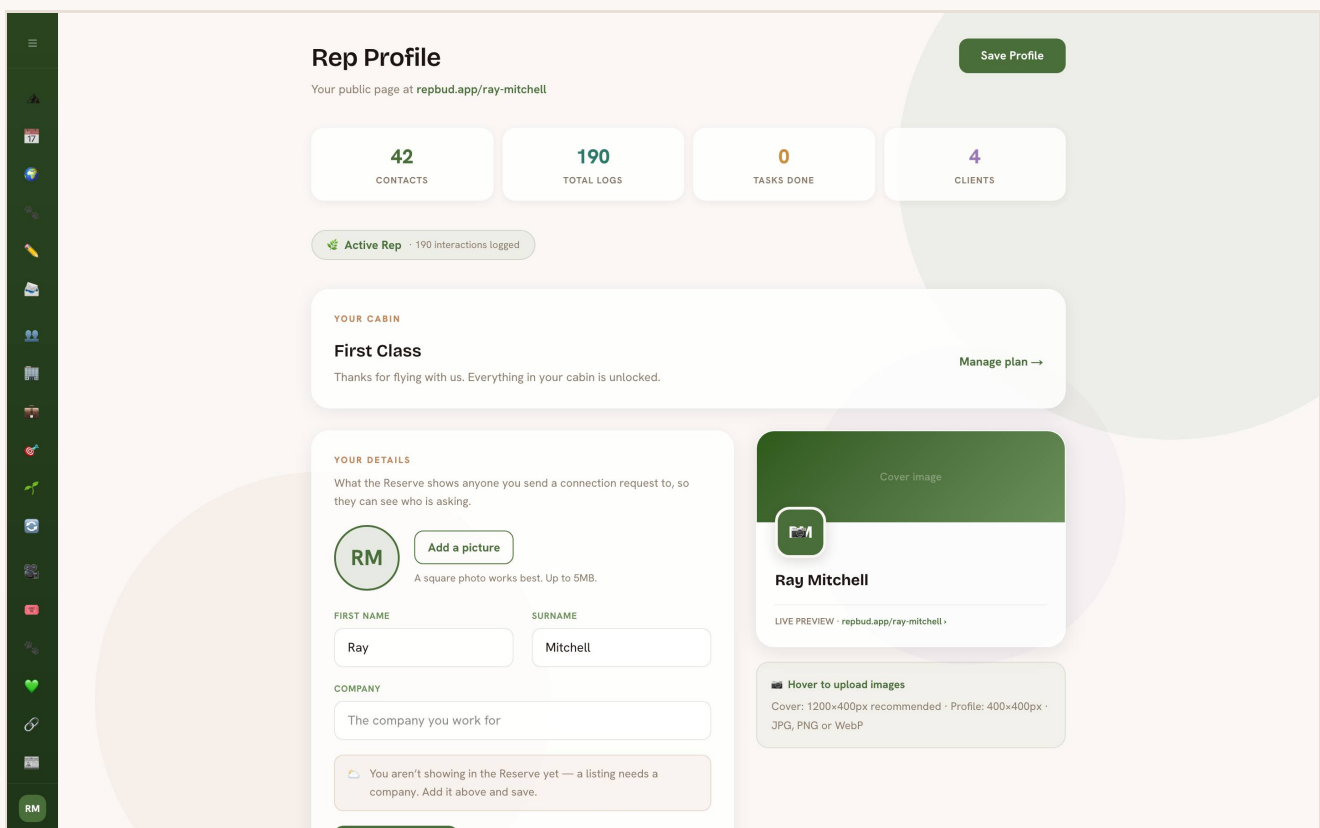


GETTING SET UP

Set up email and WhatsApp forwarding

Forwarding turns RepBud into your inbox for client conversations — forward an email or WhatsApp and it lands in The Lantern, ready to review. Here's how to set both channels up.

Covers /dashboard/profile -> the Email & WhatsApp Forwarding panel · for rep, dmc



The screenshot shows the RepBud profile dashboard. On the left is a dark green sidebar with various icons. The main content area is titled 'Rep Profile' and includes a 'Save Profile' button. Below the title are four statistics: 42 CONTACTS, 190 TOTAL LOGS, 0 TASKS DONE, and 4 CLIENTS. A status bar indicates 'Active Rep · 190 interactions logged'. The 'YOUR CABIN' section shows 'First Class' status with a 'Manage plan' link. The 'YOUR DETAILS' section includes a profile picture placeholder (RM), a bio, and fields for first name (Ray), surname (Mitchell), and company (The company you work for). A note at the bottom states: 'You aren't showing in the Reserve yet — a listing needs a company. Add it above and save.' On the right, there is a 'Cover image' placeholder and a 'LIVE PREVIEW' of the profile.

The steps

01 Open the forwarding panel

On your profile, scroll to Email & WhatsApp Forwarding — your two inbound channels live here.

02 Find your RepBud email address

Under Your RepBud email address you'll see your private @log.repbud.app address. Tap Copy to grab it.

03 Forward an email to try it

Forward any client email to that address. RepBud reads what you send and helps you log the contact and its action points — it lands in The Lantern to review.

04 Set auto-forwarding (optional)

Want it hands-off? Open How do I set this up? for rules to route client mail here automatically in Gmail, Outlook or Apple Mail.

05 Personalise your address (optional)

Prefer a tidy address? Personalise this address lets you claim something like yourname@log.repbud.app if it's free.

06 Connect WhatsApp

In the WhatsApp step, enter your number with its country code and tap Send code to confirm it's yours.

07 Verify, then forward

Enter the 6-digit code from WhatsApp and Verify. Once connected, forward any client WhatsApp to RepBud on +44 7427 134567 and it's logged the same way.

Next: Set up your RepBud profile

Questions

Where do my forwarded emails and messages go?

They land in The Lantern, where you review the logged contact and the action points RepBud pulls out before you confirm them.

Does RepBud read my whole inbox?

No — it only reads the emails and messages you choose to forward. It doesn't connect to the rest of your mailbox.

Can I choose a custom forwarding address?

Yes. Personalise this address lets you claim a handle like yourname@log.repbud.app if it's available (3+ characters).

Do I have to connect WhatsApp?

No, it's optional. Connect it with a one-time code if you'd like to forward client WhatsApp messages alongside your emails.