



Cost Monitoring Agent

Tracks monthly tool and service costs and compares them against your defined budget.

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1 AT A GLANCE

AREA	Finance
TRIGGER	Monthly, e.g. at the end of the month
RESULT	Monthly report on tool costs compared with your budget
INTEGRATIONS (EXAMPLES)	Email invoices Google Sheets / Airtable Notion AI model

2 HOW THE WORKFLOW RUNS

- 1 Collect costs**
The agent collects the invoices from your tools and services, for example from your email inbox.
- 2 Categorise**
Each expense is assigned to a tool and a category, such as software, hosting or AI.
- 3 Compare with budget**
The totals are compared with the budget you set, overall and per category.
- 4 Flag anything unusual**
You get an alert for budget overruns, price increases or new subscriptions.
- 5 Monthly report**
At the end of the month you get a short report with all costs and changes compared with the previous month.

Forgotten subscriptions and creeping price increases get noticed right away.

IDEAL FOR

- ✓ Businesses with many software subscriptions
- ✓ Founders who want to keep fixed costs under control
- ✓ Teams whose tool costs have grown quickly

CUSTOMISABLE

- ✓ Categories and budgets
- ✓ Thresholds for alerts
- ✓ Format and timing of the report

WHAT YOU NEED

- ✓ Access to the invoice emails or a cost list
- ✓ A monthly budget, overall or per category
- ✓ A place for the report, e.g. Notion or Google Sheets

PRIVACY & SECURITY

- ✓ Only invoice emails are analysed
- ✓ No access to bank accounts or payment methods
- ✓ Reports stay in your own tools

YOUR CONTROL The agent only flags and reports. Cancellations and decisions are yours.

This describes the typical process. Every workflow is adapted to your tools, processes and requirements during the project; details and pricing are agreed individually.

Interested in this workflow?

In a free intro call we look at how the workflow can be adapted to your tools.

Book an intro call