



WealthEngine API & Marketo Integration User Guide

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The information contained herein is proprietary and confidential and cannot be disclosed to anyone without WealthEngine's prior written approval. This document includes ideas for enhancing WealthEngine's products. These ideas are subject to change at any time.



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Introduction

This document details the integration between the Marketo platform and the WealthEngine API. WealthEngine's consumer data platform seamlessly integrates with Marketo to help you gain new insights, more precisely target prospects, and engage audiences in ways that improve conversion. After completing the integration with WealthEngine, customers will be able to utilize consumer wealth and attribute data and insights to enhance marketing automation activities conducted within Marketo.

Before Installation

In order to build this integration between the Marketo and the WealthEngine API a few things are required.

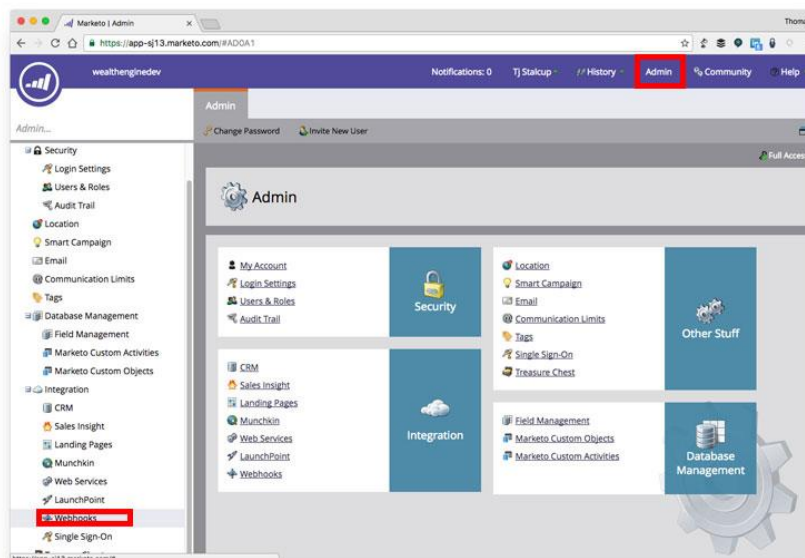
- Admin access to your Marketo Instance
- WealthEngine API Production Key – Purchased & Generated at <https://dev.wealthengine.com>
- Custom Fields to place all of the WealthEngine Data

Profile Match

The first integration approach we will look at is hooking up to the WealthEngine API Profile endpoints. WealthEngine provides 6 different endpoints to match a Lead, the correct endpoint depends on your use case. The first decision is Basic vs. Full profile. At the end of this document you will find a breakdown of data between the two. Next, how will you be looking up this Lead? WealthEngine offers looking up by Name & Address OR Email OR Phone.

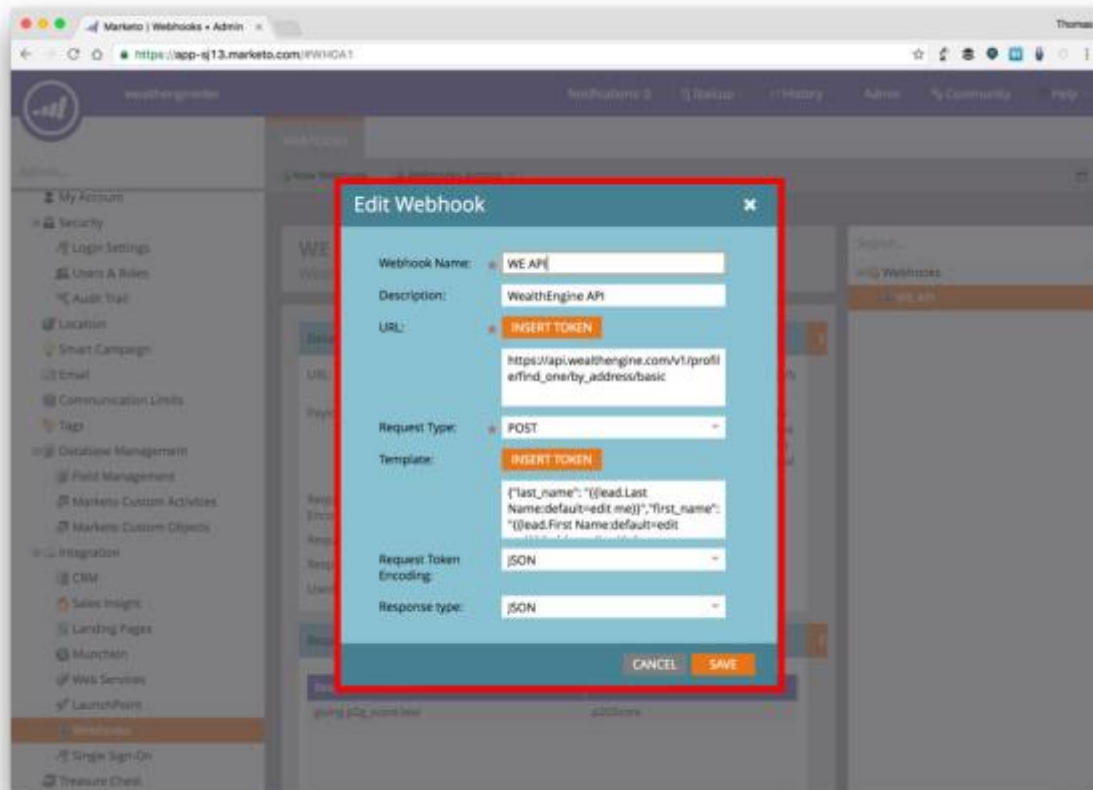
Step 1 – Log In

Log In to your Marketo Instance, select **Admin** from the Navigation Bar and click **Webhooks** in the Left Menu.



Step 2 – New Webhook

At the top of the screen is the New **Webhook Button**. This will launch a pop-up where you can input the correct parameters. They are as follows:



Webhook Name: WE API (this can be customized to your liking)

Description: WealthEngine API (also can be customized)

URL: https://api.wealthengine.com/v1/profile/find_one/by_address/basic (change to by_email, by_phone and /full as needed)

Request Type: POST

Template: `{"last_name": "{{lead.Last Name }}", "first_name": "{{lead.First Name }}", "address_line1": "{{lead.Address }}", "city": "{{lead.City }}", "state": "{{lead.State }}", "zip": "{{lead.Postal Code }}"}`

The template is setup for the default Marketo Fields to find by name & address. The fields for email & phone would be different

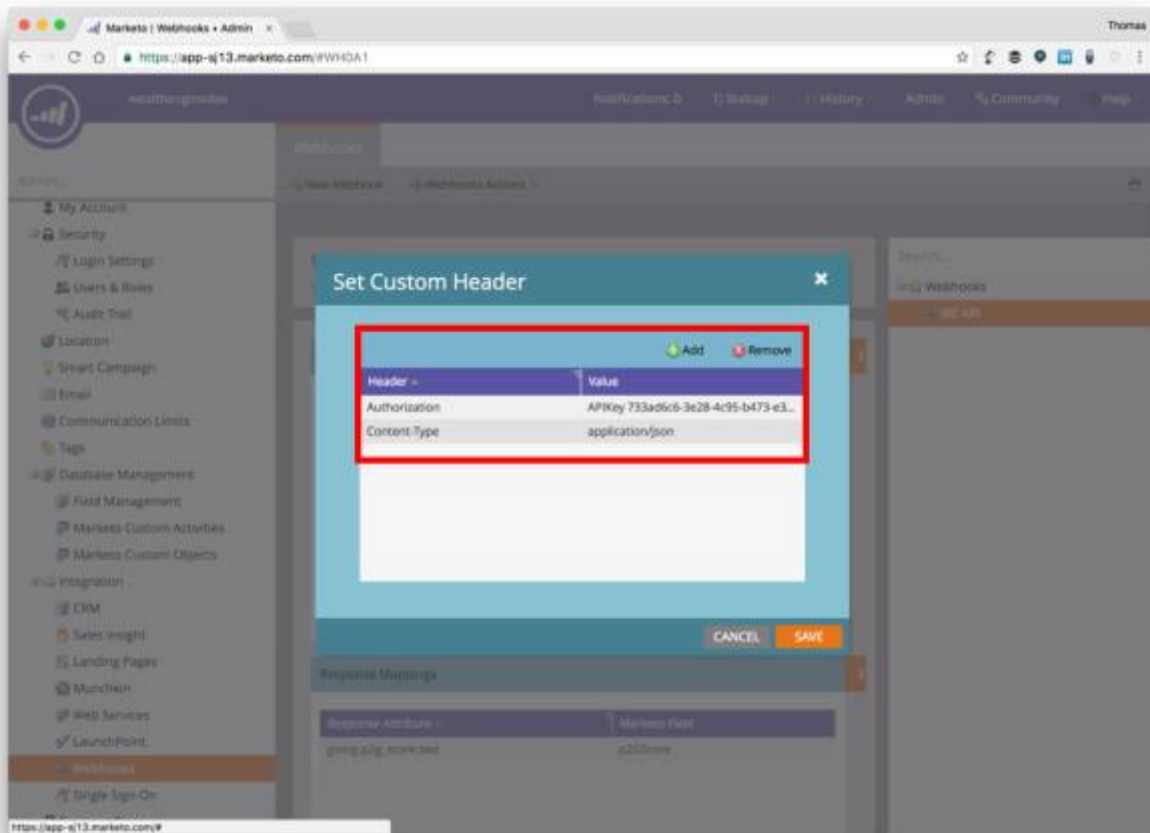
Request Token Encoding: JSON

Response Type: JSON

Step 3 – Custom Headers

Now that the Webhook Template is complete, we need to add custom headers that will allow you to authenticate to the WealthEngine API. Click the **Webhooks Actions** dropdown and select **Set Custom Header**.

Click the **Add** button twice and set the Header & Value properties as follows:



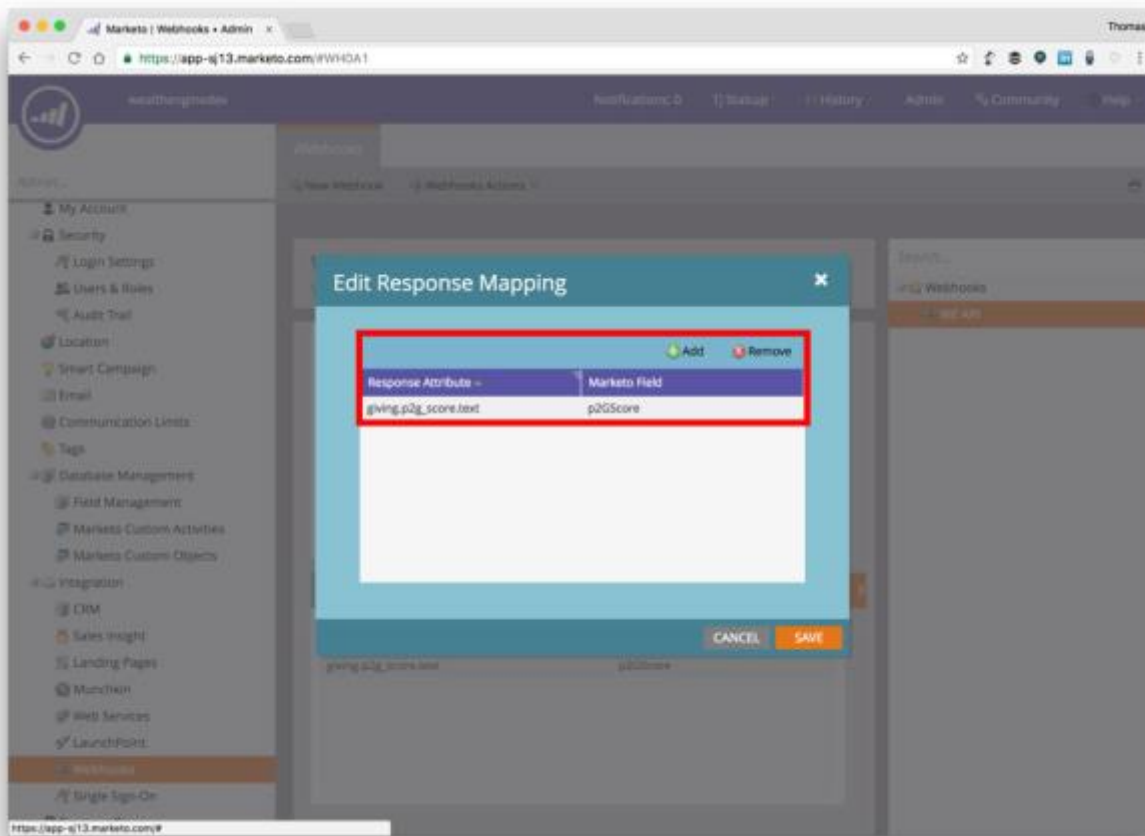
Authorization: APIKey *yourapikeyhere*

Content-Type: application/json

Step 4 – Response Mapping

Now that we have completed the connection to the API, it's time to map out all of the WealthEngine fields to your Custom Fields. Below is an example, see the table on the next page for every field that is returned for both Basic & Full profiles.

Click **Edit** to add a Response Mapping. The Response Attribute will be from the WealthEngine API, Marketo Field will map to a custom Marketo Field.



WealthEngine API Profile Fields

Basic Fields	Full Fields
id	id
identity.age	identity.age
identity.first_name	identity.first_name
identity.full_name	identity.full_name
identity.gender.text	identity.gender.text
identity.gender.value	identity.gender.value
identity.last_name	identity.last_name
identity.middle_name	identity.middle_name
	identity.marital_status.text
	identity.marital_status.value
locations[0].address	identity.emails
locations[0].address.city	
locations[0].address.postal_code	
locations[0].address.state.text	demographics.has_children
locations[0].address.state.value	
locations[0].address.street_line1	relationship.spouse.first_name
locations[0].address.street_line2	relationship.spouse.last_name
locations[0].address.street_line3	relationship.spouse.middle_name
locations[0].personal_phone	relationship.spouse.full_name
realestate.total_num_properties	
realestate.total_realestate_value.min	locations[0].address
realestate.total_realestate_value.max	locations[0].address.city
realestate.total_realestate_value.value	locations[0].address.postal_code
realestate.total_realestate_value.text	locations[0].address.state.text
realestate.total_realestate_value.text_low	locations[0].address.state.value

realestate.total_realestate_value.text_high	locations[0].address.street_line1
	locations[0].address.street_line2
wealth.accredited_investor	locations[0].address.street_line3
wealth.networth.min	locations[0].personal_phone
wealth.networth.max	
wealth.networth.value	realestate.total_num_properties
wealth.networth.text	realestate.total_realestate_value.min
wealth.networth.text_low	realestate.total_realestate_value.max
wealth.networth.text_high	realestate.total_realestate_value.value
wealth.total_income.min	realestate.total_realestate_value.text
wealth.total_income.max	realestate.total_realestate_value.text_low
wealth.total_income.value	realestate.total_realestate_value.text_high
wealth.total_income.text	
wealth.total_income.text_low	wealth.accredited_investor
wealth.total_income.text_high	wealth.networth.min
	wealth.networth.max
giving.estimated_annual_donations.min	wealth.networth.value
giving.estimated_annual_donations.max	wealth.networth.text
giving.estimated_annual_donations.value	wealth.networth.text_low
giving.estimated_annual_donations.text	wealth.networth.text_high
giving.estimated_annual_donations.text_low	wealth.total_income.min
giving.estimated_annual_donations.text_high	wealth.total_income.max
giving.gift_capacity.min	wealth.total_income.value
giving.gift_capacity.max	wealth.total_income.text
giving.gift_capacity.value	wealth.total_income.text_low
giving.gift_capacity.text	wealth.total_income.text_high
giving.gift_capacity.text_low	wealth.cash_on_hand.min
giving.gift_capacity.text_high	wealth.cash_on_hand.max
giving.p2g_score.text	wealth.cash_on_hand.value

giving.p2g_score.value

wealth.cash_on_hand.text
wealth.cash_on_hand.text_low
wealth.cash_on_hand.text_high
wealth.business_ownership.min
wealth.business_ownership.max
wealth.business_ownership.value
wealth.business_ownership.text
wealth.business_ownership.text_low
wealth.business_ownership.text_high
wealth.business_sales_volume.min
wealth.business_sales_volume.max
wealth.business_sales_volume.value
wealth.business_sales_volume.text
wealth.business_sales_volume.text_low
wealth.business_sales_volume.text_high
wealth.influence_rating.text
wealth.influence_rating.value
wealth.total_stock.min
wealth.total_stock.max
wealth.total_stock.value
wealth.total_stock.text
wealth.total_stock.text_low
wealth.total_stock.text_high
wealth.stock_holdings_direct.min
wealth.stock_holdings_direct.max
wealth.stock_holdings_direct.value
wealth.stock_holdings_direct.text
wealth.stock_holdings_direct.text_low
wealth.stock_holdings_direct.text_high

wealth.stock_holdings_indirect.min
wealth.stock_holdings_indirect.max
wealth.stock_holdings_indirect.value
wealth.stock_holdings_indirect.text
wealth.stock_holdings_indirect.text_low
wealth.stock_holdings_indirect.text_high
wealth.investable_assets.min
wealth.investable_assets.max
wealth.investable_assets.value
wealth.investable_assets.text
wealth.investable_assets.text_low
wealth.investable_assets.text_high
wealth.total_assets.min
wealth.total_assets.max
wealth.total_assets.value
wealth.total_assets.text
wealth.total_assets.text_low
wealth.total_assets.text_high
wealth.total_pensions.min
wealth.total_pensions.max
wealth.total_pensions.value
wealth.total_pensions.text
wealth.total_pensions.text_low
wealth.total_pensions.text_high

giving.estimated_annual_donations.min
giving.estimated_annual_donations.max
giving.estimated_annual_donations.value

giving.estimated_annual_donations.text
giving.estimated_annual_donations.text_low
giving.estimated_annual_donations.text_high
giving.gift_capacity.min
giving.gift_capacity.max
giving.gift_capacity.value
giving.gift_capacity.text
giving.gift_capacity.text_low
giving.gift_capacity.text_high
giving.p2g_score.text
giving.affiliation_inclination.text
giving.affiliation_inclination.value
giving.planned_giving[].text
giving.planned_giving[].value
giving.charitable_donations.min
giving.charitable_donations.max
giving.charitable_donations.value
giving.charitable_donations.text
giving.charitable_donations.text_low
giving.charitable_donations.text_high
giving.total_political_donations.min
giving.total_political_donations.max
giving.total_political_donations.value
giving.total_political_donations.text
giving.total_political_donations.text_low
giving.total_political_donations.text_high
giving.total_donations.min
giving.total_donations.max
giving.total_donations.value

giving.total_donations.text
giving.total_donations.text_low
giving.total_donations.text_high

professional.board_member

vehicles.ownership.text
vehicles.ownership.value

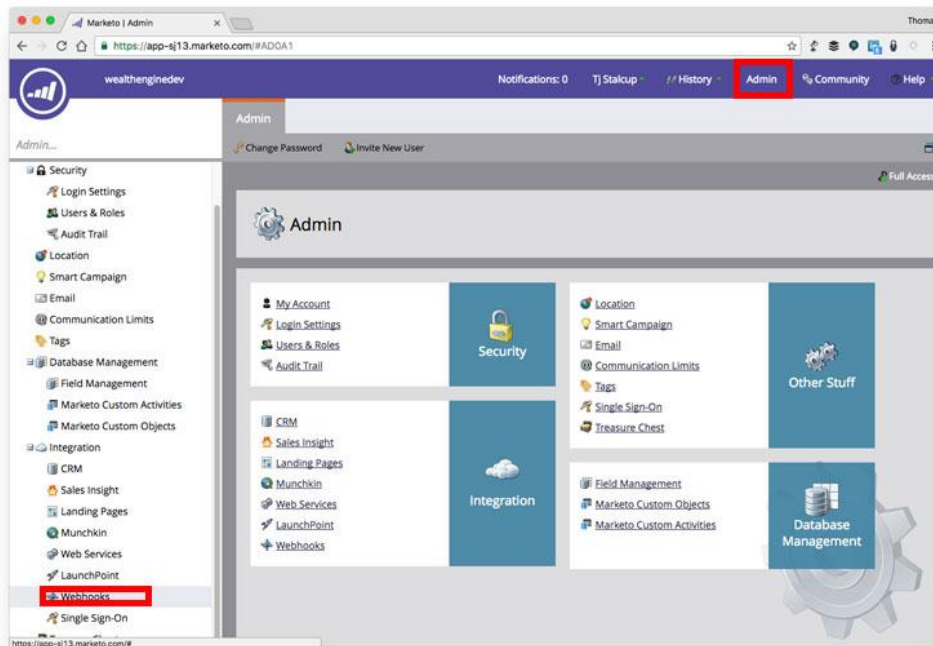
jobs
jobs[].org_name
jobs[].org_type.text
jobs[].org_type.value
jobs[].phone
jobs[].email
jobs[].title
jobs[].address
jobs[].address.city
jobs[].address.postal_code
jobs[].address.state.text
jobs[].address.state.value
jobs[].address.street_line1
jobs[].address.street_line2
jobs[].address.street_line3

Score Match

The second integration approach we will look at is hooking up to the WealthEngine API Score endpoints. WealthEngine provides 3 different endpoints to score a Lead, the correct endpoint depends on your use case. The decision is based on how will you be looking up this Lead? WealthEngine offers looking up by Name & Address OR Email OR Phone. Keep in mind that the Score Endpoints only work if you have a Model setup for API Access inside of WE Analyze already.

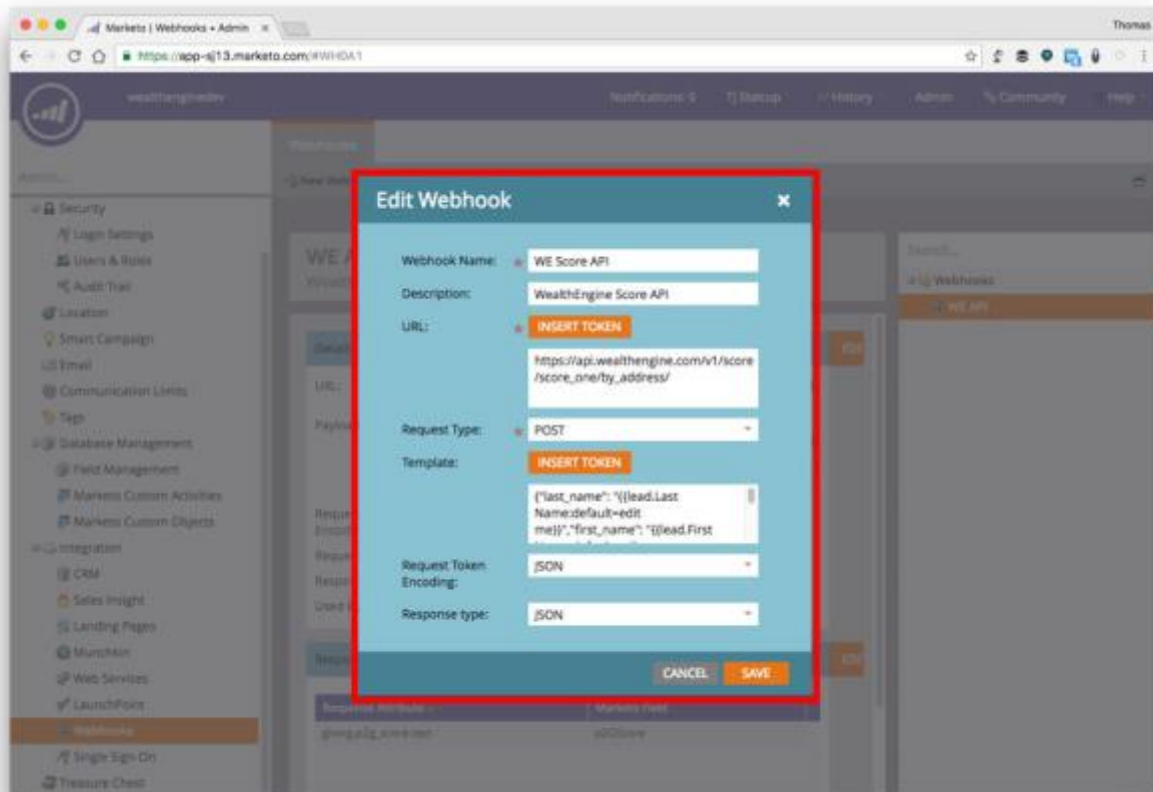
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Log In to your Marketo Instance and select the **Admin** button from the Navigation Bar and click **Webhooks** in the Left Menu.



Step 2 – New Webhook

At the top of the screen is the New **Webhook Button**. This will launch a pop-up where you can input the correct parameters. They are as follows:



Webhook Name: WE Score API (this can be customized to your liking)

Description: WealthEngine Score API (also can be customized)

URL: https://api.wealthengine.com/v1/score/score_one/by_address/ (change to by_email, by_phone and /full as needed)

Request Type: POST

Template: `{"last_name": "{{lead.Last Name }}", "first_name": "{{lead.First Name }}", "address_line1": "{{lead.Address }}", "city": "{{lead.City }}", "state": "{{lead.State }}", "zip": "{{lead.Postal Code }}", "model": "model-name"}`

The template is setup for the default Marketo Fields to find by name & address. The fields for email & phone would be different. Model references your model in WE Analyze.

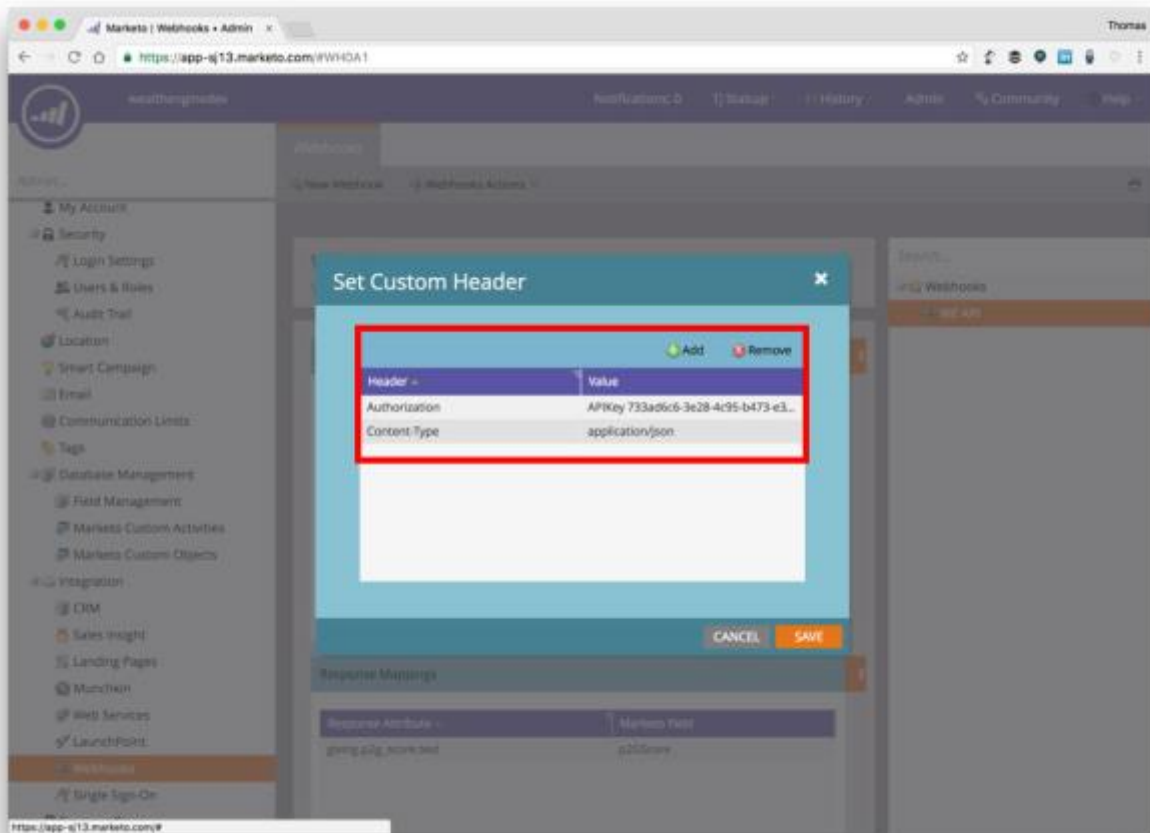
Request Token Encoding: JSON

Response Type: JSON

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Click the **Add** button twice and set the Header & Value properties as follows:



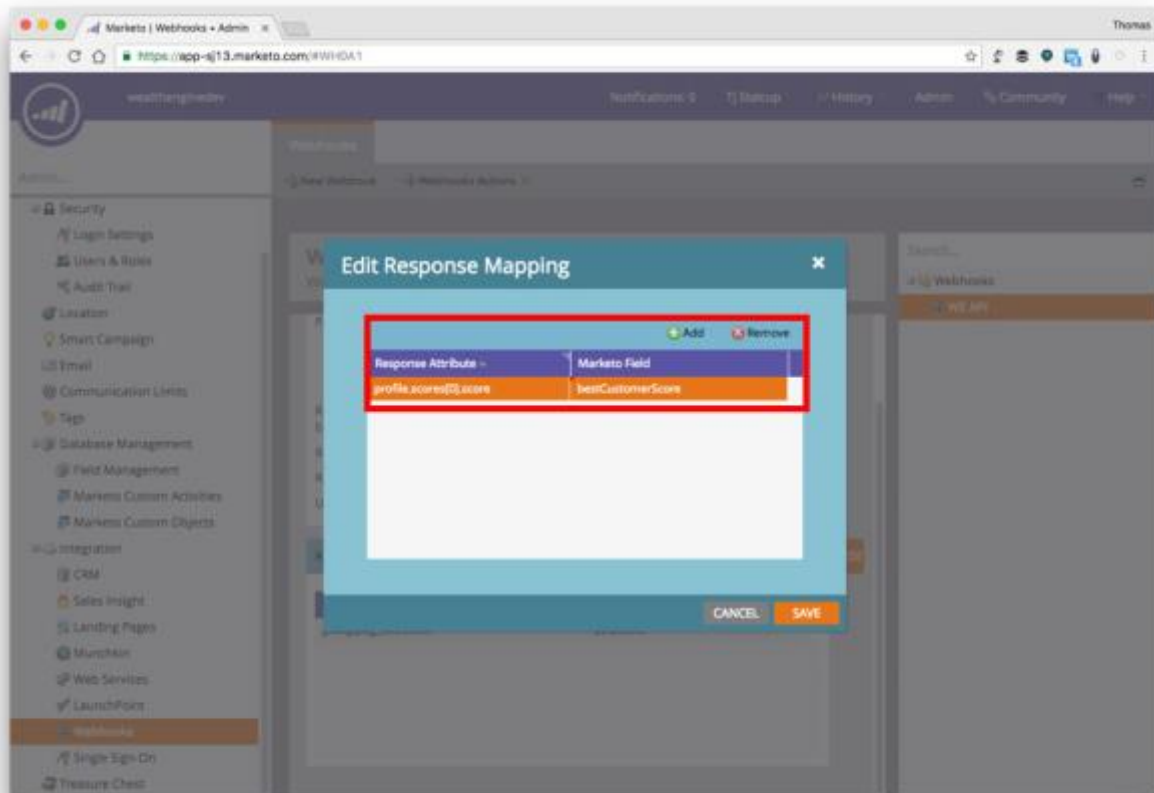
Authorization: APIKey *yourapikeyhere*

Content-Type: application/json

Step 4 – Response Mapping

Now that we have completed the connection to the API, it's time to map out all of the WealthEngine fields to your Custom Fields. Below is an example, see the table on the next page for every field that is returned from the Score Endpoints.

Click **Edit** to add a Response Mapping. The Response Attribute will be from the WealthEngine API, Marketo Field will map to a custom Marketo Field.





WealthEngine API Score Fields

Score Fields

```
profile
profile.id
profile.scores[]
profile.scores[].model
profile.scores[].score
```

WealthEngine Customer Care

If you have any issues or questions while working with the WealthEngine API & Marketo Integration, please do not hesitate to connect with the Customer Care department. We supply support for our products via email or telephone Monday thru Friday from 9:00 am – 6:00 pm eastern standard time.

Support Email: customerservice@wealthengine.com

Support Telephone: (301)215-5980, option 4