RepBud

YOUR PEOPLE

A client's profile

A client's profile is where the whole relationship lives — every interaction, the open tasks, and the report you'll send the property owner, all in one place.

Covers /dashboard/clients/[id] (Saltmeadow Safari Collective) · for rep, dmc

The steps

01 Open the client

From My Clients, open the client to see their full profile. The header carries the name, country and website.

02 Read the snapshot

The strip under the header counts open tasks, interactions and contacts — a quick read on how active the relationship is.

03 Find the key contacts

Key Contacts lists the people you deal with at this client. Tap one to open their profile, or use the mail and phone shortcuts.

04 Scan the activity history

The Timeline merges interactions and tasks, newest first. Use the filter pills to show just logs or just tasks, and expand any row to read it in full.

05 Open a task

Tasks linked to this client appear in the timeline. Open one to edit its detail, due date and priority.

06 Assign it to this client for reporting

In the task, the Clients checklist controls which clients it belongs to — tick this client so the task (and its due date) rolls into their reporting. Interactions are linked the same way when you log them.

07 Generate a client report

Set a date range and generate a report — Your RepBud drafts it from the interactions and tasks tagged to this client. Export as PDF or Word, or copy it. RepBud is designed to assist, not replace, your professional judgement.

Next: My Clients

Questions

What shows up in the Timeline?

Every interaction and open task linked to this client, newest first. Filter to just logs or just tasks with the pills, and expand a row to read the full note.

How do I assign a task or interaction to a client?

Open the task and tick the client in the Clients checklist; interactions are tagged to the client when you log them. Anything tagged to the client is what the report draws on.

How does the report get built?

Pick a date range and generate — Your RepBud drafts the report from the interactions and tasks tagged to this client in that window, ready to export as PDF or Word. It's there to assist your reporting, not replace your judgement.

Can I share a live view with the property owner?

Yes — use "Share dashboard" on the profile to invite them to a read-only dashboard of the activity for this client.