

Introducing The ExpertConnect Integration In Anvil Pro

Your advisors already communicate with customers every day through calls, texts, and emails inside **John Deere ExpertConnect**.

With this integration, those conversations now flow automatically into **Anvil Pro**, giving your team a complete, centralized history of customer activity without extra data entry.

By connecting ExpertConnect to Anvil Pro, dealerships can:

- See every inbound/outbound interaction directly on the Contact or Account record
- Convert new, unknown callers into Prospects automatically
- Create follow-up tasks or workflows based on communication events
- Provide better context to sales, parts, and service teams across the dealership

This ensures no lead, support request, or customer concern slips through the cracks.

Who Can Use This Integration?

Any John Deere dealership using ExpertConnect and Anvil Pro CRM/I package v1.83 or higher.



How The Integration Works

Whenever ExpertConnect generates a ticket – whether it's from a phone call, text message, or email – Anvil Pro automatically:

1. **Creates an Event in Salesforce** with the Subject and Description from the ExpertConnect ticket
2. **Matches the Event to an existing Contact/Account** in Salesforce
3. **Creates a new Prospect** if no matching contact exists
4. **Pulls in associated Advisor and Team information**
5. **Captures any ExpertConnect tags** and maps them as Topics in Anvil Pro


Event Call

Meeting Digest
Details
Related

Ticket Information

Advisor

Adam Stern

Subject

ExpertConnect Inbound

Description

- During the call, Mark Johnson from Nevada, Iowa, sought assistance with two
- First, he wanted to compare the yield of corn treated with fungicide against un
- He inquired about the possibility of creating a "fake operation" in the operatio
- I confirmed that while a direct comparison tool exists for recorded operations,
- I offered to research the best method and call him back
- The second issue involved a custom applicator who applied reduced nitrogen
- Mark expressed frustration over the lack of usable data and sought guidance
- I explained that these files could be considered as applied data and guided hi
- We discussed the process of checking the work data tab for the uploaded file
- We agreed to let the upload complete and planned to reconnect later

Calendar Details

Name

Mark Johnson

Start

12/16/2025, 10:47 AM

Related Users

Assigned To


John Meyer

Created By


John Meyer, 12/16/2025, 4:54 PM

An event and conversation summary are automatically generated in Salesforce through a Call Event.

Why This Matters For Your Dealership

A unified communication history helps your teams work smarter and respond faster.

This integration provides:

- **A complete record of every interaction:** Missed calls, text conversations, emailed questions—everything is visible in one place.
- **Better visibility for sales, service, and support teams:** Know exactly what's been discussed and avoid duplicate outreach or repeated questions.
- **Improved follow-up and accountability:** Managers can track advisor activity, call volume, customer issues, and more.
- **Less manual work:** No more copying/pasting notes or trying to match inbound calls to customer profiles.

Setting Up the ExpertConnect Integration

To make use of the ExpertConnect integration, dealers must:

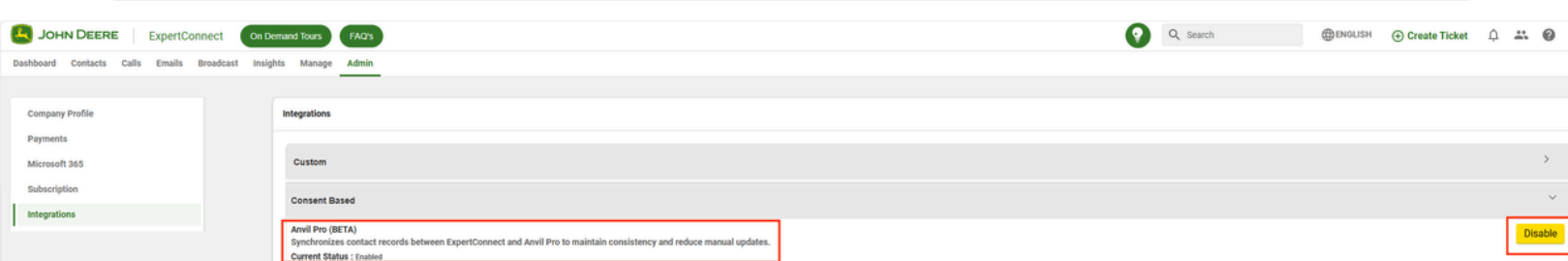
- Be a **John Deere Dealer** actively using ExpertConnect
- Have the **Anvil Pro CRM/I package v1.83+**

Step-By-Step Instructions

Setting up the ExpertConnect integration is quick and easy and requires just a few steps to be taken by your dealership and Tractor Zoom's internal team.

Step 1: Enable The Integration In ExpertConnect

1. Log in to ExpertConnect
2. Navigate to **Admin → Integrations**
3. Enable the **“Anvil Pro (BETA)”** integration



Begin the process by locating Anvil Pro in your ExpertConnect integration list.

Step 2: Locate Your Company ID

- In ExpertConnect, go to **Admin → Company Profile**
- Find your **Company ID**

Step 3: Share Your Details with the Tractor Zoom / Anvil Pro Team

Send your Tractor Zoom / Anvil Pro representative:

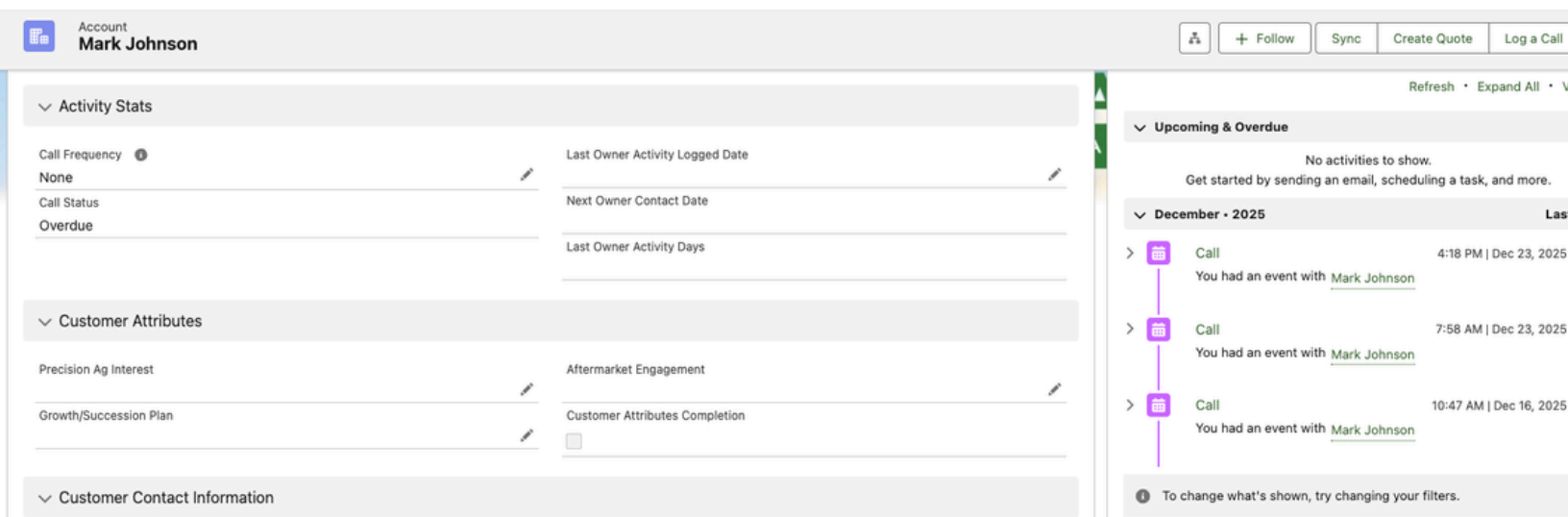
- Your **Company ID**
- Optional: A list of **ExpertConnect Teams** to exclude from ingestion

If no teams are specified, **all teams** will be included by default.

What You Can Expect After Setup

Once the integration is enabled and connected:

- Events will begin appearing on Contacts/Accounts in real time
- Unknown numbers or emails will automatically create new Prospects
- Your team will start to see a threaded historical view of customer engagement



The screenshot displays the Anvil Pro interface for a prospect named Mark Johnson. The left sidebar shows sections for Activity Stats, Customer Attributes, and Customer Contact Information. The main content area is divided into two panels. The left panel shows fields for Call Frequency (None), Call Status, Overdue, Last Owner Activity Logged Date, Next Owner Contact Date, Last Owner Activity Days, Precision Ag Interest, Aftermarket Engagement, Growth/Succession Plan, and Customer Attributes Completion. The right panel shows a list of upcoming events for December 2025, including three calls with Mark Johnson on Dec 23, 2025, and Dec 16, 2025. The interface includes buttons for Follow, Sync, Create Quote, and Log a Call.

An ExpertConnect Call Event is created in Salesforce and matched with associated Prospect Account – if no Account exists, a new one will be created.

How To Get Started

To learn how your team can use the ExpertConnect integration in Anvil Pro to streamline your communication workflows, reach out to your Tractor Zoom Customer Success Manager today.