

Ask Ray — the in-app assistant

Ray answers questions about RepBud — and about your own account — without you going looking for the screen that holds the answer.

Covers /dashboard · for rep, dmc

The steps

01 Find Ray

Ray sits in the corner of every screen, so the question can be asked where you are rather than where the answer lives.

02 Ask about the product

What it does, who it suits, what it costs, how it differs from an ordinary CRM — answered from the product knowledge rather than guessed.

03 Ask about your own work

Ray can see your contacts, your recent logs and your open items, so "what did I agree with my last contact?" has a real answer.

04 Ask what is due

"What is on my Trail this week?" reads your own follow-ups rather than a generic list.

05 Check it before acting

Ray is designed to assist, not replace, your professional judgement. Where an answer matters, open the record it came from.

06 Close it and carry on

The panel closes on Escape and leaves the screen where it was.

Next: Your home dashboard

Questions

What can Ray actually see?

Your own account — your contacts, recent logs and open items — plus how RepBud works. It does not see other members' data.

Is Ray the same thing as the assistant in the phone app?

It is the same brain behind both. In the app it is called Your RepBud.

Can I trust the answer?

Treat it as a fast reading of your own records, not a ruling. RepBud is designed to assist, not replace, your professional judgement — open the record when the answer matters.

Do I have to be on a paid plan?

Ray answers questions about RepBud for anyone. Answers drawn from your own account need you to be signed in to one.

Where is Ray?

In the corner of every screen, so you can ask from wherever you are rather than navigating to a help page.