

# ExpertConnect API Use Cases



#2038491 - Planning

Customer: Williams Frank (15634430612)

Segment: General Contractor

Account ID: 2342234

Organization:

Details:

Title:

Planting

Product Type:

Mechanic: Paris

Issue Summary:

Video Call

ALL ACTIVITY

CUSTOMER HISTORY

Date	Activity	Agent
5/10/22 10:32 AM	Activity: Jean Anderson	MEDUSA@JD
5/10/22 11:18 AM		THURSDEN@JD
5/17/22 10:56 AM	Activity: Jean Anderson	MEDUSA@JD

Model	Actual	Target	Actual %	Target %	Actual	Target	Actual %	Target %	Actual	Target	Actual %	Target %
6000	102,000	117,000	87.2%	100%	14,227	8,600	165%	100%				
6000	180,000	200,000	90.0%	100%	18,527	21,500	86.2%	100%				
800	100,000	110,000	90.9%	100%	18,527	21,500	86.2%	100%				
700	100,000	110,000	90.9%	100%	18,527	21,500	86.2%	100%				

# ExpertConnect API Use Case Overview

Use this deck as an introduction for how other groups are using ExpertConnect's open API as well as brainstorming ideas for your own use case.

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# Internal Knowledge Base

Dealers who have partnered together to create a knowledge base of ExpertConnect tickets so they can reference each other's tickets, detect recurring issues, and resolve issues more quickly.



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# Syncing Contacts from DBS (Dealer Business System)

- Dealership can work with a third-party development company to build a custom integration
- Automatically syncs new contacts and updates from EQUIP to ExpertConnect
  - Also possible with dealers using CDK as their dealer business system



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# Automate Text Messages to Customers for Parts Pick-Up

Send customers automated notifications when their parts are ready for pick up

**JOHN DEERE** | ExpertConnect | On Demand Tours

Create Ticket | ENGLISH

Dashboard | Contacts | Calls | Emails | Broadcast | Insights | Manage | Payments | Admin

#1392453 - New Alert: Customer Reply

Contact: **No Reply Fleet Intelligence** (noreplyfleetintelligence@noreply.com)

Advisor: **Charlie Jones**

Team: **Parts Priority Service** (+1 515 715 4125)

Status: **Assigned** (Mark as Unassigned)

Priority: **Medium**

Created: Thu, Oct 26th 2023 3:09 PM  
Updated: Thu, Oct 26th 2023 3:09 PM

**Contact Detail**

Account # [Search Account #] Organization [Search Organization] External Id [Search External Id]

Segments

**Ticket Detail**

Title: New Alert: Customer Reply (25/100)

Ticket Tags

Issue Summary: SENT PAY REQUEST (16/5000)

Product [ ] Machine Hours: [ ]

Serial #: [ ] Misc: [ ]

Resolution [ ]

**All Activity** | Customer History | Time Tracking | Emails

**No Reply Fleet Intelligence** (noreplyfleetintelligence@noreply.com)

Alert Name: Customer Reply

Create Time: 10/10/2023 8:26:13 AM

Alert Content:

Customer: KEVIN ROOT/13192423583 replied to 1749327 (03) Urbandale: PAY

Company Use

3:20:40 PM Oct 26th 2023



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# Centralized Trucking Example

Send customers automated text alerts with updates on their delivery

The screenshot displays the John Deere ExpertConnect interface for a trucking confirmation ticket. The top navigation bar includes the John Deere logo, 'ExpertConnect', and 'On Demand Tours'. The main header shows the ticket title '#1366137 - Trucking Confirmation' and various action buttons like 'Share' and 'Close'. Below the header, key information is displayed: Contact (13192696928), Advisor (Charlie Jones), Team (ACME Trucking), Status (Assigned), Priority (Medium), and creation/update timestamps. The left sidebar contains sections for 'Contact Detail' with search fields for Account #, Organization, and External Id, and 'Ticket Detail' with fields for Title, Tags, Issue Summary, and Machine Hours. The right sidebar shows the 'All Activity' tab, listing a series of status updates from ACME regarding the delivery of a 2023 Westfield MKX21685, including scheduled delivery, pickup, and completion.



# Route After-Hours Parts Request to a Centralized Team

- Dealers with several store locations may elect to use a centralized parts team to route after hours requests
- On Saturdays, if the specific store's Parts team doesn't respond to a ticket within 15 minutes, it moves to the "Central Parts" team
- Once someone from the Central Parts team responds, re-assign it back to the store's Parts team for fulfillment

# Salesperson Submits a Form that Generates a Ticket

Automate internal workflows by creating a ticket with each form submitted

The screenshot displays the John Deere ExpertConnect interface. At the top, the navigation bar includes the John Deere logo, 'ExpertConnect', and 'On Demand Tours'. A 'Create Ticket' button is visible in the top right corner. Below the navigation bar, a menu contains 'Dashboard', 'Contacts', 'Calls', 'Emails', 'Broadcast', 'Insights', 'Manage', 'Payments', and 'Admin'. The main content area shows a ticket titled '#1401978 - Jason Douglass Urbandale New Gen 4 Hardware 4640(\$8495)'. The ticket details include: Contact: Craig Carpenter (+1 515 346 8074); Advisor: Charlie Jones; Team: ACME Sales Order (+1 515 715 4125); Status: Assigned; Created: Mon, Oct 30th 2023 2:39 PM; Updated: Mon, Oct 30th 2023 2:40 PM. The 'Ticket Detail' section contains a title field with 'Jason Douglass Urbandale New Gen 4 Hardware 4640(\$8495)', 'Ticket Tags' with 'Sales Order', 'Issue Summary' with 'Send Order to Location: Urbandale Customer: Jason Douglass', 'Product' and 'Machine Hours' fields, 'Serial #' and 'Misc' fields, and 'Resolution' with 'New Sales Order'. A 'Chat' window on the right shows a message from Charlie Jones: 'https://acmeequipment.sharepoint.com/sites/ACMEISDept-ManagementFiles/Shared%20Documents/Zapier?jason\_douglass\_0485867.pdf' at 2:40:38 PM on Oct 30th 2023, marked as 'Delivered'. The Zapier logo is in the bottom right corner.



# Create Parts Tickets from Online Orders

Ticket created each time a customer places a new order via dealership website

The screenshot displays the John Deere ExpertConnect web interface. At the top, the navigation bar includes the John Deere logo, 'ExpertConnect', and 'On Demand Tours'. A 'Create Ticket' button is visible in the top right corner. The main header shows the ticket title: '#1402054 - MyDealer - Online Order (Reference #EP012496480120)'. Below this, contact information for Jason Anderson (+1 515 978 1310) and Charlie Jones (+1 515 715 4125) is listed. The ticket status is 'Assigned'. The 'Ticket Detail' section contains a title field with the order reference, a 'Parts' tag, and an issue summary field. Below these are fields for Product, Machine Hours, Serial #, and Misc. The right-hand side of the interface features a 'Chat' window with a message from ACME Equipment: 'Thank you for your order! We will begin processing your order as soon as possible.' The chat also includes customer and order information.

**John Deere | ExpertConnect**

Dashboard | Contacts | Calls | Emails | Broadcast | Insights | Manage | Payments | Admin

#1402054 - MyDealer - Online Order (Reference #EP012496480120)

Contact: Jason Anderson (+1 515 978 1310)

Advisor: Charlie Jones (+1 515 715 4125)

Team: All Parts Staff (+1 515 715 4125)

Status: Assigned

Created: Mon, Oct 30th 2023 2:47 PM  
Updated: Mon, Oct 30th 2023 2:54 PM

**Ticket Detail**

Title \*  
MyDealer - Online Order (Reference #EP012496480120) 51/100

Ticket Tags  
Parts

Issue Summary  
0/5000

Product: \_\_\_\_\_ Machine Hours: \_\_\_\_\_

Serial #: \_\_\_\_\_ Misc: \_\_\_\_\_

Resolution  
\_\_\_\_\_

**Chat** | Time Tracking

**ACME**  
ACME Equipment  
9505 NorthPark Drive  
Johnston, IA  
515-715-4125

*Thank you for your order!*  
We will begin processing your order as soon as possible.

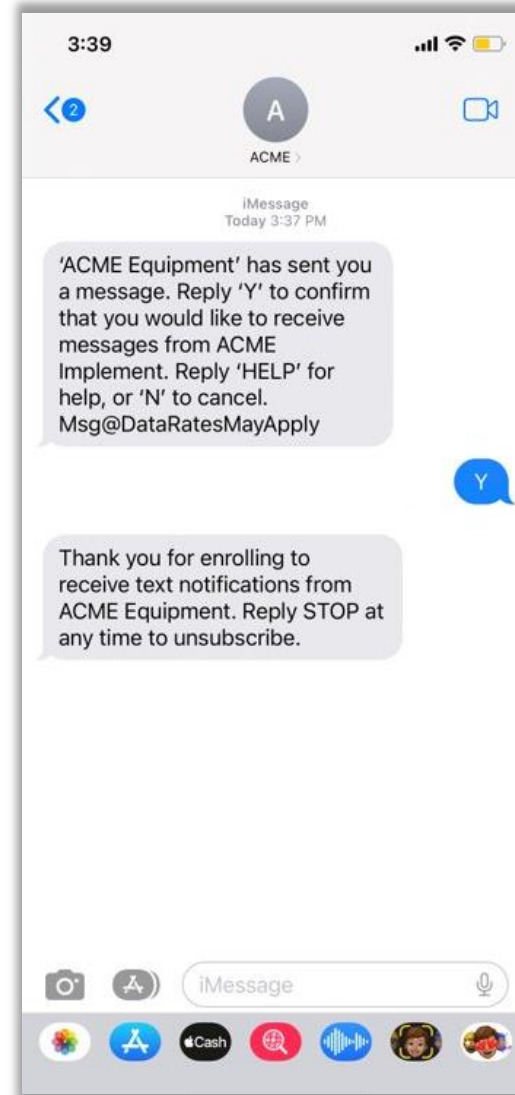
**Customer:**  
Anderson & Co.  
Box 12203  
Des Moines, IA  
50266

**Order Information:**  
Reference Number: EP012496480120  
Sales Order: 406277  
Delivery Method: Pickup



# Obtain Consent for Marketing & Apply a Segment After Filling Out a Web Form

Send contacts a text message to gain consent for promotional messaging



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## Interested in learning more about our API?

Follow [this link](#) for more information on API workflows your teams can enable or request access through our [ExpertConnect API Integration help article](#). Once requested, a member of our team will reach out to begin the set up process.



**JOHN DEERE**