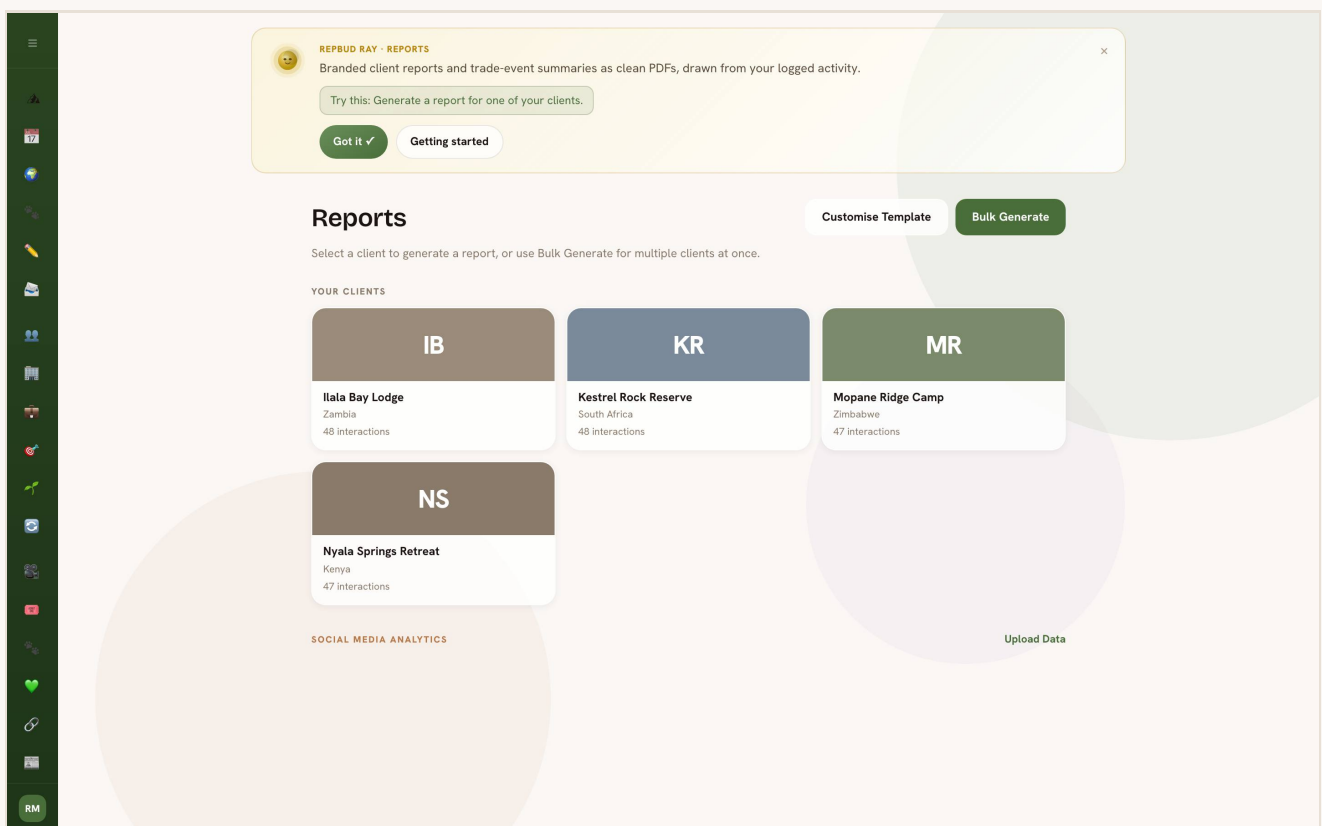


Client reports

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 screenshot shows the RepBud Reports dashboard. At the top, a yellow notification box titled "REPBUD RAY · REPORTS" contains a smiley face icon, the text "Branded client reports and trade-event summaries as clean PDFs, drawn from your logged activity.", a button "Try this: Generate a report for one of your clients.", and two buttons: "Got it ✓" and "Getting started". Below this, the "Reports" section has a subtitle "Select a client to generate a report, or use Bulk Generate for multiple clients at once." and two buttons: "Customise Template" and "Bulk Generate". Under "YOUR CLIENTS", there are four client cards: "IB" (Ilala Bay Lodge, Zambia, 48 interactions), "KR" (Kestrel Rock Reserve, South Africa, 48 interactions), "MR" (Mopane Ridge Camp, Zimbabwe, 47 interactions), and "NS" (Nyala Springs Retreat, Kenya, 47 interactions). At the bottom, there is a section for "SOCIAL MEDIA ANALYTICS" with an "Upload Data" button. A vertical sidebar on the left contains various icons, including a calendar, a list, a magnifying glass, a pencil, a mail icon, a group of people, a bar chart, a pie chart, a line graph, a heart, a link, and a document icon, with "RM" at the bottom.

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.