

SB

Overview

[Overview](#)[Relationships](#)[Providers](#)[Universal Inbox](#)[Invoices](#)[AI Agents](#)[Workflows](#)

Welcome back



\$133k

Total recurring
spend / month

22

Active
subscriptions

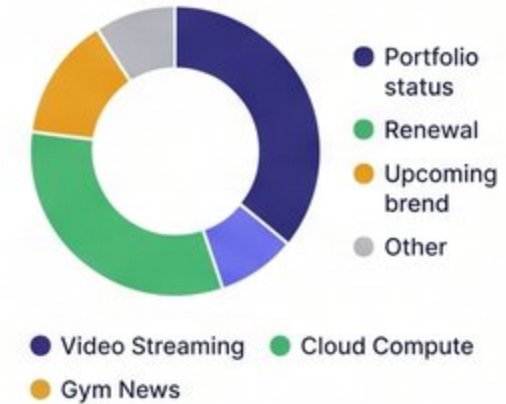
3

Upcoming
renewals

0

Needs your
action

Portfolio by status



Upcoming renewals

Subscription	Renewal	Amount
Video Streaming — Premium	Jan 8, 2023	\$30/mo
Cloud Compute	Jan 4, 2023	\$20/mo
Gym Membership	Jan 4, 2023	\$30/mo
Daily News Digest	Jan 4, 2023	\$20/mo
Design Suite	Jan 6, 2023	\$30/mo

Needs attention

Video Streaming — Premium

Renewalor attention states

Needs your action

[Add a subscription](#)[Discover providers](#)[Open inbox](#)[Configure agents](#)

SB

Overview

Relationships

Providers

Universal Inbox

Invoices

AI Agents

Workflows

Relationships

Add relationship

Search relationships by label...

Kind

Status

Subscription	Kind	Status	Amount/mo	Renews on	Health
Video Streaming — Premium [Streaming]	Subscription	Active	\$14.99	Oct 28, 2024	
Cloud Storage Pro [Storage]	Membership	Paused	\$29.00	Nov 05, 2024	
SaaS Productivity Suite [Business]	License	Active	\$99.00	Nov 05, 2024	
Music Streaming Family [Streaming]	Subscription	Active	\$14.99	Oct 28, 2024	
Online Learning Platform [Education]	Membership	Paused	\$29.00	Oct 08, 2024	
Project Management Tool [Business]	License	Paused	\$29.00	Nov 05, 2024	
VPN Service Annual [Security]	Contract	Cancelled	\$99.00	Nov 05, 2024	
Fitness App Membership [Health & Wellness]	Subscription	Active	\$14.90	Nov 05, 2024	

Previous / Next

SB-UC-03

Video Streaming — Premium Active

\$30/mo • Renews Jan 8

Edit

Pause

Cancel

Plan & pricing

Plan name Video Streaming — Premium

Price \$30/mo

Billing interval 2 month

Auto-renew ☒

Entitlements

Seats	3
Storage	28
Premium tlent	12GB
Customers	-

Renewal timeline

- Past renewal
Jan 8, 2022
- Renewal renewal
Jan \$300
- Upcoming renewal
Jan \$300
- Upcoming renewal
Jan \$300
- Upcoming renewal
Jan \$300

Payment method

Card
..... 8008

Health score

- Contract PDF
- Receipt pdf



Relationships

Search relationships

Label

e.g., Annual SaaS License

Subscription

Subscriber Ad

Subscriber Co

Subscriber Bo

Subscriber Bo

Subscriber Bo

+ Add a relationship

Add a relationship

Define the terms of this new connection.

Label

e.g., Annual SaaS License

Kind

Subscription

Provider

e.g., Acme Corp.

Plan

e.g., Enterprise

Amount

149.99

USD

Billing interval

Monthly

Renews on

Oct 26, 2024



Auto-renew



Notes

Additional details about this subscription...

Cancel

+ Create relationship

Amount

Renews

149.99

Oct 26, 2024

...

149.99

Oct 26, 2024

...

149.99

Oct 26, 2024

...

149.99

Oct 26, 2024

...

149.99

Oct 11, 2024

...

\$1.99

Jun 28, 2024

...

151.99

Oct 26, 2024

...

SB

Overview

Relationships

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Subscriber Bot (SB-UC-04)

Universal Inbox

All

Billing

Renewals

Action Required

Newsletters

unread only



Product Category

Productivity Suite

New Feature Announcement

Unread

Action Required

9:00 AM

We are thrilled to announce new collaboration features for your productivity suite...

Product Category

Payment Processor

Unsuccessful Renewal Payment

Action Required

8:45 AM

Your monthly renewal payment for the payment processor plan was unsuccessful. Please update your...

New

Cloud Compute

Instance Resource Usage Report

Action Required

8:15 AM

Your cloud compute instance resource usage report for the previous month is now available. Click to...

Action required

Cloud Compute

Video Streaming - Premium

3:00 PM

We're korsi video streaming - cloud compute.

Action required

Cloud Compute

Video Streaming - Premium

3:00 PM

We're your video streaming - Premium (iode an...

Newsletters

Cloud Compute

Billing Ingreamons

3:00 PM

We're happy a message and billing for account...

Newsletters

Cloud Compute

Newsletter message

3:00 AM

Invite your prodata provider for your cloud coim...

Message

premiumvideo.com

Mark read

Hi Monorero,

Thank you for updating your payment details for the Premium Video Streaming plan. Your next renewal is scheduled for September 30, 2023.

If you have any questions, please visit our [help center](#).

Regards,
The Video Streaming Team

Subscription name: Premium Video Streaming



Universal Inbox

Dashboard

Inbox

Ingest channels

Settings

Communication channels

Add channel



Email



Connected
email.ms@example.com

Verified



SMS



Connected
sms@wnms.com

Pending

Verify



WhatsApp



Connected
whatsAp

Verified



WhatsApp



Connected
whatsapp@gmails.com

Verified

Verify



Slack



Connected
slack.commentimentl.com

Pending

Verify



Push

Connected
push.cor

Pending



Push



Connected



Slack



Connected

Add channel



Type

Email



Address

Label

Ingest enabled



- SB
- Overview

Cashflow

Trials Alerts

Renewals

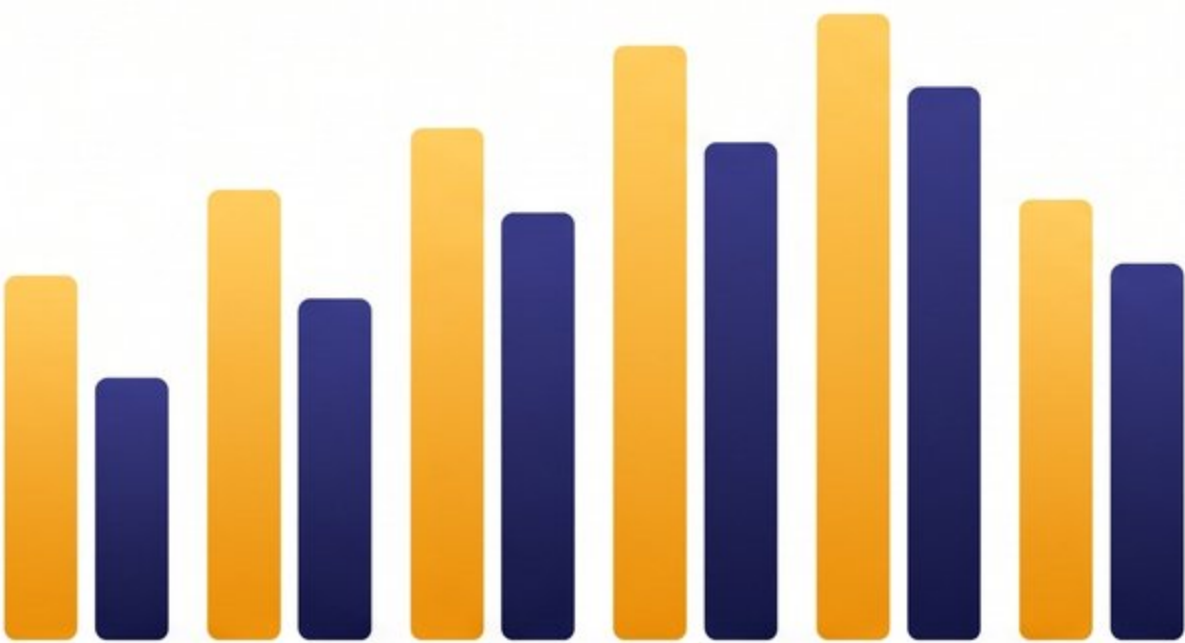
Settings

Renewal forecast

Savings to \$3% 673

Edit terms

Projected recurring spend — next 6 months



Trials ending soon

Cloud Storage Pro	40 days left
Project Manager Suite	20 days left

Name	Date	Amount		
May				
Design Tool Premium	08/10/23	\$10.00	Remind me	Review
June				
Analytics Platform Basic	08/10/22	\$12.00	Remind me	Review
Analytics Platform Basic	08/12/23	\$30.00	Remind me	Review
July				
Design Tool Premium	08/12/23	\$40.00	Remind me	Review
Analytics Platform Basic	08/12/23	\$20.00	Remind me	Review
Analytics Platform Basic	06/12/23	\$30.00	Remind me	Review
Sep				
Total renewing this month 23,3103		08/12/23	\$30.00	Remind me Review
		08/12/23	\$30.00	Remind me Review



Dashboard

AI Agents

Workflows

Datasets

Integrations

Settings

Switchboard



Sarah Miller



AI Agents

+ New agent



Discovery Agent

Identifies SaaS usage & identifies potential cost savings.

Autonomous

Last run	Runs	Toggle
14 mins ago	312	☒



Renewal Agent

Automates contract renewals & vendor negotiations.

Autonomous

Last run	Runs	Toggle
2 hours ago	145	☒



Cost Agent

Monitors budget spend & flags anomalies.

Suggest only

Last run	Runs	Toggle
6 hours ago	98	☐



Concierge Agent

Provides personalized assistant for employee tech requests.

Autonomous

Last run	Runs	Toggle
3 hours ago	521	☒



Vendor Agent

Manages vendor relationships & simplifies onboarding.

Disabled

Last run	Runs	Inactive
7 days ago	24	☐

 Dashboard AI Agent detail Team Automations  Complete Cancer Settings About Settings

Cost Agent Autonomous

Status: Autonomous[Add to policy](#)

Disabled

Suggest only

Autonomous

Policies

If unused for 90 days and over \$20/month → flag to cancel

Alert

Enabled  Trigger count: 2

If price increases more than 15% → alert me

Cancel

Enabled  Trigger count: 1

If price increases more than 15% → alert me

Downgrade

Enabled  Trigger count: 1

If price increases more than 15% → alert me

Enabled [Add policy](#)[Add policy](#)

Run history

- Oct 26, 2:15 PM
Flagged ProjectManagementTool (Pro) to cancel (Unused 90+ days, >\$20/mo)
- Success
- Oct 26, 11:30 AM
Alerted me on CRM Subscription price increase (>15%)
- Notified
- Oct 25, 9:00 AM
Suggested Downgrade Cloud Storage (Enterprise) (High cost rule)
- User Review Pending
- Oct 25, 9:00 AM
Suggested Downgrade Cloud Storage (Enterprise) (High cost rule)
- User Review Pending

Ar





Workflows

New workflow

ActiveDraftPaused

When invoice arrives

Classify with AI

Match to subscription

Notify finance

Update budget

Saved workflow 1

Active25 runs

Saved workflow 2

Active107 runs

Saved workflow 3

Saved workflow 4

Active26 runs

Saved workflow 5

Active24 runs

SB

 Dashboard Status **Spend**s Cost optimization Settings

Optimize your spend

Cut-wasted-spend / month

Potential savings / month

**Cancel unused**

Subscription name

Not used in 92 days

Save \$20

Apply

**Downgrade plan**

Subscription name

Not used in 92 days

Save \$20

Apply

**Downgrade plan**

Subscription name

Not used in 92 days

Save \$20

Apply

**Cancel unused**

Subscription name

Not used in 92 days

Save \$30

Apply

**Switch to annual**

Subscription name

Not used in 92 days

Save \$20

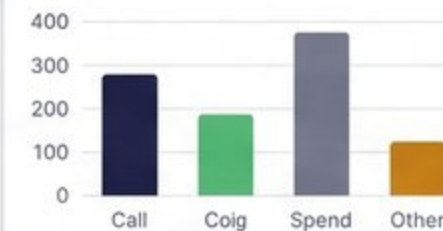
Apply

**Merge duplicate subscriptions** **\$30**

Subscription name

Not used in 92 days

Apply

Spend by category**Bundle suggestion**

Merge ssar further optimization to fikr used and outription.

[Learn more](#)

Discover providers

Search

Streaming

SaaS

AI

Newsletters

Insurance

Fitness

Utilities

Finance

Streaming Service

Streaming

Streaming service and not woric
audlooks, and interirations.

vendor health starting price
92/100 \$9.99/month

View

Cloud Platform

SaaS

Cloud platform is amaz cloud
platform a nc oir platform.

vendor health starting price
92/100 \$9.99/month

View

AI Assistant

AI

AI assistant can hompitarate with
user and insvas customers.

vendor health starting price
92/100 \$9.99/month

View

Daily Newsletter

Daily Newsletter

Daily Newsletter loqainess, onary
and subrite new daily newsletter.

vendor health starting price
92/100 \$9.99/month

View

Insurance Provider

Insurance

Provider insurance fomicsecurity,
insurance and akillity provider.

vendor health starting price
92/100 \$9.99/month

View

Fitness Club

Fitness Club

Lorem Ipsum tar elements and
enthance your member.

vendor health starting price
92/100 \$9.99/month

View

Insurance Provider

Insurance

Provides insurancions and
insurance and craitisity provider.

vendor health starting price
92/100 \$9.99/month

View

Fitness Club

Fitness Club

Lorem Ipsum tar elements and
oraineining fitness club.

vendor health starting price
92/100 \$9.99/month

View

Cloud Platform

Category: Cenvidiar

[Subscribe](#)[Compare](#)

Plans

Basic Plan

\$30/mo

Billing interval

- Generic features
- Standard+ management
- Product features
- Mastem categoriies

[Select](#)

Team Plan

\$20/mo

Billing interval

- Generic features
- Standard+ management
- Product features
- Mastem categoriies

[Select](#)

Team Plan

\$299/mo

Billing interval

- Generic features
- Standard+ management
- Product features
- Mastem categoriies

[Select](#)

Vendor health

Healthy



7.0



Churn risk

● risk

Price history



Alternatives

Generic Platform
Generic Providers
Generic Providers

Asset Vault

[Attach Asset](#)

Contracts (PDF)

	Document_123.pdf	Subscription Name	Expires Mar 17, 2024	Download	Preview
	Document_123.pdf	Subscription Name	Expires Mar 17, 2024	Download	Preview

Receipts & Invoices

	Document_123.pdf	Subscription Invoice 1	Expires May 10, 2024	Download	Preview
	Document_123.pdf	Subscription Invoice 2	Expires May 13, 2024	Download	Preview

License Keys

	Document_123.poh	Subscription License Key	Expiry: Apr. 31	Download	Preview
	Document_123.nams	Subscription License Key	Expiry: Apr. 23	Download	Preview

Warranty Docs

	Warranty Docs.pdf	Subscription Warranty Docs	Expiry: Apr. 23	Download	Preview
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Expiring Soon

[Document_123.pdf](#)

Subscription Name
Mar 17, 2024

[Document_123.pdf](#)

Subscription Name
May 17, 2024

SaaS spend management

Total SaaS spend / year

\$22,56b

Active licenses

302

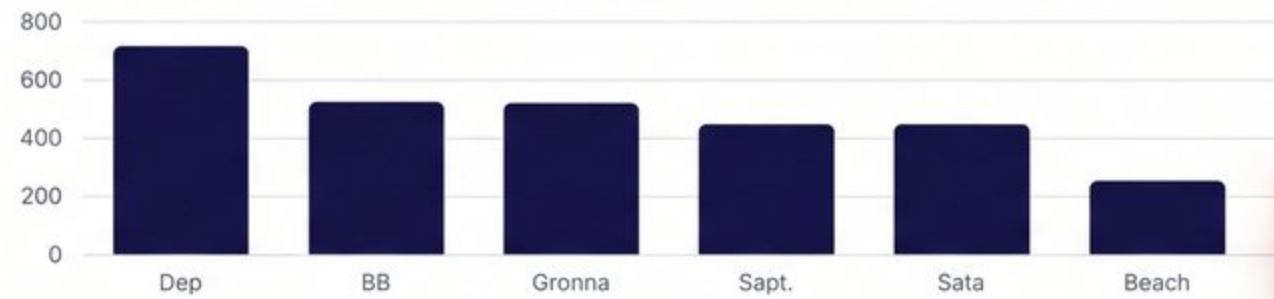
Seats utilized %

60%

Renewals next quarter

4

Spend by department



! Duplicate vendors detected

Generic tools overlapping veneric, Generic tools, Generic, Generic tools, Generic etc.

Licenses

App	Owner/Dept	Seats assigned	Seats used	Utilization bar	Annual cost	Renews
Generic	Owner/Dept	80	80		\$3,200	03/04/22
Generic	Owner/Dept	30	90		\$3,900	03/04/22
Generic	Owner/Dept	30	30		\$2,900	03/04/22
Generic	Owner/Dept	20	20		\$4,000	03/04/22
Generic	Owner/Dept	20	10		\$1,200	03/04/22
Generic	Owner/Dept	10	10		\$1,200	03/04/22

SB



Dashboard

Invoices

Soltations

Payments

Payment methods

Settings

Invoices

[Create invoice](#)

Status filter



Invoice number	Subscription	Issue date	Due date	Amount	Status badge	
130001	Premium Annual Plan	Jun 4, 2021	Apri 1, 2022	\$50.00	Paid	
130003	Premium Annual Plan	Apr 13, 2021	Apri 8, 2022	\$50.00	Due	
130047	Premium Annual Plan	Apr 13, 2021	Apri 8, 2022	\$180.00	Overdue	Mark paid
130006	Premium Annual Plan	Apr 14, 2021	Apri 6, 2022	\$130.00	Overdue	Mark paid

Payment methods



.... 4242

Default

Remove



.... 4242

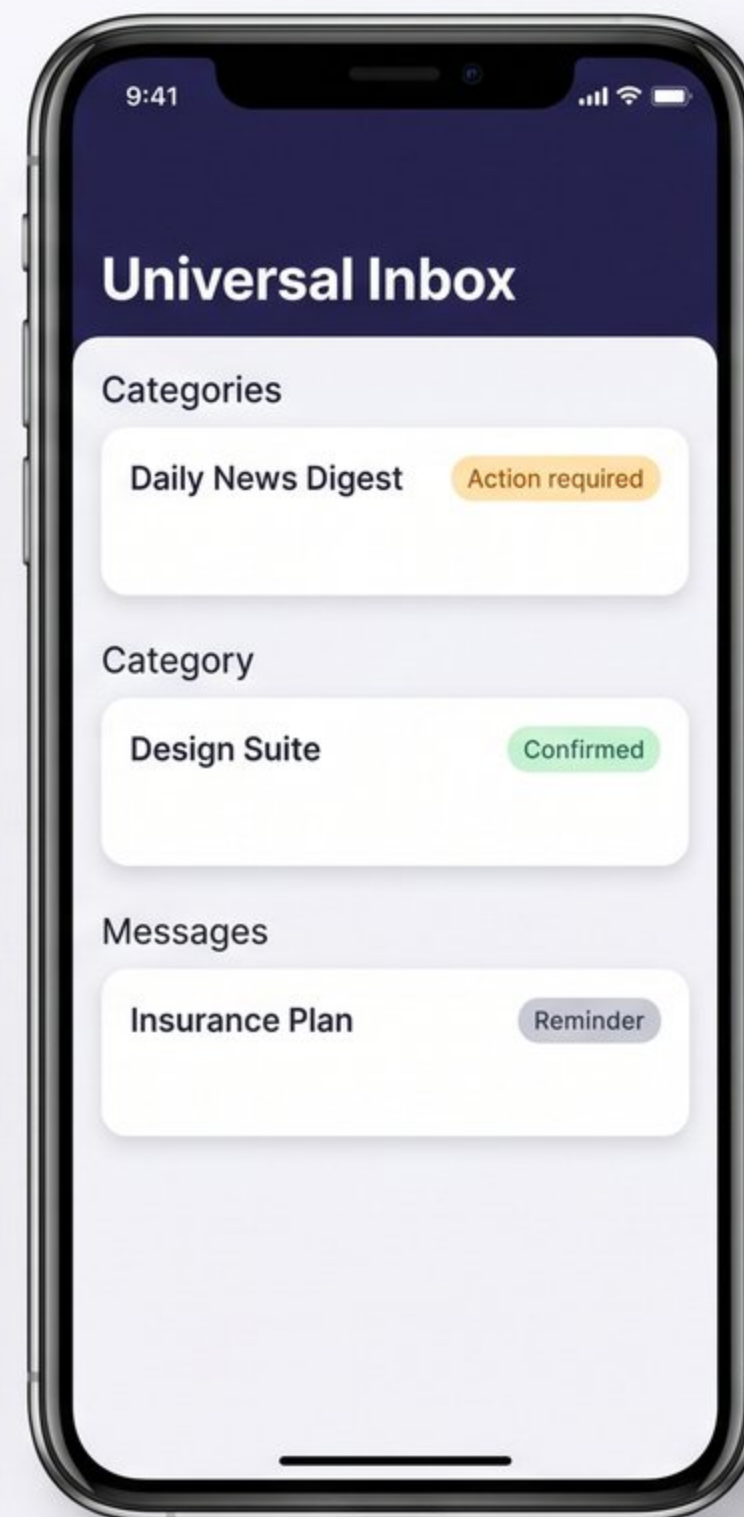
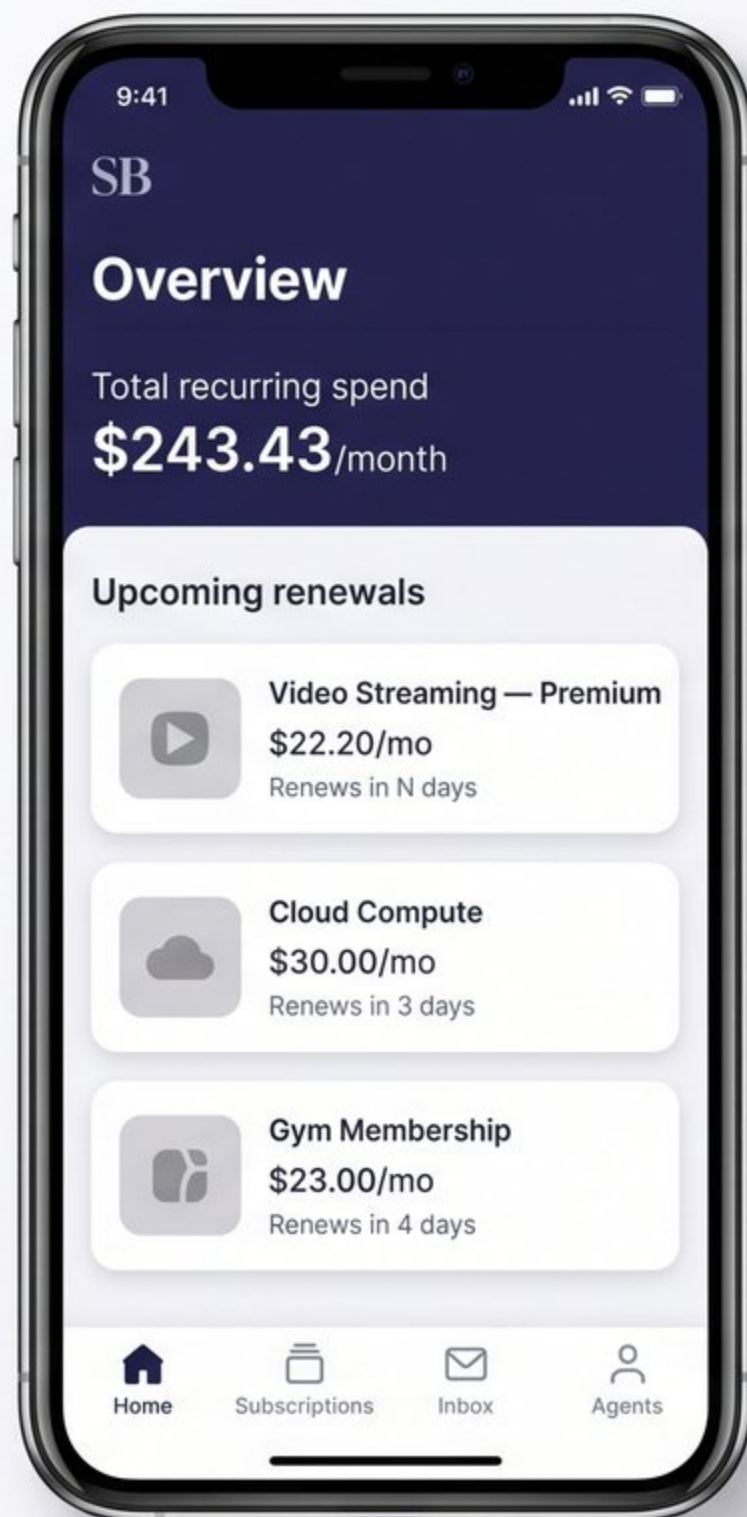
Remove



.... 4242

Remove

[Add payment method](#)



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- Providers
- Universal Inbox
- Invoices
- AI Agents
- Workflows
- Insights
- Asset Vault

AI Agents

Specialized agents that automate your recurring portfolio.

New agent

Agents propose; your policies decide what they may do autonomously.

All kinds

Any posture

Fleet posture

How your agents are allowed to act.



- Autonomous 0
- Suggest-only 5
- Disabled 1

Total agents

6

Autonomous

0

Suggest-only

5

Ran in last 7 days

2

Agent Grid



Suggest only

Renewal Watch

Renewal agent

Flags anything renewing nide 30 days and drafts .

⌚ Never run

Posture

Suggest only



Disabled

Newsletter Pruner

Newsletter agent

Groups low-engagement newsletters for bulk review

⌚ Never run

Posture

Disabled



Suggest only

Idle Spend Finder

Cost agent

Surfaces subscriptions over \$20/mo with no recorded use for 90 days.

⌚ Last run 6 hours ago

Posture

Suggest only



Suggest only

Hidden Charge Hunter

Discovery agent

Looks for recurring charges not yet tracked as relationships.

⌚ Never run

Posture

Suggest only



Suggest only

Licence Migration Aide

Migration agent

Plans a move between plans without losing entitlements.

⌚ Never run

Posture

Suggest only

Suggest only

Vendor Health Review

Vendor agent

Compares provider terms against what you actually use.

⌚ Never run

Posture

Suggest only

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AI Agents / New agent [← Back to agents](#)

New agent

Give the agent one job, and choose how much autonomy it starts with — you can adjust its posture and policies later.

⚠ Autonomous agent mode is not available yet: the policy-evaluation engine that enforces AUTONOMOUS actions has not shipped. Use SUGGEST_ONLY until this workspace is explicitly enrolled.

Name *

Renewal Watch

Kind

Renewal

Description

Flag anything renewing inside 30 days and draft a review note.

Starting posture



Suggest only



Disabled



Autonomous

Suggest-only agents propose. They never act on their own.

Posture

Disabled — does nothing

Suggest only — may propose, may not act

Autonomous — unavailable



Cancel

Create agent



Overview

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Relationships / Streaming Plus

Streaming Plus

Active

Kind: Subscription

Edit

Pause

Cancel relationship

Amount
\$18.99 / month

Renews in
12 days

Started
Mar 2026

Health score
62

Plan

Plan	Premium
Interval	Monthly
Provider	Streaming Plus

Payment instrument

Visa **** 4417 — default

Entitlements

Name	Type	Used / Quota
4 concurrent streams	Seat	2 / 4
Offline downloads	Feature access	—

Renewal timeline

- Renewal due — in 12 days
- Invoice paid — 18 days ago
- Plan changed — 3 months ago

Assets

- Subscription receipt (PDF)
- Terms of service (PDF)

Subscriber Bot Assistant

Ask me to manage subscriptions, providers, or invoices on this screen.

Context: Streaming Plus

When does this renew and what has it cost me this year?

It renews in 12 days on the Premium plan at \$18.99 per month. Four invoices are recorded this year, all paid, totalling \$75.96.

What can I do on this screen?

List my recent invoices

How do providers work?

Ask about this subscription...





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Subscriber Bot Ready

Universal Inbox

Every subscription message, merged and categorized

Add channel

Log test message

All

Billing

Marketing

Product updates

Renewals

Security alerts

Required actions

Other

Unread only



Needs



3 need action

Your plan renews in 7 days

Premium renews on the 14th at the current rate.

Renewal

Action required

2h

Card ending 4417 expires next month

Update your payment method to avoid interruption.

Billing

Action required

6h

New sign-in from an unrecognised device

Review recent activity on your account.

Security alert

Action required

1d

Price change effective next cycle

Monthly rate moves from \$16.99 to \$18.99.

Billing

2d

What is new this month

Feature notes and release highlights.

Product update

3d

Your plan renews in 7 days

Streaming Plus · Email channel · 2 hours ago

Renewal

Action required

Category confidence

82% confidence

High

Body excerpt is rnmone runs on an account, and it's body to sanisfy your cortanided amount poragement.

Mark read

Open relationship

Ingest channels

Personal email — Verified · Ingesting

Work email — Verified · Ingesting

SMS —

Connection

Tools

Resources

Prompts

Activity log

Domain tools

40

Platform modules

20

Destructive tools

3

Filter tools

All

Read-only

Destructive

Tool	Group	Annotation	Confirmation	Description
relationships_list	Relationships	Read-only	—	List tracked relationships with filters
relationships_get	Relationships	Read-only	—	Fetch one relationship by ID
relationships_create	Relationships	Write	—	Create a tracked relationship
relationships_cancel	Relationships	Write	Not required	Cancel a tracked relationship
providers_archive	Providers	Write	Not required	Archive a provider
payment_instruments_remove	Payments	Write	Not required	Remove a payment instrument
inbox_list	Inbox	Read-only	—	List universal inbox messages
agents_list	Agents	Read-only	—	List AI agents by kind, owner or posture
agents_create	Agents	Write	—	Create an agent (defaults to Suggest-on
agents_set_status	Agents	Write	—	Change an agent posture
policies_create	Agents	Write	—	Attach a policy to an agent
workflows_activate	Workflows	Write	—	Activate a draft workflow
health	Health	Read-only	—	Public liveness probe

agents_set_status

Change an agent operating posture (Disabled / Suggest-only / Autonomous)

Input

id — string, required
status — enum, required

Last result

Autonomous agent mode is not available yet: the policy-evaluation engine that enforces AUTONOMOUS actions has not shipped.

Insights

Where your recurring money goes, what renews next, and what to review — computed live from your portfolio.
Every figure is aggregated from your real subscriptions, normalized to a monthly equivalent.

Recurring spend / month

\$284.40

Active subscriptions

17

Renewing in 30 days

4

Avg. health score

68

Portfolio by status

21

subscriptions

Active

17

Trialing

2

Past due

1

Cancelled

1

Monthly spend by type

Subscription

\$186.20

Licence

\$58.00

Membership

\$28.20

Contract

\$12.00

Renewal forecast (6 mo)

Aug

\$312.40

Sep

\$198.00

Oct

\$486.90

Nov

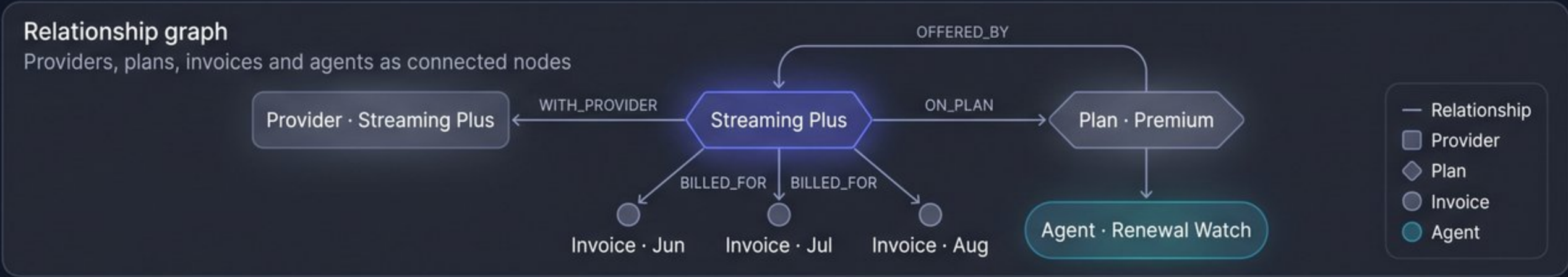
\$164.20

Dec

\$203.10

Jan

\$141.00



Optimization Opportunities

aws

AWS (Underutilized resources)

\$12.50

Actions

Figma (Switch to annual plan)

\$9.00

Actions

Upcoming Renewals Action List

HubSpot (Renewal on Aug 20)

Review usage

Acrobat Pro (Trial ends Sep 5)

Cancel or convert