:** A dropdown menu set to 'None'.
- Response type:** A dropdown menu set to 'None'.

At the bottom right, there are 'Cancel' and 'Create' buttons.

6. The D&B Direct Webhook has now been added to your Marketo instance! The Webhook can now be utilized to process your Marketo database.

# Contact Append Webhook Setup

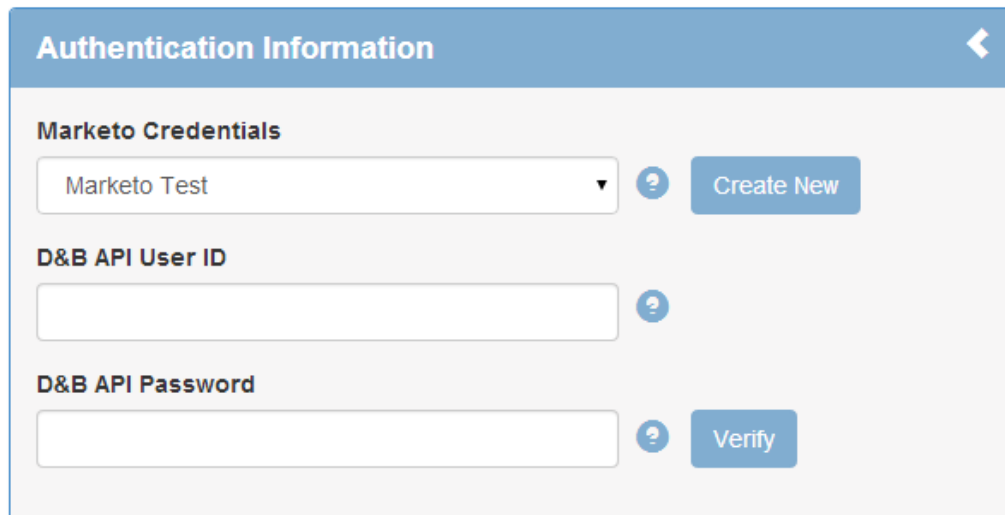
New Marketo Webhooks are first configured through the D&B Direct Dashboard. Click the “Create New Contact Append Webhook” button to start the setup process.



## Authentication Information

1. Select which Marketo Credentials you would like to use in relation to the Webhook.

Additionally, you will need to provide your D&B Direct API User ID and API. A “Verify” button is available to test the API authentication.



## Entity Selection

2. The following selections identify Source and Destination objects for the Webhook.
  - a. Marketo Source Entity Type

- i. Lead
    - 1. Select this option if Leads will be processed by this Webhook.
  - ii. Custom Object
    - 1. Select this option if Custom Objects will be processed by this Webhook.
- b. Marketo Destination Entity Type
- i. Lead
    - 1. Select this option to update Marketo Leads with D&B data.
  - ii. Custom Object
    - 1. Select this option to update Marketo Custom Objects with D&B data.

**Entity Selection** <

**Marketo Source Entity Type** ?

Lead

Custom Object

**Marketo Destination Entity Type** ?

Lead

Custom Object

Another example:

**Entity Selection** <

**Marketo Source Entity Type** ?

Lead

Custom Object

-- Select Source Custom Object -- ▾

**Marketo Destination Entity Type** ?

Lead

Custom Object

-- Select Destination Custom Object -- ▾

---

## Settings

3. The following section includes several options to customize the D&B Contact lookups.
  - a. Contact Lookup Selection
    - i. Find New Contacts by DUNS Number
      1. This option will require that a DUNS exists on the source entity, and will use it to find new contacts from D&B.
    - ii. Append Contact Information by Email Address
      1. This option will require that an email address exists on the source entity, and will use it to append contact information.
  - b. Webhook Description
    - i. This field is used to uniquely identify the configuration on the D&B Dashboard for future reference.
  - c. Roles to Retrieve
    - i. The following selection box is used to filter contacts by role during retrieval.
  - d. Max Records (per Company)
    - i. Define the max number of Contacts that should be retrieved per Company.
  - e. Import New Leads to List
    - i. For any new Leads that are created, also import them to the selected Marketo list.

### Settings

**Contact Lookup Selection** ?

Find New Contacts by DUNS Number  
 Append Contact Information by Email Address

**Webhook Description**

?

**Roles to Retrieve** ?

- Acquisitions
- Administration
- Business Development
- CEO
- CEO/President (Division, Region, or Unit)
- CFO
- Chairman
- Chief, other
- CIO/CTO
- Controller/Comptroller
- COO

(CTRL-Click to select multiple)

**Max Records (per Company)**

?

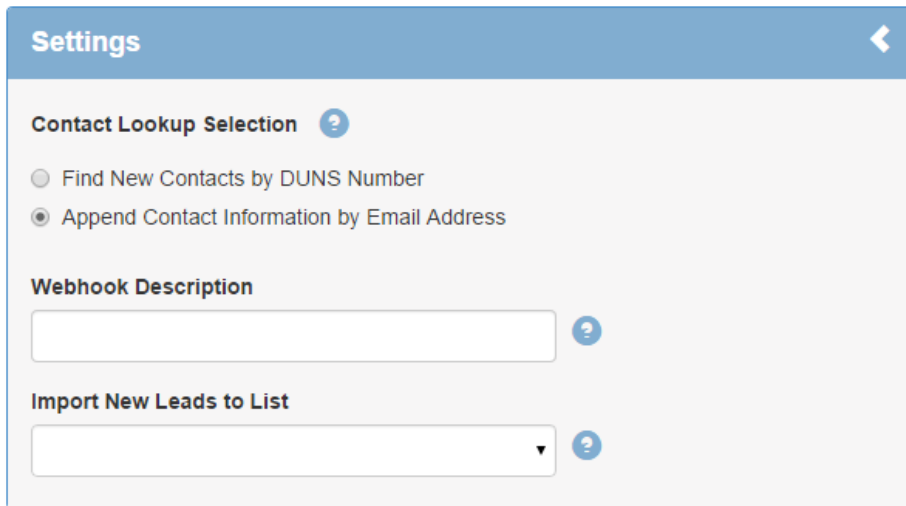
Max value is 10,000 Records

**Import New Leads to List**

?

Or





**Settings**

**Contact Lookup Selection** ?

Find New Contacts by DUNS Number

Append Contact Information by Email Address

**Webhook Description**

?

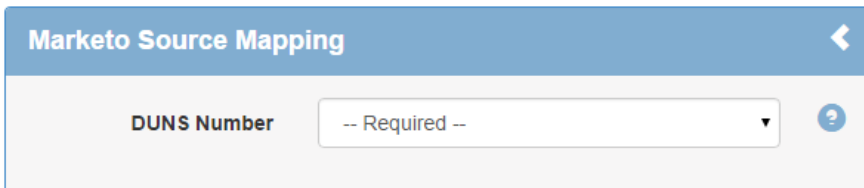
**Import New Leads to List**

?

4. Click the “Next” button to continue to Mapping.

## Marketo Source Mapping

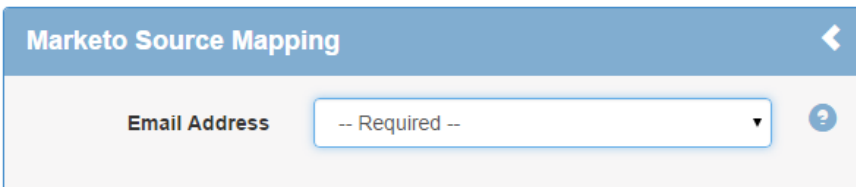
5. Find New Contacts
  - a. This section simply maps the DUNS Number field of the chosen Marketo Source entity.



**Marketo Source Mapping**

**DUNS Number** -- Required -- ?

6. Append Contact information
  - a. This section maps the Email Address field for the chosen Marketo Source entity.



**Marketo Source Mapping**


**Email Address** -- Required -- ?

## Marketo Destination Mapping

7. For each configured Destination Entity, the following mapping section will appear.

- a. Find Contacts by DUNS or Append Contact Information both offer the same mapping fields.
- b. Leads and Custom Object Destinations will require the Email Address to be mapped. This value is used for the unique identifier.

### Marketo Destination Lead Mapping ←

Email Address (Unique)	<input type="text"/>	
DUNS Number	<input type="text"/>	
First Name	<input type="text"/>	
Last Name	<input type="text"/>	
Name Prefix	<input type="text"/>	
Company Name	<input type="text"/>	
Job Title	<input type="text"/>	
Management Responsibility	<input type="text"/>	
Phone Number	<input type="text"/>	
International Dialing Code	<input type="text"/>	

**Marketo Destination Custom Object Mapping**
◀

**Email Address (Unique)**

**DUNS Number**

**First Name**

**Last Name**

**Name Prefix**

**Company Name**

**Job Title**

**Management Responsibility**

**Phone Number**

**International Dialing Code**

?

## Data Dictionary for Contact Append Webhook

Name	Description	Field Name on Mapping Screens
Principal eMail Address	Text recording the principal's e-mail address. [C] [M+]	Email Address
Principal First Name	Text recording the first name of the principal. [C] [M+]	First Name
Principal Job Title Text	Text recording the job held by the principal or manager, e.g., Leader Global Communication, Manager National Technical Support Center. [C] [M+]	Job Title
Principal Last Name	Text recording the last name of the principal. [C] [M+]	Last Name

Name	Description	Field Name on Mapping Screens
Principal Name Prefix Text	Text that describes the correct form of address for this principal. E.g. Dr, Professor, Lord, etc. [C] [M+]	Name Prefix
Principal Telephone Number	The telephone number of the principal. [C] [M+]	Phone Number

## Complete

8. Congratulations, you have configured the Marketo Webhook! After completing the configuration, the final step will contain the URL that should be copied to a new Marketo Webhook. Further instructions are included later in the document.

The D&B Contact Append Webhook has been configured successfully.

To test the setting configuration and field mapping, please visit the [Test](#) page.

**Install the configuration by copying and pasting the following URL into a new Marketo Webhook.**

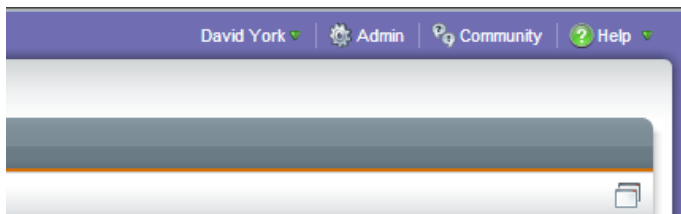
```
https://dnb.sureshotmedia.com/Marketo/ContactAppend/Process?Id=0cccfc93-658f-4dc7-a4a0-91db821a1411&email={{lead.Email Address}}
```

Open the [Dashboard](#) to view all configured Marketo Webhooks.

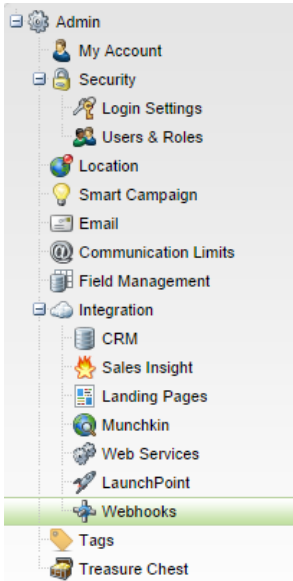
## Marketo Installation (Contact)

After configuring the D&B Direct Webhook, the last steps involve adding it to your Marketo instance.

1. Navigate to Marketo and log in: <https://login.marketo.com/>
2. Navigate to the Admin portal



3. Open the Webhooks page



4. Select “New Webhook”



5. Title the Webhook and paste in the previous URL

**New Webhook**

**Webhook Name:** \* D&B Contact Append

**Description:**

**URL:** \* Insert Token

**Request Type:** \* POST

**Template:** Insert Token

**Request Token Encoding:** None

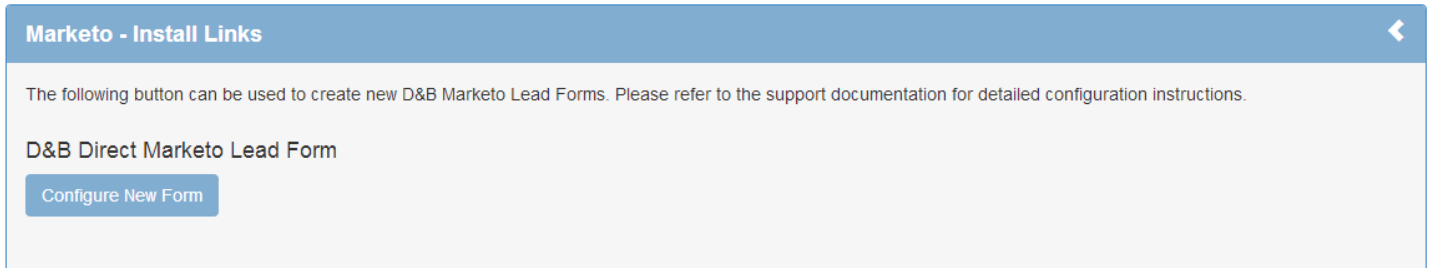
**Response type:** None

Cancel Create

6. The D&B Direct Webhook has now been added to your Marketo instance! The Webhook can now be utilized to process your Marketo database.

## Lead Form Setup

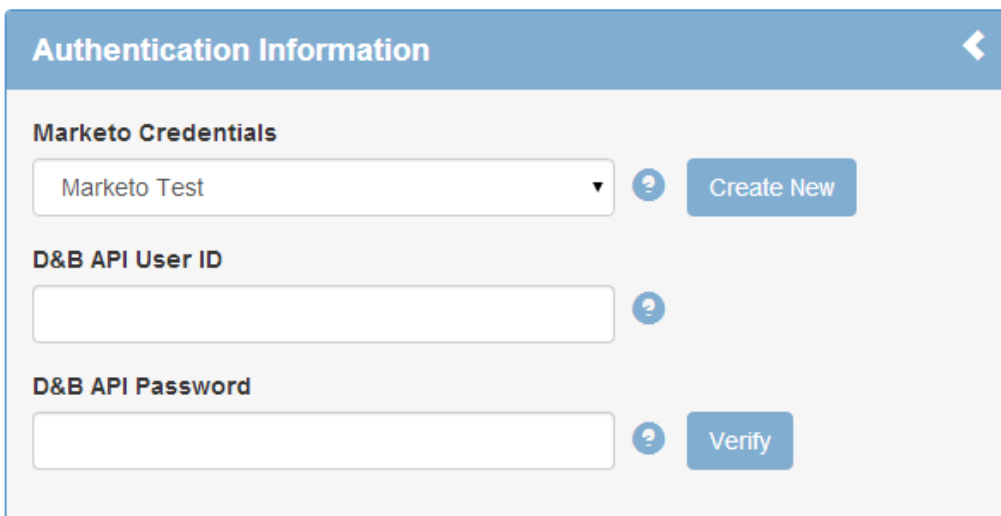
New Marketo Lead Forms are created through the D&B Direct Dashboard. Click the “Create New Form” button to start the setup process.



## Authentication Information

1. Select which Marketo Credentials you would like to use to create the Lead Form.

Additionally, you will need to provide your D&B Direct API User ID and API. A “Verify” button is available to test the API authentication.



## Settings

2. There are several options to configure on the Settings page.
  - a. Description
    - i. Labels the Lead Form internally for the Dashboard
  - b. Marketo Form

- i. This offers two options:
  1. Enter the HTML Form name into the input box
  2. Leave blank and allow the scripts to infer the form name from the landing page. We recommend only using this option if there is only one form on the landing page.
- c. Lookup Type
  - i. This offers two options for API lookups
    1. Use a Match and Append call to retrieve all possible D&B company data.
    2. Use a Match only call to retrieve abbreviated D&B company info.
- d. Lookup Priority Ranking
  - i. Lookup types will be enabled and ranked with these options. The choices are lookup by Company Name, Email Domain, and IP Address. The highest ranked feature will be used first, but if no results are found, it will fall back to the next priority. The highest ranking is Priority 1.
  - ii. Note: A minimum of one feature must be ranked, and a feature cannot be ranked twice. If a feature is not ranked, it's API call will not be utilized.

**Settings** ◀

**Description**

**Marketo Form**  ?

**Lookup Type** Match and Append ?

**Lookup Priority Ranking**

**Priority 1** ▼

**Priority 2** ▼

**Priority 3** ▼

Note: Selecting IP Address as a Lookup Priority can incur additional API costs.

## Input Mapping

3. Map Marketo Lead fields to form inputs. These should correspond to fields that are set up in the Lead Form in Marketo. Company Name and Email Address may be required based on Priority rankings.



**Input Field Mapping**

**Primary Fields**

Company Name

Email Address

**Additional Fields**

City

Country

State

Street

Zip

## Output Mapping

4. Map D&B API fields to Marketo Lead fields. These correspond to Marketo Lead fields that can be used on your form, but will usually be mapped to Lead fields that are hidden on the form. The available fields are dependent on the Lookup Type (Match and Append or Match Only).

Default Fields	
Address	<input type="text"/>
City	<input type="text"/>
Company Name	<input type="text"/>
Company Synopsis	<input type="text"/>
Country ISO	<input type="text"/>
D&B Industry Code	<input type="text"/>
DUNS Number	<input type="text"/>
Employees Here	<input type="text"/>
Global Ultimate DUNS Number	<input type="text"/>
Global Ultimate Name	<input type="text"/>
Hoovers Industry Description	<input type="text"/>
International Dialing Code	<input type="text"/>
Latitude	<input type="text"/>

(Internal Note: These mappings contain the same values from the D&B Data Dictionary)

## Setup Complete

5. Congratulations, you have configured the Marketo Lead Form! After completing the configuration, the final step will contain the html code that should be copied to the Marketo Landing Page as a new HTML element. Further instructions to do so are included later in the document.

The D&B Lead Form has been configured successfully.

To test the setting configuration, please visit the [Test](#) page.

**Install the Lead Form in Marketo by copying and pasting the following code into a new HTML Element in the Marketo Landing Page.**

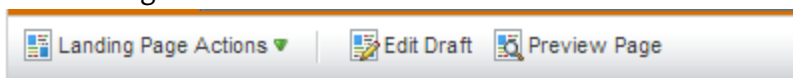
```
<script type="text/javascript" language="javascript" src="//dnb.sureshotmedia.com/Scripts/jquery-1.10.2.min.js"></script>
<script type="text/javascript" language="javascript" src="//dnb.sureshotmedia.com/Scripts/typeahead.bundle.js"></script>
<script type="text/javascript" language="javascript" src="//dnb.sureshotmedia.com/Scripts/hogan.js"></script>
<script type="text/javascript" language="javascript" src="//dnb.sureshotmedia.com/Scripts/leadform/leadform.js"></script>
<script type="text/javascript" language="javascript">
(function ()
{var o = {"mapping":{"company":"Company"},"selector":"test","id":"decdefc0-aff2-e311-85e5-9eb4c398fe3c"};
$__leadform(o);
})();</script>
```

Open the [Dashboard](#) to view all configured Eloqua Lead Forms.

## Marketo Installation (Lead Form)

After configuring the D&B Direct Lead Form integration, the last steps involve adding it to your Marketo landing page.

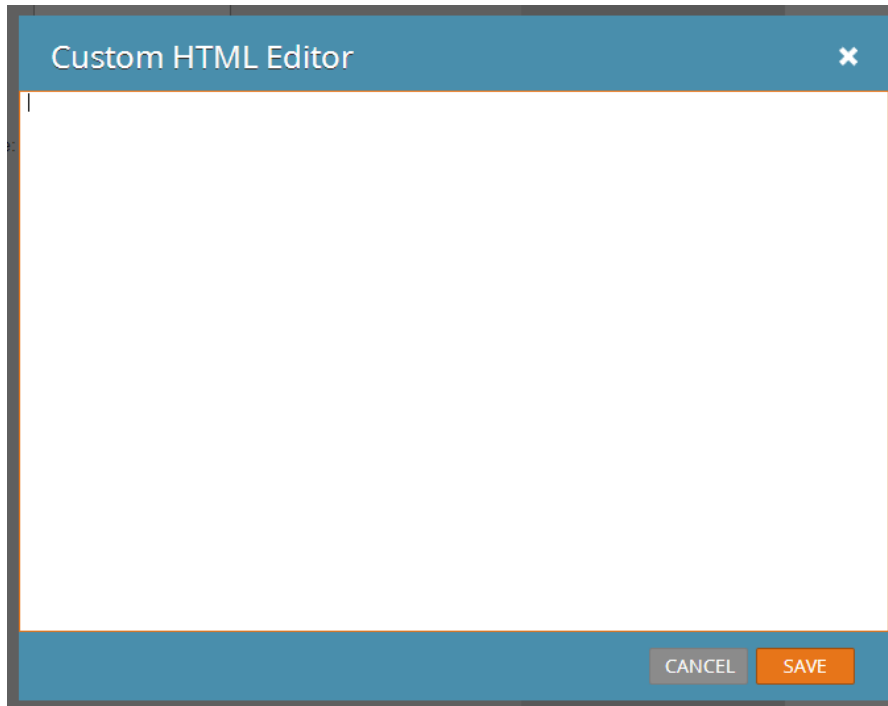
1. Navigate to Marketo and log in: <https://login.marketo.com/>
2. Navigate to the Marketo Landing Page that you have previously set up.
3. Edit the Page.



4. If the configured form has not already been added to the page, insert it on the page now.
5. Insert a new HTML element onto the page.



6. In the "Custom HTML Editor", paste the D&B Direct HTML into the editor. Click Save.



7. The D&B Direct Lead Form has now been added to the Marketo Landing Page! Test the functionality by Previewing the Draft. If configured correctly, a dropdown will appear when typing in the company name field.

# Service Dashboard

## Dashboard

**D&BDIRECT** Settings

### Marketo - Install Links

### Marketo - Configured Settings

Your configurations of D&B Direct for Marketo are listed below. Click on any of the settings to see configuration details.

#### Lead Forms

	Description	Last Updated	Date Created
<a href="#">Edit</a>	D&B Test	<a href="#">6 minutes ago</a>	<a href="#">8 minutes ago</a>
<a href="#">Edit</a>	My Test Form	<a href="#">about 6 hours ago</a>	<a href="#">about 6 hours ago</a>
<a href="#">Edit</a>	Test Lead Form	<a href="#">about 6 hours ago</a>	<a href="#">about 6 hours ago</a>



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