



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.

Covers /dashboard · for rep, dmc

The screenshot shows a mobile app interface with a dark green sidebar on the left containing various icons. The main content area has a light cream background. At the top, a yellow banner with a sun icon says "Nice work, Ray — let's finish setting up" with a close button. Below this, three panels provide setup instructions: 1. "YOUR REPBUD EMAIL ADDRESS" with a text field containing "ray.mitchell@example.com", a "Copy" button, and a link to "Personalise this address". 2. "ADDRESSES YOU SEND FROM" with a "sign-in" button for the email address, a text field for "another address you send from", an "Add" button, and explanatory text. 3. "WHATSAPP" with explanatory text, a text field for a phone number containing "+44 7700 900000", a "Send code" button, and an "I'm all set" button. At the bottom, a "Good Morning, Ray" greeting is shown with a sun icon, the date "Tuesday, 18 August 2026", a "LIVE · YOUR MARKETS" ticker, and "LIVE" and "THE RIDGE" toggle buttons.

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.