

RALLY.VIN

[01 // WORKSTATION ONBOARDING & CRM INTEGRATION]

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RUN THIS SETUP ONCE ON EVERY DESKTOP WORKSTATION YOU USE

Rally attaches to eLead and kDealer to provide real-time sales intelligence.

STEP-BY-STEP

// PHASE A // EXTENSION INSTALLATION & CHROME PERMISSIONS

Install Tampermonkey

01

Open the **Chrome Web Store** or **Edge Add-ons** catalog, search for **Tampermonkey**, and click **Add to Browser**.

Enable User Scripts Security

02

In Chrome, navigate to:

`chrome://extensions`

Click **Details** on Tampermonkey & toggle **Allow User Scripts** to **ON**.

⚠ If dashboard reports "User scripts unavailable", this toggle fixes it.

Install Rally Engine

03

Navigate to the direct installation address:

`https://ask4trey.com/podium/rally/rally.user.js`

Tampermonkey will open an installer tab. Click the **Install** button.

Verify Active Script

04

Open the Tampermonkey Dashboard.

Confirm that **exactly one instance of Rally** is present and that the status toggle is set to **Enabled (Green/ON)**.

// PHASE B // AUTHENTICATION & PROFILE SETUP

Reload eLead CRM

05

Navigate to / refresh eLead Unify:

`https://app-unify.app.connectcdk.com/applications`

The dark **Rally Top Command Bar** will initialize across the header.

Authenticate & Set Alerts

06

Log in using your corporate credentials:

- **Email:** Podium login address
- **Password:** `Greenway1!`

⚠ Password expires on the 31st. Reset password &

Enable Desktop Alerts

Set Nickname & Daily kDealer Routine [Mandatory]

Salesperson Callsign / Nickname:

Enter the exact name other salespeople and managers call you (e.g. Derek King `$\rightarrow$` `DK`). Do not skip profile configuration.

Daily Synchronization Rule:

Open a separate tab and log in to **kDealer**. You must log in to kDealer and refresh eLead once at the start of every shift.

07

THE TANK

[02 // MOBILE CLAIM PROTOCOL & FIELD DISPATCH]

ENGINE: RALLY TANK v2
TARGET: INTERNET LEADS

CLAIM FROM YOUR PHONE. RUN FROM YOUR DESK.

Rally seamlessly forwards leads from your mobile device directly to your workstation CRM session.

FAST CLAIM

// PROTOCOL 01 // SYSTEM READINESS CRITERIA

Workstation Requirements

Incoming mobile claims are routed to a physical workstation meeting all 3 criteria:

- ✓ Rally extension installed in browser
- ✓ Logged into active Rally profile
- ✓ Desktop configured to "Run Phone Claims"

Lead Eligibility Rules

You are qualified to claim incoming internet leads from your phone if:

- ✓ Logged into desk Rally within the last 3 hours
- ✓ Physically present on the dealership lot
- ✓ Available and active for rapid response

// PROTOCOL 02 // HOW TO CLAIM A LEAD ON MOBILE

Open The Tank

01

Navigate to the mobile dispatch terminal on your phone:

<https://ask4trey.com/podium/tank>

Authenticate Mobile Session

02

Sign in using your standard **Rally Email & Password**. Save this page to your mobile home screen for 1-tap access.

Monitor the Lead Queue

03

Keep the Tank dashboard active. As soon as an internet opportunity drops into the pool, it will trigger on-screen.

Claim & Forward

04

Tap **CLAIM** instantly. Rally will lock the lead to your account and display a success confirmation once routed to your desk.

// REFERENCE // TROUBLESHOOTING & COMMON RESOLUTIONS

Top Bar Does Not Appear in eLead

Check Tampermonkey icon in the browser toolbar. Verify that the script toggle shows **ON** and refresh eLead. If prompted, allow script execution permissions.

Mobile Claim Button Inactive / Locked

Verify your last desk login. If more than 3 hours have elapsed, log in at your showroom workstation and refresh the Tank mobile page.