



YOUR PEOPLE

Manage client viewers

Want a colleague to see your field notes and reports without being able to change anything? Here's how to give them read-only access in about a minute.

Covers /dashboard/viewers · for rep, dmc

CONTENT SHARING

Your Viewers

Give colleagues at your company read-only access to your Lantern, Trail and Brief. They sign up as a RepBuddy first — then you assign them here.

REPBuddies AT @GMAIL.COM

No RepBuddies at @gmail.com yet

When your colleagues sign up as RepBuddies with their @gmail.com email, they'll appear here and you can assign them as viewers.

What viewers can access

Viewers get read-only access to your Lantern (field notes in review), your Trail (activity history) and your Brief (generated reports). They cannot log interactions, manage contacts, run scans or access any other RepBud features.

The steps

01 Open Your Viewers

Head to Your Viewers to manage who at your company can see your work. The eyebrow reads "Content Sharing".

02 Who can be a viewer

Viewers are colleagues who've signed up to RepBud as a RepBuddy on your email domain. Ask a teammate to join first and they'll show up here.

03 Find the colleague

Under RepBuddies at @meridianrep.test, RepBud lists same-domain teammates you can assign. Each card shows their name, job title and email.

04 Assign as viewer

One tap grants read-only access. They move up into your assigned list straight away.

05 Confirm they're active

Active viewers sit under Assigned viewers with a green Viewer tag, so you can see at a glance who has access.

06 Check what they can see

The panel spells out the boundary: read-only Lantern, Trail and Brief. Viewers can't log interactions, manage contacts or run scans.

07 Revoke access

Changed your mind? Tap Remove on the assigned card and access is withdrawn at once.

Next: What your client viewers see

Questions

How do I add someone as a viewer?

They first sign up to RepBud as a RepBuddy using an email on your company domain. Once they have, they appear under "RepBuddies at @yourdomain" on the Your Viewers screen, and you tap Assign as viewer.

Why can't I see my colleague in the list?

The list only shows RepBuddies on your own email domain who aren't viewers yet. If they haven't signed up, or use a different domain, ask them to join first — then refresh the page.

What can a viewer actually see?

Read-only access to your Lantern (field notes in review), your Trail (activity history) and your Brief (generated reports). They can't log interactions, manage contacts, run scans or reach other RepBud features.

How do I revoke access?

Find the person under Assigned viewers and tap Remove. Access is withdrawn right away, and they move back to the discovery list in case you want to re-assign them later.