

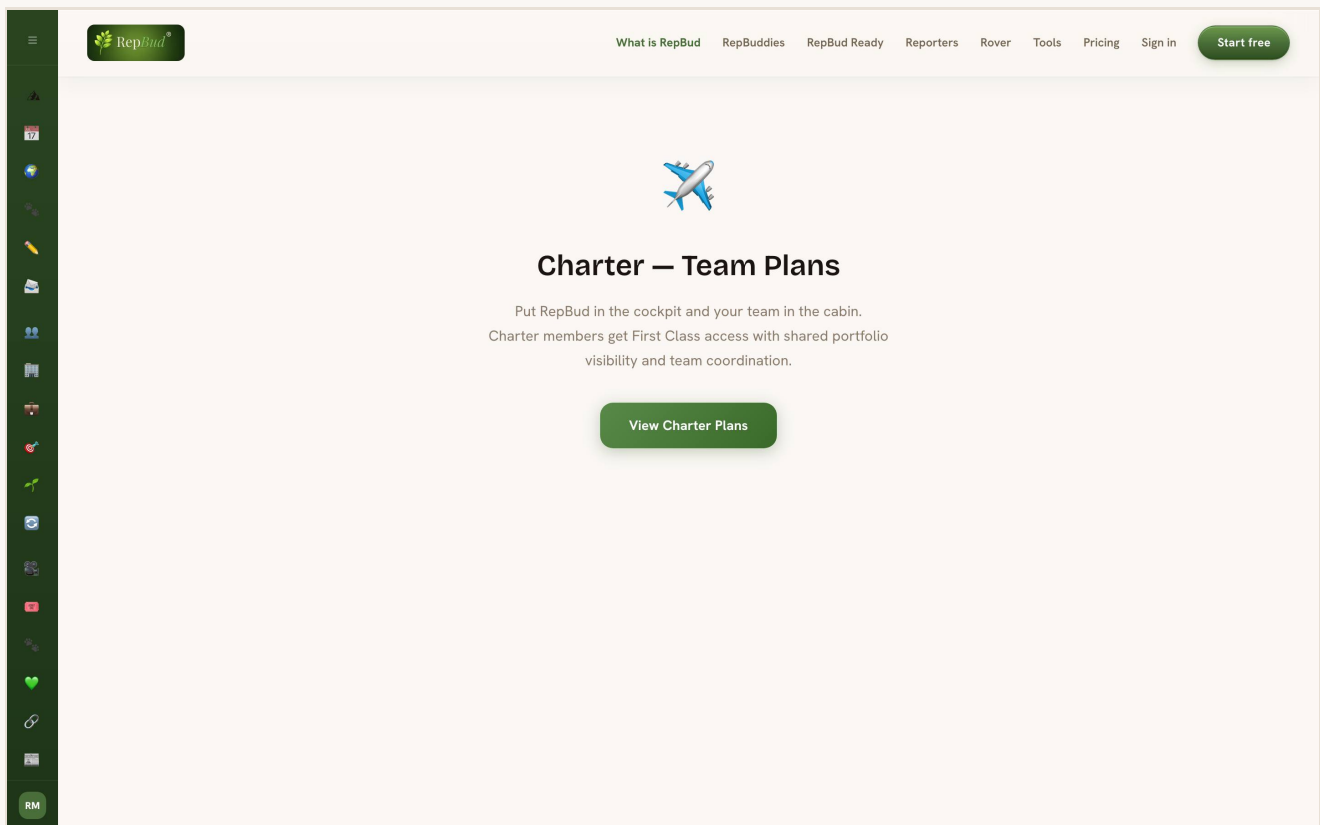


YOUR PEOPLE

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.

Covers /dashboard/team · for rep



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.