



GETTING SET UP

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.

Covers `/join?type=rep` · for rep, dmc

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.