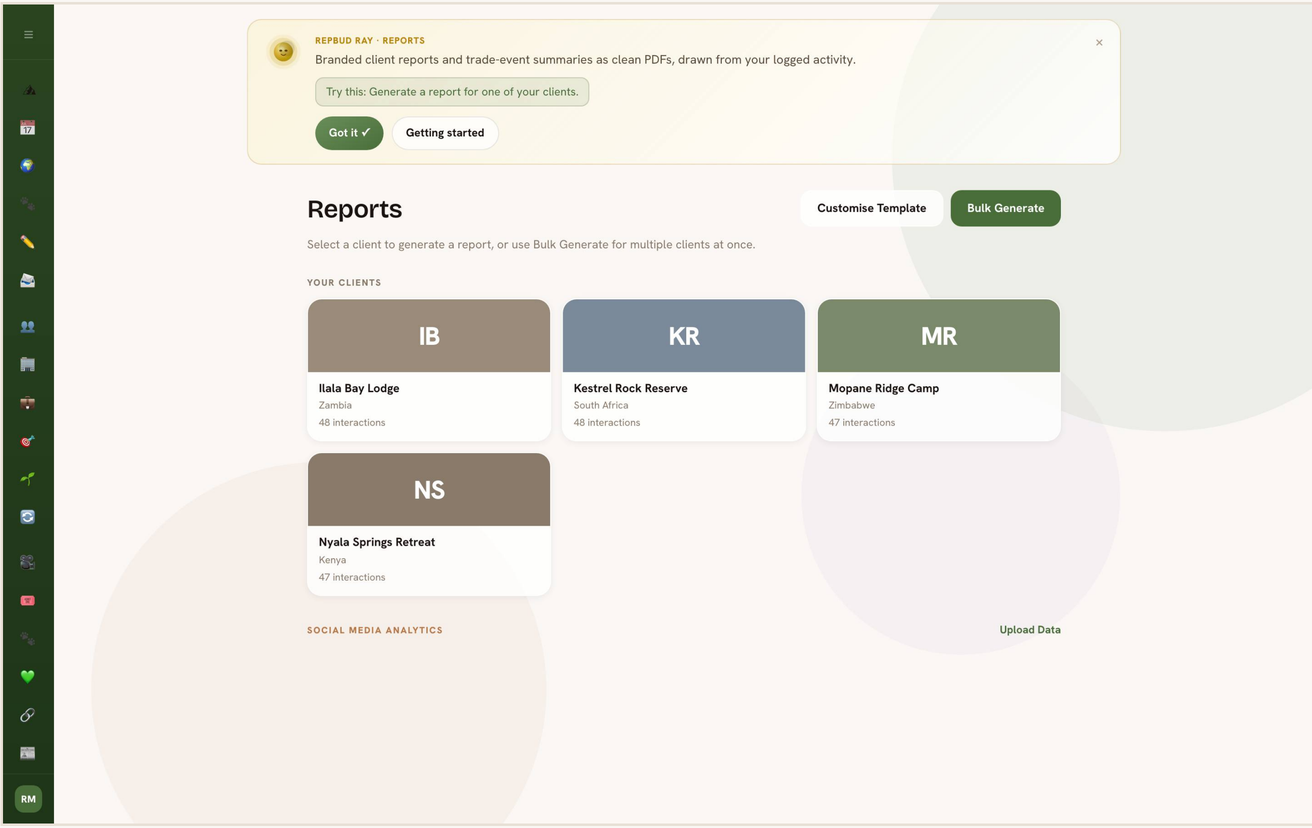
RepBud

THE LOOKOUT

# 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.

*Covers /dashboard/reports · for rep, dmc*




## 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.