RepBud

USER MANUAL

The RepBud user manual

Every walkthrough in the guide library, in one document — from setting up your profile to running a sales trip, proving the work and reaching the trade.

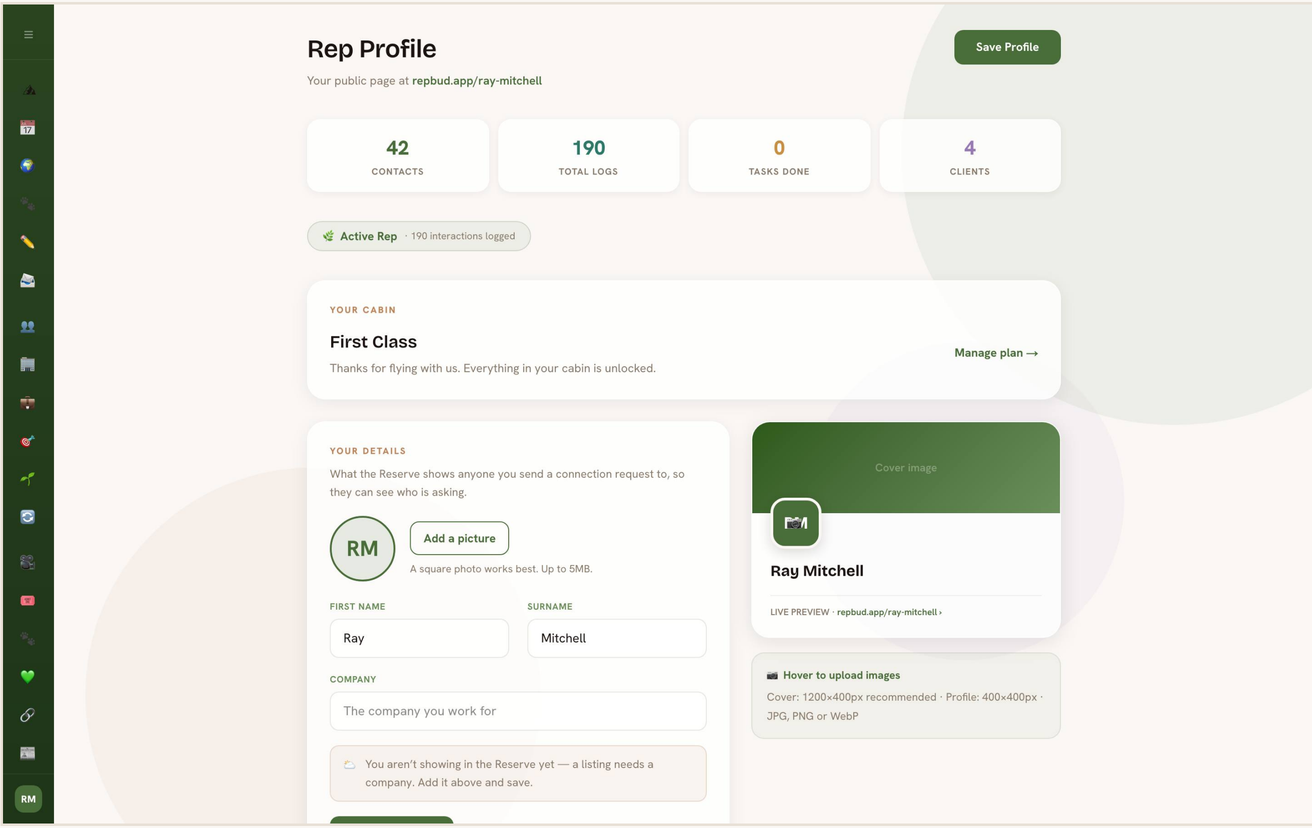
65 guides · repbud.app/guides

Contents

GETTING SET UP

Set up your RepBud profile

A complete profile is how partners and property owners find you on RepBud — here's how to set yours up in under two minutes.



The steps

01 Open Settings

From any screen, open Settings in the sidebar to reach your profile.

02 Claim your public page

Your public page is your shareable RepBud profile. Set a tidy URL slug, display name and a short bio.

03 Add a photo & contact details

A photo and contact details make your page feel personal and reachable.

04 Set where you're based

Property owners on RepBud Ready use this to find reps near their markets.

05 Set the markets you cover

Add the source markets you sell into so the right properties match with you.

06 **Turn on discovery**

Toggle discovery so you appear to property owners; optionally set a minimum retainer.

07 **Set up forwarding**

Forward emails and notes to your private @log address and they'll land in The Lantern for review.

08 **You're set**

Your profile is live. Next, bring your contacts in with ReRoot.

Next: Import your contacts (ReRoot)

Questions

Who can see my RepBud public page?

Anyone with your link, plus property owners and partners discovering reps on RepBud — it's your shareable shopfront.

What's the difference between "where I'm based" and "source markets I cover"?

Based = your home countries (how owners near you find you); source markets = the markets you sell into (how the right properties match with you).

Do I have to turn on discovery?

No. Discovery is optional — leave it off and your profile simply won't surface in the property-owner directory.

What is the forwarding address for?

Forward client emails or quick notes to your private @log address and they arrive in The Lantern, ready to review and log.

Sign up and choose your role

Joining RepBud takes about a minute — pick the part of the trade you're in, enter a few details, and you're on your way to your guest stay.

The steps

01 **Open the sign-up page**

Head to /signup. The first question is simply which part of the Reserve you are.

02 **Pick your role**

Five cards: I'm a Rep, I'm a DMC, I'm a RepBuddy, I'm a RepBud Reporter and I'm RepBud Ready. The last three are marked FREE.

03 **Got an invitation code?**

Reps and DMCs can add a Rover or promo code for a longer guest stay. No code is fine — your two-week stay is waiting.

04 **Add your details**

Under Your details, enter your first name, email and a password of at least 8 characters.

05 **Check what you get**

A panel sums up your stay — two weeks as our guest, no card, no commitment — with a taste of the tools below.

06 **Complete your Check-In**

The button creates your account and sends a confirmation email.

07 **Watch for the email**

RepBud sends a confirmation link to your address — confirming it sets up your Rep account.

Next: Confirm your email

Questions

Which RepBud role should I choose?

Pick the card that matches your work — Rep or DMC for the supply and services side (these start a guest stay), or RepBuddy, RepBud Reporter or RepBud Ready, which join free.

Do I need a credit card to sign up?

No. Reps and DMCs begin with a two-week guest stay with no card and no commitment; the three trade-side roles are free with nothing to upgrade.

What is a Rover or promo code?

An optional invitation code on the Rep and DMC path. Tap "Been invited by a RepBud Rover?", enter the code and tap Apply code to extend your guest stay before you sign up.

Why didn't my sign-up go through?

Choose a role first, enter your first name, and use a password of at least 8 characters that matches in both fields — the page will flag whichever is missing.

Confirm your email

One click on the email RepBud sends you confirms your address and drops you straight into setting up your profile.

The steps

01 **Open the confirmation email**

After sign-up, RepBud emails a confirmation link to the address you entered. Open that email.

02 **Click the link**

The link confirms your email and signs you in. Use the same browser you signed up in.

03 **Let it sign you in**

RepBud confirms your address and prepares your session — a brief moment while it gets the Reserve ready.

04 **Land in onboarding**

You arrive in onboarding with your role already chosen, ready to finish your profile.

Next: Finish your profile

Questions

I didn't get the confirmation email — what now?

Check spam and confirm you typed the address correctly on sign-up. The email goes to the exact address shown on the "Check your email" screen.

The link asked me to sign in instead of confirming — why?

You likely opened it in a different browser or device than you signed up in. Your email is already confirmed — just sign in with your email and password to carry on.

What happens after I click the link?

RepBud confirms your address, signs you in, and takes you straight to onboarding to finish your profile — no second login needed.

Do I have to confirm my email before I can use RepBud?

Yes — confirming proves the address is yours and creates your session, which is what carries you into onboarding.

Finish your profile

Ray walks you through three quick steps — your basics, your role, and bringing your world in — and your RepBud profile is ready.

The steps

01 **Meet Ray**

You land in onboarding with your role already chosen. Ray, your guide, walks you through three short steps.

02 **Your basics**

Add your name and the company you work for. Home city, country and LinkedIn are optional but help partners place you.

03 **Continue to your role**

First name and company are required — once they're in, the button activates.

04 **Pick your role**

Choose the option that best fits your day. "Other" is there if your work is a mix.

05 **Bring your world in**

The final step hands you to RepBud ReRoot, which reads your CSV or Excel export and moves your contacts and companies in.

06 **Save and import**

The button saves your profile and opens ReRoot so you can import straight away.

Next: Import your contacts (ReRoot)

Questions

What's required to finish onboarding?

Just your first name and company on Step 1, plus a role on Step 2. Home city, country and LinkedIn are optional and can be added later in your profile.

Can I change my role or details after onboarding?

Yes. Onboarding captures the basics so you can get going; you can update your role, company and the rest anytime in Settings.

What happens at the last step?

RepBud saves your profile and opens ReRoot, which reads your existing CSV or Excel export — HubSpot, Salesforce, Zoho, Google Contacts, Outlook or a plain spreadsheet — to help bring your contacts and companies in.

Why does it ask me to pick a country from a list?

Country is a set list rather than free text so it matches cleanly — reps connect with RepBuddies by country, and a canonical name makes that work.

Import your contacts with ReRoot

Bring your contacts and companies into RepBud — drop your export, and Ray reads it, maps the columns and files everything for you to check.

The steps

01 **Open ReRoot**

From The Ridge, open ReRoot to bring an export into RepBud. The header reads RepBud ReRoot.

02 **Drop your files**

Drop a CSV or Excel export onto the zone — Ray reads the supported systems and any plain CSV.

03 **Ray reads them**

RepBud Ray opens each file, finds the real table and works out what's inside.

04 **See Ray's read**

Ray sums up what it found: the source, the row and company counts, and how the two files connect.

05 **Check the mapping**

Each column is mapped to a RepBud field. Skim it, and change anything Ray was unsure about.

06 **Start the import**

Happy with it? Confirm — Ray keeps working even if you close the tab.

07 **Watch it land**

Ray creates the companies first, then links the contacts, with a live count per file.

08 **Done — go to contacts**

When it finishes you get the totals. Open your contacts to see them in place.

Next: Your contacts CRM

Questions

What files can I import with ReRoot?

CSV and Excel exports right now — from TourPlan, Tourwriter, Wetu, HubSpot, Salesforce, Pipedrive, Google Contacts, Outlook and most plain spreadsheets. Ray finds the real table even when the export has a title block or subtotal rows above it. PDFs and Word docs join a waitlist for RepBud Archive.

Will Ray map my columns correctly?

Ray proposes a mapping for each column and marks anything it's unsure about, so you review and adjust before importing — it's there to assist your judgement, not replace it.

Do I have to wait with the tab open?

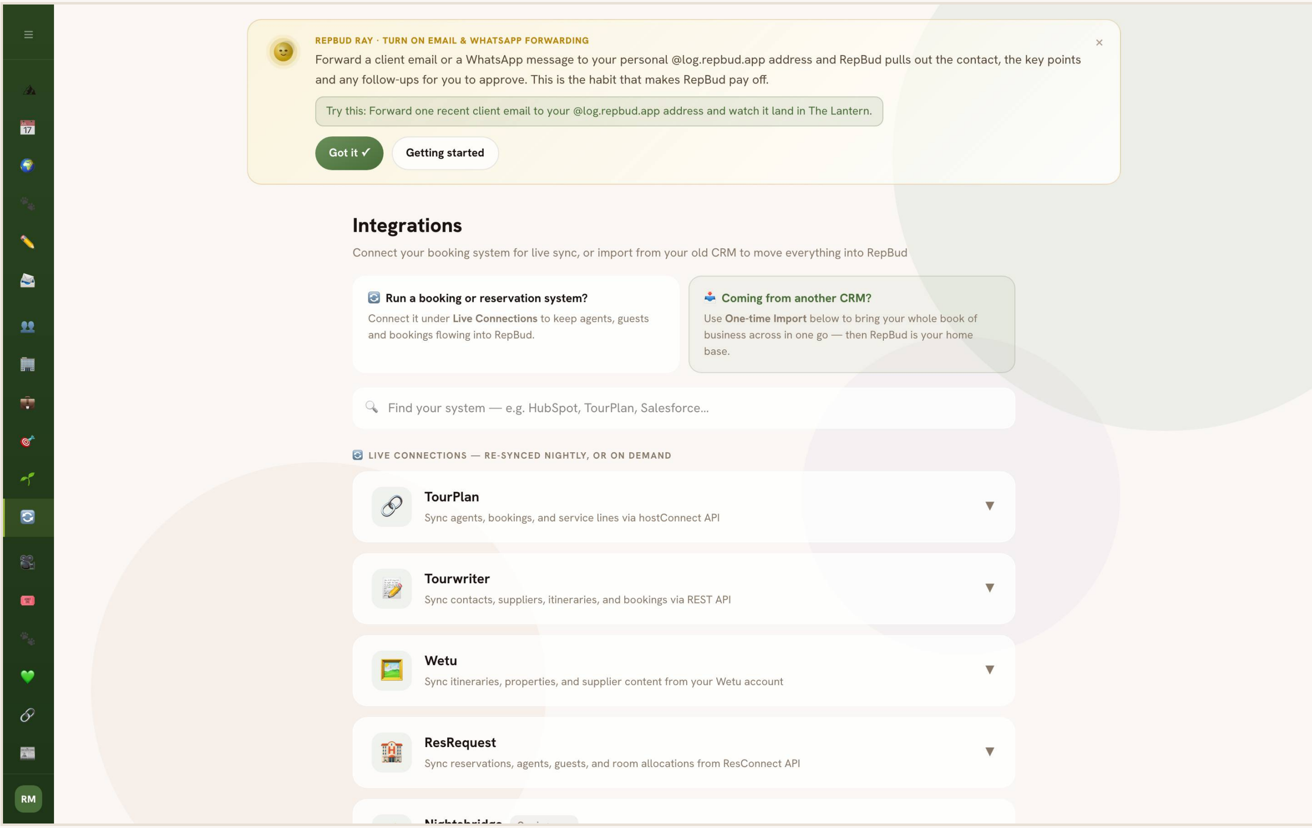
No. Once you confirm, Ray keeps working in the background and emails you when it's finished — you can close the tab and carry on.

Can I see what I imported before, or import more than one file?

Yes — drop several files in one go, and use See past imports (/reroot/history) to review earlier batches and their counts.

Connect your CRM and tools

Already run a booking or reservation system? Connect it once and your properties, partners and bookings keep flowing into RepBud — here's how.



The steps

01 Open Integrations

From the sidebar, open Integrations. This is where you connect a booking system for live sync, or import from an old CRM.

02 Pick your path

Two routes: Live Connections keep a booking system in sync; One-time Import moves a whole CRM across in one go.

03 Find your system

Search to jump straight to your provider, or scroll the Live Connections list.

04 Read the quick setup

RepBud shows what comes across and the steps to connect — about 3 minutes, and you only do it once.

05 Add your API key

In Wetu, open Settings -> API and copy your API key, then paste it into the field.

06 Test the connection

Test Connection checks the key works before anything is saved.

07 Save & sync

Once the test passes, Save & Sync Now stores the key (encrypted) and pulls your data in.

08 You're connected

A green Connected badge appears, with last-sync time and a Sync Now button for anytime. Your key is encrypted — nobody at RepBud can read it.

Next: Connect with partners

Questions

What's the difference between a Live Connection and a One-time Import?

A Live Connection (like Wetu, TourPlan or ResRequest) keeps your booking data syncing into RepBud. A One-time Import (like HubSpot, Pipedrive or Salesforce) brings your contacts, companies and deals across once — then you can disconnect and RepBud is your home base.

Is my API key safe?

Yes. It's encrypted with AES-256-GCM in a secure edge function before it reaches the database, and the key sits in a separate vault. Nobody at RepBud can read it — decryption happens only at the moment of sync, then it's discarded.

What comes across from Wetu?

Your properties and content map to Properties, suppliers map to Companies, and itineraries map to Bookings. Each provider's panel shows its own "What comes across" map before you connect.

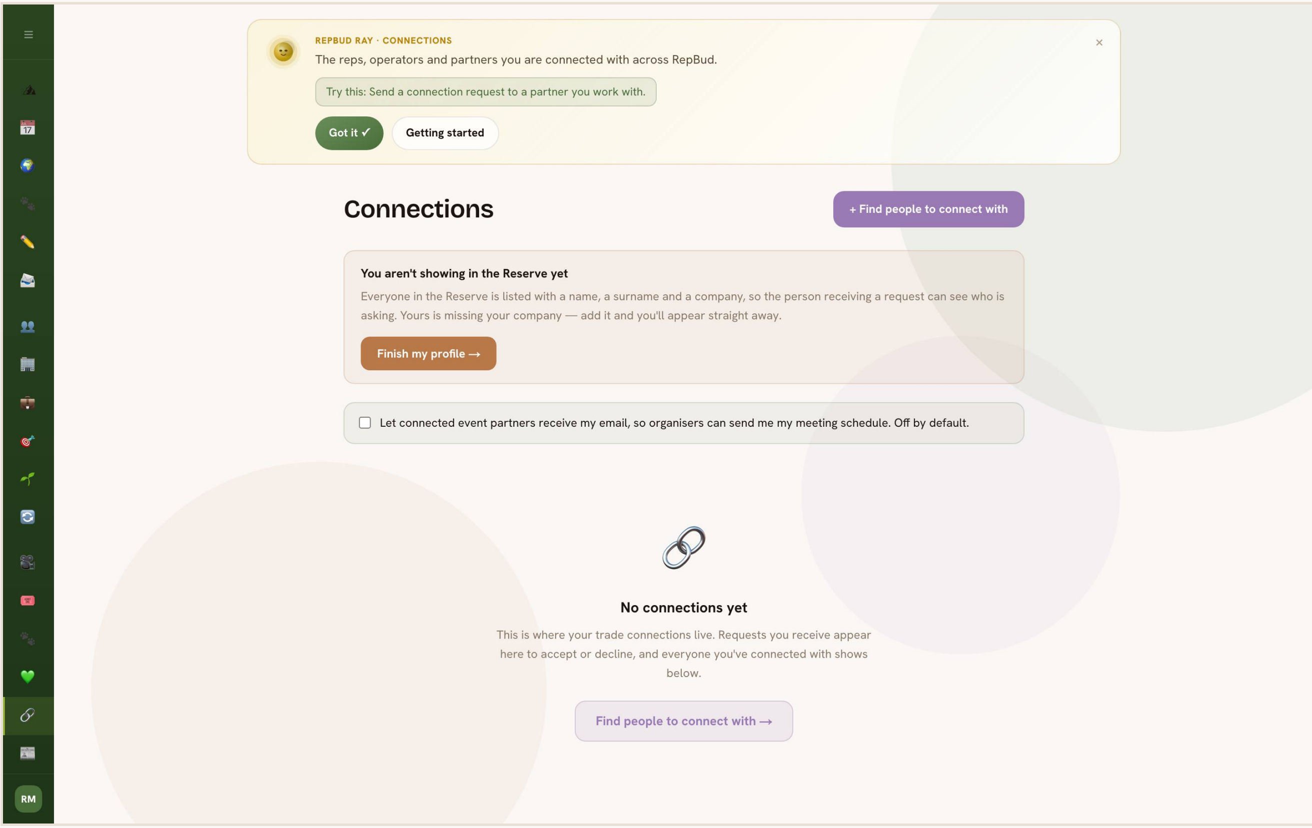
My system isn't listed — what now?

You can still import a spreadsheet export from almost any system on the Import Data page. RepBud is designed to assist, not replace, your professional judgement on what to bring across.

GETTING SET UP

Connect with partners

Connections is your trade address book on RepBud — here's how to find partners, send a request and accept the ones coming in.



The steps

01 Open Connections

From the sidebar, open Connections — your trade connections live here.

02 Choose what partners see

A tick-box lets connected event partners receive your email, so organisers can send your meeting schedule. It's off by default.

03 Pending vs Connected

Pending is requests waiting on a reply; Connected is everyone you've already linked with.

04 Find people to connect with

Open the directory to search RepBuddies — the trade buyers active on RepBud.

05 Search and send a request

Search by name, company or market, then send a request — they appear in Pending once they accept.

06 Accept an incoming request

A request someone sent you shows in Pending with Accept or decline.

07 Now you're connected

Accepted partners move into Connected, with their company and markets. A RepBud Real badge means a verified business.

Next: Invite your team

Questions

What's the difference between Pending and Connected?

Pending holds requests waiting on a reply — ones you've sent (marked "Pending") and ones sent to you (with Accept/decline). Connected is everyone you've already linked with.

Who can see my email address?

Nobody by default. The share-email tick-box is off until you turn it on, and even then it only lets connected event partners receive your email so organisers can send you a meeting schedule.

Who are RepBuddies?

RepBuddies are the trade buyers active on RepBud. The Find directory surfaces them so you can send a connection request; they appear in your Pending list once they accept.

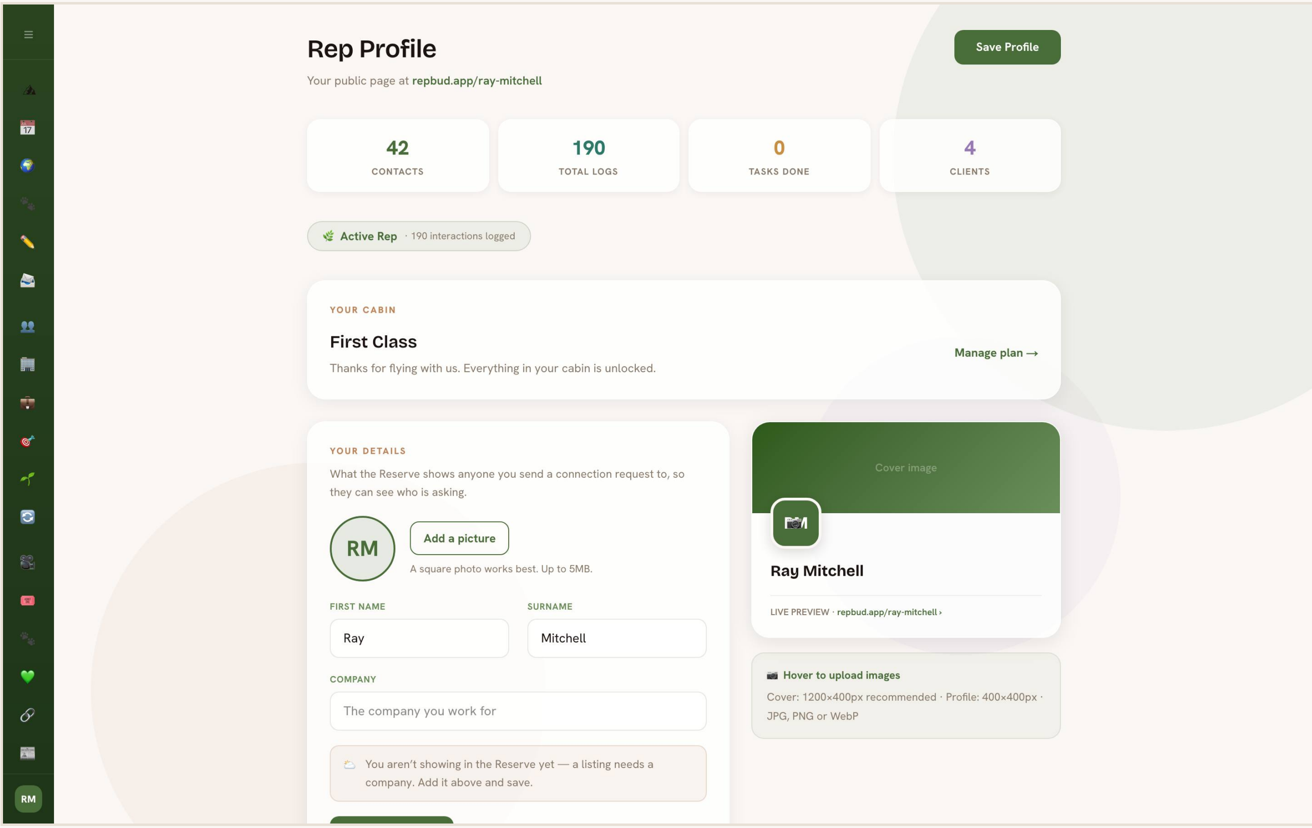
What does the "RepBud Real" badge mean?

It marks a verified business on RepBud, so you can see at a glance which connections have been confirmed.

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.



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.

RepBud is designed to assist, not replace, your professional judgement.

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).

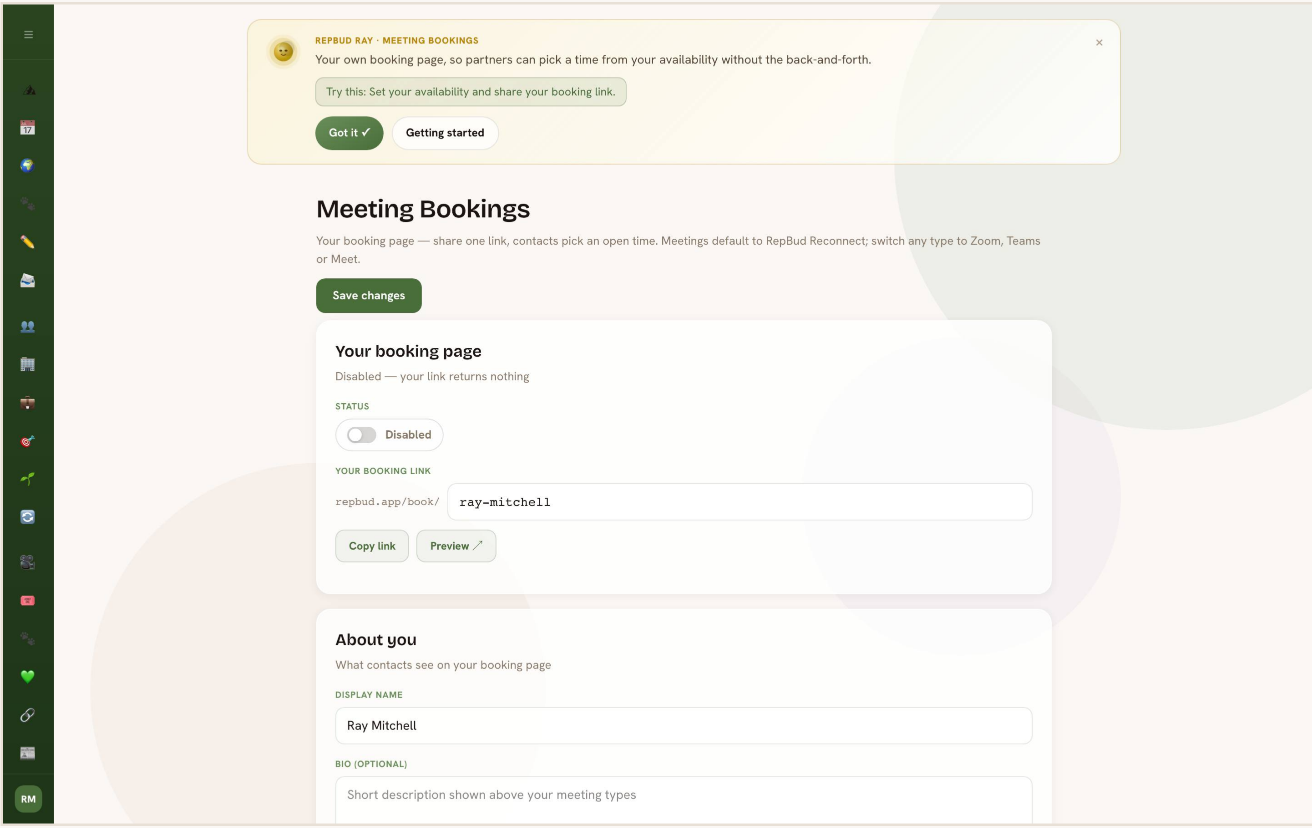
Do I have to connect WhatsApp?

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

GETTING SET UP

Set up your Meeting Links booking page

Give contacts one link, and let them pick a time that already fits around your calendar — here's how to set up your Meeting Links page in about a minute.



The steps

01 **Open Meeting Links**

In the sidebar, open Meeting Links under MORE to build your personal booking page.

02 **Claim your link & go live**

Pick a tidy URL slug — it checks availability as you type — then flip the status to Live so contacts can book.

03 **Add your details**

Your display name and short bio are what contacts see at the top of the page. Set your timezone, or let it auto-detect.

04 **Set when you're available**

Tick the days you work and set start/end times. Slots are only offered inside these windows.

05 **Sync your calendar**

Paste your calendar's private ICS feed so busy events block those slots — works with Apple, Google and Outlook.

06 **Set your booking rules**

Add a buffer between meetings, a booking window, and how much notice you need before a slot can be taken.

07 **Add a meeting type**

Each type is a bookable option — name, length, format and the link to send. Add one to start taking bookings.

08 **Save and share**

Save your changes, then copy your link to drop into emails and your signature — or Preview to see it as a contact would.

Next: Meeting Prep

Questions

What is the booking link and where does it live?

It's your personal page at repbud.app/book/<your-slug>. Share it in emails or your signature and contacts pick a time from the slots you've opened.

Does it check my calendar so I don't get double-booked?

Yes — paste your calendar's private ICS feed and busy events block those slots automatically. It supports Apple Calendar, Google Calendar and Outlook.

Can I offer more than one kind of meeting?

Yes. Add a meeting type for each option — different lengths, formats (phone, Zoom, Teams, Google Meet, in person) and links — and toggle any of them on or off.

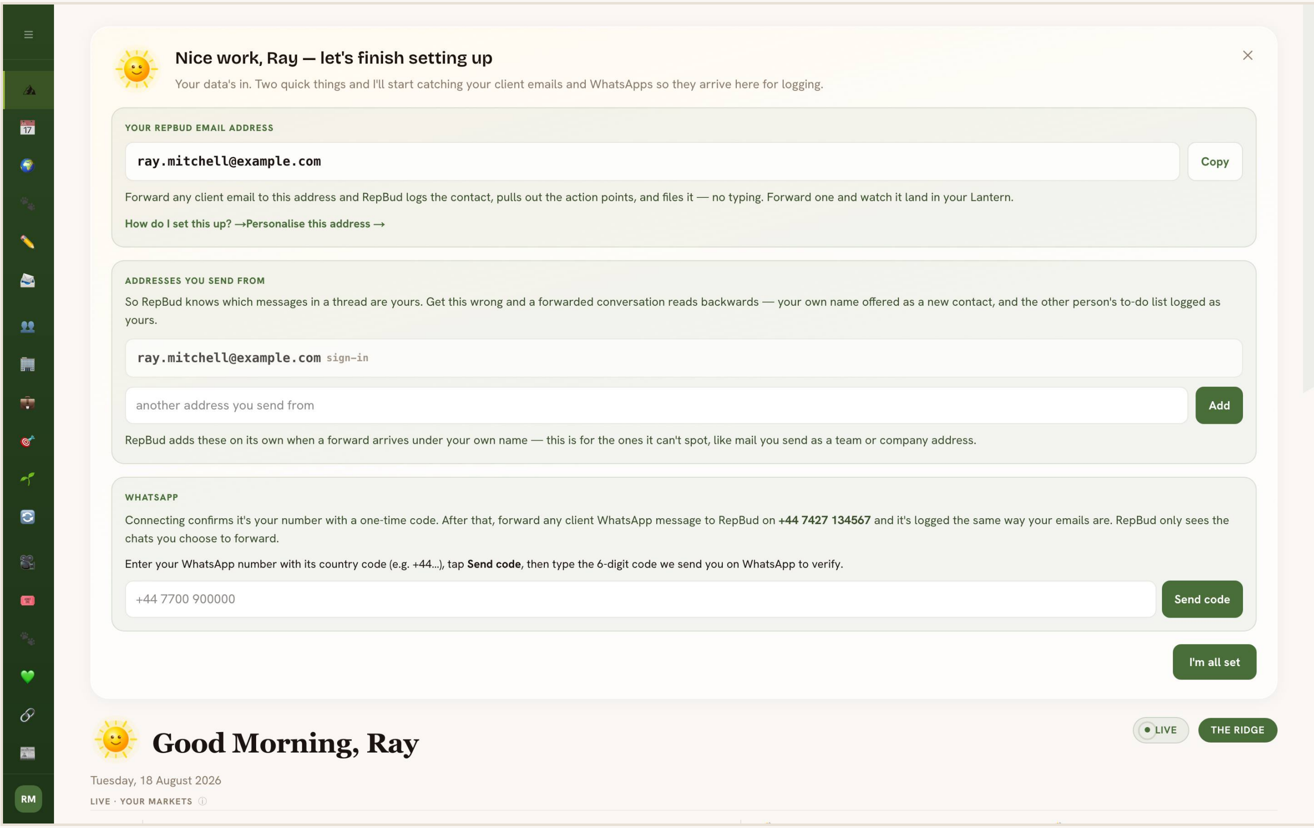
What do the booking rules do?

They shape what contacts can pick: a buffer between meetings, how far ahead bookings are allowed, and the minimum notice you need before a slot opens.

DAILY FLOW

Your home dashboard

This is The Ridge — your home view in RepBud. Here's the quick tour: what each panel shows you, and where to tap when you want to act on it.



The steps

01 Welcome to The Ridge

The Ridge greets you by name and keeps a LIVE badge — it updates as new logs and emails land. The ticker beneath shows your next trade show, client-city weather and FX.

02 Today's Move

Today's Move surfaces the one thing worth doing next — a Lantern item, an overdue task, a client owed a report or a contact going quiet.

03 Focus the view

Filter the whole page to one client, and choose how far back to look — handy when you're prepping for a specific account.

04 Your headline numbers

The metric tiles are your at-a-glance score: Contacts, Companies, who needs attention, open tasks and what's waiting to review. Each tile is a shortcut.

05 **Activity & relationship health**

The timeline shows how much you've logged; Relationship health groups contacts from Active through to Dormant so you can see who's cooling.

06 **Your client portfolio**

Each client gets a card with interactions in the period and room nights year-on-year — open one for the full profile.

07 **Stay in touch & on cadence**

Engagement decay lists the contacts you've not spoken to in a while; Report cadence flags which clients are due an update.

08 **Your territory map**

The map plots your network — switch between contacts, companies and clients to see where everything sits.

09 **Where to go next**

That's The Ridge. Most days start in The Lantern, reviewing what's landed — let's head there next.

Next: Review your inbox (The Lantern)

Questions

What is The Ridge?

It's your RepBud home dashboard at /dashboard — a single overview of your contacts, clients, tasks and activity, with a Today's Move prompt for the next thing worth doing.

How does Today's Move decide what to show?

It checks your day in order — items waiting in the Lantern first, then your most overdue task, a client overdue a report, a contact going quiet, then an upcoming trade show — and surfaces the first one that needs you.

Why do my numbers change when I click a client or lookback pill?

Those filters scope the whole page. Pick a client to see just that account, and a lookback window (30d, 90d, 180d or all) to set how far back the charts and counts reach.

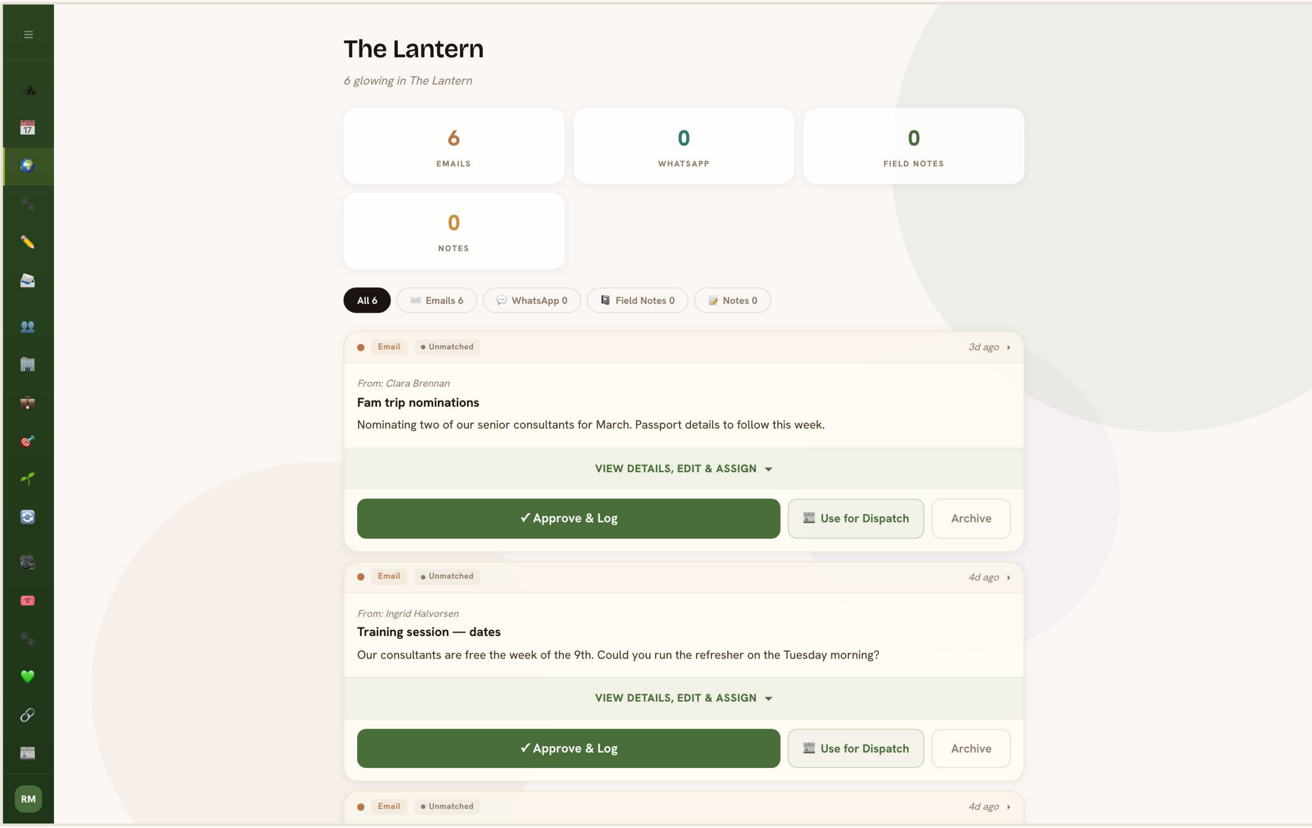
What does "Relationship health" mean?

RepBud groups each contact by how recently you've been in touch — from Active down to Gone quiet, Reach out and Dormant — so you can spot who's cooling before they go cold.

DAILY FLOW

Review your inbox

Everything you forward to RepBud lands in The Lantern — here's how to check what it picked out, fix anything off, and file it as a log with action items in seconds.



The steps

01 Open The Lantern

The Lantern is your review queue. Forwarded emails, WhatsApp messages and quick field notes arrive here once RepBud has read them.

02 Open an item

Each card shows who it's from, a short summary, and a source tag. Open one to see what RepBud pulled out.

03 Check who it's about

RepBud suggests the contact and a confidence badge — Matched, Likely or Unmatched. Confirm it's the right person before you file it.

04 Assign or create a contact

If nobody matched, search your contacts and pick the right one — or create a new contact from the note in a tap.

05 Edit the log and action items

RepBud drafts a tidy log entry plus any action items, each with a priority and due date. Edit the wording, untick anything you don't want, or set a date.

06 Approve & Log

Approving files the log under the contact and adds the ticked action items to your tasks. The item leaves The Lantern.

07 Clear the easy ones in bulk

When several items are already matched, the banner lets you approve them together — unmatched ones stay behind for you to check.

08 A clean Lantern

An empty Lantern means you're caught up. RepBud is designed to assist, not replace, your professional judgement — you approve everything before it's filed.

Next: Log a meeting (Field Log)

Questions

What turns up in The Lantern?

Anything you forward to your private @log.repbud.app address — emails and WhatsApp messages — plus quick notes you write in Field Log. RepBud reads each one, drafts a log entry and suggests action items for you to review.

What do the Matched, Likely and Unmatched badges mean?

Matched = RepBud linked a saved contact; Likely = it found a full name but no saved match; Unmatched = only a first name or no people, so you'll want to assign the contact yourself.

What does "Approve X matched" do?

It approves the items that already have a matched contact in one go. Unmatched and likely items are left in place so you can check who they belong to before filing.

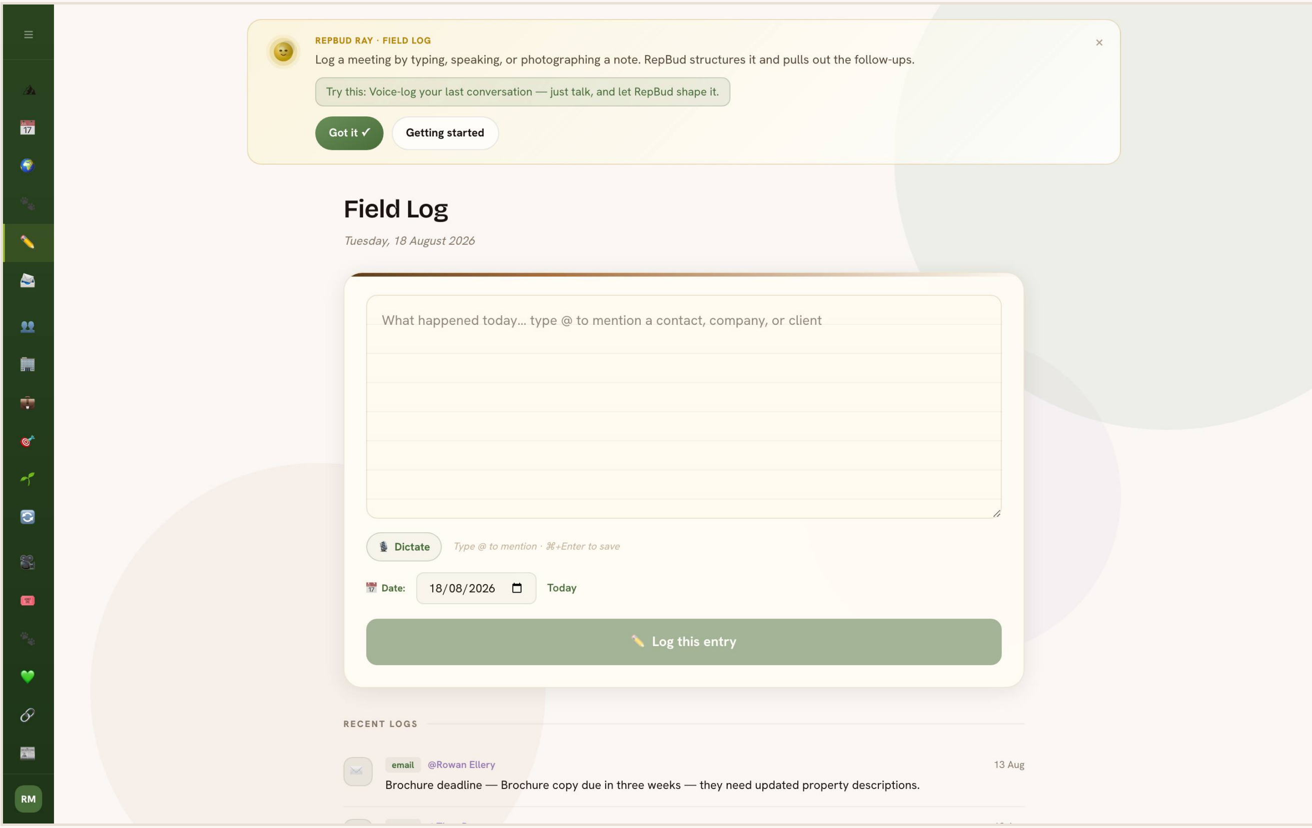
Can I fix the contact or wording before approving?

Yes. Reassign the contact, edit the log text, and adjust each action item's wording, priority and due date — nothing is filed until you press Approve & Log.

DAILY FLOW

Log a meeting

Just out of a meeting? Field Log lets you jot a few lines, tag who was there, and RepBud turns it into a tidy log with action items — here's how.



The steps

01 Open Field Log

Field Log is your quick journal for meetings, calls and notes. Open it whenever you've just spoken to a partner.

02 Write the note

Type what happened in plain language — a couple of lines is plenty.

03 Mention who was there

Type @ to tag a contact, company or client so the log files against the right person.

04 Let RepBud spot names too

If you type a name without an @, RepBud quietly suggests it as a one-tap chip under "Mentioned in your note?".

05 Dictate hands-free

Short on time? Tap Dictate and speak the note instead of typing.

06 Set the date and log it

Set the date if it wasn't today, then log the entry — or press +Enter.

07 What happens next

RepBud reads your note and drafts a log plus any action items, ready in The Lantern to review and approve. It's there to assist, not replace, your professional judgement.

Next: Review your inbox (The Lantern)

Questions

What's the difference between Field Log and The Lantern?

Field Log is where you write a note; The Lantern is where RepBud's draft log and action items wait for you to review and approve. A note you log here arrives in The Lantern.

How do @mentions work?

Type @ and start a name to tag a contact, company or client. The log files against the tagged contact so it shows up on their timeline. RepBud will also suggest names it spots in your note even without the @.

Can I dictate instead of typing?

Yes — tap Dictate and speak your note. Voice capture uses your browser's speech recognition, so it appears in Chrome, Edge and Safari.

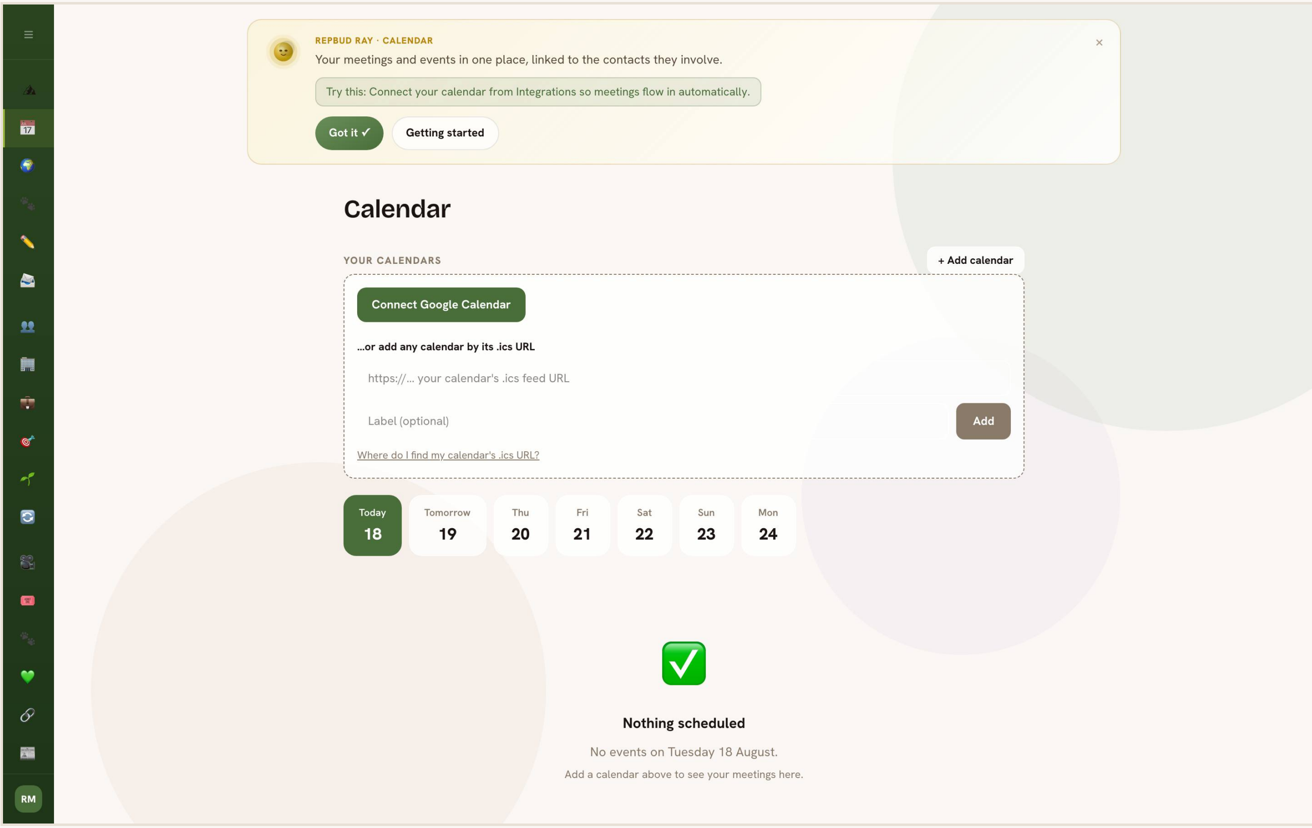
Is there a length limit?

Field Log is built for short notes. If a note gets long, RepBud offers to forward it as an email to your @log.repbud.app address instead, where there's no length limit.

DAILY FLOW

Calendar & meeting matching

Connect a calendar once, and your day lines up here — each meeting matched to the right contact, ready to prep and log.



The steps

01 Open the Calendar

From the sidebar, open Calendar. The day strip across the top runs from Today through the week — tap a day to jump to it.

02 Connect a calendar

Under Your calendars, add one in seconds: Connect Google Calendar, or paste any .ics feed URL — your Google secret iCal address, Outlook, Apple or a shared team calendar. Add as many as you like.

03 Your day fills in

Once connected, your meetings appear in the day view. The header counts the day — how many meetings, and how many RepBud matched to someone in your network.

04 Matched to your contacts

When a meeting names someone you know, RepBud shows the matched contact and their company, with a View link to their full record.

05 Company & soft matches

No specific person named? RepBud matches the company instead (e.g. an all-day "Northwind Voyages" block). A lone first name is flagged — "Matched on first name — tap to confirm" — so you stay in control.

06 Generate meeting prep

Open a matched event and tap * Generate meeting prep. RepBud reviews your history with that contact and gives you a short brief before you walk in.

07 Log it in one tap

After the meeting, tap Log meeting. It saves to that contact's timeline, so your record stays current without retyping.

08 Keep it tidy

Refresh re-syncs every connected calendar; the x removes one. Match, prep, log — straight from the calendar. RepBud is designed to assist, not replace, your professional judgement.

Next: Send meeting follow-ups

Questions

Which calendars can I connect?

Connect Google with one tap, or paste an .ics feed URL — that covers Google (its secret iCal address), Outlook/Microsoft 365, Apple iCloud and shared team calendars. You can connect more than one.

Where do I find my calendar's .ics URL?

In Google: Calendar -> Settings -> your calendar -> "Integrate calendar" -> copy the *Secret address in iCal format*. The "Where do I find my .ics URL?" link on the page lists Outlook and Apple too.

How does RepBud match a meeting to a contact?

It looks first at attendee email, then a full name in the title, then a single unambiguous first name, and finally a company name — as precise as the meeting details allow.

What happens when I log a meeting from the calendar?

It's saved to the matched contact's timeline with the meeting date, so it shows in their history and feeds your follow-ups — no separate data entry.

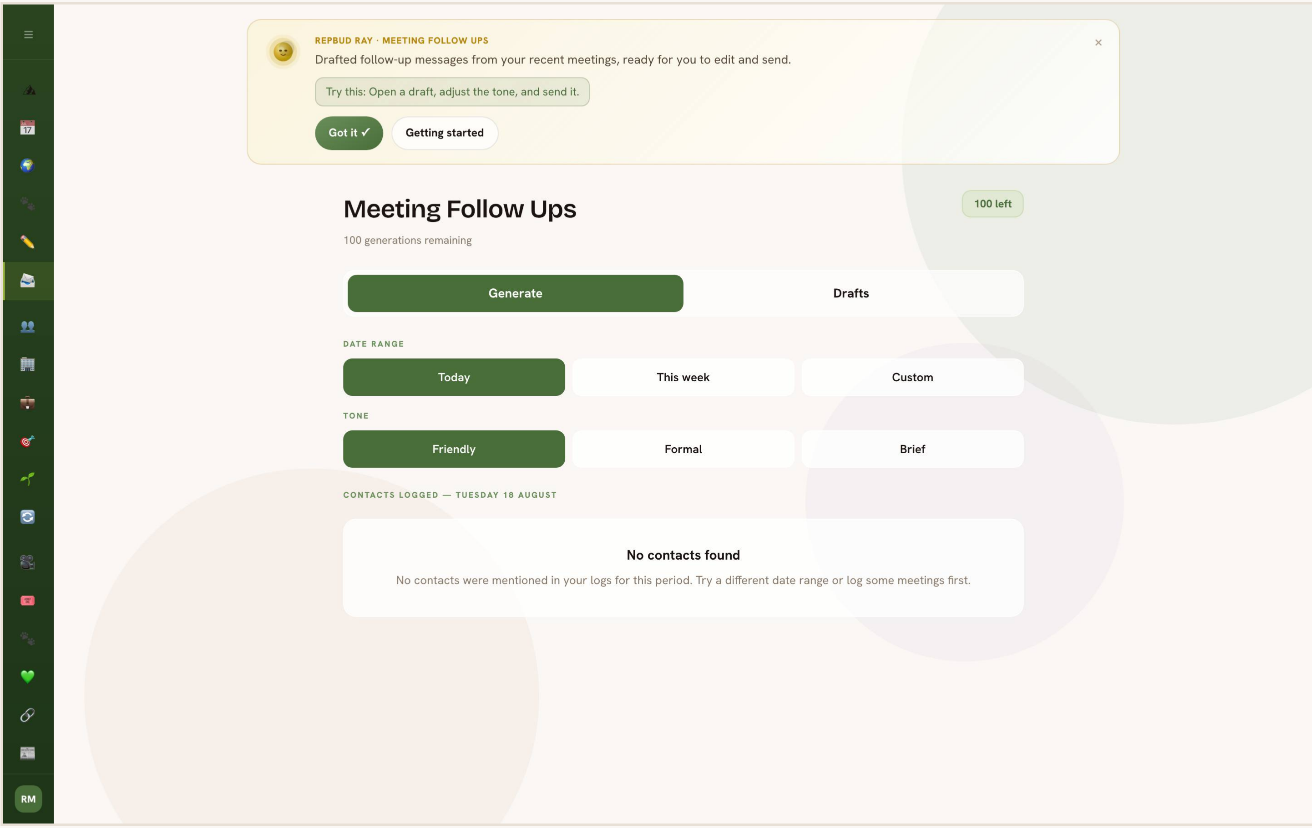
Is my calendar data shared with anyone?

No. Your calendar is read-only and private to your account; you can remove any connected calendar at any time with the x.

DAILY FLOW

Send meeting follow-ups

Turn this week's meetings into follow-up emails in a couple of clicks — RepBud drafts each one from what you logged, and you stay in control of every word.



The steps

01 Open Meeting Follow Ups

From the sidebar, open Meeting Follow Ups. Two tabs: Generate to draft new emails, Drafts for ones you've made. Your remaining generations show top-right.

02 Pick a date range

Choose Today, This week, or a Custom range. RepBud pulls in the contacts you logged a meeting with in that window.

03 Choose a tone

Set how the emails should read: Friendly, Formal or Brief. The same choice applies to everyone you select.

04 Select who to follow up

The Contacts logged list shows everyone from that range. Tick the ones you want, or use Select all.

05 **Generate the drafts**

Tap Generate and RepBud writes a follow-up for each contact, drawing on what you logged. It then opens the Drafts tab.

06 **Review and edit**

Open a draft to see its Meeting Summary and the email. Edit the text right there — it's a starting point, not the final word.

07 **Set a chase reminder**

Tick Remind me to chase in 3 days if no reply and RepBud adds a task so the thread doesn't go cold.

08 **Copy, send, mark sent**

Copy email, paste it into your email client to send, then mark it Sent so the card tracks where it's at.

Next: Track your tasks (The Trail)

Questions

Which contacts show up in the list?

The people you logged a meeting or note for inside the date range you pick — so set the range to cover when those meetings happened.

Does RepBud send the email for me?

No. It drafts the email and you copy it into your own email client to send — RepBud is designed to assist, not replace, your professional judgement.

What does the chase reminder do?

It adds a task to chase that contact in three days if you haven't heard back, so the follow-up doesn't slip.

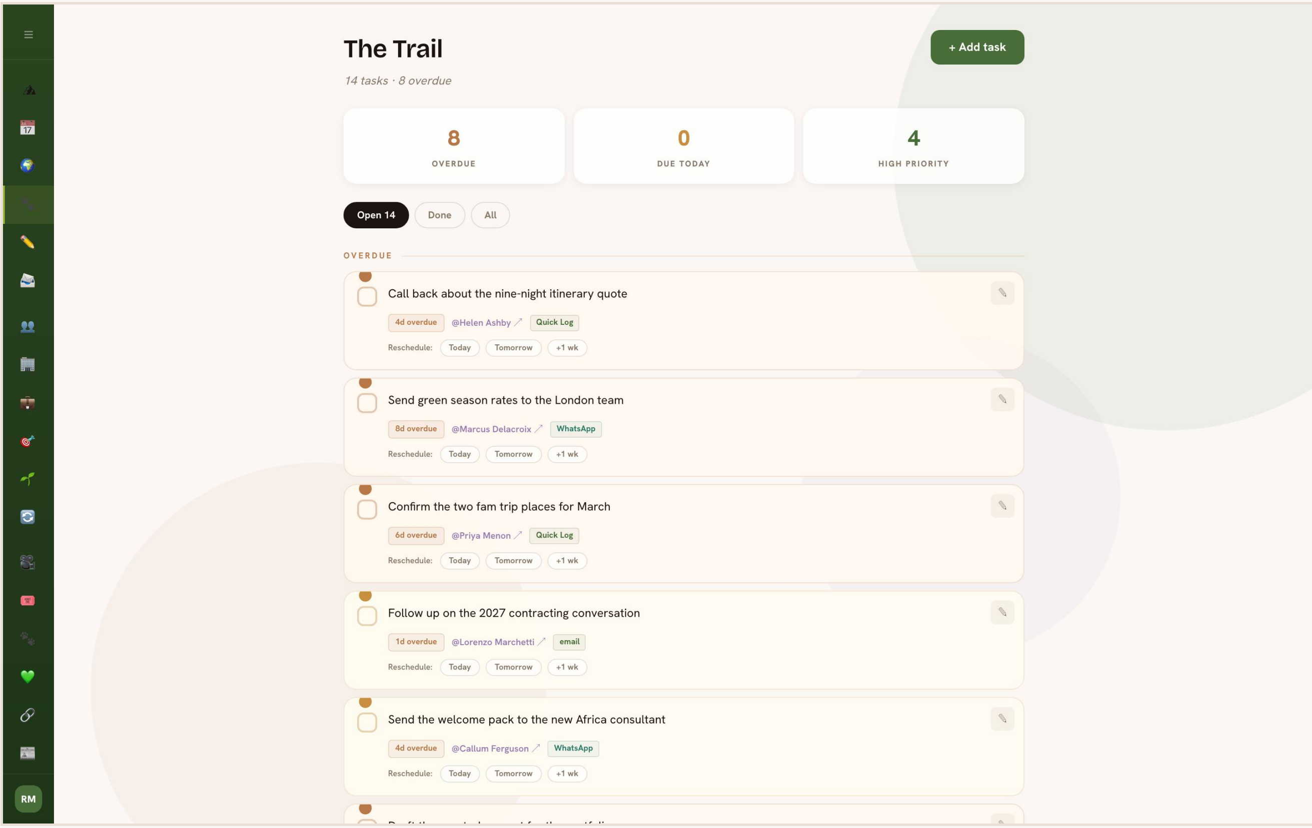
Can I change the wording or the tone?

Yes — edit any draft inline before you copy it, or use Regenerate to redraft it.

DAILY FLOW

Track your tasks

The Trail is where every follow-up lands in one place — sorted by what's overdue, what's due today, and what matters most. Here's how to work it in under a minute.



The steps

01 Open The Trail

The Trail gathers your action items into one list. The subtitle shows how many are open and how many have slipped overdue.

02 Filter Open, Done or All

The three pills switch the view. Open is your working list; Done is what you've cleared; All shows both.

03 Read the priority pins

The dot on each card marks priority — terracotta for high, gold for medium, green for low — so the urgent work reads at a glance.

04 Follow the due date and links

The date badge shows "Due today", "Tomorrow" or "Xd overdue". The lavender @name is a one-tap jump to that contact; client chips show who it's for.

05 Reschedule in one tap

The Reschedule row bumps the due date without opening anything — Today, Tomorrow or +1 wk.

06 Complete and log it

Tick a task and it's marked done. When it's linked to a contact, RepBud offers to log the completion to their history so the timeline stays current.

07 Keep the list tidy

A cleared task drops out of Open; flip to Done any time to review what you've finished.

Next: Log an interaction (The Lantern)

Questions

What's the difference between Open, Done and All on The Trail?

Open is your live to-do list, Done shows tasks you've ticked off, and All shows both together. The view opens on Open so you see what still needs doing first.

How does the quick reschedule work?

The Reschedule row on each open task sets the due date to Today, Tomorrow or one week out in a single tap — no need to open the editor.

What happens when I complete a task linked to a contact?

Ticking it done marks the task complete and offers to log the completion to that contact's history, so their timeline reflects the follow-up. You can add a note or skip the log.

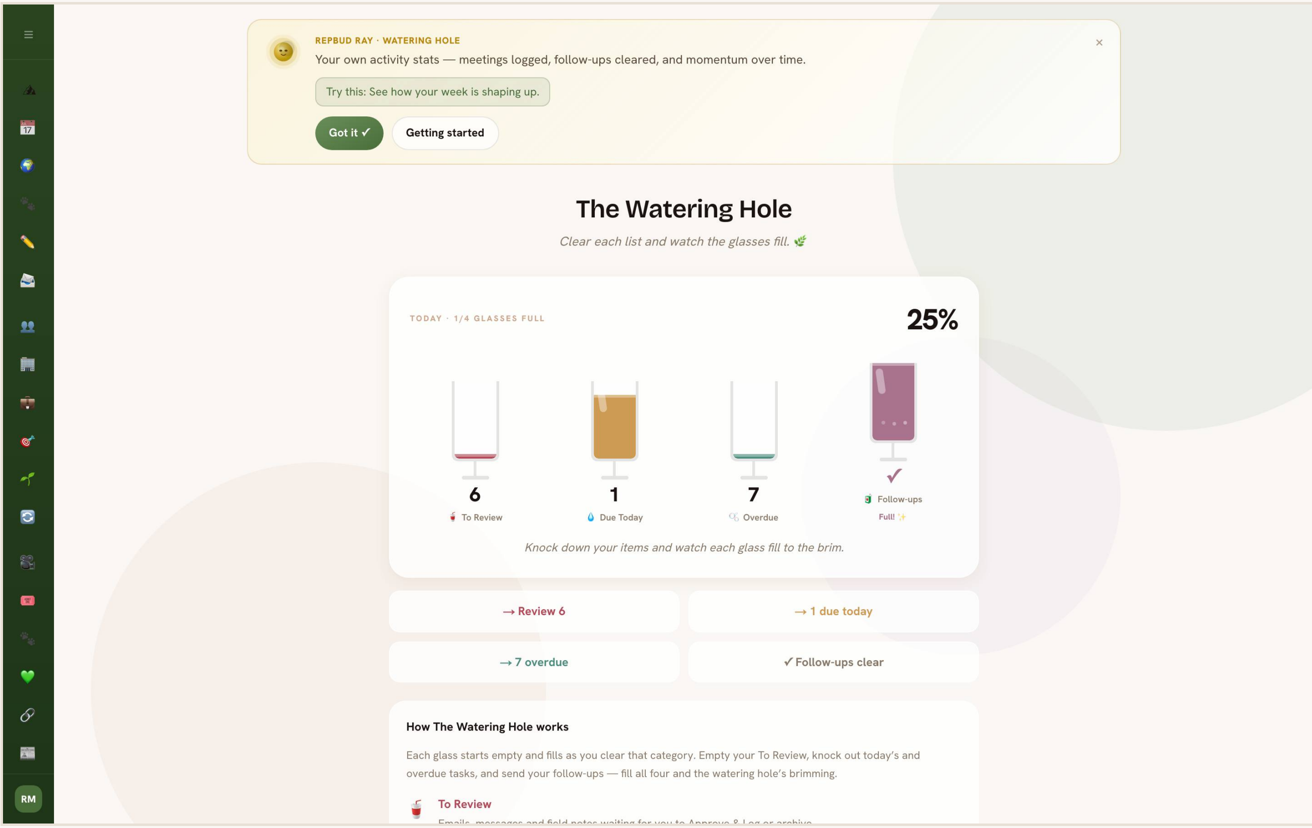
Why are some tasks marked overdue or high priority?

The date badge flags anything past its due date, and the coloured pin shows priority — terracotta high, gold medium, green low — so the work that needs attention sorts to the top.

DAILY FLOW

Clear your day

The Watering Hole turns your to-do list into four glasses — clear a category and its glass fills. Here's how to empty your day.



The steps

01 Open the Watering Hole

The Watering Hole gathers the four things that pile up in a day into one calm view.

02 Four glasses, one goal

A glass starts low and fills as you clear that category — the percentage and glasses full count at the top track your whole day.

03 To Review

The first glass is your Lantern — emails, messages and field notes waiting to be approved and logged or archived.

04 Due Today & Overdue

The middle glasses are your tasks: what's due today, and anything past its date. Clear them off The Trail to fill them.

05 **Follow-ups**

The last glass holds meeting follow-ups you've drafted but not sent yet — send them to top it up.

06 **Jump straight to a list**

Each glass has a shortcut button beneath — tap one to go and clear that category, then come back.

07 **Fill them all and celebrate**

When the last category clears, the bar reads 100% and the watering hole brims — a small well-earned moment.

Next: Review your inbox (The Lantern)

Questions

What are the four glasses?

To Review (your Lantern inbox), Due Today and Overdue (your tasks), and Follow-ups (drafted meeting replies waiting to send). Clear a category and its glass fills.

Why is a glass low or empty?

A glass reflects how much of that category is still outstanding — the more items left, the lower it sits. Clear them and it rises to the brim.

What happens when I clear everything?

The header hits 100%, the glasses show a +, and a short confetti celebration fires the moment the last category clears.

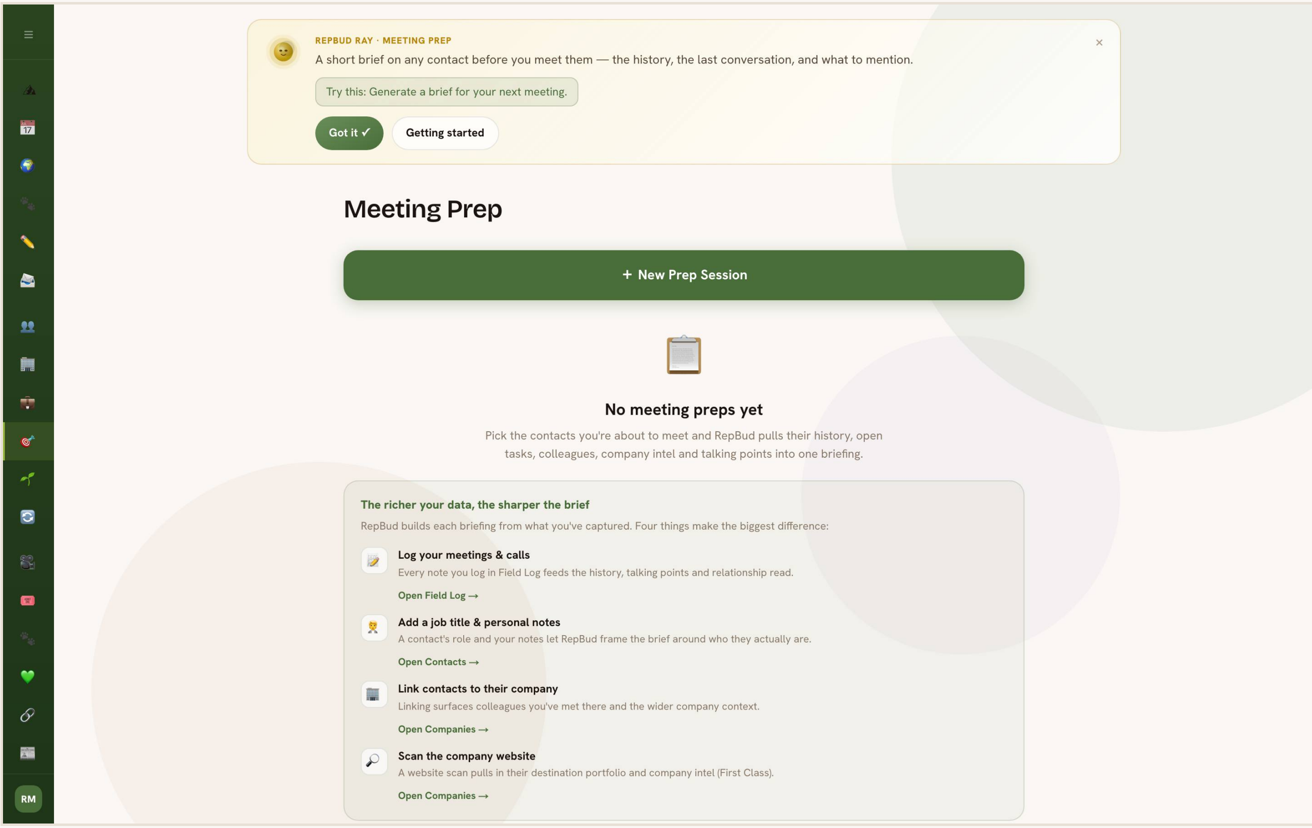
Where do the quick-link buttons take me?

Straight to that category — To Review, your Tasks (The Trail) or your Follow-ups — so you can clear it and watch the glass fill on your way back.

DAILY FLOW

Meeting prep briefs

Before you walk into a meeting, RepBud pulls everything you know about that contact into one briefing — so you sound prepared, not scrambling.



The steps

01 **Open Meeting Prep**

From the sidebar, open Meeting Prep. Past sessions live here; tap How briefs work any time to see what makes a brief sharper.

02 **Start a new session**

Each brief is one prep session. Tap New Prep Session to begin.

03 **Pick the meeting type**

Choose how you're meeting — one-off, trade workshop, function, or trade show — then name it and set the date.

04 **Choose who you're meeting**

Search and tick the contacts you'll see. You can add more than one.

05 **RepBud builds the brief**

RepBud reads the contact's history, open tasks and company context to assemble the briefing.

06 **Read the brief**

The card shows a relationship-health read, what you last discussed, open tasks, talking points and a suggested opener — plus colleagues met and company intel where you've captured them.

07 **Build an agenda**

Tap the beside any talking point to add it to your agenda, then copy it out to take into the room.

08 **After the meeting**

When you're done, log how it went and add follow-up tasks — that history feeds an even sharper brief next time.

Next: Log a meeting in Field Log

Questions

Why does my brief look thin?

Briefs are built from what you've captured. If a contact has little logged history, no job title and no company link, the brief leans on company context. Log your calls and meetings, add their role and notes, and link them to their company to sharpen it.

What does the relationship-health chip mean?

It's a quick read — Strong, Warm or Needs attention — based on how recently and how often you've been in touch, to help you judge the tone going in.

Can I prep for more than one person in the same meeting?

Yes. Tick several contacts in the picker and RepBud builds a brief card for each one in the same session.

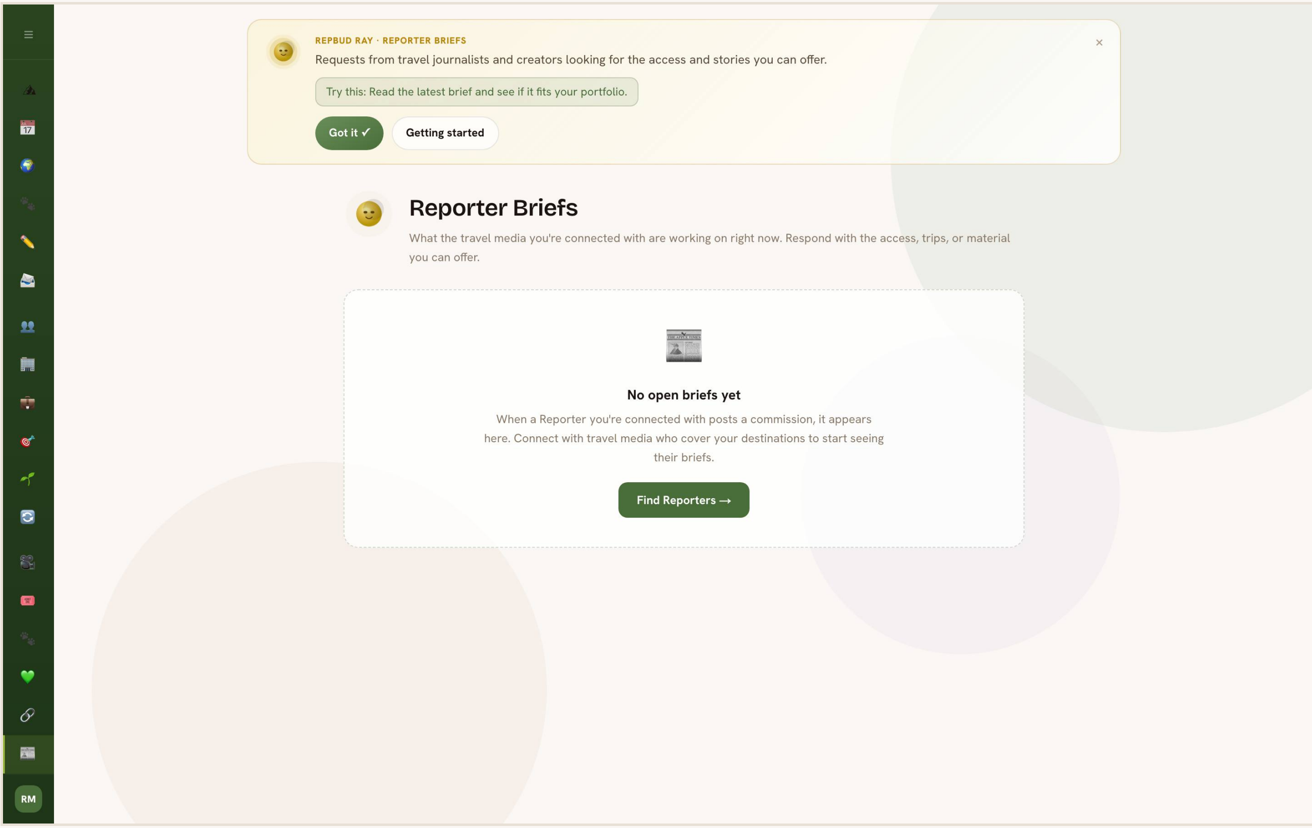
What's the agenda builder for?

Tap the beside any talking point to pin it, then copy the numbered agenda to your clipboard to paste into notes or take into the room.

DAILY FLOW

Respond to reporter briefs

When a journalist you're connected with posts a commission, it lands here — this is how to see what they need and pitch what you can offer.



The steps

01 Open Reporter Briefs

Reporter Briefs shows what the travel media you're connected with are working on right now.

02 Read what they need

Each card is one open brief: the headline, the angle, and the destinations it covers.

03 Check who's asking & by when

Under the title you'll see the reporter, their medium and outlet, plus the deadline in terra.

04 Open the response

Hit Respond to pitch the access, trips, or material you can offer.

05 Write your pitch

Tell them what you can offer — a property, a trip, an interview, imagery, a press release. They see your name and message.

06 Confirm it sent

The card now shows a green "You responded" note with your message, so you know it's logged.

07 Edit if things change

Offer firmed up or a date moved? Reopen and update your response any time the brief's still open.

Next: Next guide

Questions

Why do I see "No open briefs yet"?

Briefs only appear from Reporters you're connected with, and only while a brief is open. If it's empty, connect with travel media who cover your destinations — use the Find Reporters button to start.

Who sees my response?

The reporter who posted the brief sees your name and your message. Pitch the access, trips, interviews or imagery you can genuinely offer.

Can I change a response after sending it?

Yes. While the brief is still open your card shows an Edit link — reopen it, update the text and save with Update response.

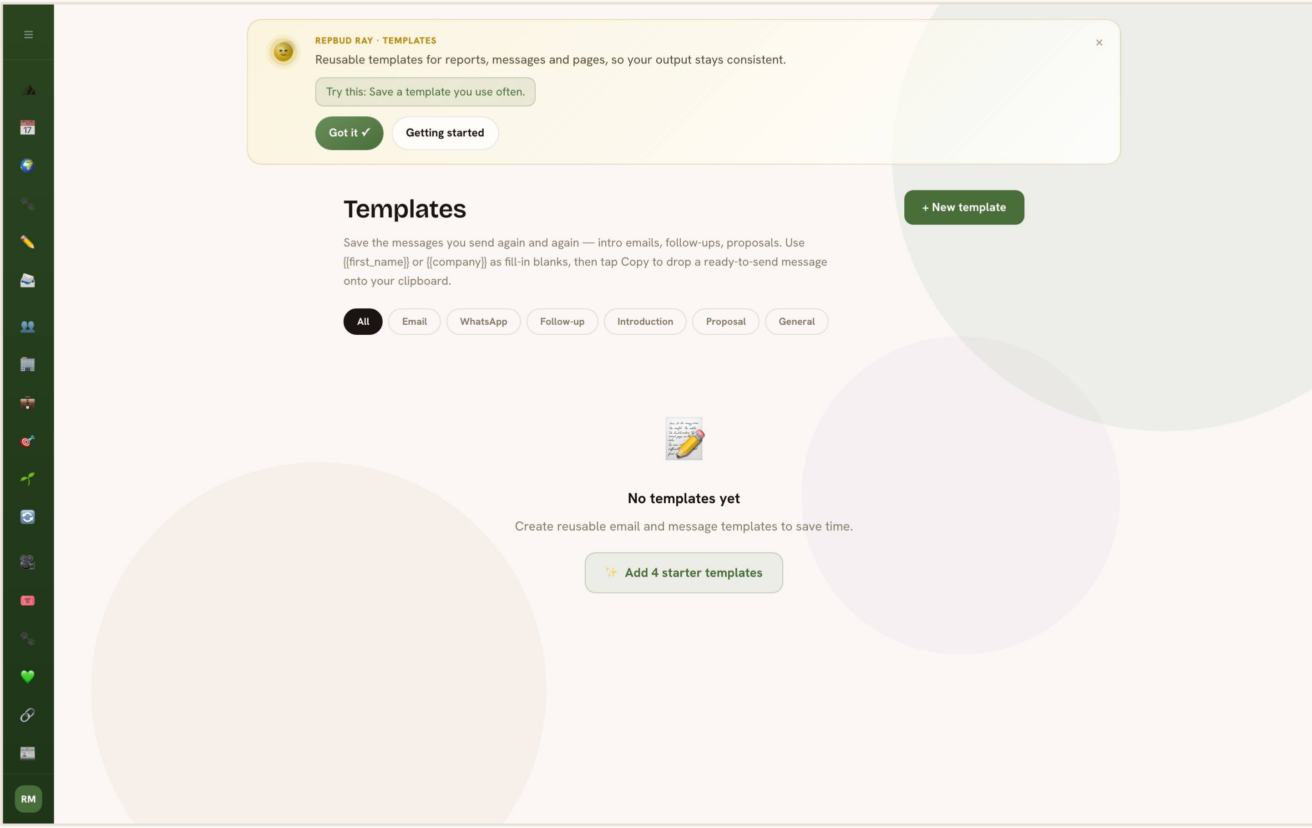
What should I put in a pitch?

Keep it specific to the angle — a property, a press trip in their window, an interview, or imagery. RepBud is designed to assist, not replace, your professional judgement.

DAILY FLOW

Save & reuse your message templates

Save the intros, follow-ups and proposals you send again and again — then drop a ready-to-send message onto your clipboard in two taps.



The steps

01 Open Templates

Templates is where you keep the messages you send again and again. A fresh account starts empty.

02 Start a new template

Give it a title and pick a category so it's easy to find later.

03 Write it with fill-in blanks

Type your message and use {{first_name}} or {{company}} as blanks you fill in each time.

04 Add a starter set

New to templates? Drop in a few professional starters and edit them to sound like you.

05 Filter by category

The category pills let you jump straight to the kind of message you need.

06 Fill & copy

Templates with blanks open a panel — type the values, watch the live preview, then copy.

07 Edit or copy as-is

Tidy any template with Edit. Templates without blanks copy straight to your clipboard.

Next: Client pages

Questions

What are the {{variables}} in a template?

They're fill-in blanks. When a template has them, tapping Fill & copy opens a panel with a field for each one and a live preview, so you can personalise the message before copying it.

Where does a copied template go?

Straight onto your clipboard, ready to paste into your email client, WhatsApp or anywhere else you write to a contact.

Can I organise my templates?

Yes — give each one a category (Email, WhatsApp, Follow-up, Introduction, Proposal or General) and use the pills at the top to filter to it.

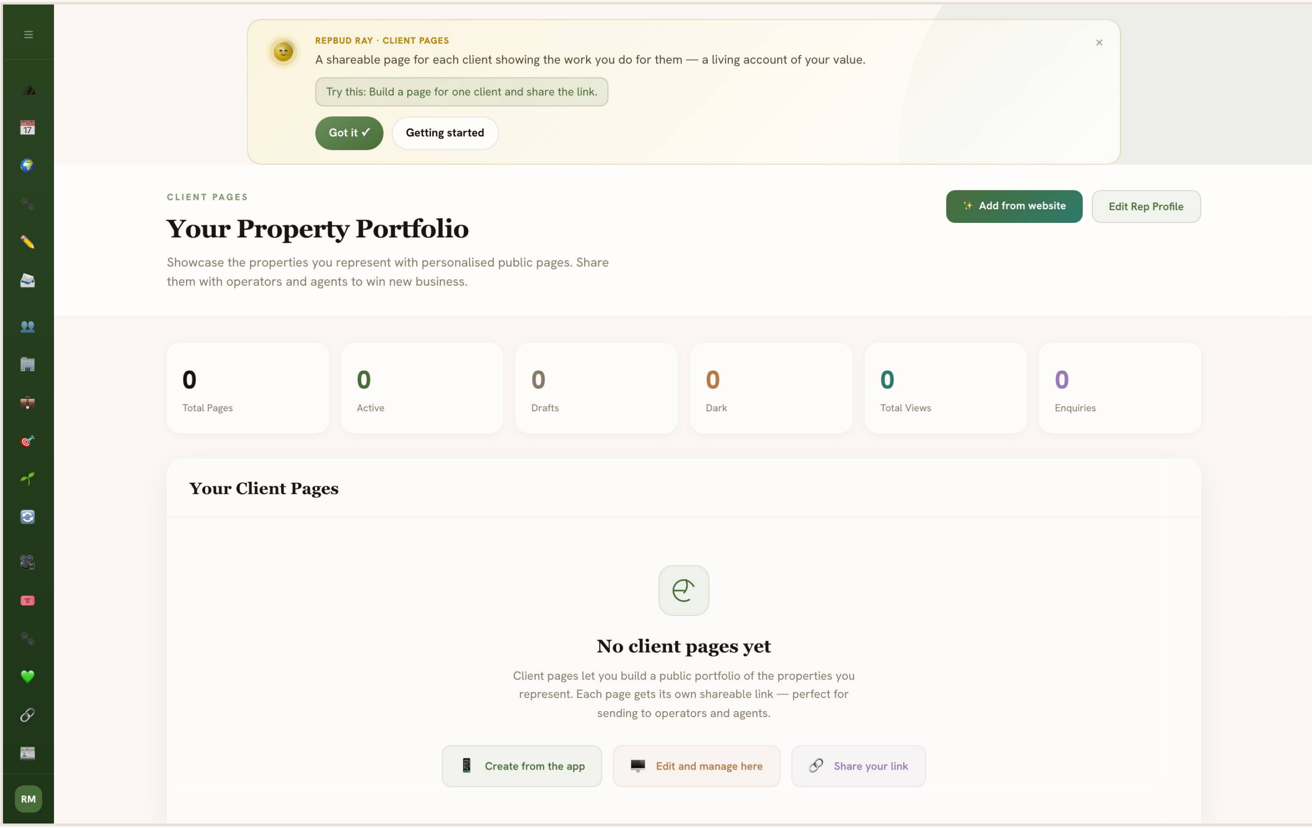
Do I have to write every template from scratch?

No. On a fresh account, the "Add 4 starter templates" button drops in professional intro, follow-up, proposal and WhatsApp examples you can edit to suit your voice.

DAILY FLOW

Build a shareable client landing page

Give a client their own public landing page — branded, shareable, and live at your RepBud address in a couple of minutes.



The steps

01 Open Client Pages

This is your property portfolio — the landing pages you share with operators and agents. The strip up top tracks pages, views and enquiries.

02 Create a page from a website

The quickest start: paste a property's website and RepBud drafts the tagline and description for you.

03 Open the editor & set the slug

The editor is where you shape the page. The URL slug sets its address: repbud.app/<you>/<client>.

04 Add branding

A cover photo and logo make the page feel like the client's own.

05 Add the properties

Each client page can hold individual property pages — added from the mobile app, or in bulk when you import a collection.

06 Save as draft & check status

Save while you work. Pages sit as draft until you publish; active is live; dark hides a page you've taken down for now.

07 Publish & share

Publishing makes the page live at your RepBud address, ready to send. Publishing needs a First Class Annual plan.

Next: Client reports

Questions

How do I create a client page on the web?

Use Add from website — paste a property's URL and RepBud drafts the tagline and description, then choose "Create a new client page". You can also create pages from the RepBud mobile app and manage them here.

What do active, draft and dark mean?

Draft is a work-in-progress that isn't public; Active is published and shareable at your RepBud address; Dark is a page you've taken down for now without deleting it.

Can I add several properties at once?

Yes — paste a collection or listing URL in Add from website, and RepBud detects the multiple properties so you can tick the ones to bring in as child property pages.

What do I need to publish a page?

A URL slug and a description, plus a First Class Annual plan. Once published, the page is live at repbud.app/<your-slug>/<client-slug>.

DAILY FLOW

Task reminders — the 8am nudge

A commitment with a date on it gets an 8am reminder, so the thing you promised at a show does not quietly pass its day.

The steps

01 Give a task a date

A task with no due date sits on The Trail; a task with one is something RepBud can remind you about.

02 The 8am nudge

Dated tasks are gathered into one reminder each morning rather than pinging you through the day.

03 Read the bands

Overdue, due today, upcoming and finished — so the morning starts with what actually needs answering.

04 Clear it from there

Tap through from the reminder to the task and its contact, and close it off without hunting for it.

Next: Track your tasks

Questions

When does the reminder arrive?

At 8am, for tasks that have a due date.

Do I get one for every task?

No. Only dated tasks are gathered, and they come as one morning reminder rather than a stream through the day.

What if I do not set a due date?

The task still sits on The Trail — it simply has no day for RepBud to remind you about.

Can I turn them off?

Yes, in your device's notification settings for RepBud.

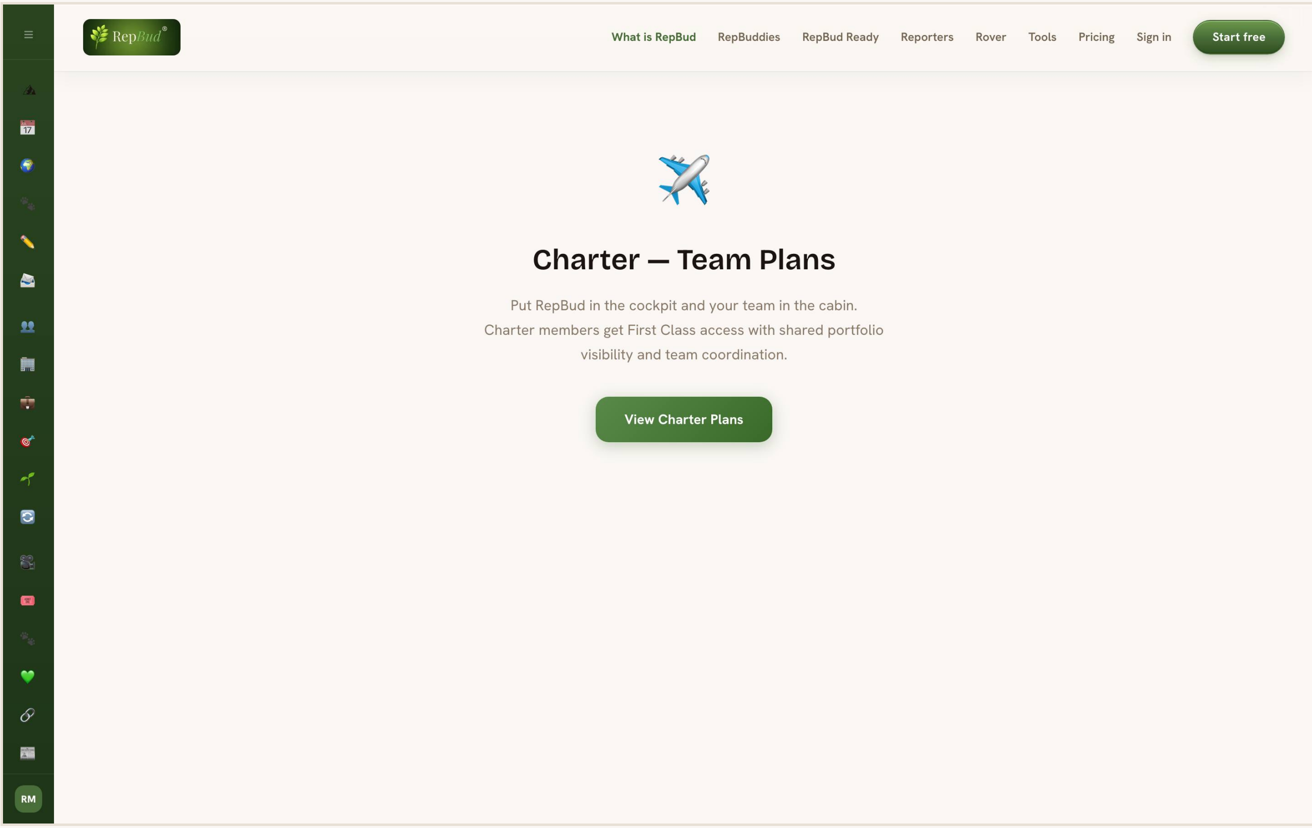
Where do the tasks come from?

From what you log — a commitment picked out of a forwarded email or a field note becomes a task for you to approve, as well as ones you add yourself.

YOUR PEOPLE

Invite your team

If you're on a Charter plan, here's how to bring your colleagues into RepBud — invite them, track seats, and manage pending invitations from one screen.



The steps

01 **Open your team**

From the dashboard, open the Team screen to manage who's on your Charter plan.

02 **See your team at a glance**

The header shows your team name, your Charter seat count, and your role — here, First Officer, the admin who can invite.

03 **Read your seat usage**

Three counters tell you where you stand: Active members, Pending invitations, and seats still Available.

04 **Invite a colleague by email**

In Invite a Cabin Director, type a colleague's work email and send. They join as a Cabin Director with First Class access.

05 **Confirm it's on its way**

A confirmation shows the invitation went out, and the helper line explains they'll get an email link to join.

06 **Track pending invitations**

Anyone you've invited but who hasn't joined yet sits under Pending Invitations, with the date you sent it.

07 **Revoke if you need to**

Sent to the wrong address or changed your mind? Use Revoke to pull a pending invitation back.

Next: Set up your RepBud profile

Questions

Who can invite teammates on a Charter plan?

The team's First Officer (the admin). Cabin Directors can see the team but don't see the invite or revoke controls.

What access does an invited colleague get?

They join as a Cabin Director with First Class access to RepBud and shared portfolio visibility across the team.

What happens when all my seats are used?

"Available" drops to zero and the invite box is replaced by an "All seats filled" note — contact support if you'd like more seats.

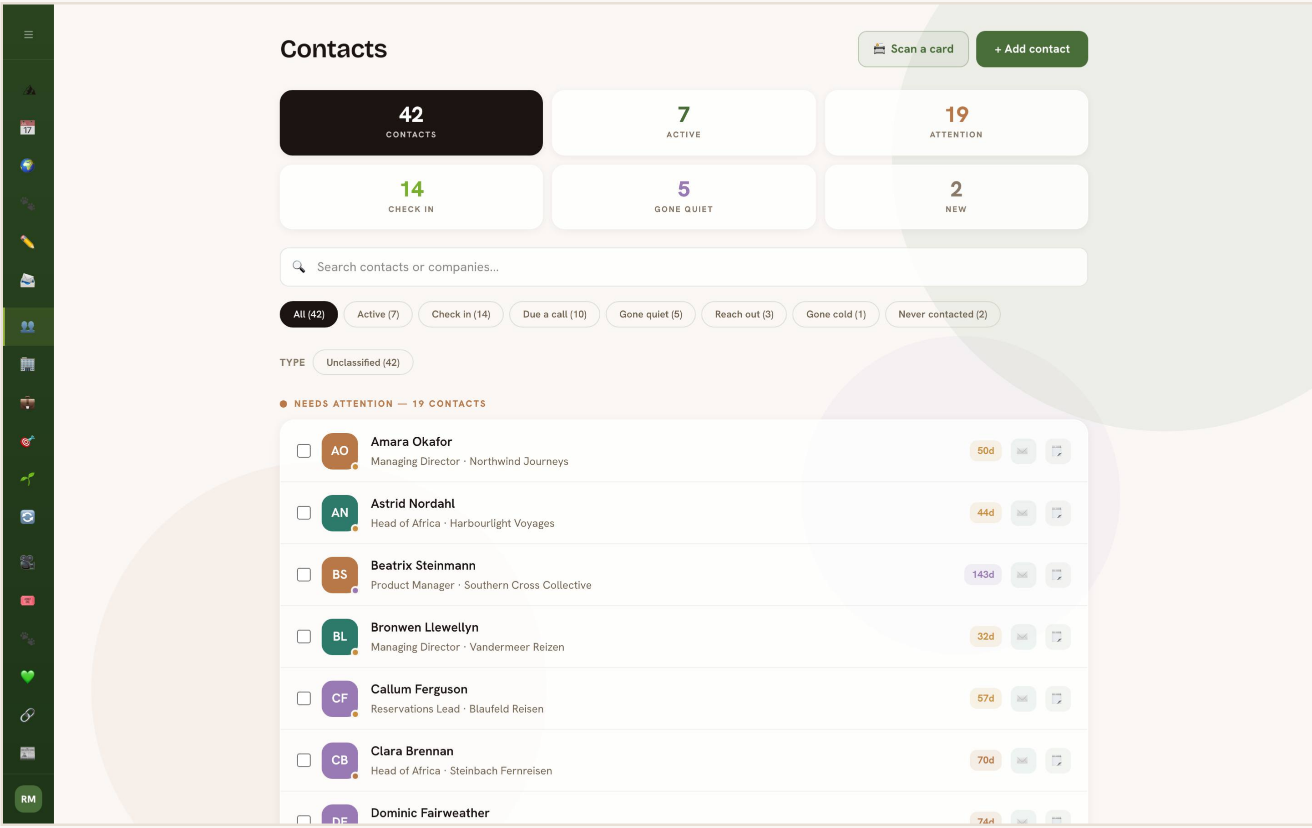
Can I cancel an invitation before someone accepts?

Yes. Any pending invitation shows a Revoke button next to it; revoking frees the seat back up.

YOUR PEOPLE

Your contacts

Your contacts page keeps every partner in one place and quietly flags who's gone quiet — here's how to work it in a minute.



The steps

01 Open Contacts

Contacts is your address book of partners, with a health dot on each so you can see who's warm at a glance.

02 Read the status tiles

The tiles across the top count your book by status: Contacts, Active, Attention, Check in, Gone quiet and New.

03 Focus with a tap

Tapping a tile or a filter pill narrows the list — handy when you want to see only who needs a nudge.

04 Search by person or company

The search box matches names, companies and emails, so you can jump straight to who you need.

05 Spot who needs attention

The Needs Attention band lifts contacts who are due a call, gone quiet or worth a reach-out to the top.

06 Add a contact

Add someone by hand in seconds — first name is all that's required, the rest you can fill later.

07 Scan a business card

Met someone at a show? Snap their card and Your RepBud reads the details into the form for you to check.

08 Open a contact

Click any row to open their full timeline — meetings, tasks and notes in one place.

Next: A contact's timeline

Questions

What do the coloured dots and day badges mean?

They show how recently you've been in touch — from Active through Check in, Due a call, Gone quiet and Reach out — so you can see who's slipping without opening anyone.

Do I have to fill in everything to add a contact?

No. Only first name is required; you can add the job title, company, email and mobile now or later from their page.

How does scanning a card work?

You snap or upload a photo of the card and Your RepBud reads the details into the New contact form. It's designed to assist, not replace your professional judgement — so check the fields before you save.

Can I search by company, not just name?

Yes. The search box matches names, companies and email addresses, so a company name pulls up everyone linked to it.

A contact's timeline

Open a contact and you've got their whole history in one scroll — every meeting, task and note ready before you call.

The steps

01 **Open a contact**

The contact page gathers everything about one partner — details, relationship and history in a single view.

02 **Reach out from the top**

The action row lets you Call, WhatsApp, Email or Log an interaction without leaving the page.

03 **Read the timeline**

Scroll to the activity history: your logged meetings, linked tasks and emails for review, newest first.

04 **See linked tasks**

Open tasks tied to this contact (and their company) surface here, so nothing follow-up slips.

05 **Check the linked company**

The Company field links Aria to Northwind Voyages — pick an existing company or type a new one to re-link.

06 **Edit any field inline**

Click a field to edit it — job title, status, where you met or personal notes — and it saves on the spot.

07 **Set the relationship**

Set Relationship type and Rep status so your book stays organised and your reporting is accurate.

08 **Prep before a meeting**

A quick scroll of the timeline and notes is your meeting prep — you walk in knowing exactly where you left off.

Next: Meeting prep briefs

Questions

Where do the items in the timeline come from?

It merges your logged interactions, tasks linked to the contact, and emails waiting for review into one feed, newest first.

How do I edit a contact's details?

Click any field — name, job title, email, status or notes — edit it inline and it saves straight away. No separate edit mode.

How do I fix the company on a contact?

Click the Company field and pick an existing company or type a new one. Re-linking keeps the contact and the company record in step.

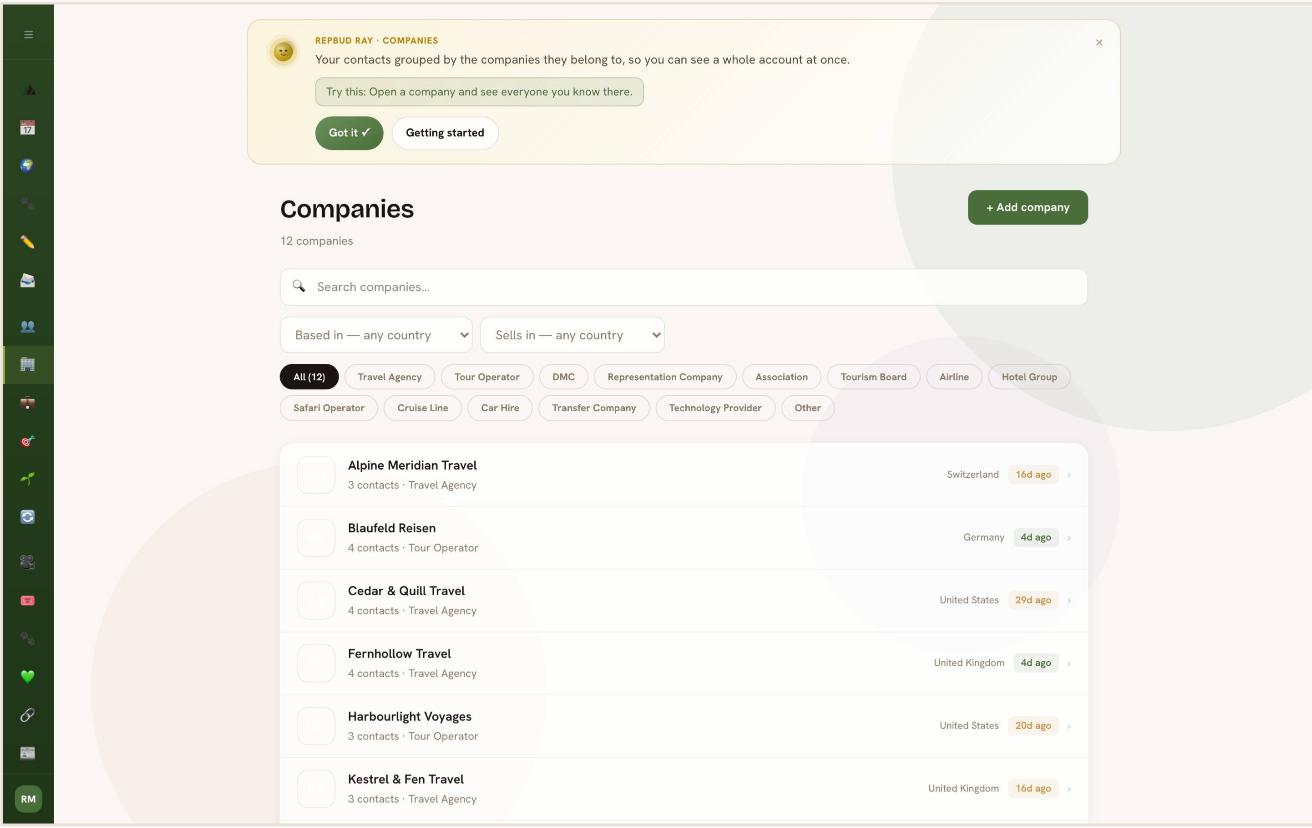
Can I use this page to prepare for a meeting?

Yes. Scrolling the timeline and the personal notes gives you the history at a glance. It's designed to assist, not replace your professional judgement, so read the context before you decide your approach.

YOUR PEOPLE

Companies

Your Companies list is the directory of every operator, DMC and property you work with — here's how to read it at a glance and pull intelligent destination intel on a whole batch at once.



The steps

01 Open Companies

Companies is your directory of operators, DMCs and properties. The header shows how many you're tracking.

02 Read a row at a glance

Each row pulls its logo from the company website, then shows the contact count, the type, the country, and a colour-coded last-log badge.

03 Search and filter by type

Search by name, country or type, and tap a type pill to narrow the list.

04 Add a company

Add one by hand with a name, country, type and website — the website is what powers the logo and the intelligence scan.

05 Open the batch scan

Batch Scan reads each company's website and surfaces their destination portfolio — countries, destinations and properties — to help your prep.

06 Choose who to scan

Tick the companies to scan, or use Select unscanned. The "scans remaining" counter shows what your scan pack covers.

07 Run it and read results

Run the scan and watch each company resolve to a count of countries and properties you can act on.

08 Open a company

Open any scanned company to see its full profile and the intel you just pulled.

Next: A company's profile & intelligence

Questions

What does the colour on the last-log badge mean?

It's a recency cue — green for logged in the last couple of weeks, gold for a month or two back, amber when it's been a while, and grey for "Never logged" so you can see who's gone quiet.

Where does the company logo come from?

It's fetched from the website on record. Add a website and the logo (and the intelligence scan) light up; with no website, you'll see the initials.

What does the batch intelligence scan actually pull?

It reads each company's website and surfaces their destination portfolio — the countries, destinations and properties they sell — so you walk into a meeting already briefed. It's there to assist your prep, not replace your own checks.

Why is the Scan button greyed out?

Scanning spends scans from a pack. If your balance is zero you'll see "Buy 250 Scan Pack" instead — top up, then your selection becomes scannable.

A company's profile & intelligence

Open any company and you get one screen for everything you know about them — your contacts, your history, and intelligent destination intel pulled from their own website.

The steps

01 **Open the company**

The header shows the logo, country, type and website. The four stats — Contacts, Logs, Countries, Properties — are your at-a-glance summary.

02 **Run the intelligence scan**

Under Destination Portfolio, scan the company's website to surface the countries, destinations and properties they sell.

03 **Explore the portfolio**

Tap a country to open its destinations, then a destination to list the properties — your prep, drilled down.

04 **See it "From the source"**

When the company's own rep has shared a profile, you'll see their bio, DMC partnerships, destinations and key team in the "From the source" panel.

05 **Your contacts & activity**

My Contacts lists the people you've linked here; Activity History merges your logs, tasks and emails for this company into one timeline.

06 **Map their DMC relationships**

Record which DMC the operator uses in each country — names already in your network appear as suggestions.

07 **Edit the company details**

Name, trading name, type, country, website and account status are all click-to-edit. The website is what powers the logo and the scan.

08 **Log or report**

From here, log an interaction or jump to your reports — the company stays in context.

Next: Contacts CRM

Questions

Why are the Countries and Properties stats showing "—"?

That company hasn't been scanned yet. Run "Scan site" under Destination Portfolio and the counts (and the portfolio drill-down) fill in from their website.

What does the intelligence scan read?

It reads the company's own website and surfaces their destination portfolio — countries, destinations and the properties they sell — to help you prepare. It's there to assist, not replace, your own judgement.

What's the difference between the portfolio and the "From the source" panel?

The portfolio is pulled from the website by the scan; "From the source" is what the company's own rep has shared — their bio, DMC partnerships and key team — once they've enriched the profile.

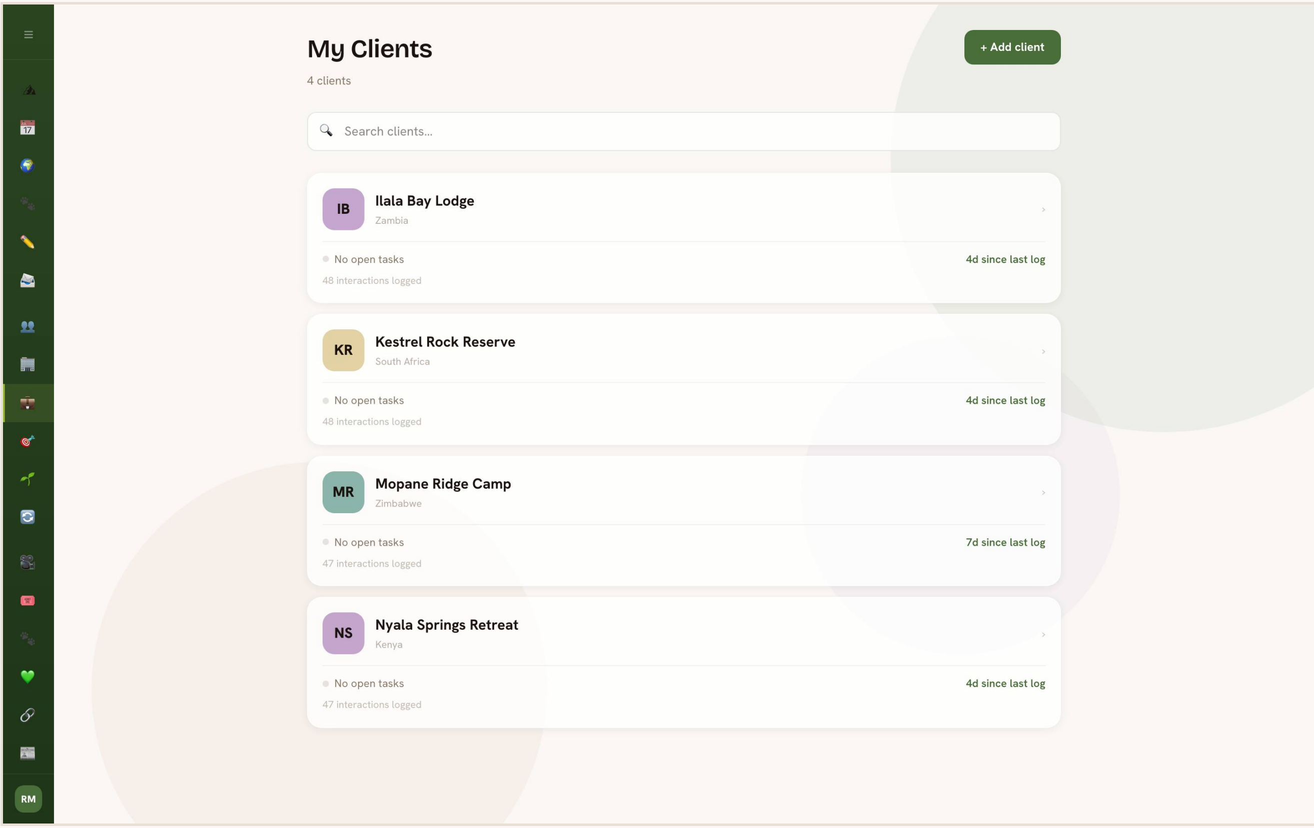
Is the intel locked in?

No — rescan any time to refresh the portfolio, and every detail field (name, type, country, website, account status) is click-to-edit.

YOUR PEOPLE

My Clients

My Clients is your portfolio overview — at a glance you can see who has open tasks, who you've spoken to recently, and who's gone quiet.



The steps

01 Open My Clients

From the sidebar, open My Clients to see the properties and destinations you represent. The count under the heading tells you how many you're carrying.

02 Read a client card

Each card carries the client's name, trading name and country — your portfolio in one scroll.

03 Check open tasks

The dot and label on each card show outstanding work — a gold dot means there are open tasks to action.

04 Spot who's gone quiet

The right-hand label colour-codes how recently you last logged: green is recent, gold is getting on, terracotta means it's been a while. The line below counts interactions logged.

05 Search the portfolio

Search filters by name or trading name as you type — handy once the list grows. Clear it with the .

06 Open a client

Tap any card to open the full profile — interaction history, tasks and reporting.

07 Adding a client

New clients are added through the app — for example when you set up a client page or bring one in from the mobile app. They then appear here in your portfolio.

Next: A client's profile

Questions

What do the colours on the last-log label mean?

Green means you logged recently, gold means it's been a few weeks, and terracotta means it's been a while — a quick prompt for who to reach back out to.

What counts as an interaction?

Any meeting, call or note you've logged against the client. The "interactions logged" line tallies them so you can see how active the relationship is.

How do I add a new client?

Clients are added through the app — for example when you create a client page or add one in the mobile app — and then appear in your portfolio here.

Why can't I edit a client from this list?

This screen is your portfolio overview. Open a client to see their full profile, manage tasks, and generate reports.

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.

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.

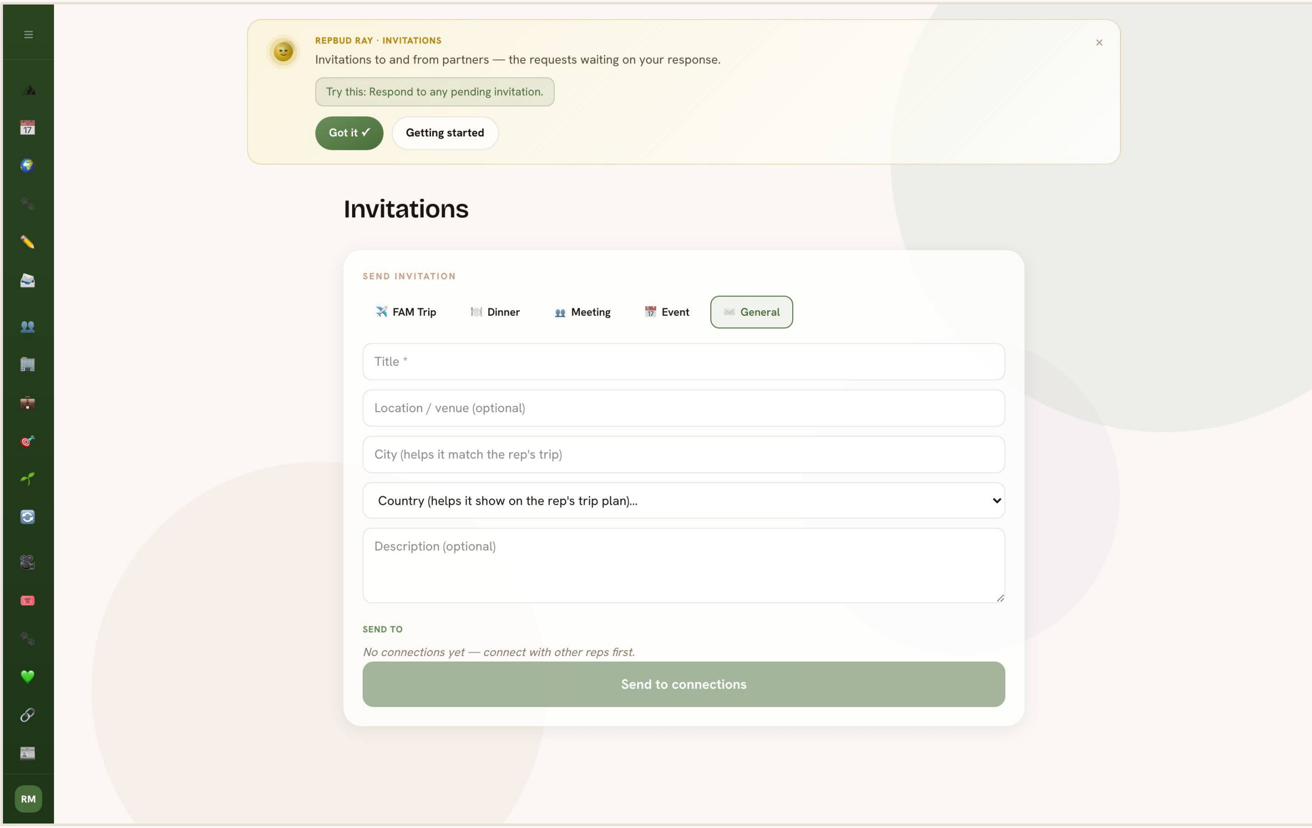
Can I share a live view with the property owner?

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

YOUR PEOPLE

Send invitations

Got a stand, a dinner or a FAM coming up? Here's how to invite the RepBuddies you're connected with and track who's coming — in one place.



The steps

01 **Open Invitations**

Invitations is where you send and track meetups with the people you're connected with.

02 **Pick the type**

Choose what it is — FAM Trip, Dinner, Meeting, Event or General. The recipient sees the matching label.

03 **Add the details**

Give it a title, and optionally a venue, city and country so it can line up with the rep's trip plan.

04 **Choose who to invite**

Under "Send to", tick the connections you want. You can pick more than one.

05 **Send it**

The button confirms how many it's going to. Hit it and you'll see "Sent!".

06 Track who accepted

Under "Sent invitations", each one shows accepted, pending and declined counts plus a chip per person.

07 Respond from your inbox

Invites sent to you arrive under "Your inbox" — accept or decline right there.

Next: Next guide

Questions

Why can't I send an invitation?

You can only invite people you're connected with. If the form says "No connections yet", connect with other reps first, then they'll appear under "Send to".

Can I invite several people at once?

Yes. Tick as many connections as you like under "Send to" — the Send button shows how many it's going to before you send.

How do I know who's coming?

The "Sent invitations" section groups each invite and shows accepted, pending and declined counts, with a colour-coded chip for every recipient.

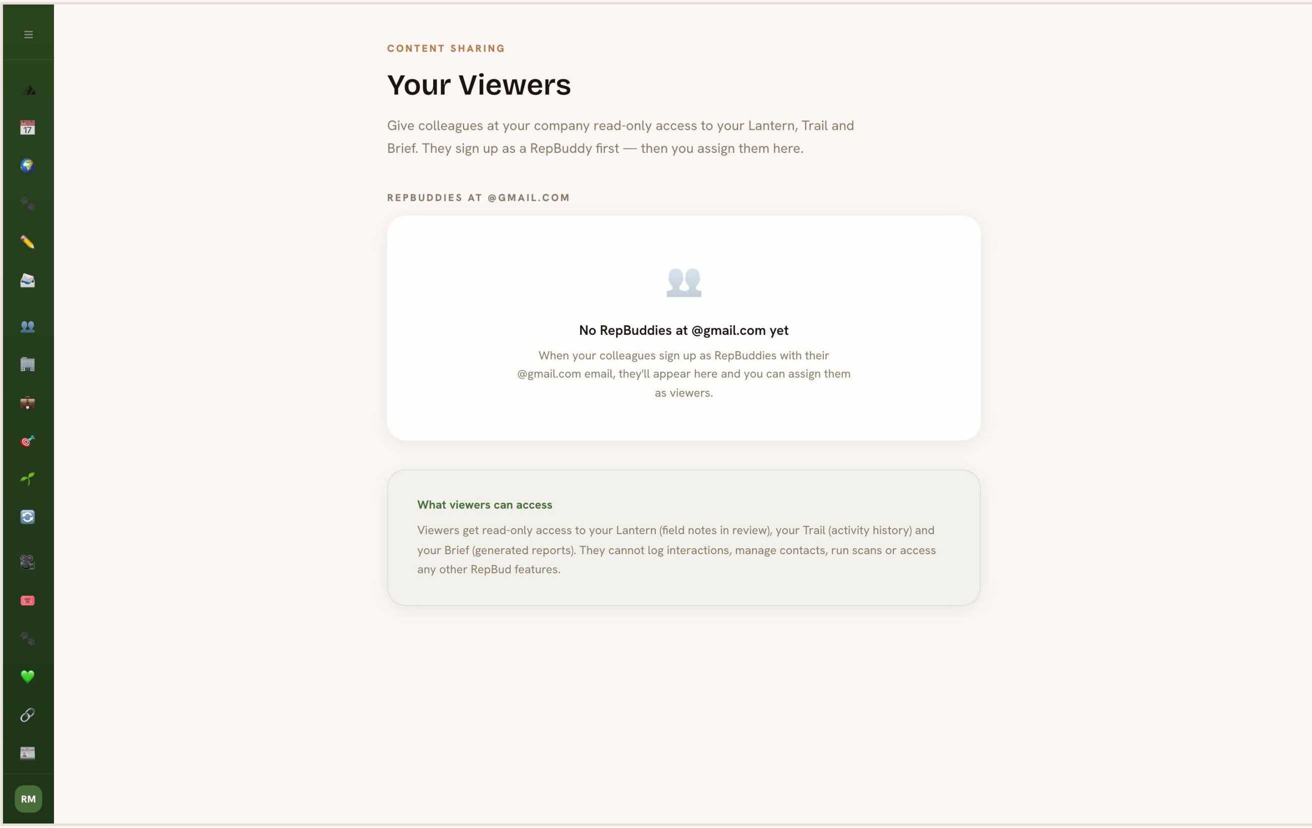
Where do invites sent to me show up?

Under "Your inbox" on the same page. Each one has Accept and Decline buttons, and shows the outcome once you've responded.

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.



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.

Find an email, and scan before a meeting

Two small things that save a search: finding an address you never saved, and seeing what changed on a company's site before you walk in.

The steps

01 **Open a contact with no address**

It happens constantly — you met them, you logged them, and the email never got written down.

02 **Find the address**

Smart Email Finder looks for a professional address rather than making you hunt back through old threads. Business Class and above.

03 **Check it, then keep it**

You see what was found before it is saved onto the record, so a wrong guess does not become your contact's address.

04 **Now the company**

Open the company you are about to meet. If a website is on record, RepBud can read it.

05 **Scan before you go in**

The pre-meeting scan reads what the company publishes, so you walk in knowing what has changed since last time rather than asking.

06 **Use it in the room**

New properties, a new destination, a changed team — the things that make a good opening question.

Next: Meeting prep briefs

Questions

Which plans include these?

Business Class and above, both of them.

Where does the email come from?

From professional sources, not from other members' address books. Nobody's contacts are shared.

Is the address guaranteed correct?

No, which is why it is shown for you to check before it is saved. RepBud is designed to assist, not replace, your professional judgement.

What does the pre-meeting scan read?

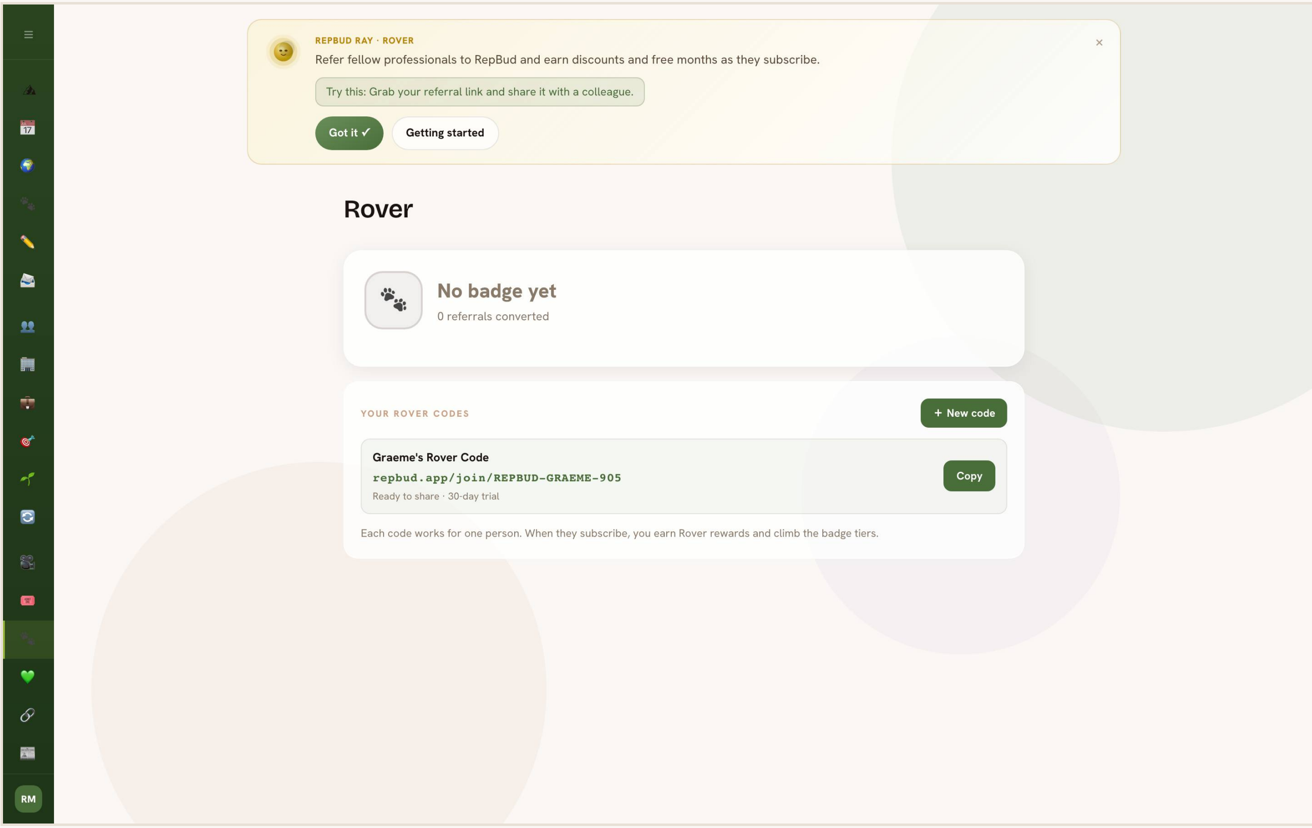
What the company publishes on its own website. If no website is on record, the scan cannot run — add one first.

How often should I scan?

Before a meeting is the point. It is a read of what is there now, compared with what you already had.

Rover referrals

Rover turns the partners you already recommend RepBud to into rewards — here's how to invite someone and track where they land.



The steps

01 Open Rover

Find Rover in the sidebar — it's where you invite people and watch your referrals progress.

02 Your badge & progress

Your badge tier climbs as referrals subscribe. The bar shows how far you are from the next tier: Scout, Tracker, Pathfinder, Ranger.

03 Create an invite code

Each Rover code is personalised and works for one person. Add an optional label for your own reference and pick the trial length to gift.

04 Share it

Your new code appears under Your Rover Codes marked "Ready to share". Copy the link and send it however you like.

05 Track referral statuses

As your invite moves along, its status updates: Invited, Signed up, In trial, Subscribed +, or Expired.

06 Earn rewards, climb tiers

When someone you invited subscribes, that referral counts as converted — you earn Rover rewards and move toward the next badge tier.

07 See the leaderboard

The leaderboard is opt-in — reps who opt in appear by first name (or "Anonymous") with their converted count and badge.

08 That's Rover

Invite, share, track, and let the rewards build. Next, find the properties looking for a rep like you.

Next: Rapport matching

Questions

How do I get my Rover invite link?

Under Your Rover Codes, click New code to create a personalised, single-use code, then Copy its repbud.app/join/... link to share. Each code works for one person.

What do the referral statuses mean?

Invited (code sent), Signed up (account created), In trial, Subscribed + (converted — this is what counts toward your tier), and Expired.

How do the badge tiers work?

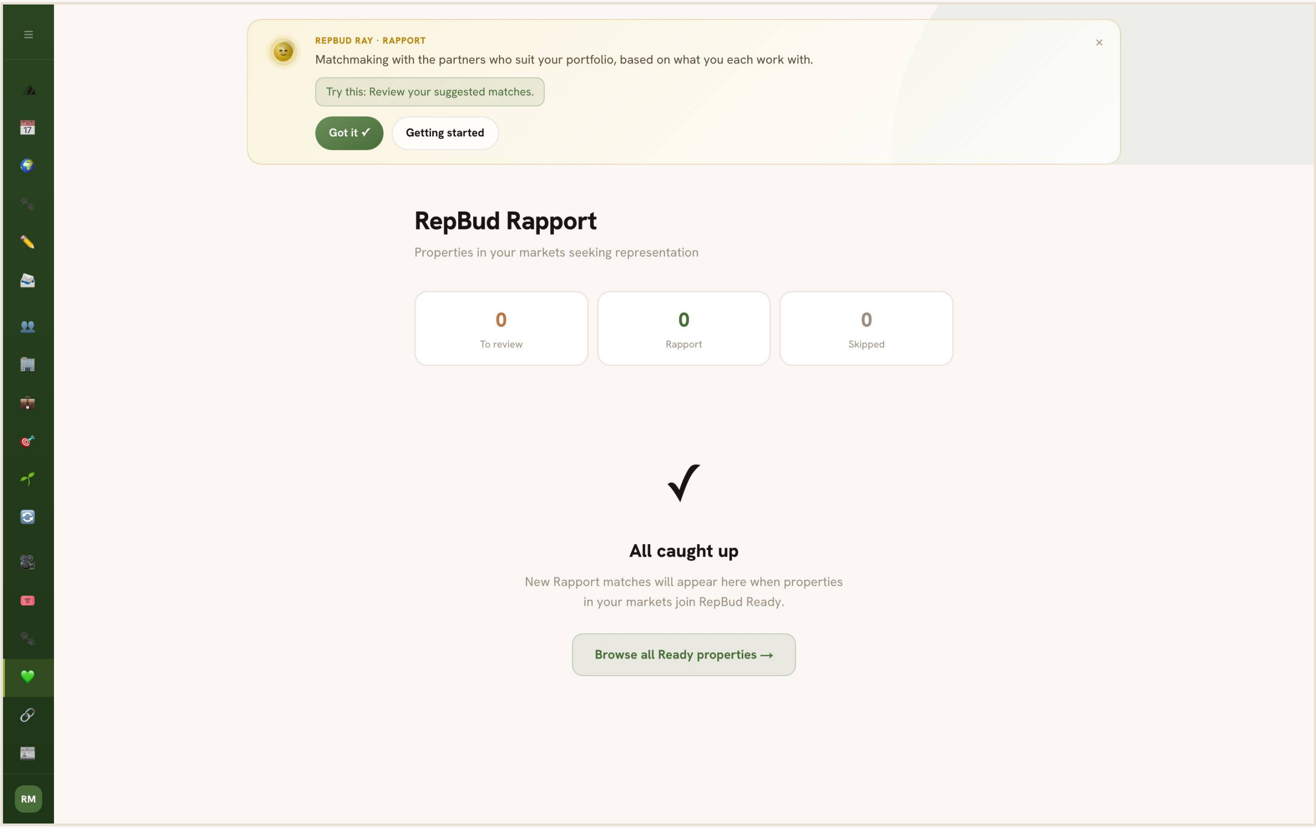
Scout, Tracker, Pathfinder and Ranger are earned as your referrals subscribe; the progress bar shows how many more conversions reach the next tier.

Is the leaderboard public?

It's opt-in. Only reps who opt in appear, shown by first name or "Anonymous" alongside their converted count — so you can leave yourself off if you prefer.

Rapport matching

Rapport surfaces the properties seeking representation in your markets — signal interest, find the mutual matches, and the introduction is yours to make.



The steps

01 Open Rapport

Rapport shows properties in your markets that are seeking representation. Open it from the sidebar.

02 Check your stats

The three tiles track your deck: To review, Rapport and Skipped, with a bar showing how many you've reviewed.

03 Read a property card

Each card shows the business, location, categories, room count, who they're seeking reps for, and what they're looking for.

04 Rapport or skip

Tap Rapport if you'd like to represent them, or -> Skip for now to set it aside. Skipped properties stay findable in the Ready directory.

05 When it's mutual

If the property has also expressed interest, a Mutual Rapport banner appears — both sides are interested.

06 Your mutual matches

Mutual matches collect in a standing Mutual Rapport * list so you can reach out in your own time.

07 An empty deck is fine

When there's nothing new to review you'll see All caught up — new matches appear as Ready properties in your markets join.

08 Make the introduction

Rapport points you to the right properties — reaching out and building the relationship is yours. RepBud is designed to assist, not replace, your professional judgement.

Next: Connect with partners

Questions

What is RepBud Rapport?

It surfaces RepBud Ready properties in your markets that are seeking representation, so you can signal interest before reaching out — a lighter way to discover who's a fit.

What's the difference between Rapport and Skip?

Rapport marks that you're interested; -> Skip for now sets a property aside (you can still find it in the Ready directory).

What happens on a mutual match?

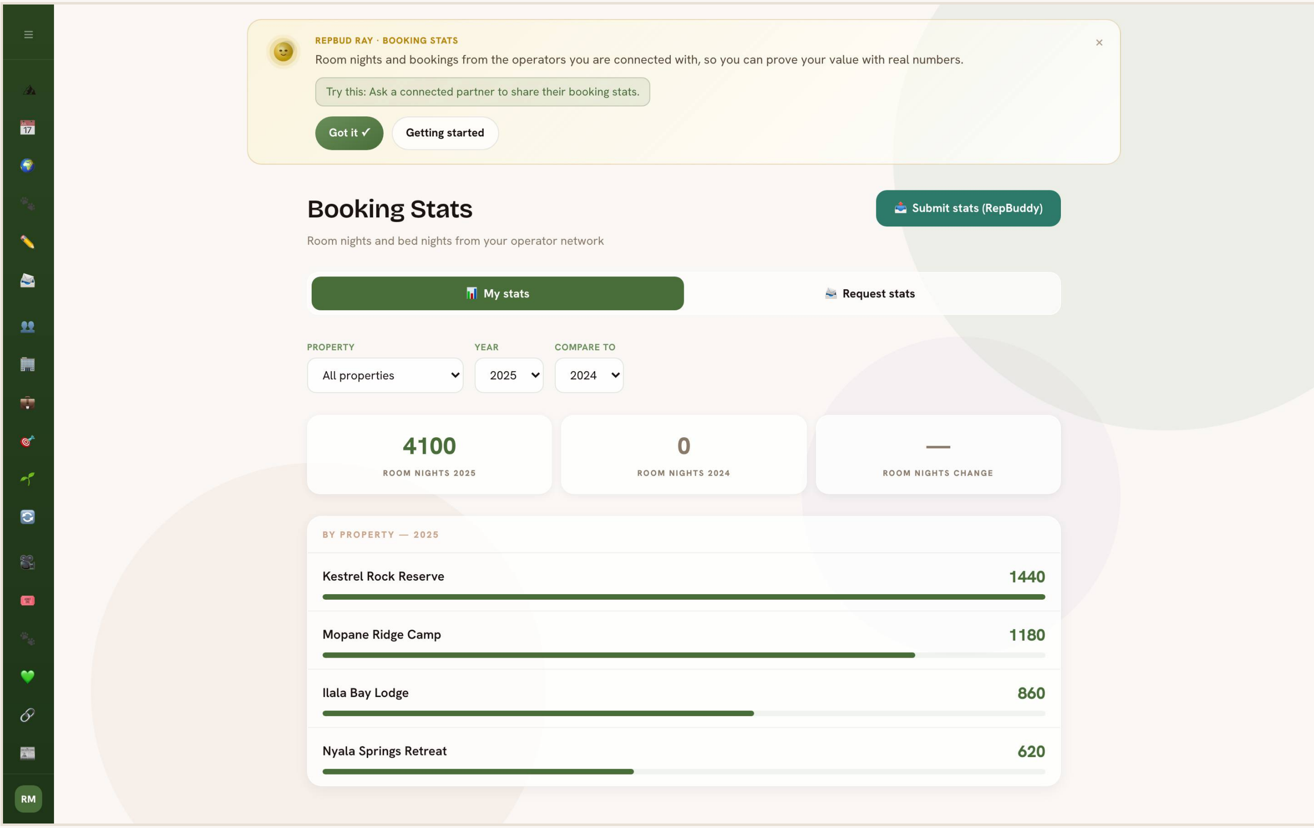
When you and a property both express interest it becomes a Mutual Rapport — it joins your standing list with the property's website so the introduction is yours to make.

Why is my deck empty?

Cards only appear when Ready properties in your markets join. Until then you'll see "All caught up" — browse the Ready directory in the meantime.

Booking stats

See how your room nights are trending year on year — and ask your operators for the numbers you're still missing, all from one screen.



The steps

01 Open Booking Stats

Booking Stats gathers the room nights and bed nights from your operator network in one place.

02 Read the year-on-year totals

The three tiles show room nights for your chosen year, the year you're comparing to, and the change between them.

03 Filter by property and year

Narrow to one property, pick the year you care about and the year to compare against.

04 See the by-property breakdown

The breakdown ranks each property by room nights, with bed nights and the change versus your comparison year.

05 **Switch to Request stats**

Missing numbers? Ask a connected operator to send theirs — they get an in-app request with your property list ready to go.

06 **Choose the period**

Request an annual, quarterly or custom-date period — the summary line confirms what you're asking for.

07 **Pick properties and send**

Choose which of your properties to ask about, add an optional note, and send.

08 **Track who still owes you**

Pending requests sit under "Awaiting response" until the operator replies.

Next: Booking incentives

Questions

Where do the booking stats come from?

From your connected operators (RepBuddies). They either upload room nights for properties you represent, or send them in response to a request you raise from the Request stats tab.

What's the difference between room nights and bed nights?

Room nights count nights a room was booked; bed nights count nights per guest. The tiles and breakdown lead on room nights and show bed nights alongside where an operator has provided them.

Can I ask about competitor properties too?

Yes — the Request stats tab has an optional Competitor properties field to ask whether an operator is willing to share those numbers. It's their call whether to provide them.

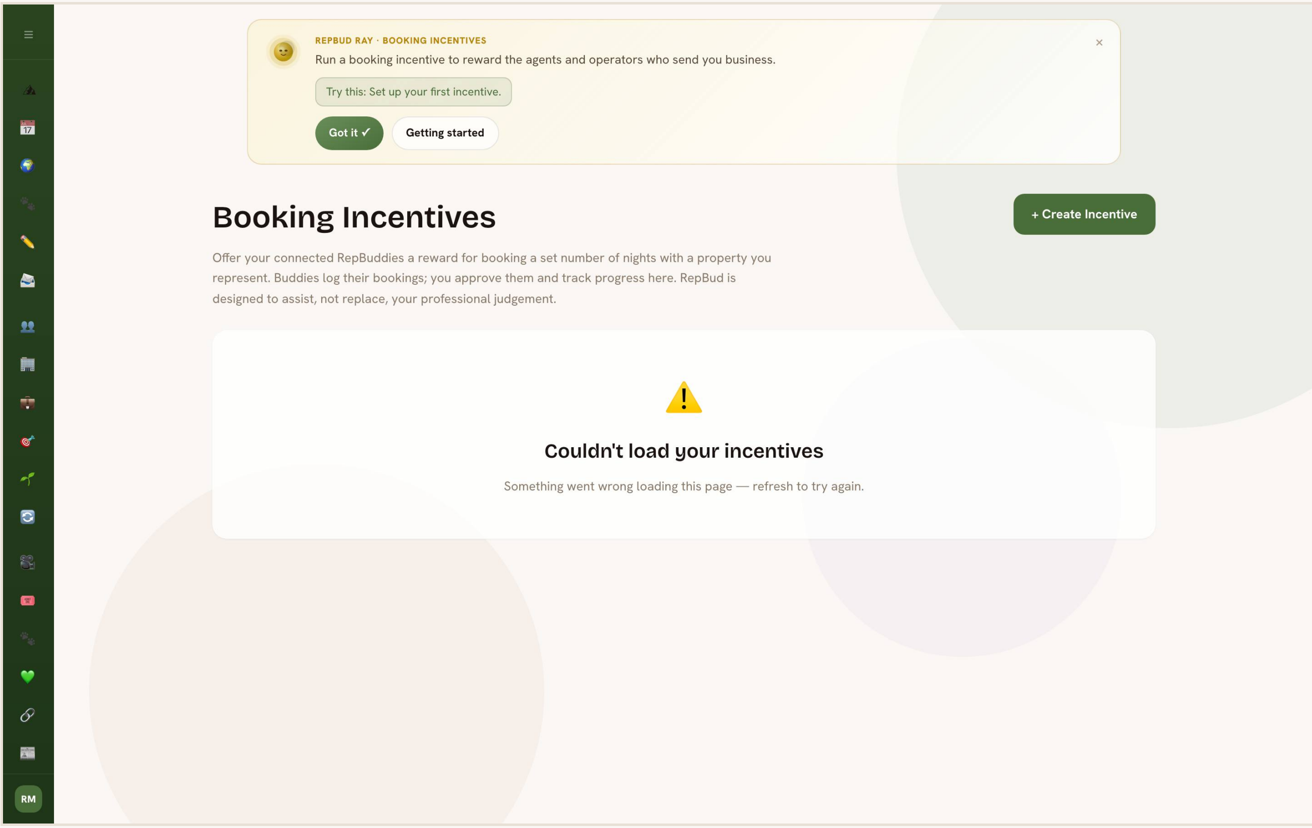
What happens after I send a request?

The operator gets a push and in-app request with your property list pre-loaded. Until they reply it shows under "Awaiting response", and the numbers land in My stats once submitted.

THE RESERVE

Booking incentives

Reward the operators who book your properties — set a nights target, approve the bookings they log, and watch each one climb toward the prize.



The steps

01 Open Booking Incentives

Each card is a campaign offering a reward for booking a target number of nights at a property you represent.

02 Scan your campaigns

A card shows the status, the "book X nights -> reward" offer, and how many buddies have opted in, are awaiting approval, or have earned it.

03 Open a campaign

Open a card to see its rules, who can see it, the bookings to approve and every buddy's progress.

04 Check the rules

The summary lists the reward, covered properties, who can see it, the cap on how many buddies can earn it, the dates and any terms.

05 **Control its status**

Publish, pause, resume or end a campaign without deleting its history.

06 **Set who can see it**

Offer it to all your connected buddies, or pick a chosen few.

07 **Approve logged bookings**

When a buddy logs a booking it lands under "To approve" — approve it, or reject with a short reason.

08 **Track each buddy's progress**

The Buddies list shows each buddy's nights toward the target; mark the reward sent once it's earned.

Next: Booking stats

Questions

Who can join a booking incentive?

Only your connected RepBuddies. You choose whether every connected buddy can see it or just a selected few, and a cap limits how many can earn the reward.

How does a buddy earn the reward?

They opt in and log their bookings for the covered property. You approve each logged booking; once their approved nights reach the target, the buddy is marked as earned and you can mark the reward as sent.

Can I pause or stop a campaign?

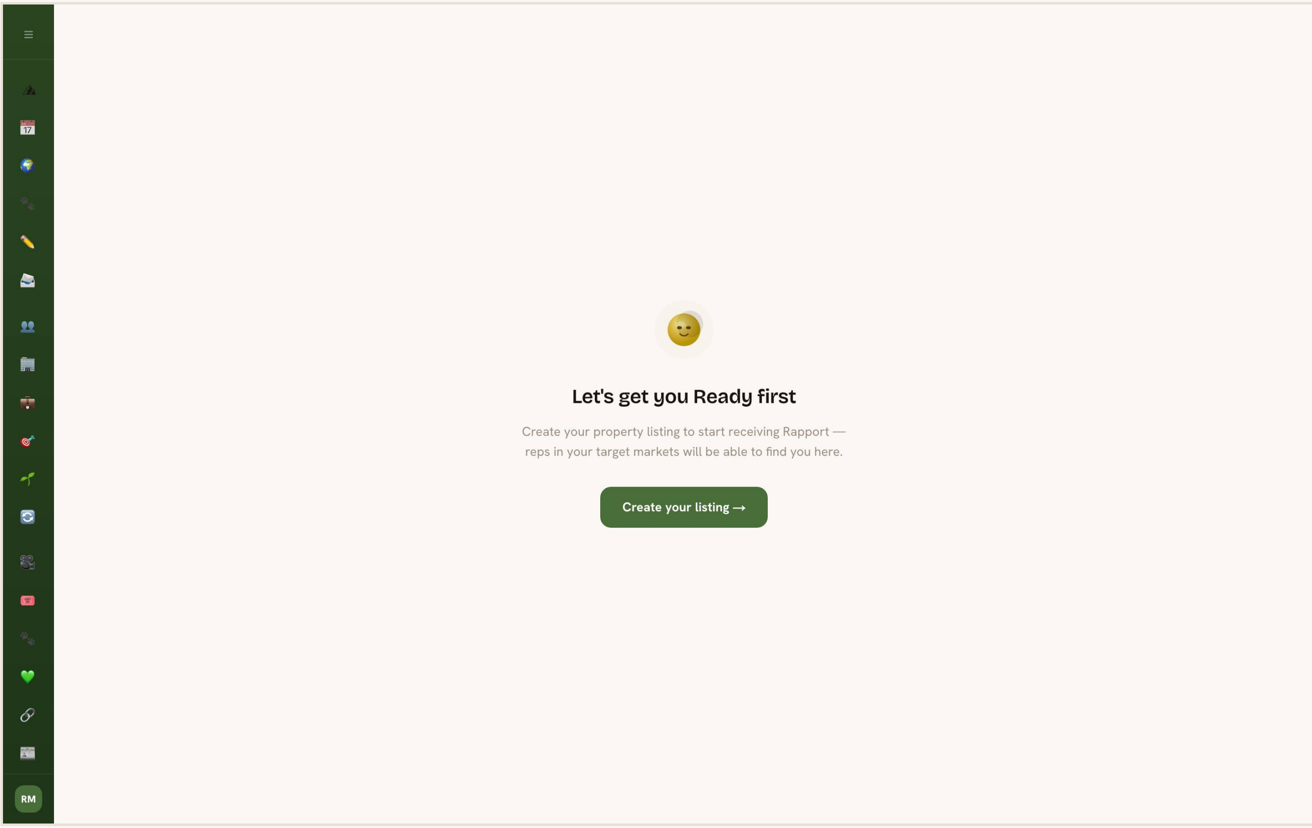
Yes. You can publish, pause, resume or end an incentive from the detail page — ending it keeps the history rather than removing it.

Why can't I create an incentive?

Creating booking incentives is a First Class and Charter plan feature. On a trial you'll see an upgrade card instead of the create button. RepBud is designed to assist, not replace, your professional judgement.

Property Rapport

When a rep wants to represent your property, their interest lands here as Rapport — and when you both say yes, their identity reveals so you can make the introduction.



The steps

01 **Open Your Rapport**

Reps who want to represent your property show up here. Open it from the sidebar to see who's interested.

02 **Read the room at a glance**

Four tiles summarise your Rapport: Total, Mutual, To review and Passed.

03 **Reps interested in you**

Pending reps appear anonymously — "A rep in your markets" with their target markets and a RepBud Real badge if verified.

04 **Express interest — or pass**

Tap the heart to express interest, or the x to pass. Identities stay hidden until interest is mutual.

05 Mutual Rapport reveals

When you both express interest, a banner confirms it and the rep's full profile unlocks.

06 See who they are

Mutual cards show the rep's name, company, job title, markets and any RepBud Real verification.

07 The introduction is yours

RepBud surfaces the match; the next move — reaching out — stays with you.

Next: Create your property listing

Questions

Why can't I see who a rep is before responding?

Pending reps stay anonymous — you see their markets and verification, not their name. Identities reveal only when interest is mutual, which keeps early interest low-pressure on both sides.

What does "Mutual Rapport *" mean?

It means the rep expressed interest in representing you and you expressed interest back. At that point their full profile — name, company, job title and markets — unlocks so you can make the introduction.

What's the "RepBud Real" badge?

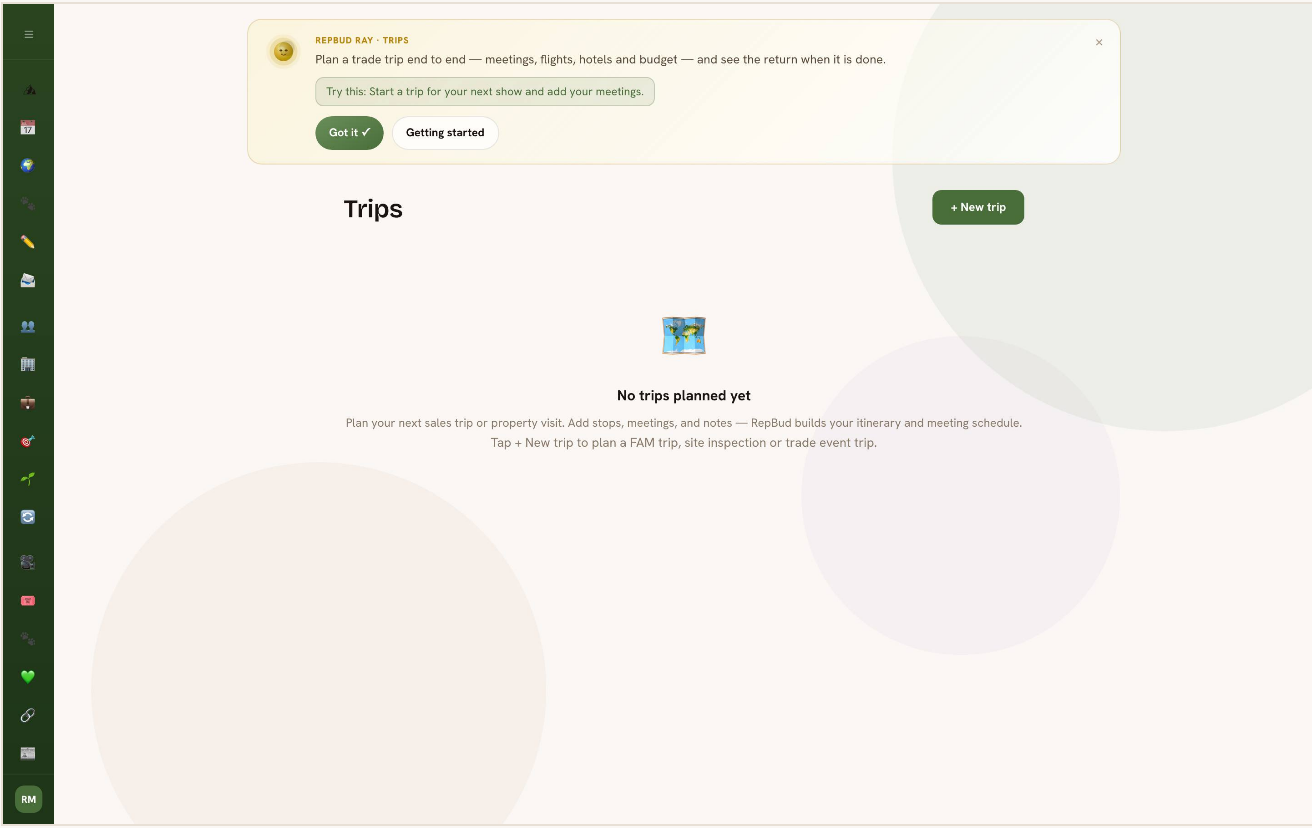
It marks a rep whose identity RepBud has verified, so you can weigh how much is confirmed when you review their interest.

I have no Rapport yet — is something wrong?

No. Most matches arrive within the first week of going Live, and a polished listing with a strong description and clear target markets reaches noticeably more reps.

Trip planner

The trip planner helps you map a FAM trip or site visit, split its budget across the clients it's for, and jump straight to booking — all in one place.



The steps

01 Open Trips

From the sidebar, open Trips to see what's coming up. Trips are grouped into Upcoming and Past so the next thing on your calendar is at the top.

02 Start a new trip

Tap + New trip to open the planner. Give it a name and, optionally, a city and country — these drive the booking links later.

03 Set the dates

Add the FROM and TO dates. These set the trip's place in your timeline and pre-fill the check-in/out on the hotel link.

04 Split the budget by client

Pick the clients this trip is for, then enter a TRIP BUDGET. RepBud even-splits it across them, and you can type over any amount to override — the line at the bottom shows what's still to allocate.

05 Save the trip

Save, and the trip drops into Upcoming as a card with its dates, budget and any notes.

06 See meetings lined up there

If you've sent RepBuddy meeting invites for that destination, they surface on the card under RepBuddy meetings here with their status.

07 Book this trip

Under Book this trip, the Hotels, Flights, Transfers, Car hire and eSIM links open partner sites — pre-filled with your destination and dates where possible.

Next: Client reports

Questions

How does the per-client budget split work?

Pick the clients on the trip and enter a total budget — RepBud divides it evenly across them. Type over any client's amount to override, and the rest re-balances so the split always adds up.

What are the "Book this trip" links?

They're quick links out to travel partners for hotels, flights, transfers, car hire and eSIMs, pre-filled with your destination and dates where possible. RepBud links you to the partner to book — it doesn't book or guarantee the travel itself. Some are affiliate links, so RepBud may earn a small commission at no extra cost to you.

Why do some meetings show up on a trip card?

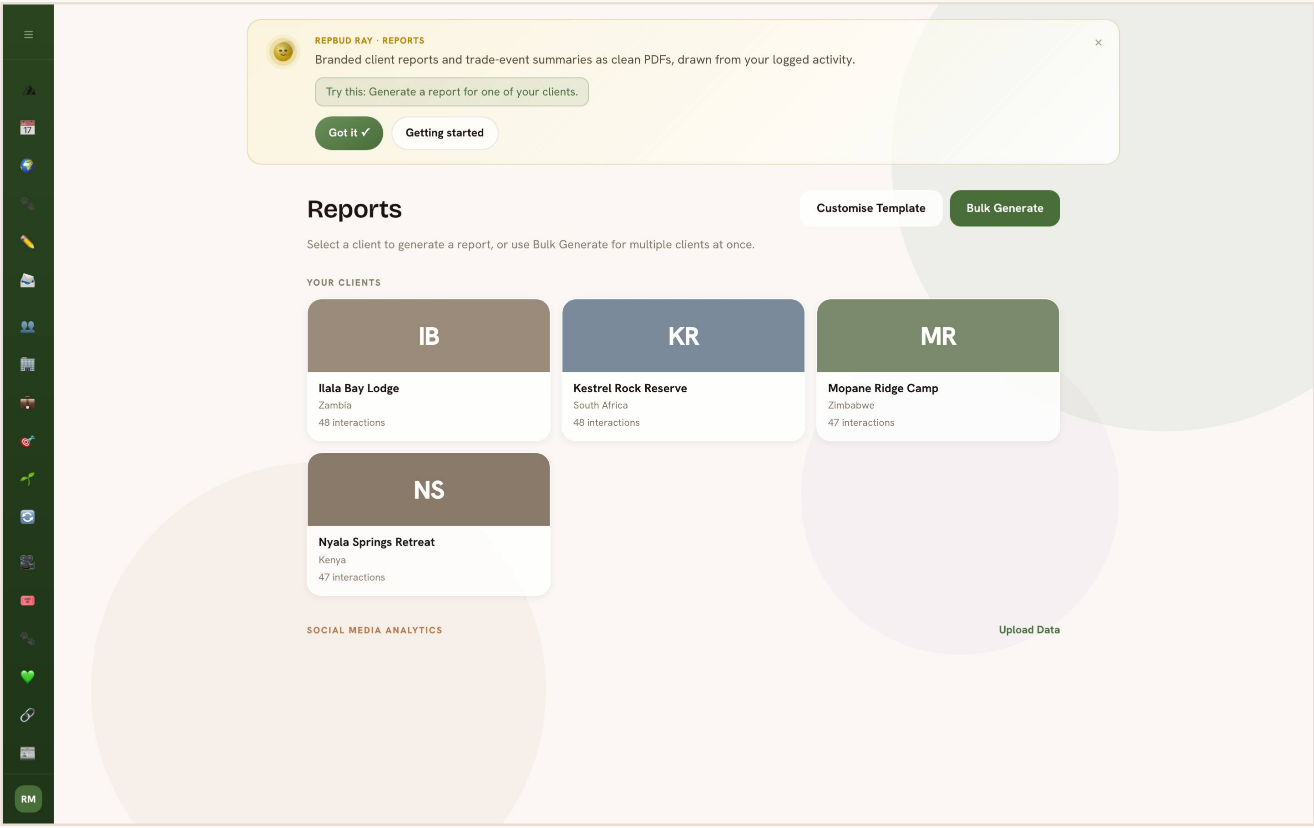
If you've sent a RepBuddy meeting invite for that destination, it's matched to the trip and shown under "RepBuddy meetings here" with its status, so your travel and your meetings sit together.

Do I have to add a budget or clients?

No — only the trip name is required. Dates, destination, clients and budget are all optional, but adding a destination and dates is what powers the pre-filled booking links.

Client reports

Client reports turn the meetings and notes you've logged into a polished, narrative PDF for each client — one at a time, or for several at once.



The steps

01 Open Reports

From the sidebar, open Reports. Your clients show as cards with their country and how many interactions you've logged — that's the raw material a report draws on.

02 Pick a client and a period

Click a client to open the generate panel, then set the From and To dates the report should cover.

03 Generate the report

Hit Generate Report. Your RepBud writes an intelligent narrative from the interactions and tasks you logged in that period — a story, not just a list.

04 Watch the queue

Reports build in the background. In Progress shows what's generating (with a Cancel if you change your mind); finished ones drop into Recent Reports.

05 **Open a finished report**

In Recent Reports, tap View to open the report on that client's profile, ready to download and share.

06 **Do several at once**

Use Bulk Generate to run a batch: set the period once, tick the clients, and queue them all together.

07 **Add your social stats**

Under Social Media Analytics, upload a CSV or Excel export from a platform, tag the clients it covers, and RepBud parses the metrics into those clients' reports.

Questions

Where does the report narrative come from?

From the interactions, meetings, tasks and notes you've logged against that client within the chosen date range. Your RepBud writes them up into a readable narrative — it's designed to assist, not replace, your professional judgement, so always review before you send.

How do I report on several clients at once?

Use Bulk Generate — pick the date range once, tick the clients you want, and RepBud queues a separate report for each.

Can I choose which sections appear?

Yes. Customise Template lets you toggle sections on or off and drag to reorder them, with an optional per-client template that overrides your default.

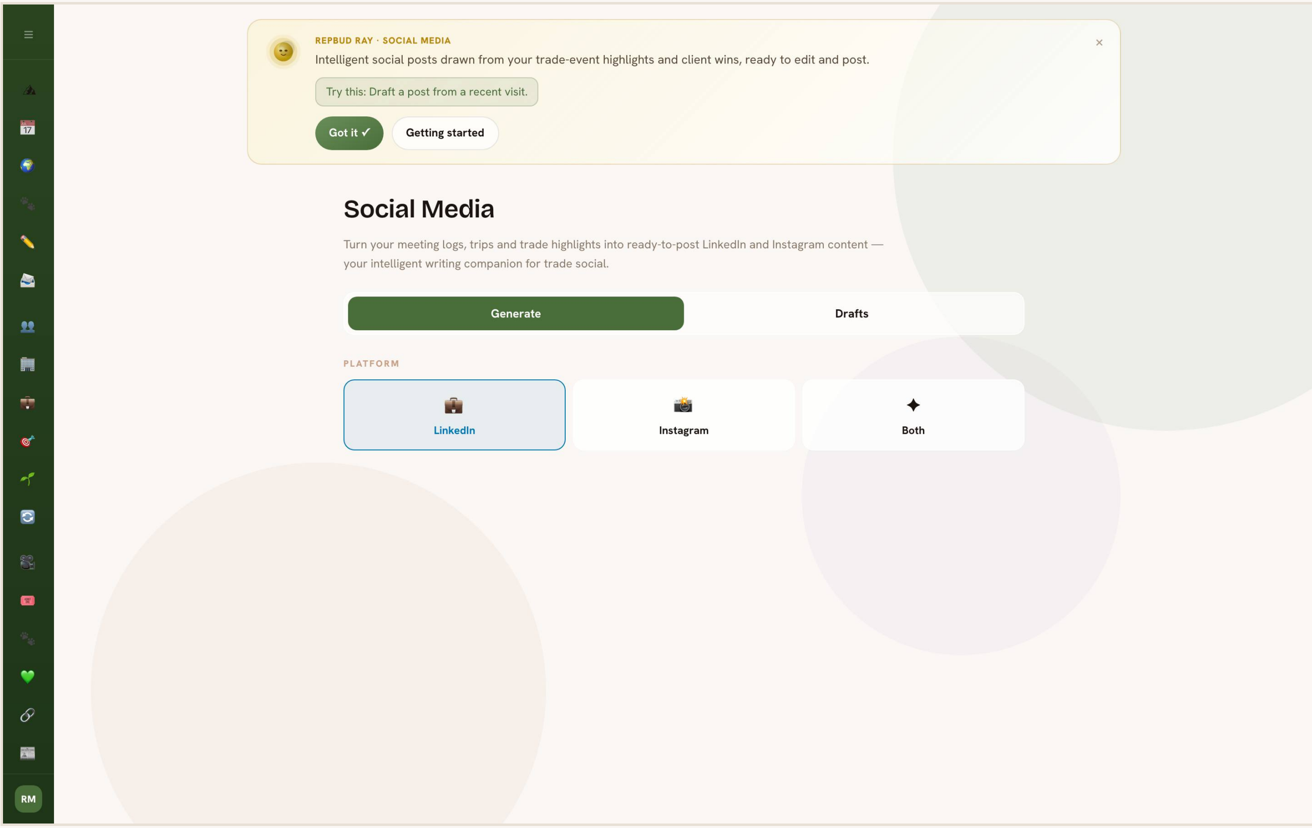
What file do I upload for social stats?

A CSV or Excel export from your social platform's analytics. Tag the clients it covers and set the period, and RepBud parses the metrics so they can appear in those clients' reports.

THE LOOKOUT

Social posts

You logged a great meeting — here's how to turn it into a LinkedIn or Instagram post you can edit and share in under a minute.



The steps

01 Open Social Media

From the sidebar, open Social Media. The Generate tab is where you build a new post.

02 Pick a platform

Choose LinkedIn, Instagram, or Both — RepBud tailors the length and style to each.

03 Set the tone

Pick how it should sound: Thoughtful, Warm, Punchy or Story.

04 Choose your source

Build from a real meeting log, a trip, or Write my own brief. Pick a client to weave in a tasteful spotlight.

05 Generate the draft

One tap drafts the post from your log. Your RepBud is your writing companion — you stay the editor.

06 Edit and tune

Refine the wording in the text box. Hashtags are grouped Reach / Niche / Brand — tap any to drop it. On Instagram you also get a suggested-image note.

07 Copy it out

Copy post + hashtags grabs the lot; Body only copies just the text. Copying marks the draft as Copied.

08 Find it later in Drafts

Every generated post is saved automatically. Reopen the Drafts tab any time to copy again.

Next: Newsletters

Questions

Do I need a logged meeting to make a post?

No. "From a meeting log" is the richest source, but you can pick Write my own brief and describe what you want to share instead.

What's the difference between LinkedIn, Instagram and Both?

Each is tailored to its platform — LinkedIn leans longer and professional, Instagram shorter with a suggested image and tags. Both drafts a version for each in one go.

Are my posts saved?

Yes — every generated post is saved to the Drafts tab, so you can come back and copy it later. There's no auto-posting; you copy and paste it yourself.

Why are the hashtags in three groups?

Reach, Niche and Brand help you balance broad discovery with relevance and your own identity — tap any tag to remove it before you copy.

Newsletters

Forward the supplier news you already get, pick the stories worth sharing, and send a polished weekly newsletter to your contacts — here's the whole loop.

The steps

01 **Open The Dispatch**

From the sidebar, open Newsletters — RepBud calls it The Dispatch. The Inbox tab holds news forwarded in.

02 **Forward your supplier news**

Forward the newsletters you already receive to your private @log address. RepBud reads each one and pulls out the stories.

03 **Curate the stories**

Open a sender to see its stories, tagged News, Offer, Event and more. Tick the ones worth sharing, untick the rest.

04 **Build the draft**

When you've chosen your stories, generate a draft newsletter in one tap. It lands in the Drafts tab.

05 **Edit in the editor**

The editor has a live email preview. Edit the title and introduction, nudge the tone (Warm / Professional / Punchy), reorder or trim stories, and add your own.

06 **Preview the email**

Preview renders the real email exactly as recipients will see it.

07 **Choose recipients**

Send Dispatch opens your contact list — search, filter by company, or add a whole company at once. Only contacts with an email show.

08 **Send and confirm**

Confirm the recipient count, then send. RepBud emails it for you — it won't send anything until you confirm.

09 **Check the Sent tab**

Every dispatch you send is logged under Sent, with the date and how many it reached.

Next: Client reports

Questions

Where do the stories come from?

From supplier newsletters you forward to your private @log address. RepBud reads each one and extracts the stories into your Inbox for you to curate.

Does RepBud send the newsletter automatically?

No. You pick the recipients and confirm the count on a final dialog before anything goes out — sending is a deliberate step you control.

Can I add my own stories or notes?

Yes. In the editor use + Add story for a custom item, and add a personal note to any story so it sounds like you, not a feed.

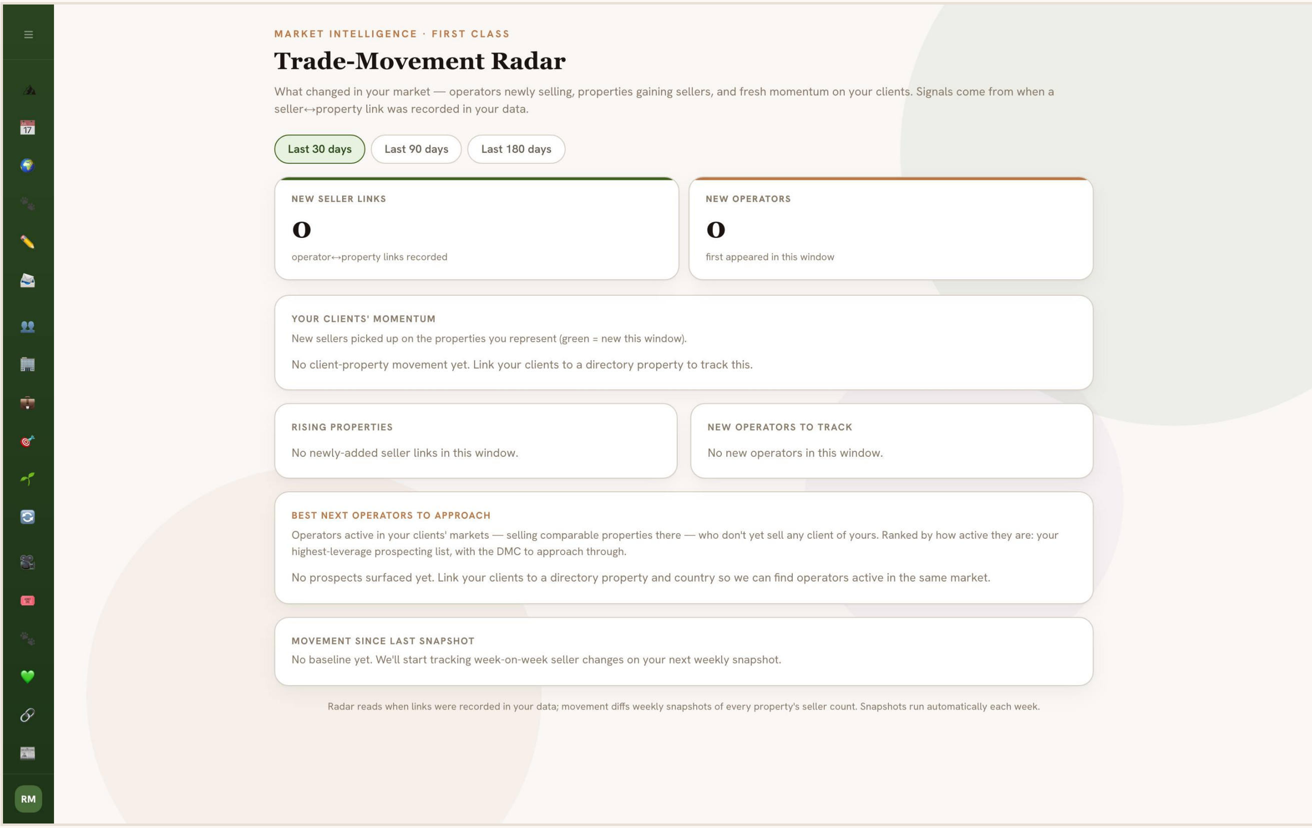
Who can I send to?

Any of your contacts that have an email address. Use the search and company filters in the recipient picker, or add a whole company in one tap.

THE LOOKOUT

Radar — who is moving in your market

Radar watches the operators in your market and tells you what changed since last time — so you walk in knowing.



The steps

01 **Open Radar**

Radar is the market intelligence view — movement in your market since the last snapshot. A First Class feature.

02 **Read the movement**

The top band is what has changed since the last snapshot, so you are looking at news rather than a standing list.

03 **See your clients' momentum**

Whether the properties you represent are being picked up or quietly dropped, across the operators being watched.

04 **Spot rising properties**

Properties gaining ground in the market — useful whether they are yours, a target, or a competitor's.

05 **Find new operators**

Operators that have appeared since the last look, with the seller links that put them there.

06 **Take the best next call**

Radar ranks who is worth approaching next, so the list turns into a morning's work rather than a report.

Next: Share of Shelf and Whitespace

Questions

Which plan includes Radar?

First Class. It sits with the other market intelligence views.

Where does Radar get its information?

From what operators publish on their own sites, read on a schedule and compared with the previous snapshot. It is designed to assist, not replace, your professional judgement.

What does "movement since last snapshot" mean?

Only what has changed since the last read — new operators, new seller links, properties gaining or losing ground — rather than the whole picture again.

Why is a band empty?

Because nothing changed in that window. An empty band is a real answer, not a missing one.

Share of Shelf — where you are absent

Share of Shelf shows which of your clients' competitors an operator already sells — and where you are missing from the shelf.

The steps

01 Open Share of Shelf

The market intelligence view that answers "who else are they selling, and am I on the list?"

02 Pick one of your properties

The screen starts with one question. Choose a property and RepBud finds its comparable set — the properties it is really competing with for a slot.

03 Read the shelf

For each property, the operators selling it. That is your share of the shelf, counted rather than guessed.

04 Find the gaps

Whitespace is the other half: operators selling the category who are not selling you. Those are the calls worth making.

05 Follow the chain

The distribution chain shows how a property reaches the market, so you can see where you are being left out rather than only that you are.

06 Bring your contacts in

Where you already know somebody at an operator, the contact is shown beside it — so a gap becomes a person to call.

07 Take it into the meeting

Walking into a review with the shelf counted is a different conversation from walking in with an opinion about it.

Next: Client reports

Questions

How does it know who my competitors are?

You pick one of your properties and RepBud finds the comparable set — the properties competing for the same slot — then shows which operators sell them.

What is "share of shelf"?

How many of the operators selling a category are selling your property, against how many are selling somebody else's. It is the retail idea applied to travel distribution.

What counts as whitespace?

An operator selling the category who is not selling you. It is where a new listing is most likely to be won.

Which plan includes it?

First Class, with the other market intelligence views.

Where does the coverage data come from?

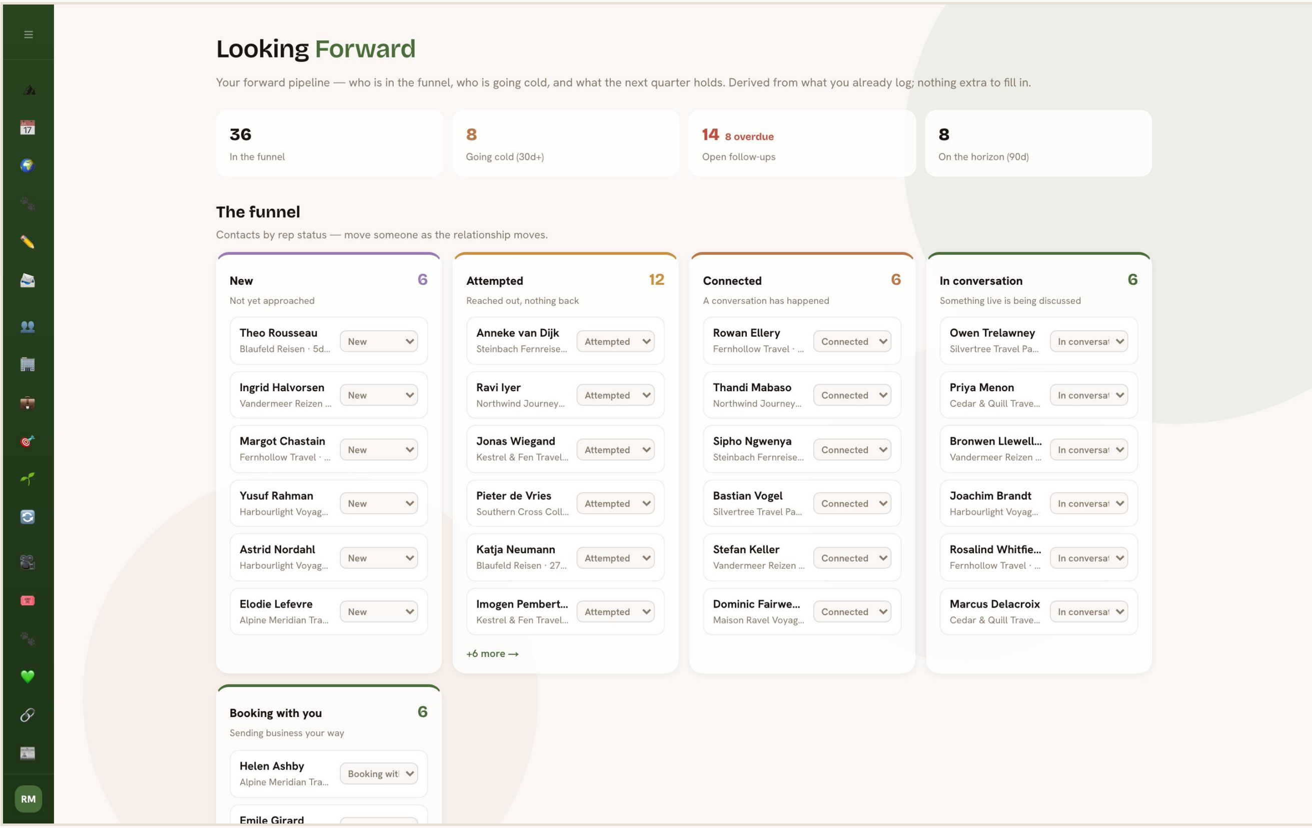
From what operators publish about what they sell. It is designed to assist, not replace, your professional judgement — check a target before you act on it.

Can I see who I already know at a target?

Yes. Your own contacts are shown against the operator, so a gap on the shelf becomes a person you can call.

Looking Forward — your pipeline ahead

Looking Forward turns what you have already logged into what to do next — no new admin, no pipeline to maintain by hand.



The steps

01 **Open Looking Forward**

The forward view: who is warm, who is cooling, and what is worth doing this week. First Class and Charter.

02 **It is derived, not entered**

Everything here comes from what you already log — the same last-touch reading The Ridge and Contacts use. There is no separate pipeline to keep up to date.

03 **See who is going cold**

Longest since you last spoke, warmest first — so the person most worth rescuing is at the top rather than the most overdue.

04 **Watch the rep status**

Contacts move through rep status as the relationship moves, and you can move somebody by hand when you know better than the data.

05 Who is booking with you

The people actually placing business, so effort follows the relationships that pay rather than the ones that shout.

06 Act on it

Each row leads somewhere — a task, a message, or a place in the next trip.

Next: Plan a sales trip

Questions

Do I have to maintain a pipeline for this to work?

No. Everything is derived from the interactions you already log, using the same last-touch reading as The Ridge and Contacts.

Which plans include it?

First Class and Charter.

What does "warmest first" mean?

Among the contacts who have gone quiet, the ones with the strongest history are listed first — those are the relationships most worth rescuing, not simply the most overdue.

Can I overrule it?

Yes. Rep status can be moved by hand whenever you know something the record does not.

Does it replace my own judgement about a market?

No. RepBud is designed to assist, not replace, your professional judgement — this is a reading of your own history, not a forecast.

Mileage — log a business trip

The drive to a lodge visit is a business cost. Mileage logs it against the company and the vehicle, and files it into your books.

The steps

01 **Open Mileage**

It lives in the app, because that is where you are when the trip happens.

02 **Say what the trip is for**

Pick the company, the vehicle and a note on the purpose, so the record is ready for the books rather than needing explaining later.

03 **Allow location, once**

RepBud asks for location to measure the trip. It is used for the distance and nothing else.

04 **Start the trip**

Tap once as you set off. On Android, keep RepBud on screen while you drive — tracking there runs only while the app is open.

05 **Stop and check it**

At the other end, stop and review before it is saved — the distance, the company and the note, with a chance to discard a trip you started by accident.

06 **It lands in your books**

The trip files into the accounting workspace at your per-mile or per-kilometre rate, so it reaches the year-end without being retyped.

Next: Revenue — your accounting workspace

Questions

Does it track me in the background?

On iPhone it can continue while the app is in the background. On Android it tracks only while RepBud is open on screen, which is why the screen says to keep it there.

Does RepBud know where I am the rest of the time?

No. Location is used for a trip you have started and stopped yourself. There is no passive tracking.

What rate is used?

Your own per-mile or per-kilometre rate, set in the accounting workspace, so the figure matches what you actually claim.

Can I throw away a trip I started by mistake?

Yes. The review step before saving has a discard option.

Where does the trip end up?

In Revenue, against the company you chose, so it is part of the books rather than a note somewhere else.

Who's Nearby and Smoke Signals

Half the value of a week on the road is knowing who else is in town. Who's Nearby tells you, at city level, and only if you have both opted in.

The steps

01 **Open Nearby**

Connect with the trade around you — the members who are in the same city and have chosen to be visible.

02 **It is opt-in and coarse**

You choose whether you appear at all. The position is city-level, deliberately: useful for a show, useless for following anybody.

03 **Choose who sees you**

Visibility can be everyone opted in, people you choose, or a saved group — so a competitor does not have to see you at the same show.

04 **See who is here**

The list is other members in your area who have opted in. Where you are already connected, you can message them from here.

05 **Ask to connect**

Somebody you have not met yet gets a connection request rather than a direct message. They accept or decline — approach is always their call.

06 **Send a Smoke Signal**

A short ping to the people around you — "we're at the bar on level 2" — broadcast or to chosen people. One an hour, so it stays a signal rather than noise.

07 **Join somebody else's**

Active Smoke Signals from others show here, and you can join one — which is how three people end up at the same table.

Next: Plan a sales trip

Questions

Can people see exactly where I am?

No. Presence is city-level and deliberately coarse — enough to know you are both at the same show, not enough to find you.

Do I appear automatically?

No. It is opt-in, and you can be visible to everyone opted in, to people you choose, or to a saved group.

Can a stranger message me?

No. Somebody you are not connected to has to send a connection request, and you accept or decline it.

What is a Smoke Signal?

A short ping to members near you — where you are, or what you are heading to. Broadcast or to chosen people, limited to one an hour.

Can I turn all of it off?

Yes. Set your visibility so you do not appear, and you are not on the list at all.

Scan a business card or a badge

Sixty cards after a show, and none of them typed up. Photograph one and the details come off it for you to check.

The steps

01 **Open the scanner**

From Contacts, tap Scan a card. It is built for the walk back to the stand, not for the office later.

02 **Get a readable shot**

Lay the card flat on a dark surface, keep all the text in frame and in focus. Good lighting makes a real difference to what comes off it.

03 **Or use one you already took**

A photo from the camera roll works, for the cards you snapped at the time and never went back to.

04 **Let it read the card**

Your RepBud reads the name, company, role and contact details off the image while you watch.

05 **Check before you save**

The review step shows what was read, beside the raw scan, so you can correct a misread line rather than discover it a month later.

06 **New contact, or the one you have**

If it matches somebody already in your book, you merge rather than create a duplicate.

07 **Keep going**

Straight into the next one, which is the only way sixty cards ever get done.

08 **Badges too**

Event badges and their QR codes scan the same way, so the people you met on the stand arrive the same evening.

Next: Your contacts

Questions

How accurate is it?

Good enough to save the typing, not good enough to skip the check — which is why there is a review step with the raw scan beside it. RepBud is designed to assist, not replace, your professional judgement.

What if the person is already in my contacts?

You are offered a merge instead of a new record, so a show does not leave you with duplicates.

Does it read cards in other languages?

Yes, across a range of languages — useful at an international show where half the cards are not in English.

Can I scan event badges?

Yes, badges and their QR codes, the same way as a card.

Can I use a photo I took earlier?

Yes. Choose it from your camera roll rather than taking a new one.

Your boarding pass and QR code

Your member pass, on your phone — hand someone a QR code instead of the last card in your pocket.

The steps

01 **Open your boarding pass**

It is your RepBud member pass — your name, your company and a code that opens your public page.

02 **Show it properly**

Pinch to zoom so a code scans first time across a stand, and double tap to reset.

03 **Keep it in your wallet**

Add it to Apple Wallet and it is on the lock screen, which is where you need it walking into a show.

04 **Or share the code itself**

The QR code screen does the same job on its own, with a link you can copy into a message.

05 **See who looked**

Views on your public page are counted, so you know whether the code is actually being used.

Next: Set up your RepBud profile

Questions

What does the QR code open?

Your public RepBud profile — the page you control from Settings, not your account.

Does the person scanning need RepBud?

No. It opens a normal web page in their browser.

Can I keep it in Apple Wallet?

Yes, so it is on the lock screen rather than three taps into an app while somebody waits.

Can I regenerate it?

Yes, there is a regenerate option if the pass needs rebuilding after a profile change.

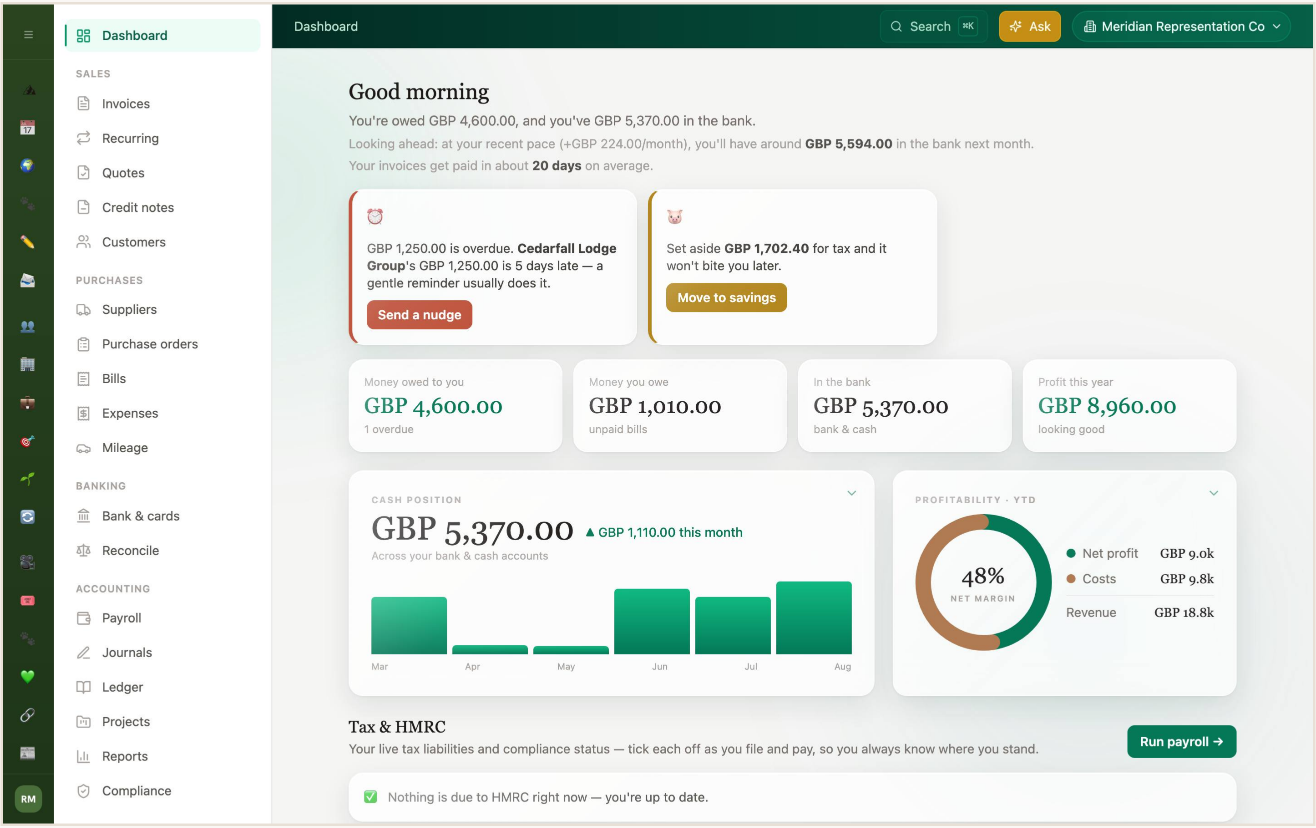
Do I find out if it gets used?

Yes. Views of your public page are counted.

THE WIDER TOOLKIT

Revenue — your accounting workspace

Your invoices, costs and year-end sit in the same login as your client work — here's how Revenue keeps the books while you sell.



The steps

01 **Open Revenue**

Revenue is a full set of books inside RepBud, on any paid plan. Same login, no second password, and it opens where you left it.

02 **Read the position**

The top of the workspace answers the question you actually have: what came in, what went out, and what is left.

03 **Raise an invoice**

Invoice a represented property in a few fields — the customer, the line, the amount. It carries your own numbering on.

04 **Send it and watch it**

Once sent, the invoice tracks itself: viewed, paid or overdue, without you keeping a separate list.

05 **Put costs in**

Bills and expenses go in the same place — show fees, flights, a stand, subscriptions — so the margin on the work is a real number.

06 **Log your mileage**

A trip logged against a company and a vehicle files itself into the books at your per-mile or per-kilometre rate.

07 **See the year taking shape**

Profit and loss, and your tax position, are worked out as you go rather than assembled in a panic in March.

08 **Hand it to your accountant**

Reports export when somebody else needs them, so the year-end conversation starts from a finished set of books.

Next: Reach — email your trade list

Questions

Do I need a separate accounting subscription?

No. Revenue is included with any paid RepBud plan and opens with the login you already use — there is no second account and no second bill.

Is this real double-entry accounting?

Yes. Revenue keeps a chart of accounts, a ledger and journals behind the screens, so the reports you hand over reconcile rather than being a spreadsheet of totals.

Can my accountant get in?

Yes. Reports export for handover, and access can be granted per company rather than by sharing your own sign-in.

What happens to invoices I have already raised elsewhere?

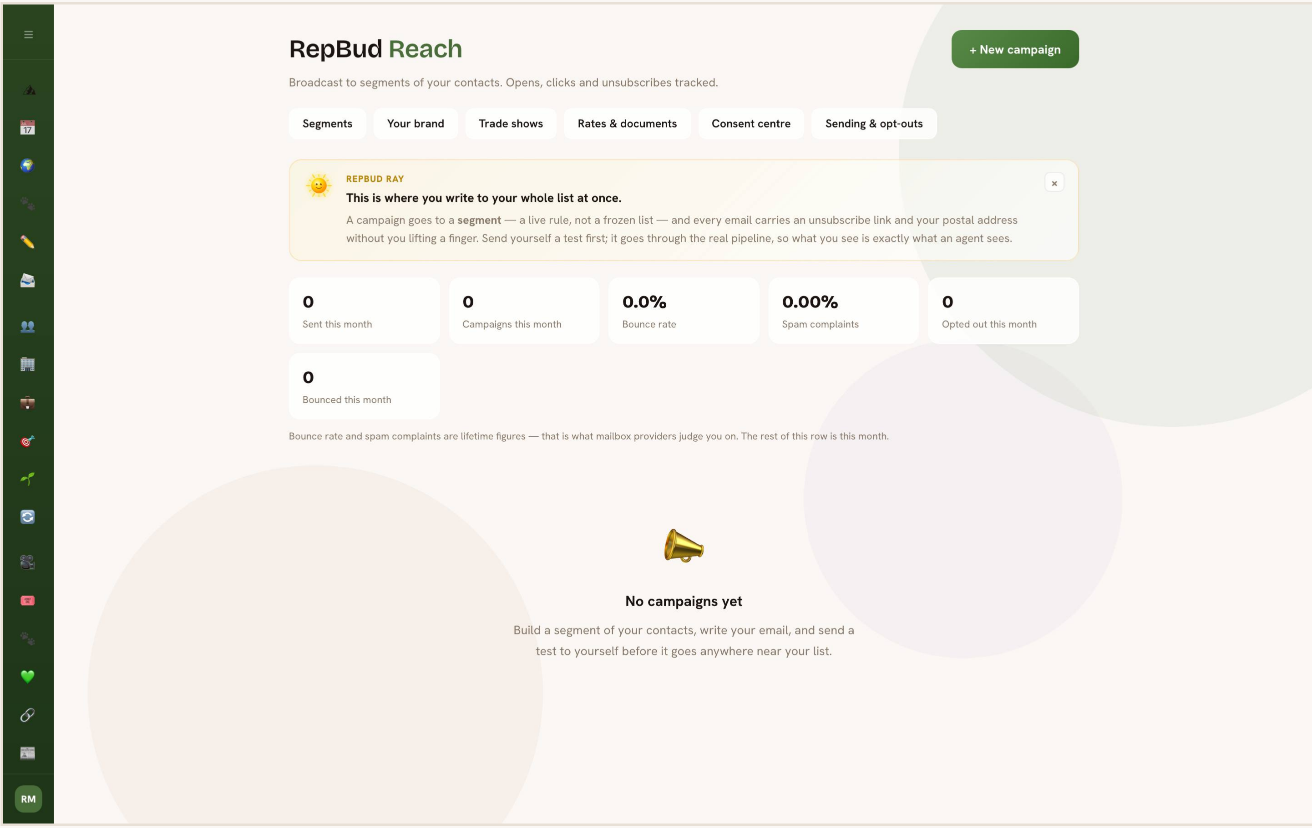
You can carry your numbering across so the sequence continues rather than restarting, and enter opening balances for the position you are bringing in.

Does it handle VAT?

Yes — VAT registration, schemes and returns are supported, and the tax panel shows what is due and when. It is designed to assist, not replace, your professional judgement or your accountant's.

Reach — email your trade list

Reach emails the trade list you already have, with the consent rules built in — here's how to send one properly.



The steps

01 Open Reach

Reach sends to your own contact book — the people you have actually met — rather than a bought list.

02 Set your brand once

Your logo, colours and signature are set once and carried by anything you send, so a campaign looks like you rather than like a template.

03 Choose who it goes to

A segment is a rule, not a list you maintain by hand — the agents in one market, or everyone you have not spoken to in ninety days.

04 Check the consent position

The consent centre applies South African POPIA rules alongside UK and German ones. Where a country is unknown it is treated as strictly as opt-in.

05 **Attach net rates, safely**

Net rates can ride with a campaign so operators see them and retail agents do not. That split is enforced in the database, not just hidden on the page.

06 **Build the campaign**

Write it, preview it, and see it as the recipient will. Nothing is sent until you say so.

07 **Run a show sequence**

Around a trade show you can send a run of messages — before, during and after — and import the badges you scanned on the stand.

08 **Read what happened**

Opens, clicks and replies come back against the contact, so a campaign feeds the record rather than sitting in a separate tool.

Next: Relay — send files too big to email

Questions

Where does Reach get its list from?

From your own contacts in RepBud. There is no bought list and no shared pool — you send to people you have met and recorded.

How does it handle consent?

The consent centre applies POPIA, UK and German rules and records the lawful basis for each contact. Where the country is unknown it is treated as strictly as opt-in rather than assumed.

Can I show net rates to operators but not to agents?

Yes. Rates attach to a campaign with a visibility rule, and the rule is enforced in the database rather than on the page, so the wrong audience cannot see them by other means.

Does a campaign update my contact records?

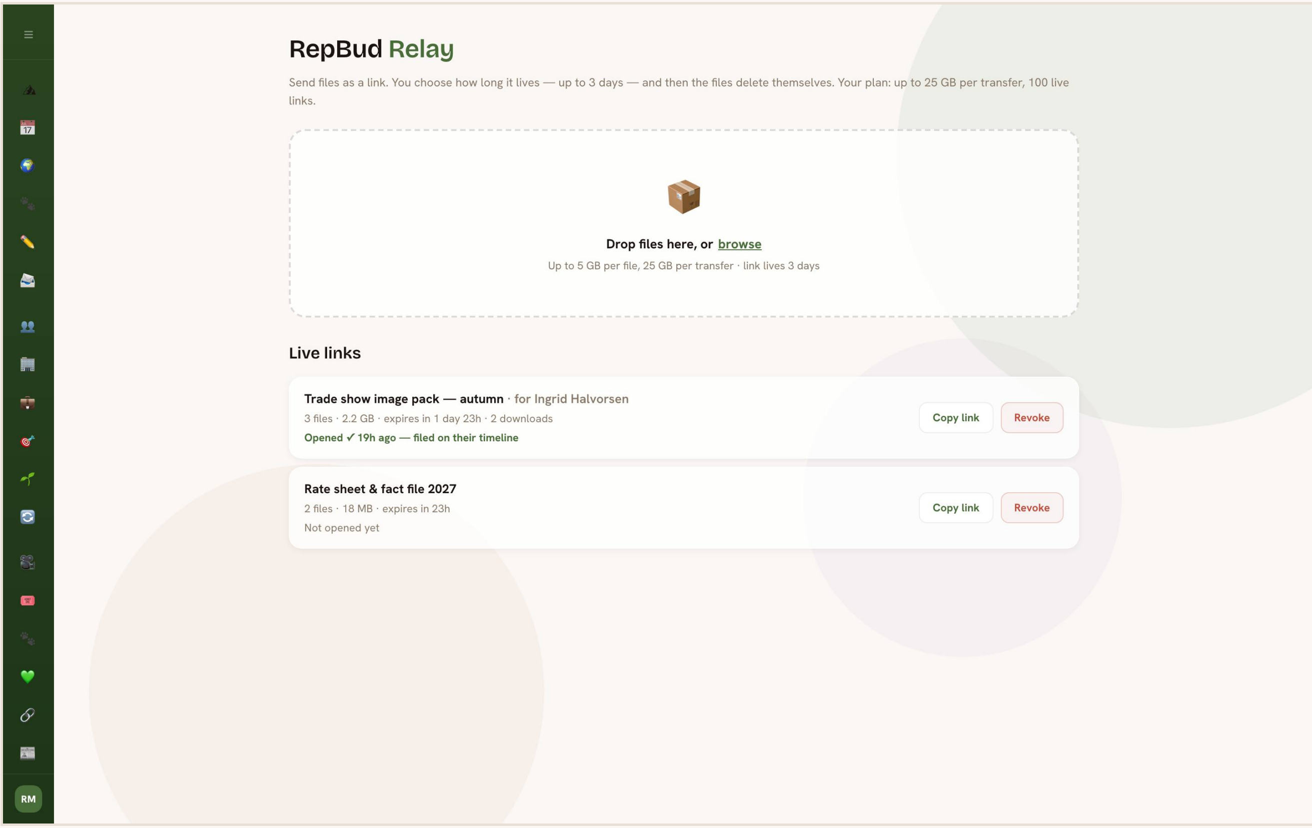
Yes. Opens, clicks and replies come back against the contact, so what happened is part of the relationship history rather than a separate report.

Can I import the badges I scanned at a show?

Yes. Badge scans import into Reach and can feed a trade-show send sequence, so the people you met on the stand hear from you while they still remember the conversation.

Relay — send files too big to email

An image library or a rate sheet is too big for email — Relay turns it into one link that expires on its own.



The steps

01 Open Relay

Relay sends big files as a link. The person receiving it needs no account and nothing to install.

02 Drop the files in

Drag them in or browse for them. Up to 5 GB per file, and several files travel as one link.

03 Name the transfer

A title tells the recipient what they are opening before they download it.

04 Say who it is for

Attach a contact and the first download is filed onto their timeline, so the send becomes part of the relationship rather than a lost email.

05 Add a note

A line of context travels with the link, so it does not arrive bare.

06 **Choose how long it lives**

You choose how long the link lives, up to three days, and then the files delete themselves — so an old rate sheet cannot circulate for a year.

07 **Lock it if you need to**

A password on top of the link, for anything that should not travel on its own.

08 **Send it and watch it**

Once shared you can see whether it has been opened and how many times — and kill the link the moment you need to.

Next: Reconnect — video meetings and webinars

Questions

How big a file can I send?

Up to 5 GB per file, and several files travel as one link. Your plan sets the size of a single transfer and how many links you can have live at once.

Does the person receiving it need a RepBud account?

No. They open the link and download — no account, no sign-in, nothing to install.

How long does a link last?

You choose when you send it, up to three days. After that the link stops working and the files delete themselves, so an old rate sheet cannot keep circulating.

Can I stop a link after I have sent it?

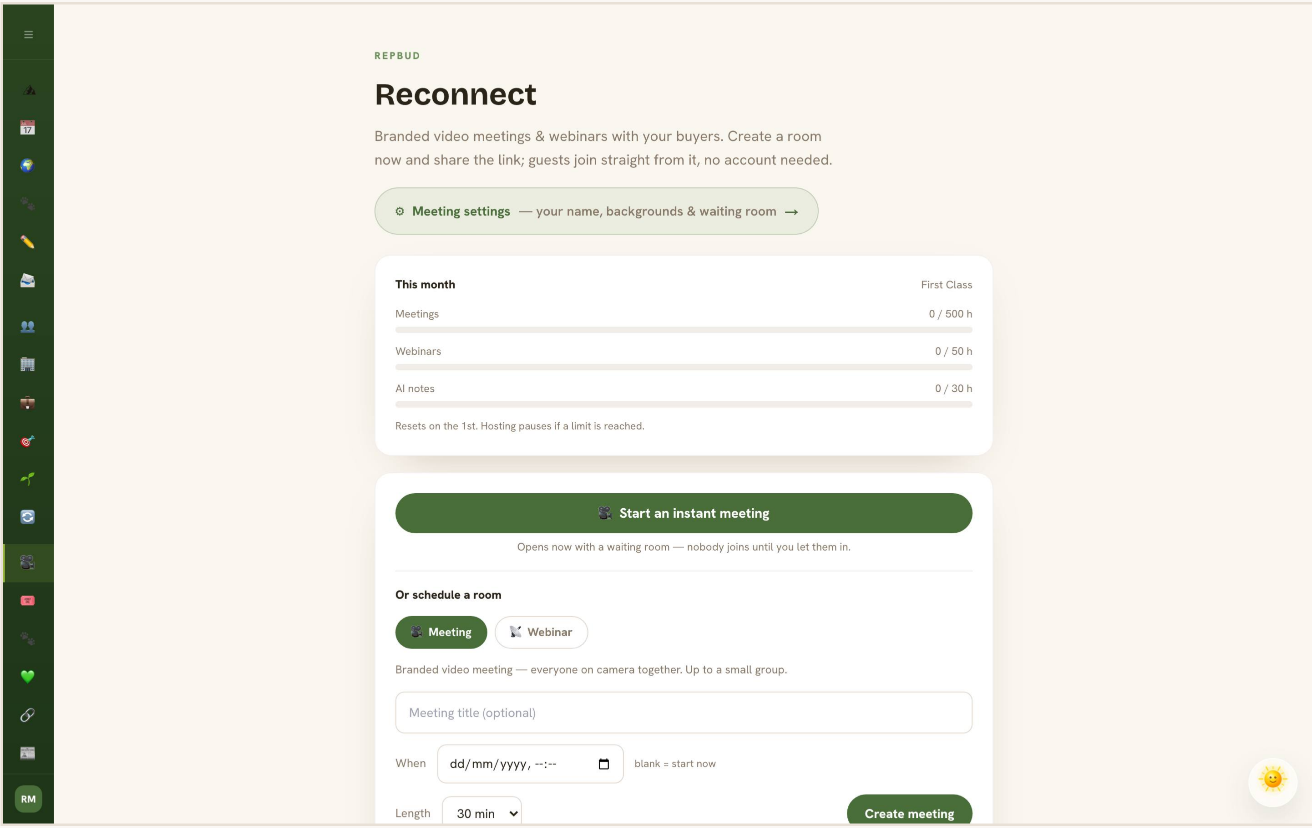
Yes. Revoking it takes effect immediately — anyone holding the link loses access.

Does a transfer show up against the contact?

Yes, when you attach one. The first download is filed onto their timeline, so what you sent and when is part of the history.

Reconnect — video meetings and webinars

Meet a buyer over video without sending them to another platform — Reconnect runs the room from inside RepBud.



The steps

01 **Open Reconnect**

Reconnect is branded video meetings and webinars on your own account. Guests join from a link with nothing to install.

02 **Start a room now**

For a conversation that has to happen this minute, open a room and send the link. It opens with a waiting room, so nobody joins until you let them in.

03 **Set the room up as you**

Your name, your background and a waiting room, so a buyer arrives somewhere that looks like your company.

04 **Or schedule one ahead**

Give it a title, a date and a length, and the room waits for the time you set. Blank means start now.

05 **Run a webinar**

For a training session or a product update, a webinar adds registration, Q&A, polls and breakouts.

06 **Share your screen**

Screen share, chat and a whiteboard are in the room, so a rate walkthrough does not need a second tool.

07 **Reach a room in another language**

Live captions and translation across ten languages, for a trade partner who would rather read along.

08 **Keep what was said**

A recap of the meeting lands in The Lantern for you to approve, so the conversation reaches the contact's record.

09 **Watch your allowance**

The panel shows the hours used against your plan this month, so a busy show season holds no surprises.

Next: Set up your Meeting Links booking page

Questions

Does my guest need an account or an app?

No. They open the link and join from their browser — no account, no download.

Which plans include Reconnect?

Business Class and above. The monthly panel shows the meeting and webinar hours your plan carries.

Can I run a webinar rather than a meeting?

Yes. Webinars add a registration page, Q&A, polls and breakout rooms, which is the shape a training session or a product update needs.

Does the meeting reach my CRM records?

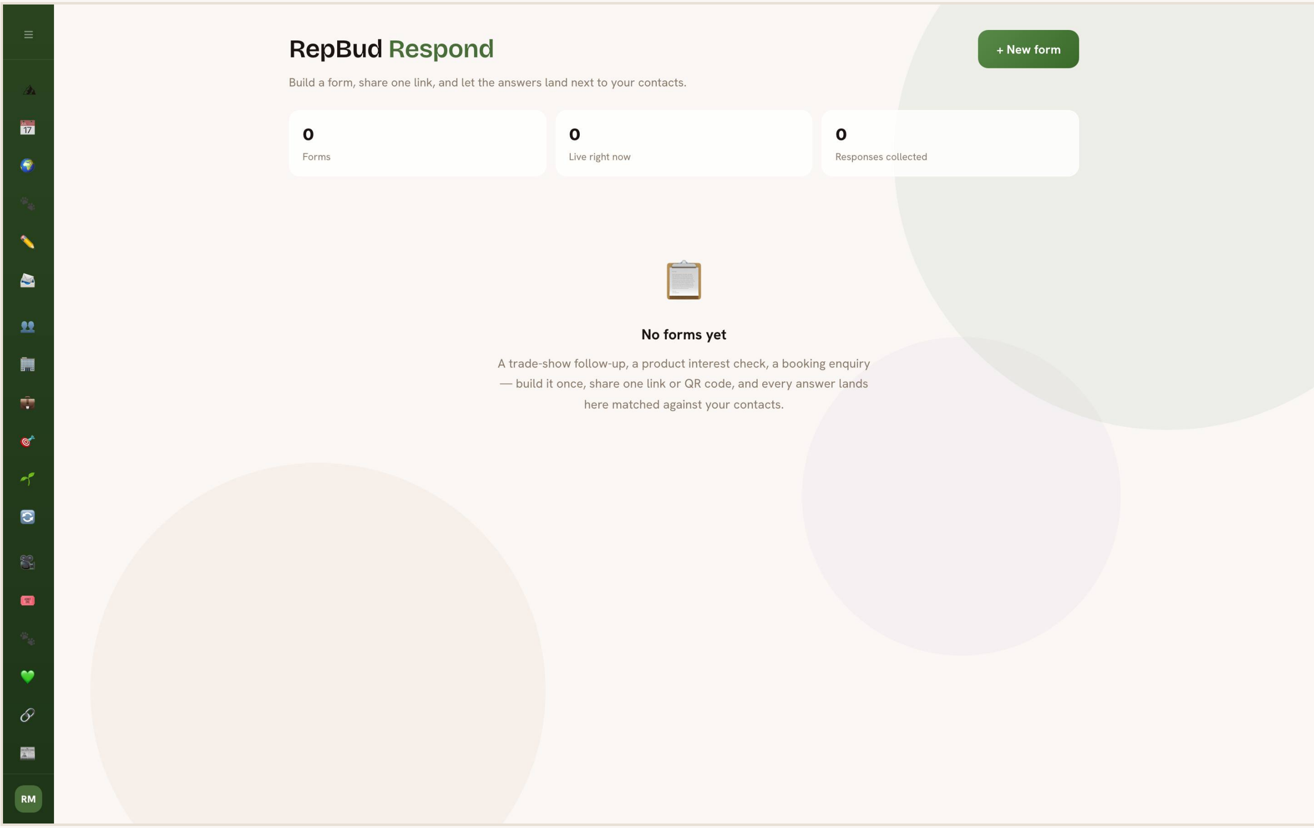
Yes. A recap is delivered into The Lantern for you to review, so what was agreed reaches the contact rather than staying in your head.

Can partners book a time themselves?

Yes, through your Meeting Links booking page, which shares your availability and sends the calendar invite and reminders. That is a separate screen — see the Meeting Links guide.

Respond — forms that fill your CRM

A training sign-up or a fam trip application that fills in your CRM as people answer — that is Respond.



The steps

01 **Open Respond**

Build a form, share one link, and let the answers land next to your contacts. Included on every plan.

02 **Start a form**

A training sign-up, a fam trip application, a rate request — start from the thing you keep asking people for.

03 **Ask what you need**

Add the questions and mark the ones you cannot do without, so an application arrives usable rather than half-filled.

04 **Publish it as a link**

Respond gives you a short public link. The person answering needs no account.

05 **Put it where people are**

The link goes in an email, a signature, a WhatsApp message or on a stand — anywhere a QR code or a URL fits.

06 Answers land on the contact

A response is matched to the person it came from, so it becomes part of their record rather than a spreadsheet you have to reconcile later.

07 Follow up from there

With the answer on the record you can raise a task or reply straight away, while the request is still warm.

Next: Reach — email your trade list

Questions

Which plans include Respond?

It is included on every plan, including the free Economy tier, with the number of active forms and monthly responses set by your plan.

Does the person answering need an account?

No. They open the link and answer — nothing to install and no sign-in.

What happens to an answer from somebody I do not have yet?

It still arrives. You can create the contact from the response rather than retyping what they already told you.

Can I use it on a trade show stand?

Yes. The link works as a QR code, so a visitor can enter a prize draw or request a rate sheet from their own phone.

Where do the responses go?

Onto the contact's record in RepBud, so the request and your reply sit with the rest of the relationship history.

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.

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.

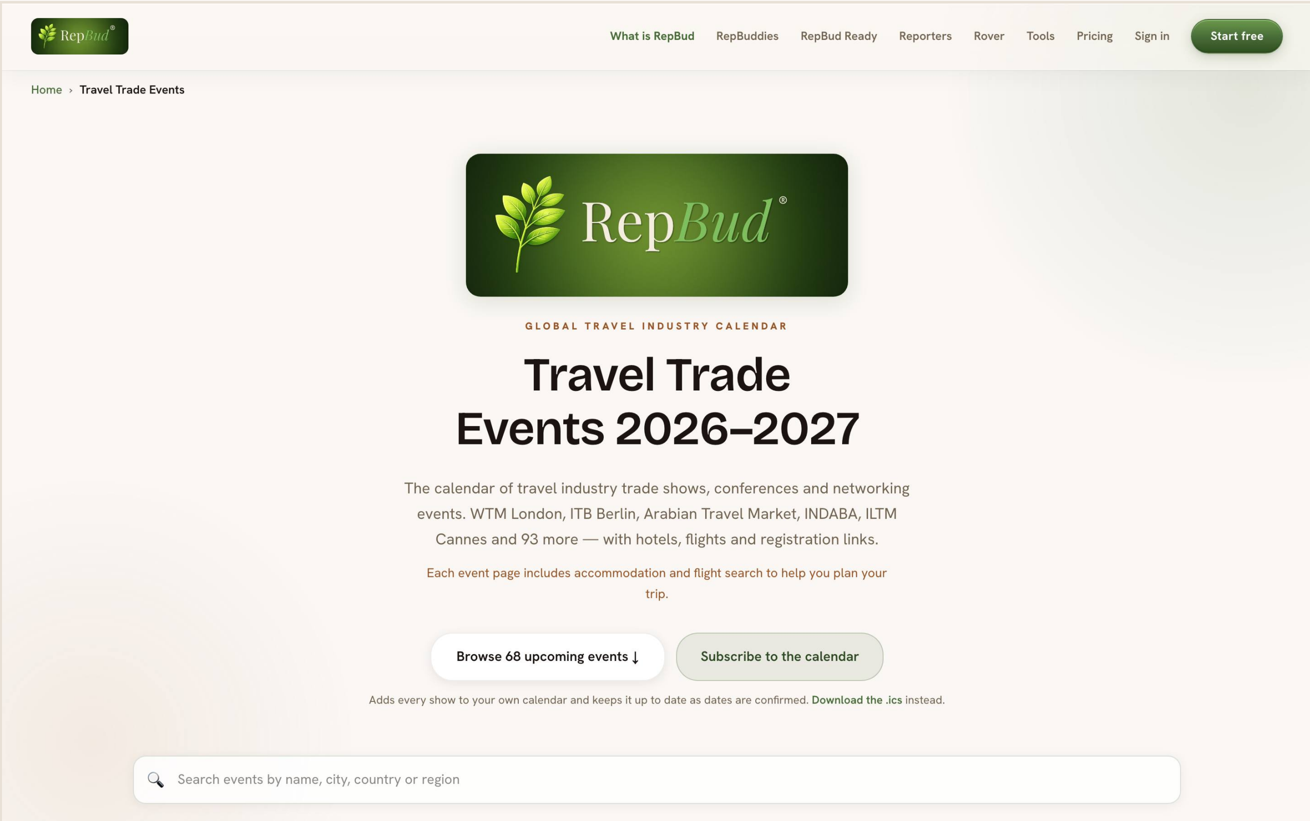
Where is Ray?

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

FREE TOOLS

The trade events calendar

The travel trade's show calendar in one place — dates, venues, who attends and what it will cost to go. Free, and no account.



The steps

01 Open the calendar

The directory of travel trade shows, conferences and networking events — 93 of them, with 50 still to come. No signup, no card.

02 Find your shows

Filter by region, month or the kind of event, so a year's calendar becomes the four shows you actually work.

03 Open one

Each show carries its dates, venue, who attends and how to register — the things you need before you can commit to it.

04 Plan the cost

The budget sheet works out what a show costs with live currency conversion, so the number you take to a client is current.

05 **Sort the logistics**

Hotels and flights sit beside the show rather than in a separate tab you forget to open.

06 **Keep it in view**

Subscribe to the calendar feed, or ask to be reminded before a show opens for registration.

Next: Plan a sales trip

Questions

Do I need a RepBud account to use the events calendar?

No. It is free and open — no account, no card, no trial.

How many events are listed?

93 trade shows and industry events, of which 50 are still to come. The list is maintained rather than dumped once.

Where do next year's dates come from?

Where an organiser publishes them, they are picked up and shown with the source, so you can check it yourself.

Can I get the calendar in my own diary?

Yes. Subscribe to the feed and the shows appear in your calendar, or ask to be reminded before one opens for registration.

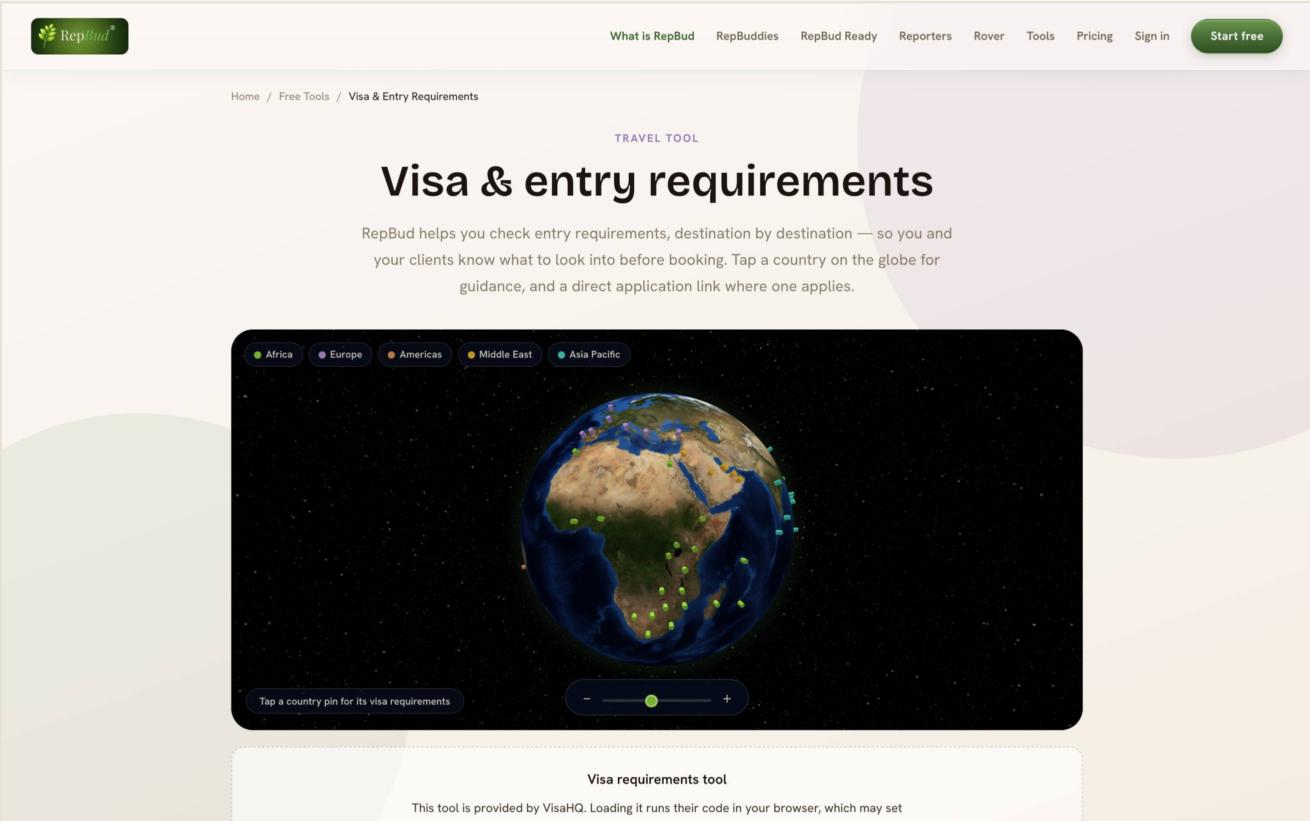
Does the budget sheet use today's exchange rate?

Yes, conversion is live, so a figure you quote is current rather than one from whenever the page was written.

FREE TOOLS

Visa and entry requirements

"Do my clients need a visa?" — asked mid-quote, and this answers it with the official source attached. Guidance only: RepBud does not handle, apply for or guarantee any visa.



The steps

01 Open the tool

Entry requirements for 50 destinations, by nationality. Free, no account.

02 Pick the destination

Tap a country on the globe, or use the directory underneath if you would rather read a list.

03 Say who is travelling

Requirements depend on the passport, so choose the nationality rather than assuming one.

04 Read the guidance

What is needed, in plain terms — so you can answer the question in the meeting rather than after it.

05 Check the source

Every destination links to the official source. Use it before anybody books; rules move.

RepBud is designed to assist, not replace, your professional judgement.

06 It is guidance, not a visa service

RepBud does not handle, apply for or guarantee any visa. It shows you what to check and where the official answer lives — the application itself is always with the issuing authority or a licensed provider.

Next: The trade events calendar

Questions

Is this a visa service?

No. It is guidance with a link to the official source for each destination — RepBud does not apply for anything on your behalf.

How many destinations are covered?

50, by nationality.

Do I need an account?

No. The tool is free and open, with no signup.

How current is it?

Entry rules change, sometimes at short notice. The official source is linked for every destination for exactly that reason — check it before anybody books.

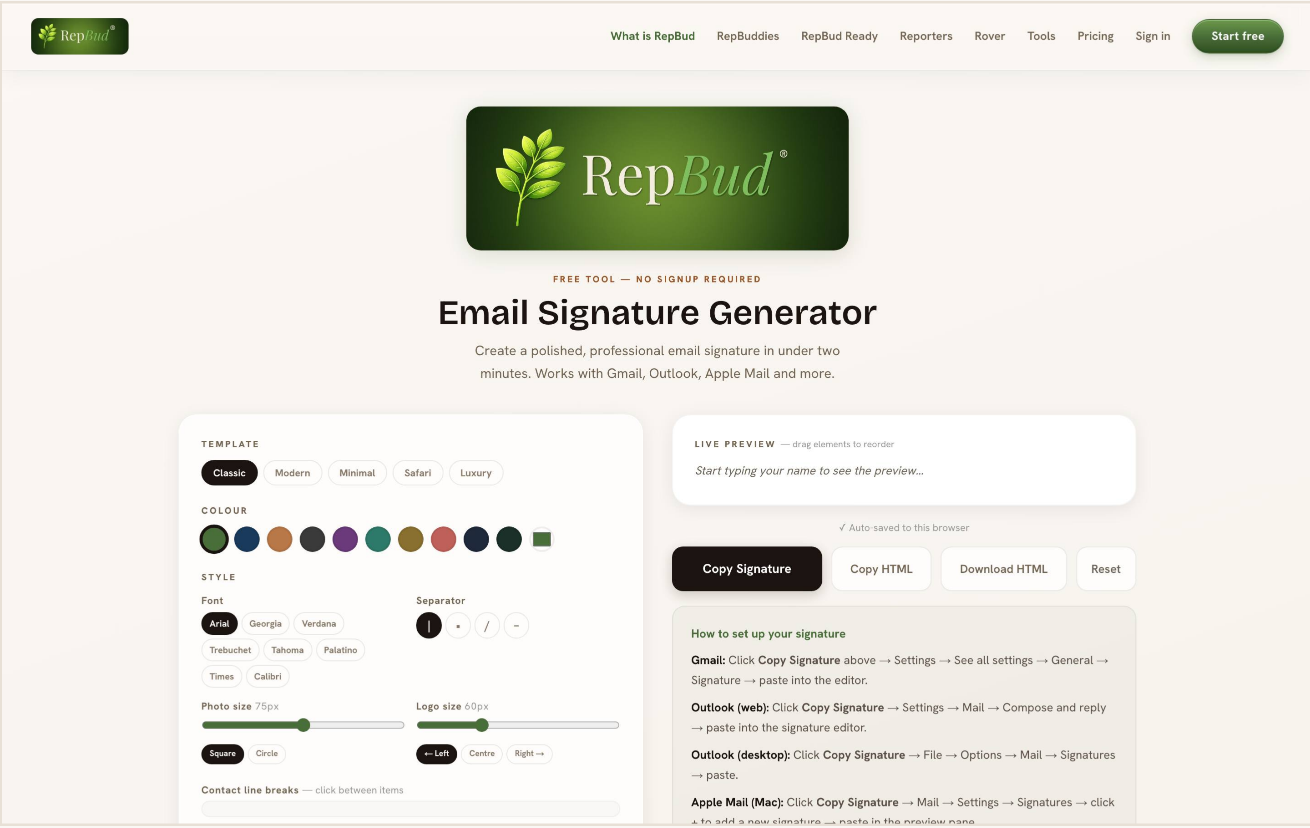
Can I use this to answer a client mid-quote?

That is what it is built for. It is designed to assist, not replace, your professional judgement, so confirm against the source before you commit a client to anything.

FREE TOOLS

The email signature generator

A signature that looks like your company rather than a default — built in about two minutes, with no signup and no watermark.



The steps

01 Open the generator

Free, no signup. It works with Gmail, Outlook, Apple Mail and the rest.

02 Pick a layout

Five to choose from — Classic, Modern, Minimal, Safari and Luxury — so it can suit a lodge brand or a corporate one.

03 Put your details in

Name, role, company and the ways you want to be reached. Fill only what you want shown.

04 Make it your colour

Use a palette or paste your own brand colour, and pick the font, so it matches what your company already sends.

05 **Add a photo and a logo**

Both size themselves, so the signature does not arrive with an image three times too big.

06 **Add the extras**

Social links, association logos and a booking link, for the things a travel signature carries that others do not.

07 **Take it to your mail**

Copy Signature is the one to use for Gmail, Outlook on the web, Outlook desktop and Apple Mail — the page lists the paste path for each. Copy HTML and Download HTML are there when you want the markup itself.

Next: Set up your Meeting Links booking page

Questions

Is it really free?

Yes. No signup, no watermark and no limit on how many you make.

Which mail clients does it work with?

Gmail, Outlook on the web, Outlook desktop and Apple Mail. Use Copy Signature and follow the paste path shown for yours; Copy HTML and Download HTML are there if you want the markup.

Can I use my own brand colour?

Yes — pick from the palettes or paste your own colour, and choose the font alongside it.

Can I add association logos?

Yes, along with social links and a booking link, which is the set a travel trade signature usually needs.

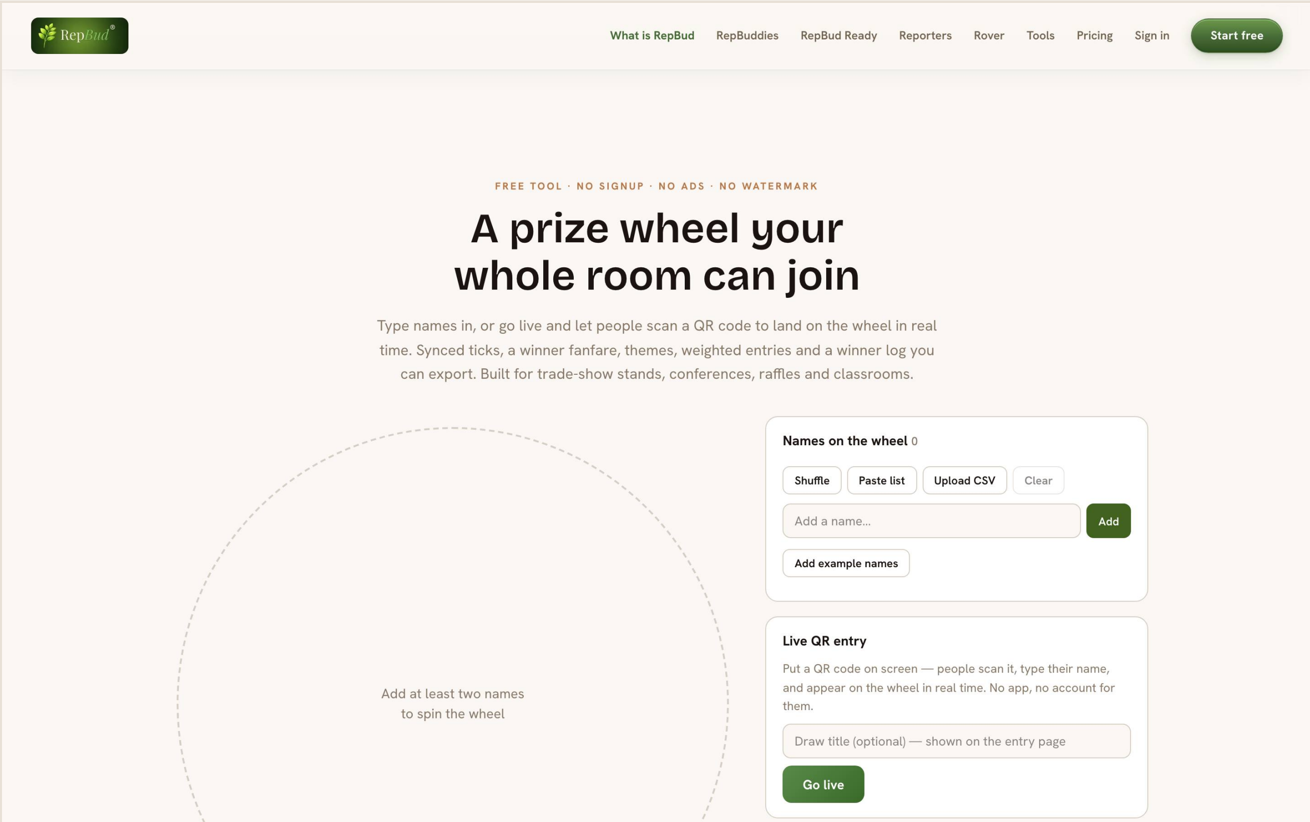
Do I need a RepBud account?

No. The generator is open to anyone, member or not.

FREE TOOLS

The trade show prize wheel

A prize draw your whole stand can join from their own phones — and a winner log you can actually keep.



The steps

01 Open the wheel

Free, no signup, no ads and no watermark. Built for a trade show stand.

02 Add the entries

Type names straight in when you are running it from a list you already have.

03 Or let the room join

Go live and show the QR code. People scan it and land on the wheel in real time, with the ticks synced on your screen.

04 Weight it if you need to

Entries can carry different weights, for a draw where not everybody should have the same odds.

05 Dress it for the stand

Themes so the wheel matches your branding, and a fanfare when it lands.

06 Keep the winners

The winner log exports, so the names you collected leave the show with you.

Next: Respond — forms that fill your CRM

Questions

Do entrants need an app?

No. They scan the QR code and land on the wheel in their browser.

Is it free?

Yes — no signup, no ads, no watermark.

Can I run it without the QR code?

Yes. Type the names in and spin; live entry is optional.

Can some entries have better odds?

Yes, entries can be weighted.

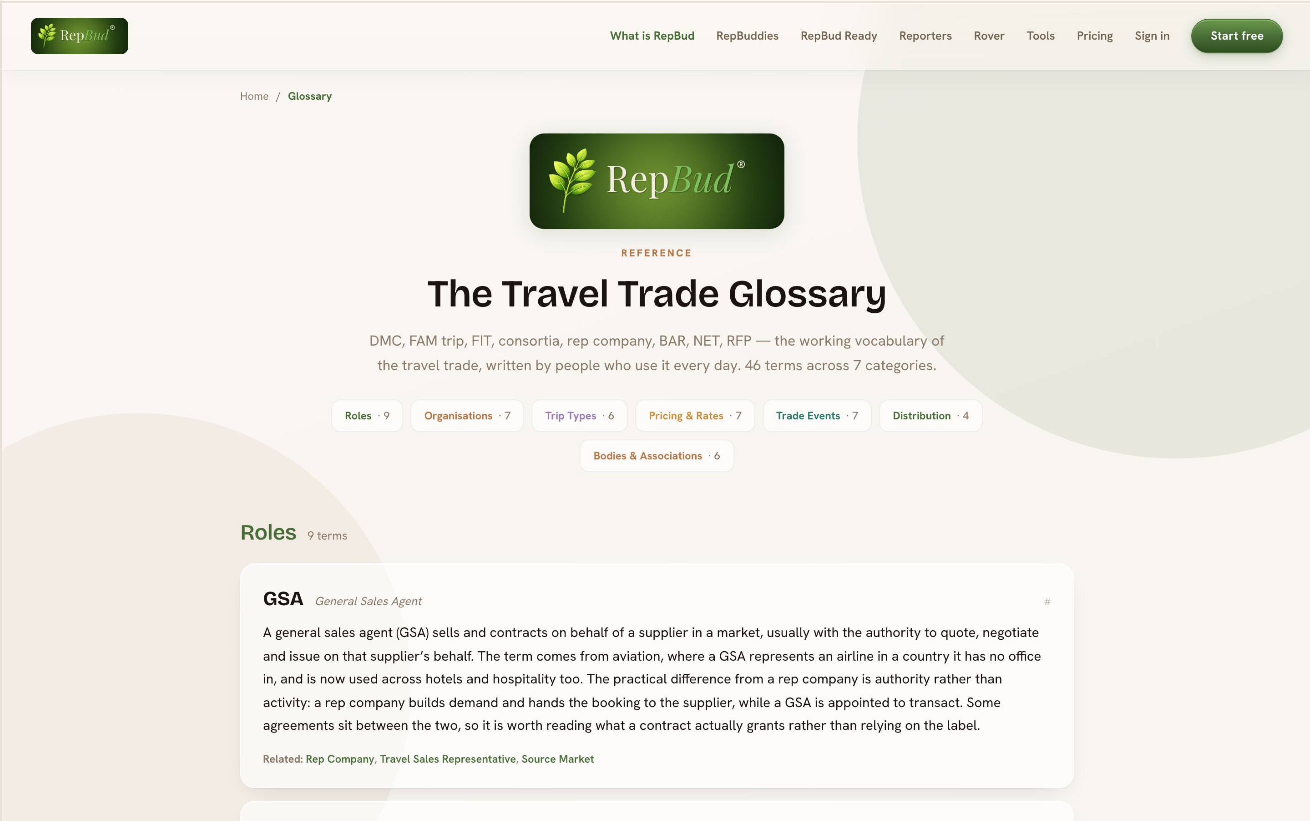
What happens to the names afterwards?

The winner log exports so you keep them. If you want the entry details on your contact records instead, pair it with a Respond form.

FREE TOOLS

The travel trade glossary

DMC, FIT, BAR, NET, consortia — the working vocabulary of the travel trade, written by people who use it.



The steps

01 Open the glossary

46 terms across 7 categories — the words the trade uses without explaining them. Free, no account.

02 Browse by category

Roles, organisations, trip types and the rest, so you can read a section rather than hunt an alphabet.

03 Look one up

Each entry says what the term means and how it is actually used, which is usually the part that is missing.

04 Use it in the room

Written for somebody new to the trade, or new to this side of it, so it holds up when you send it to a colleague.

Next: What RepBud is

Questions

How many terms are there?

46 across 7 categories — roles, organisations, trip types and the rest.

Do I need an account?

No. The glossary is free and open.

Who is it written for?

Anybody new to the travel trade, or new to the selling side of it — and for sending to a colleague who is.

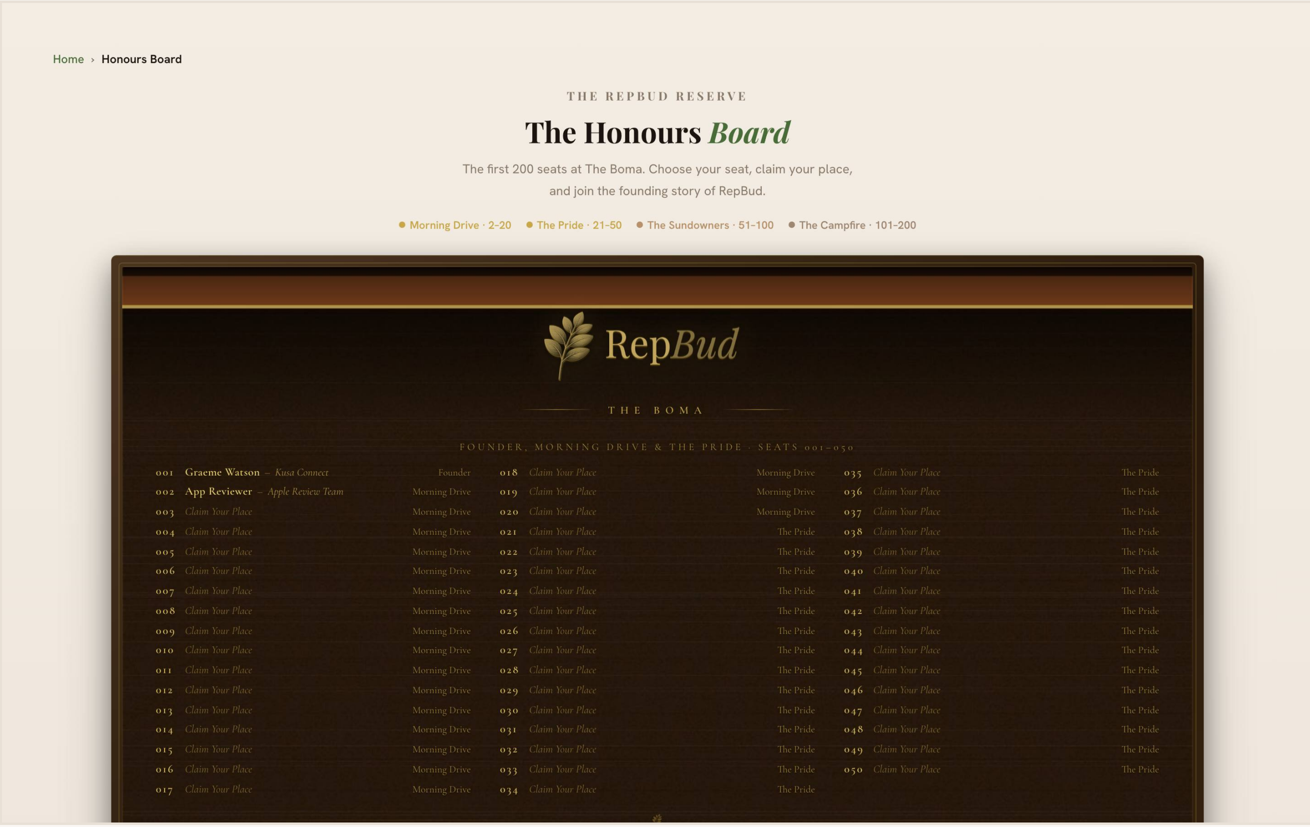
Does it cover the rate terms?

Yes — BAR, NET, RFP and the rest of the commercial vocabulary sit alongside the roles and trip types.

FREE TOOLS

The Honours Board — the founding 200

The first 200 seats at The Boma — who joined early, and which seats are still open.



The steps

01 **Open the board**

The Honours Board records the first 200 members of the RepBud Reserve, by seat number.

02 **Read the bands**

Seats are grouped into bands — Morning Drive, The Pride, The Sundowners, The Campfire — so where you joined is part of the record.

03 **Find a seat**

Each row is a member, their company and their number. Earlier numbers are the earlier arrivals.

04 **Claim yours**

A seat is taken when you subscribe, and vacated if you leave — so the board reflects who is actually here.

Next: Pricing and what each cabin includes

Questions

What is the Honours Board?

A public record of the first 200 subscribing members of the RepBud Reserve, listed by seat number.

What are the bands?

Morning Drive, The Pride, The Sundowners and The Campfire — seat ranges rather than plan tiers.

How do I get a seat?

Seats go to paying subscribers. A seat is claimed when you subscribe and vacated if you cancel, so the board stays honest about who is here.

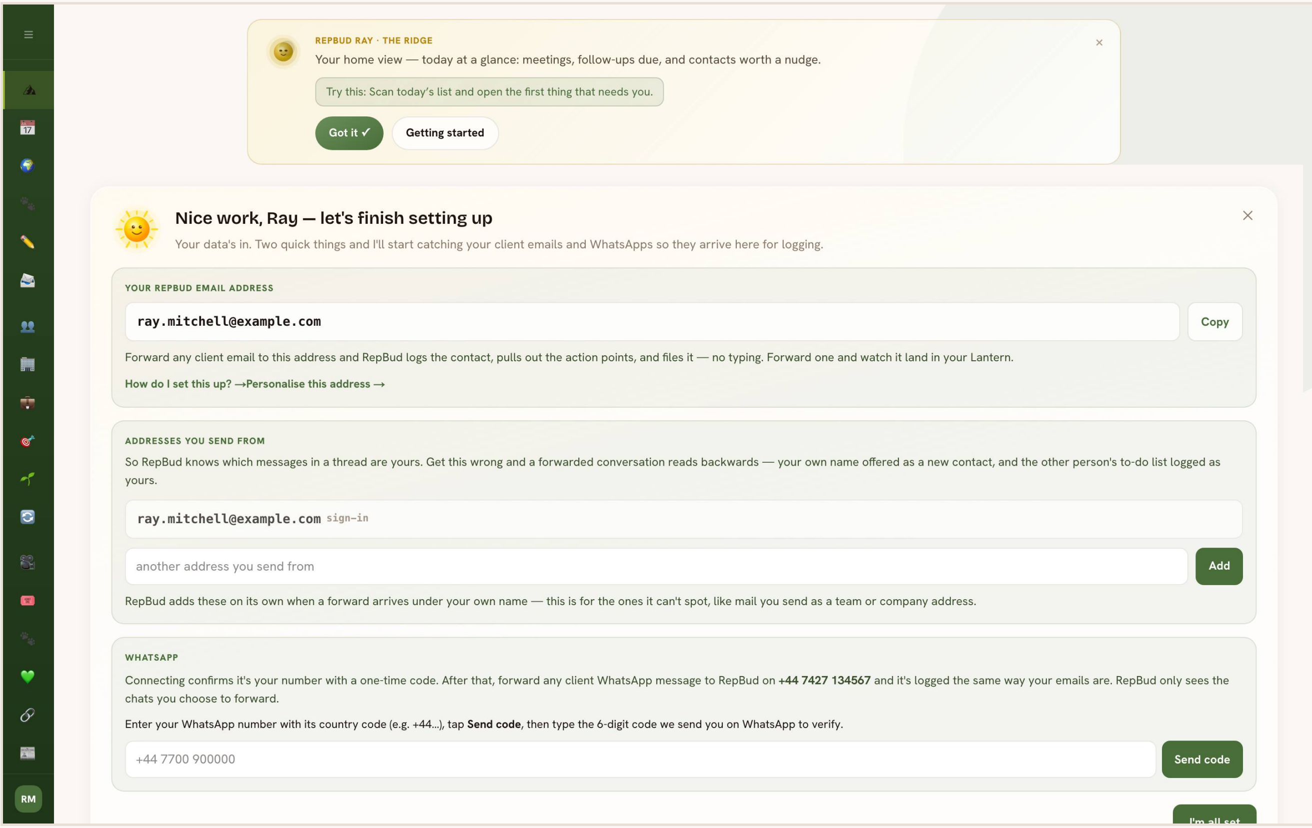
Is my name shown automatically?

The board is public, so consider it part of joining early — it is a record of the founding members, not a private list.

ROLE-SPECIFIC

RepBuddy home & flow

This is your RepBuddy home — where the reps you work with request booking stats, invite you to events, and stay connected. Here's how to find your way around.



The steps

01 Your home at a glance

The header greets you and shows your RepBuddy badge and company. Everything a rep needs from you starts here.

02 Fill in your profile

The Your profile tile shows your location and the countries you sell. Setting these helps reps in your area find and connect with you.

03 Stats requests from your reps

When a rep needs your booking data, a request appears here. Tap the alert to review what they've asked for and respond.

04 Choose how reps reach you

The Connect with reps card controls event & meeting invitations. Leave it on and reps near you can invite you to trade events or ask to meet — turn it off any time.

05 **See your connected reps**

The Connected reps card lists the reps you're linked with and how many. These are the people who can request stats and send invites.

06 **Claim your company**

In the sidebar, Your company lets you find your company and claim its shared profile — DMC partnerships, destinations, specialities — so the reps you work with see consistent details.

07 **Find trade events**

Trade Events shows invitations from reps plus events in the markets you sell. Apply to attend, or accept an invite, right from the list.

08 **Stay connected on the move**

That's your RepBuddy home. Next, upload booking stats when a rep asks. Get the app to stay reachable between desk sessions.

Next: Upload booking stats

Questions

What is a RepBuddy on RepBud?

A RepBuddy is a booking manager, agent or product partner (like a tour operator) that reps connect with. Your home at /dashboard/buddy is where those reps request booking stats, invite you to events, and keep your shared details in sync.

Why can't I see the RepBuddy dashboard on my account?

These screens render only for a buddy account type. A rep or DMC login is redirected to the standard dashboard — you need a RepBuddy account to see them.

Do I have to let reps invite me to events?

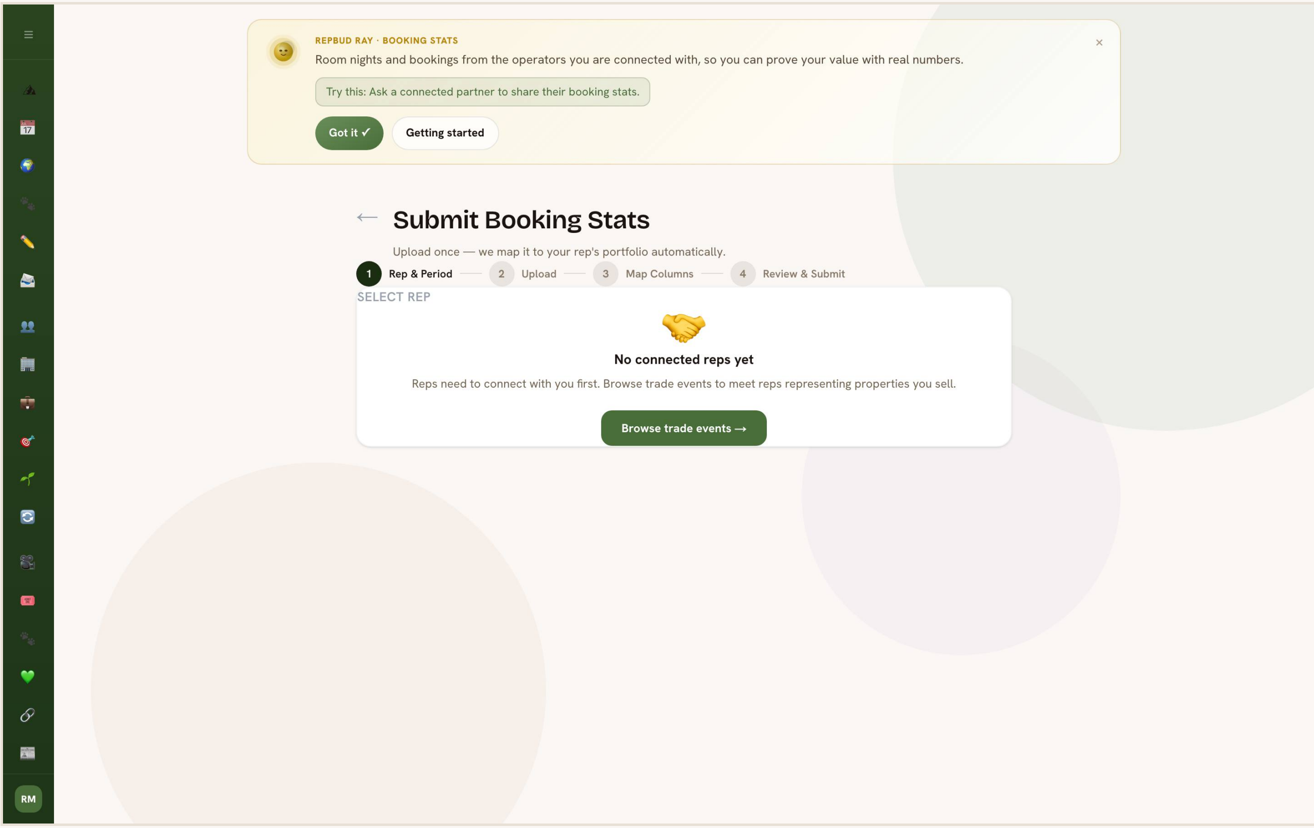
No. The Event & meeting invitations toggle on the Connect with reps card is yours to control — switch it off and reps can't invite you or request to meet, and you can switch it back on any time.

What does claiming my company do?

Claiming your company profile lets you keep its details — partnerships, destinations, specialities — current in one place, so the reps you work with see the same information.

Upload booking stats

When a rep asks for your booking numbers, you upload them once — RepBud matches each row to their properties so you don't retype anything. Here's the flow.



The steps

01 Open Submit Booking Stats

From a rep's stats request, you land on the submit screen. A four-step bar — Rep & Period, Upload, Map Columns, Review & Submit — tracks where you are.

02 Pick the rep

Choose which connected rep you're sending stats to. RepBud loads that rep's property portfolio so it can match your file.

03 Set the period

Tell RepBud which period these numbers cover — monthly, quarterly, annual, or a custom date range — then the year.

04 Upload your file — or type it

Drop a CSV or Excel export from your reservations system. Short on a file? The manual panel is pre-filled with the rep's properties so you can type room nights and pax instead.

05 Check the column mapping

RepBud reads your headers and suggests a RepBud field for each — Property Name, Room Nights, Pax and so on. Fix any that look off, then preview.

06 Review the matched rows

Each property is matched to the rep's portfolio with a confidence score. Deselect anything you don't want to send, and tweak a room-night figure inline. Unmatched rows can be shared as competitor intel.

07 Submit to your rep

When it looks right, submit. The rep gets your numbers in their dashboard and the request is marked fulfilled.

Next: RepBuddy home & flow

Questions

What file formats can I upload?

CSV, XLS or XLSX exports from your reservations system — any column layout. RepBud reads the headers and suggests a mapping; you confirm it before anything is sent.

I don't have a file — can I just type the numbers?

Yes. On the Upload step there's an "or enter manually" panel pre-filled with the rep's properties, so you can type room nights and pax for each and submit without a spreadsheet.

What if a property in my file isn't in the rep's portfolio?

Unmatched rows are kept separate. You can leave them out, or toggle them on to share as competitor intelligence — your choice.

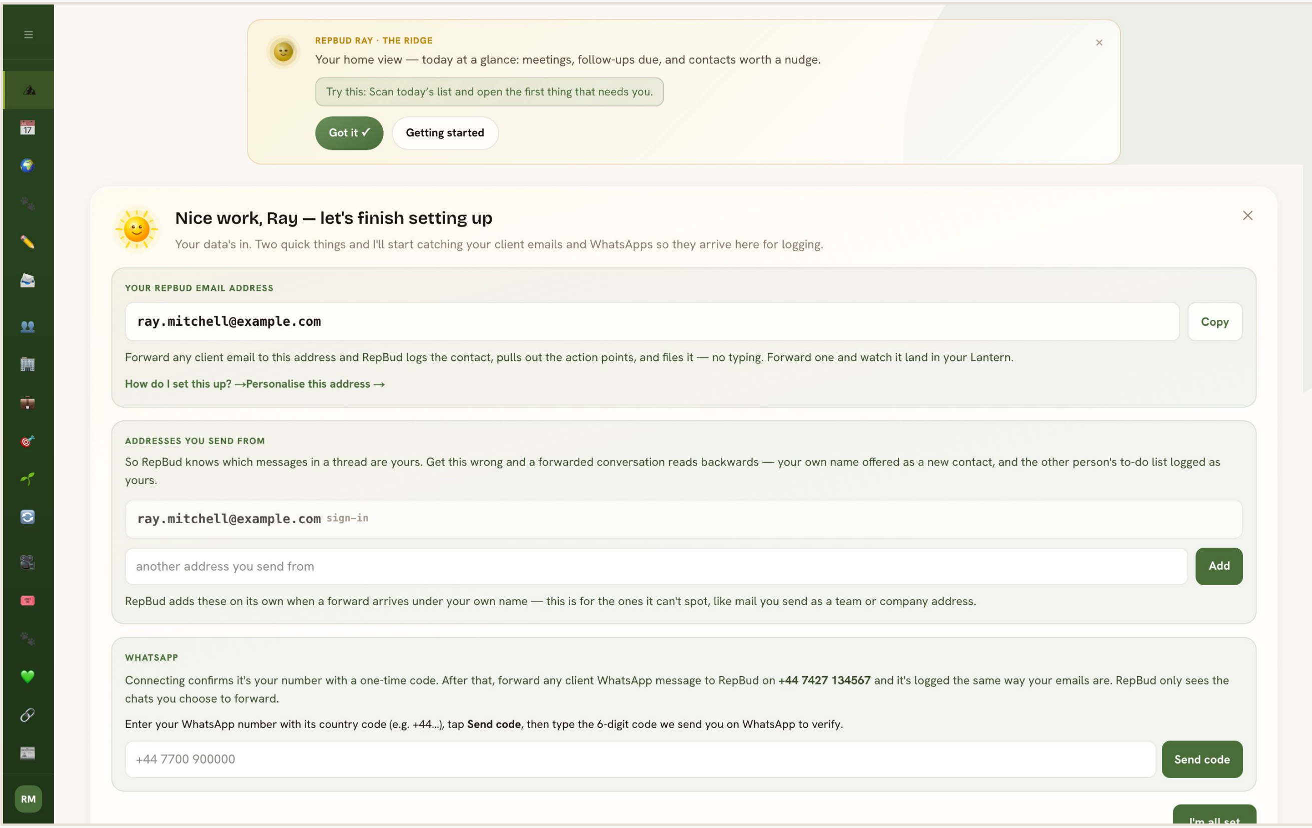
What does the rep see after I submit?

Your room-night and pax totals land in the rep's stats view, the period's request is marked fulfilled, and the rep is notified that stats arrived. RepBud is designed to assist, not replace, your professional judgement — review the matches before you submit.

ROLE-SPECIFIC

Reporter home & briefs

Your reporter home is where you post what you're working on and let connected reps come to you — here's the whole flow in under a minute and a half.



The steps

01 Your reporter home

This is your home as a journalist on RepBud. Your name, medium and outlet sit up top, with everything you're working on below.

02 Post a brief

Under What I'm working on, post a commission and connected reps who can help will reach out.

03 Describe the assignment

Give it a headline, say what you're looking for, and pick the medium and deadline so reps can gauge fit.

04 Tag the destinations

Add the destinations the brief concerns. Connected reps and PR contacts who cover them will see it.

05 Track the responses

Each brief shows its status and any responses — the rep, their company and their message — so you can compare in one place.

06 Manage as it moves

When a brief lands, mark it fulfilled; tidy it away with close, or edit the detail anytime.

07 Your reps & PR contacts

Your connections are the reps and PR agencies who'll receive your briefs and send press-trip invitations.

08 Stay visible

Set whether you appear in Who's Nearby when you are in the same city as other members, and whether you receive press and FAM trip invitations.

Next: Set up your profile & discovery

Questions

Who sees the briefs I post?

Connected reps and PR contacts who cover the destinations you tag. Post what you're working on and the ones who can help reach out to you.

What's the difference between a brief's statuses?

Open means it's live and reps can respond; mark it fulfilled once a rep delivers; close it to tidy it away — you can reopen it later.

How do reps end up connected to me?

Find reps and PR agencies for the destinations you cover via Find more, and connect — that's how briefs reach them and invitations reach you.

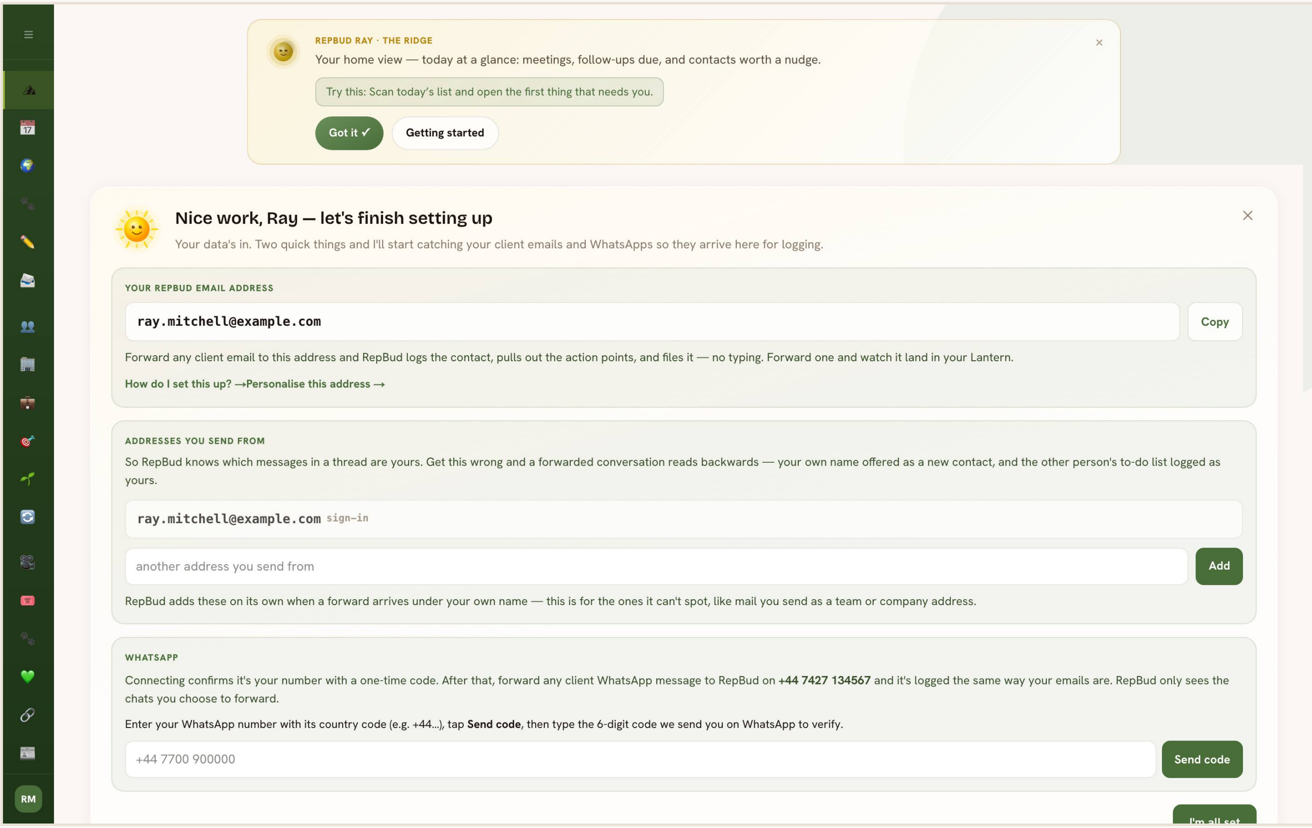
What does "Appear in Who's Nearby" do?

It lets reps in the same city see you're there too — at a show or on a sales trip — so you can meet in person. Leave it off and you simply won't surface.

ROLE-SPECIFIC

RepBud Ready listing

Your RepBud Ready listing is how reps discover your property — here's how to fill it in and watch the completeness score climb as the right reps start to match.



The steps

01 Your Ready listing

This is your property's shopfront for reps. The status pill up top shows whether you're Draft, Incomplete or Live.

02 Tell reps about you

Add your property name, country, room count and website, then describe what makes you special and the rep you're after.

03 Pick your property type

Select the types that fit so reps can filter by category — pick all that apply.

04 Choose your target markets

Add the countries where you want representation. Reps in these markets are notified when you save.

05 Set a private budget

Your monthly budget is kept private and used only to surface compatible reps — or tick "open to discussion".

06 Watch the score climb

The completeness ring and nudges show what's still worth adding — a fuller listing reaches around 3x more reps.

07 Preview how reps see it

The live preview shows your listing exactly as a rep does, with the Express-interest card they'll tap.

08 Save & match via Rapport

Save to go Ready — reps in your markets are notified, and Rapport surfaces your matches.

Next: Set up your profile & discovery

Questions

Is my budget shown to reps?

No. Your monthly representation budget is kept private and used only to surface compatible reps — reps see your listing, not your figures.

When do reps find out about my listing?

When you save, reps in your target markets are notified, and RepBud's Rapport matching surfaces you to reps who fit.

What does the completeness score do?

It scores how filled-in your listing is and nudges the next worthwhile field. A fuller listing reaches roughly 3x more reps.

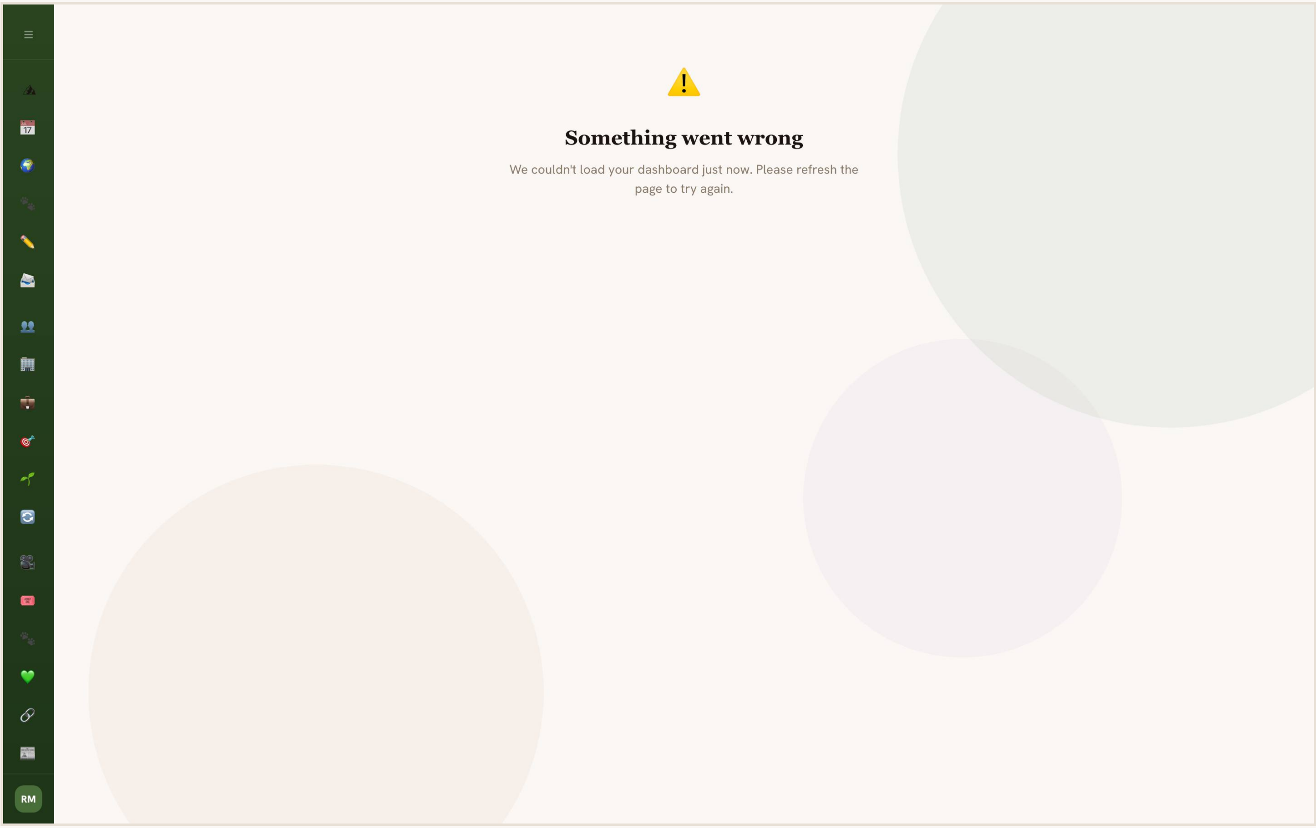
What's the difference between Draft, Incomplete and Live?

Draft is unsaved; Incomplete is saved but still thin; Live means it's filled enough that reps in your markets can see it.

ROLE-SPECIFIC

Client viewer dashboard

If your brand is represented by a RepBud rep, this is your read-only window into everything they've been doing for you — meetings, trips and a running activity feed.



The steps

01 **Your dashboard, by invitation**

Your rep invites you, and you land on a dashboard greeting you by name. It's read-only — visibility, not access to their tools.

02 **Who's representing you**

The banner names your brand and the rep behind it, with an Active status so you know the relationship is live.

03 **The numbers that matter**

Three tiles summarise the relationship: interactions over the last 90 days, meetings booked, and trips planned.

04 **Recent activity feed**

Below the stats, "Recent activity" lists what your rep has been doing for you, newest first.

05 **Read each interaction**

Each entry is tagged by source — Email, WhatsApp, Quick Log, Meeting or Meeting Prep — with who it was with and a short summary.

06 **Read-only by design**

You can see the work, not change it. Nothing here edits your rep's logs — it's a transparency layer.

07 **No access yet?**

If you haven't been invited, you'll see a lock screen — ask your sales representative to add you.

Next: Manage client viewers

Questions

Can I edit or add anything from the client viewer dashboard?

No. It's read-only by design — a transparency window into your rep's activity. You see meetings, trips and the activity feed, but nothing here changes their logs.

How far back does the activity go?

The stats summarise the last 90 days, and the "Recent activity" feed lists recent interactions newest first, tagged by how each one came in.

What do the source tags mean?

They show how the interaction reached your rep — Email, WhatsApp, Quick Log, Meeting or Meeting Prep — so you can see the channel at a glance.

I see "No dashboard access" — what now?

It means you haven't been invited to a dashboard yet. Ask your sales representative to invite you, and it'll appear here.

ROLE-SPECIFIC

Charter — running a team

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

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.