

Charter — running a team

Charter is RepBud for a team — one view of what everyone is carrying, without asking them all for an update.

Covers /dashboard/team/trail · for rep, dmc

The steps

01 Open the team Trail

All open tasks across your team in one list, so the Monday question is answered before it is asked.

02 Start with what is late

The overdue band comes first. It is the part that costs a relationship, so it is not buried below the rest.

03 See it by person

The per-member breakdown shows who is carrying what — useful for spotting the rep who is quietly swamped as much as the one who is not.

04 Narrow it down

Filter by member or by priority when you want one person's week, or the things that actually matter this week.

05 Nudge from where you are

A task can be nudged from the list — a reminder to a colleague without a separate message asking about it.

06 Open a member

Their page shows recent activity and whether their Lantern is clear, so a quiet fortnight is visible rather than assumed.

07 Ask the team a question

Send a query to a member from their page. The thread stays with them, so the answer is not lost in a chat app.

08 Manage the seats

Seats are shown as active and available, with invitations you can send or revoke. Charter runs five or ten.

Next: Invite your team

Questions

What is Charter?

RepBud for a team rather than an individual — a representation company, or the trade sales team inside a larger business. Five or ten seats.

Can I see my team's contacts?

The manager view is about work in flight — open tasks, activity and Lantern state. It is there to run the week, not to read over shoulders.

What are Cabin Director and First Officer?

The roles on a Charter account. They decide who can manage seats and who can see the team views.

How do I nudge somebody without nagging?

The inline nudge sends a reminder against the task itself, so it arrives with the thing it is about rather than as a separate "any update?"

What does a quiet member mean?

That there has been no activity in the last fortnight and their Lantern is clear. It is a prompt to ask, not a verdict — RepBud is designed to assist, not replace, your professional judgement.

How many seats does Charter have?

Five or ten, shown as active and available so you can see what is left before inviting somebody.