USER MANUAL

Vera AI

The complete guide to the platform · every screen, every workflow

Redress Compliance · 2026-07-17

00 · Getting started & orientation

This chapter gets you signed in and oriented: how to log in securely, how the app is laid out, and the handful of screens you will return to every day. If you read only one chapter first, read this one.

> **What Vera AI is for.** Vera AI, by VendorBenchmark, helps you buy software at the right price: upload vendor proposals for expert benchmarking, run instant price checks, track your agreements and renewals, and work negotiations to a close. Everything else in this manual is a specific way of doing one of those four things.

CREATING YOUR ACCOUNT

Where: `/get-started` (instant) · `/request-access` (reviewed)
Who: anyone with a corporate email

Two doors into the platform, both free to start:

Instant (self-serve). On `/get-started`, enter your name, corporate email, and organization, and your workspace is provisioned in seconds: a free 30 day trial with the sample portfolio already loaded. Your sign-in details arrive by email (that email is also how we confirm the mailbox is yours); sign in and set your own password. New self-serve workspaces run in a short verification window while our team completes a background check, usually within 1 business day. Everything on your own data works immediately; community features (buying blocs, the outcome network, peer calls) open when the check clears.

Reviewed (request access). Prefer a guided start, or want a specific plan? Request access on `/request-access` and a named analyst reviews the request and sets the workspace up for you within 1 business day.

Tips

- If your company already runs Vera AI and has domain capture on, either door routes you to your team's workspace admin instead of creating a second workspace.
- Personal email domains are not accepted; use your work address.

SIGNING IN

Where: `/login`
Who: everyone

You sign in with your work email. Two methods are available:

How to use it

1. Go to the sign-in page and enter your work email.
2. Either type your password, or choose **Email me a link** to get a one-time magic link instead of a password.

3. If your organization requires two-factor authentication (always on for accounts with elevated access), you will be asked for a six-digit code from your authenticator app next.

Tips

- Invited by a teammate? Your invite email links to `/signup`, where you set your name and password once, then land in your organization already set up.
- Forgot your password? Use **Reset password** on the sign-in page; you will get a link to set a new one.

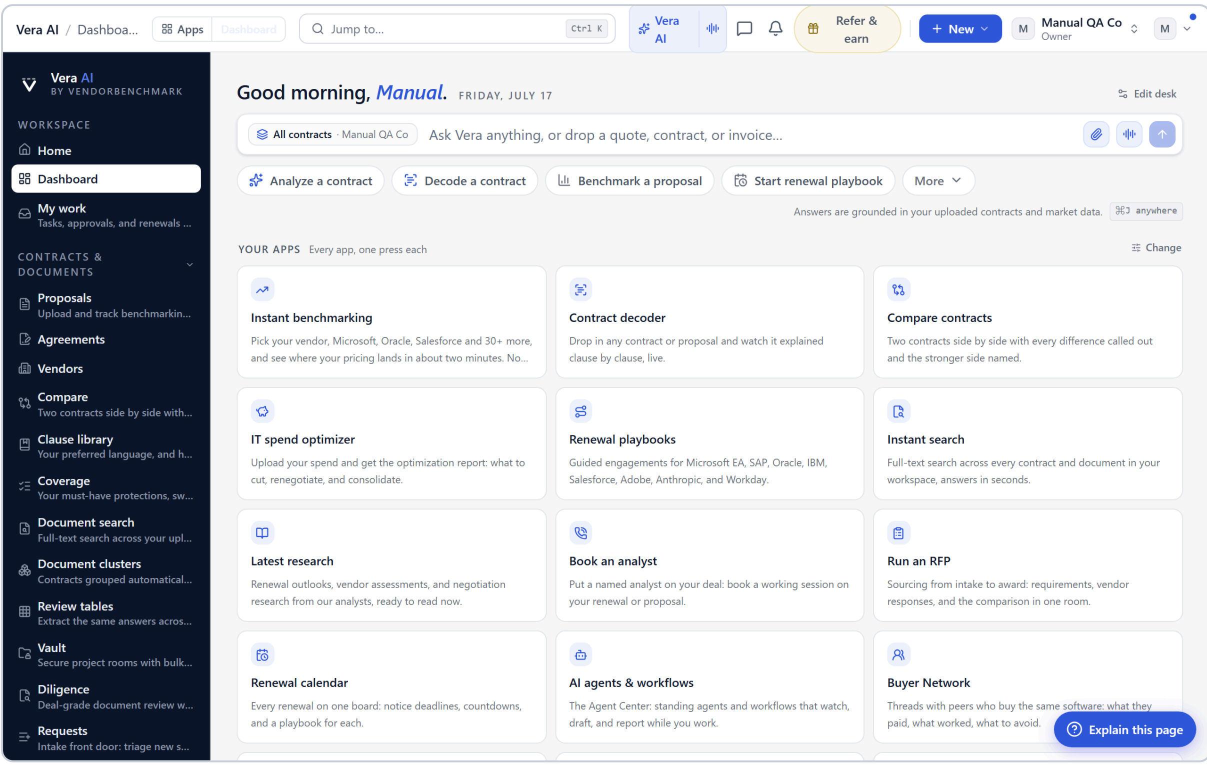
TWO-FACTOR AUTHENTICATION

Where: `/mfa` (challenge) · set up under Settings › Security
Who: everyone (required for elevated access)

After your password, a two-factor challenge asks for a rotating six-digit code from an authenticator app (Google Authenticator, 1Password, Authy, and the like). This protects your account even if your password leaks. You turn it on and register your device in Settings › Security.

THE APP SHELL

Every screen shares the same frame: a dark navigation rail on the left, a white utility bar across the top, and your content in the middle.



The left rail

The rail is your main map of the product. It groups destinations by the job you are doing:

- **Contracts & documents** — the paper itself: proposals, agreements, clauses, and document search.

- **Renewals & deals** — the deal calendar: renewals, negotiations, the rider, and the watchdogs.
- **Benchmarks & market** — price checks, delivered reports, research, and the buyer community.
- **Spend & savings** — the money: portfolio analytics, spend, invoices, opportunities, and savings proof.
- **Tooling** — upload-driven optimizers and the vendor playbooks.
- **Team & AI** — tasks, approvals, and Vera, the AI analyst.

On the screen

- **Recent** — a section at the top of the rail listing the last four screens you visited, so the pages you actually use stay one click away in either rail mode.
- **Used often** — under Recent, the pages you open most over the past month, marked "pinned by usage", once you have built a real habit. It never crowds out the fixed navigation.
- **Your views** — the saved list filters you return to, each with a live count. Owners can share a view with the whole organization; a shared view carries a **Shared** marker, is pinned in everyone's Your views rail, and stays owner-managed, so a teammate cannot rename, unshare, or delete it.
- **Group headers** — click one to fold or unfold it. Your folds are remembered per device. Until you fold something yourself, your workspace preset (or the role you picked in the getting-started course) decides which groups start open.
- **Core vs full rail** — by default the rail shows the 15 core destinations, every group keeping its flagships. The rest live in the **More** catalog and the command palette, so the rail stays short. You can switch to the full rail from the control at the foot of the rail; your workspace preset sets the starting tier until you choose. Throughout this manual, a section whose destination sits outside the core rail carries a "via **More** or Ctrl/⌘ K" marker on its **Where** line, so you know not to hunt for it in the short rail.
- **Workspace summary (foot of rail)** — your organization and your role are always shown here, so you know which tenant you are in. Your workspace preset appears underneath with a **Change** link back to the picker.
- **Collapse button** — narrows the rail to icons only when you want more room.

The top bar

The bar keeps to a handful of controls; everything less frequent lives in your account menu.

On the screen

- **Breadcrumb** — shows where you are (Vera AI › current view).
- **Apps and Dashboard switch** — the mode switch between your two homes: Apps opens the launcher, Dashboard opens the full command view, and the active mode is highlighted. It rides every screen, so either home is always one press away.
- **Add to dashboard** — on any feature page, this button pins the page to your dashboard shortcuts. Click it once and the page appears in a Your shortcuts band on your dashboard; click it again (it reads On dashboard) to remove it. Your shortcuts are personal and do not affect the rest of your team.
- **Jump to… (Ctrl/⌘ K)** — the command palette. Start typing any page, tool, or vendor and jump straight to it, and now run actions from the same box too: new proposal, start a benchmark, generate a negotiation brief, start a playbook, or ask Vera, each one keystroke away. This is the fastest way to move around; you rarely need to hunt in the rail.

- **Keyboard grammar** — press **g** then a letter to jump without the palette: **g d** dashboard, **g r** renewals, **g c** proposals, **g p** portfolio, **g s** spend, **g t** tooling, **g w** watch, **g b** benchmarking. Press **?** anywhere for the shortcuts overlay with every jump grouped.
- **The Vera cluster (Ctrl/⌘ J)** — one control with two modes: the text chip opens Vera, the AI analyst, over whatever you are looking at, and the voice segment beside it starts a spoken conversation. See Vera AI.
- **Chat and the inbox** — your team chat, and the bell that opens one triage inbox folding notifications, watchtower changes, and money-critical signals into a single list, with a needs-decision filter and per-signal mute. Money items are flagged calmly, never alarmist.
- **New menu** — the one place to start something: upload a proposal, add an agreement, and the other create actions.
- **Refer & earn** — the gold pill beside the bells. Like the platform? Invite a colleague from here: the dialog shows your personal referral code, sends up to five personal invites, and links to the Referrals page where you track who signed up and what you have earned (10% of what a referred company spends for their first 12 months).
- **Org chip and account chip** — switch organization (if you belong to more than one) and open your account menu. The account menu also carries What's new, Session activity, and the help and feedback actions (Take a tour, Refer & earn, Report a bug, Suggest a feature), each keeping its unread dot, so the bar itself stays calm.

Help and feedback (in the account menu)

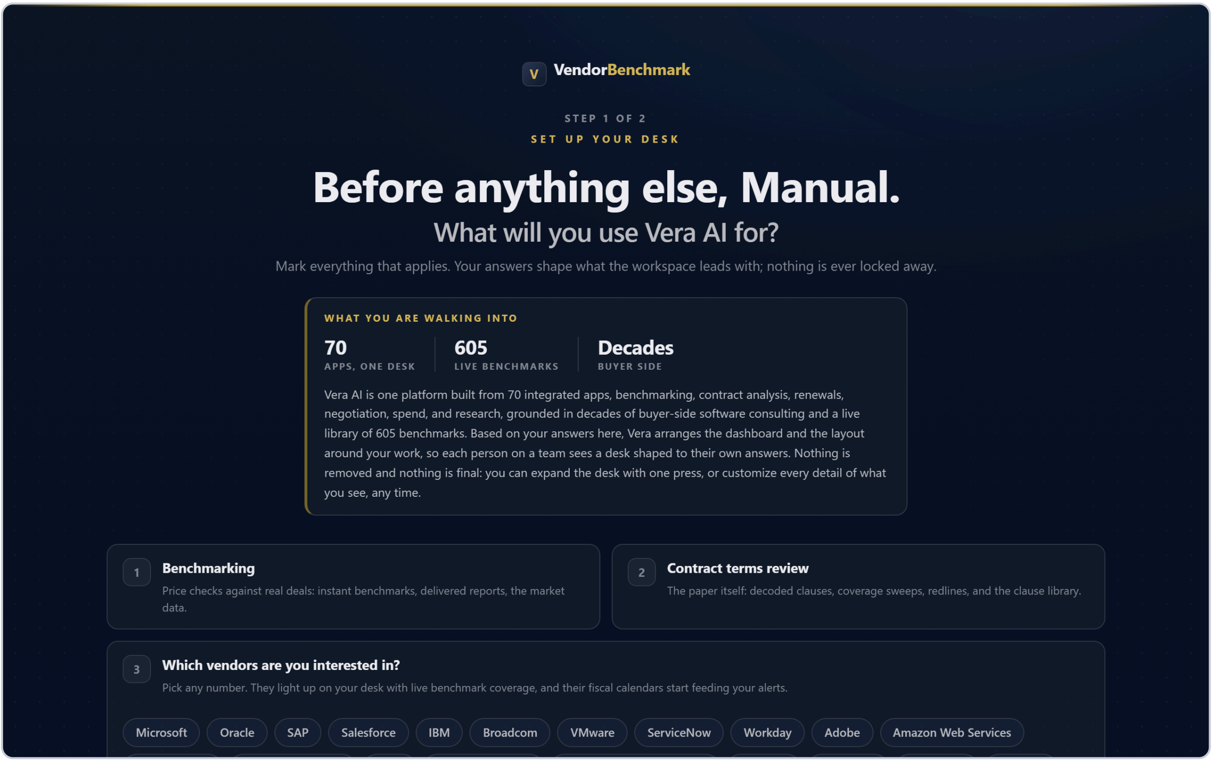
- **Take a tour** — a three minute guided walkthrough of the platform on real screenshots: 15 steps in five chapters covering the life of a deal, from upload to benchmark to renewal to the AI desk. A chapter rail on the left jumps to any step, each step lists what to notice on the screen, and **Open this screen** drops you onto the page being shown. Move with the arrow keys or the Next button, and reopen it any time, it is a good way to show a new colleague around.
- **Report a bug** — pick how badly it hurts (blocking, annoying, or minor), describe what happened and what you expected, and send. The page you were on, your browser, viewport, and timezone are attached automatically and shown to you before sending, so nothing is captured invisibly. You get a reference code to quote in follow-ups; bugs are typically fixed within 24 hours.
- **Suggest a feature** — tell the product team what to build: the area it belongs to, the idea, the problem it solves, and how much it would matter to your work. Every suggestion is read, and shipped ideas are announced in What's new.

THE SCREENS YOU WILL USE MOST

The desk survey

Where: your first sign-in lands here · retake from Getting started · `/welcome/survey`
Who: everyone, once

Before the home screen greets you, the platform asks six quick questions so your desk opens arranged around your work. Existing accounts that have never answered are asked once on their next sign-in; after that the survey never repeats unless you retake it.



On the screen

- **Step 1, the six questions** — mark everything that applies: benchmarking, contract terms review, which vendors you are interested in (tap the chips, or type any vendor and press Add), IT cost optimization, cloud optimization, and optimization tools. The vendors you pick go on watch: they light up on your desk with live benchmark coverage and their fiscal calendars feed your alerts.
- **Step 2, the three views** — three previews of your navigation rail, each built live from your own answers (gold sections are the ones you lit up). Pick how the desk should treat everything else:

- **Focused desk** — hides what is not relevant; one press on **Show all sections** in the rail brings everything back.
- **Relevant first** — your sections lead the rail, open; the rest stays visible but folded.
- **The full desk** — every section open from the start; you fold what you do not need.

How to use it

1. Mark your interests and vendors, then press **Continue**.
2. Compare the three previews, press the one you want, then **Continue to your workspace**.

Tips

- Nothing is ever locked away: whichever view you choose, the command palette (Ctrl/⌘ K) and the More catalog always search the whole platform.
- Change your mind later from Getting started, **Retake the desk survey**, or just use the rail's own **Show all sections**.

Home (the launcher)

Where: sign-in lands here · Workspace › Home · `/welcome`
Who: everyone (until you switch your home to the dashboard)

Your front door. Signing in opens a calm, full-screen home built for one thing: getting you into the right app in one press. At the top, a live pulse of your workspace; below it, every app as a door. Use an app, press **Home** in the rail (or the brand mark in the corner), and you are back here, ready for the next thing. The dashboard is always one press away, but it is your choice, never the default.

On the screen

- **Workspace pulse** — three live numbers: contracts on file, renewals closing inside 90 days, and unread alerts. Each is a link straight to its page; the renewals figure turns gold when something is on the clock.
- **Run the introduction** — the gold strip at the top starts First Light, the guided walkthrough that builds the desk around you. Until you have seen it, it carries a Start here flag; after that it reads "Run the introduction again" and replays it any time.
- **Your apps** — sixteen doors, one press each, and every one opens in **app mode**: the navigation rail disappears, the tool owns the screen under a slim top bar, and everything runs in the dark navy theme so it feels like one surface with this screen. Press Apps in that bar to come home, or Dashboard to restore the full desk. Hover any door (or tab to it with the keyboard) and a small card tells you when to use that app. The doors: Instant benchmarking, Contract decoder, Compare contracts, IT spend optimizer, Renewal playbooks, Instant search, Latest research, Book an analyst, Run an RFP, Renewal calendar (with a live count of what is closing in), AI agents & workflows, Buyer Network, Buyer intros, Negotiation dossier, and Platform updates.
- **Dashboard link (top right)** — a standing shortcut to the full command view.
- **Edit this screen** — compose the grid itself: press an app to remove it, press Add apps to put any tool or page on the platform here as a door (searchable), and Restore defaults brings the original set back. Every tool also carries an **Add to apps** button in its top bar.
- **Choose dashboard apps** — flip the grid into a picker, highlight the apps you want, and your dashboard carries exactly that clean set as a Your apps band. No customization means all of them; a Change link on the dashboard band leads back here.
- **Reconfigure this screen** — rerun the desk survey any time your work changes; the rail and this screen rearrange around the new answers.
- **Apps and Dashboard switch (top bar)** — every screen carries the mode switch in the top bar: Apps opens this screen, Dashboard opens the full command view, and the active mode is highlighted. Either one can be your sign-in home.
- **First-visit orientation** — three cards under the greeting on your first visit: the two modes and how to switch, Vera AI and what she remembers (with example questions), and Secure by design, which opens the security answers in place.

- **What about security?** — a footer control that opens the security answers in a popup right on this screen: tenant isolation, file handling, the AI data flow, deletion, sign-in security, and SOC 2 status, taken word for word from the full security FAQ. A button inside opens all 60 answers in a new tab, so you never lose your place.
- **Footer choice** — "Prefer the dashboard? Make it your sign-in home" turns the launcher off: from then on, sign-ins go straight to the dashboard and the Home entry leaves the rail.
- **One-time asks** — the stage asks two questions, once each and never together: where money-critical alerts should reach you, and whether you want the weekly briefings by email (price list updates per vendor, vendor licensing news, the knowledge summary). Both are strictly opt-in, both stay adjustable in Settings › Notifications, and every briefing email carries a one-click unsubscribe.

How to use it

1. Read the pulse: if renewals or alerts show a number, that is usually your first stop.
2. Press the app you came to use. When you are done, press **Home** in the rail to come back.
3. Want the full picture instead? The dashboard is the top-right link, or **g d** on the keyboard.

Tips

- On your very first visit, the door you choose also arranges your workspace: picking a renewal-shaped door opens the renewal groups in the rail and pins the matching tools to your dashboard. You can change this any time under the workspace preset picker.
- If you turn the launcher off and miss it, the command palette (Ctrl/⌘ K) still finds "Home".
- Holding a document and want proof before you explore anything else? Your first verdict turns it into a defensible verdict and your first plan moves in four steps.

Your first verdict

Where: from Home (the launcher) · `/welcome/first-verdict`
Who: requires an AI plan
You get: a verdict on your own document plus the first drafted moves of a renewal plan · under five minutes

One continuous flow from a fresh sign-in to a defensible verdict on your own document, in four visible steps: Upload, Decode, Benchmark, Plan. Under the hood it is a normal Verdict Bar run, so nothing about it is throwaway: the verdict it produces is a real one, saved with your other runs.

On the screen

- **The step rail** — Upload, Decode, Benchmark, and Plan across the top with a progress bar beneath. Each finished step collapses to its key result lines, so the story of your document builds as the run works.
- **The dropper** — drop a quote, contract, or invoice, or click to pick one. PDF or DOCX up to 30 MB, photos up to 3.5 MB. The file is read in memory and never stored.
- **Or run it on a document you already have** — if your organization already holds documents, the most recent ones are listed here so you can run the flow without uploading anything new.

- **The kind chooser** — if the run cannot tell what the document is, it stops and asks: a quote or priced offer, a contract or terms, or an invoice. Choosing costs nothing; the same file re-runs straight through the right engine.
- **The summary card** — once the fourth step lands: the one-line verdict, what grounded it, each step's key results, and the doors onward. Open the full verdict, benchmark the vendor, start the drafted renewal plan, or go to your desk.
- **Skip to the dashboard** — the top-right link out at any time; nothing here is mandatory.

How to use it

1. Drop the document, or pick one from the list of documents you already have.
2. Watch the steps land: Upload verifies the file and classifies it, Decode reads every clause, line, and figure, Benchmark places the deal against comparable ones and the peer corridor, and Plan drafts the first moves of your renewal plan from the matching playbook.
3. If the run asks what the document is, pick the kind and it continues on the same file.
4. From the summary card, open the full verdict for every figure, or follow one of the doors onward.

Tips

- A refresh mid-run resumes exactly where the run left off. The one exception: if the run stopped to ask what the document is and you reload before answering, drop the file once more, because the original never left your browser.
- Every run after your first lives in the Verdict Bar under Recent runs; this page is simply the guided first pass over the same machinery.

Related: Verdict Bar · Renewal playbook

Dashboard

Where: Workspace › Dashboard · `/dashboard`
Who: everyone

Your home page, kept to a few calm bands so it answers one question once: the ask bar, the desk verdict, the Today queue beside your vitals, your apps, your shortcuts, and the renewal horizon. Everything else is an optional widget you add at Customize.

On the screen

- **Ask bar** — the AI front door: ask a question about your portfolio, or drop a quote, contract, or invoice on it for an instant verdict. The Edit desk link beside it opens Customize.
- **The desk verdict** — a slim two line read that takes a position on your week, nothing more. Money appears inside the sentence when there is money worth naming.
- **Today queue** — the ranked answer to "what should I do now", directly under the verdict: every item carries why it matters and its one next action. On Mondays the weekly vendor briefing appears here as a single line instead of its own section.

- **Vitals rail** — beside the queue: proposals in review, tracked spend, and your next notice deadline, each with its trend, with the savings proof card (the savings you have captured) beneath it.
- **Setup checklist** — your first steps on the platform, below the queue. It disappears once you have completed them.
- **Your apps** — the launcher's doors as a dashboard band: all of them until you customize, or exactly the set you highlighted with Choose dashboard apps on the home screen. Change leads back to the picker.
- **Your shortcuts** — a band of the pages you pinned with the Add to dashboard button in the top bar, each one click away. It only appears once you have pinned at least one page. Remove a shortcut with the X on its tile, or with the top-bar button on the page itself.
- **Renewal horizon** — the next 18 months of renewals on one strip, each deal sized by spend and colored by risk. The same strip renders on the Renewals page, so the two always agree.
- **More for your workspace** — a collapsed band at the foot holding the widgets you opted into at Customize (`/dashboard/customize`): the toolkit, the Monday commission briefing, the weekly vendor report, the portfolio treemap and ledger, the team board, the savings odometer, the data freshness pulse, tracked vendors, and more. Pick which appear and in what order; your order always wins.
- **Sample data** — new account? Load an example portfolio to explore, then remove it in one click. Sample rows never mix with your real data. Empty screens carry their own preview too: Proposals, Renewals, Delivered reports, and Watch each offer a **See it with sample data** view so you can see the page full before adding your own, clearly marked and one click to dismiss.

How to use it

1. Work top to bottom: read the verdict, then clear the Today queue; everything below it is supporting context.
2. Use the Ask bar at the top of the dashboard to ask a question about your portfolio without navigating anywhere.
3. As you find pages you return to often, click Add to dashboard in the top bar so they land in Your shortcuts.
4. Want a band the default view does not show, say the toolkit or the savings odometer? Open Edit desk (or `/dashboard/customize`) and add it as a widget.

Tips

- On a brand-new account, load sample data first so every screen has something to show while you explore. Remove it before you start entering real contracts.
- Pin the two or three desks you open every day (a benchmark, a playbook, the verdict bar) so they are always one click from the dashboard.

Getting started (the course)

Where: Account › Getting started · `/start`
Who: everyone

A guided tour matched to why you are here: benchmarking one contract, understanding a single contract, connecting your data sources, or running the full platform. Pick a path and tick steps off as you go; progress is saved to your account and syncs across your devices.

On the screen

- **Your workspace (preset picker)** — four arrangements of the same workspace: **Renewal desk** (one or two vendors, a renewal on the clock), **Deal check** (pressure-test a quote), **Portfolio command** (the whole estate), and **Explore everything**. Your pick decides which rail sections start open, whether the rail begins simple or full, which tools are pinned to your dashboard, and where the course begins. If you answered the goal question at signup, the matching preset carries a **Suggested** marker. A preset only changes emphasis: every feature stays available in search and the More catalog, and you can switch presets anytime here or from the foot of the rail.
- **Four doors** — benchmark one contract, understand a contract, connect your data, or run the full platform. Change paths anytime with **Change path**.
- **Role and use-case questions** — the full-platform path asks your role and what you want to get done, then builds a personal track from your answers.
- **Progress path** — the row of numbered dots shows your whole track: green dots are done, the blue one is your next step.
- **Next up card** — your single next step, promoted to the top with what you get out of it.

How to use it

1. Check the Your desk card: if the rail does not fit how you work anymore, retake the desk survey from there.
2. Pick the workspace preset that matches your situation; the sidebar and dashboard rearrange immediately.
3. Pick the door that matches why you are here.
4. Answer the role and use-case questions if prompted.
5. Do the "Next up" step, then mark it done. Repeat down the track.

My work

Where: Workspace › My work · `/my-work`
Who: everyone

Everything assigned to you personally: tasks, renewals you own, and approvals waiting on you. This is your answer to "what needs me?"

On the screen

- **Queues** — your open items grouped by type, so you can clear them in one sitting.

How to use it

1. Open My work at the start of the day and clear each queue.
2. For team-wide to-dos rather than just yours, see Tasks.

The More catalog

Where: Workspace › More · `/more`
Who: everyone

The full, searchable catalog of every tool and page, including everything the short rail hides. When you cannot remember where something lives, this is the place to browse or search.

How to use it

1. Open More and search, or browse by group.
2. Faster still: press **Ctrl/⌘ K** anywhere and type what you want.

What's new

Where: account menu (your avatar, top right) · `/whats-new`
Who: everyone

Release notes in two levels: curated highlights in the journal, and the full changelog of every small change behind the Full changelog button in the header. The latest release leads as a full-width plate, older releases group by month, and on large screens a month index on the left jumps to any month. Each entry links to the feature it describes.

Next: Chapter 01 · Contracts & renewals

01 · Contracts & renewals

This is the paper-trail heart of the platform: where you upload vendor quotes for expert benchmarking, keep your signed agreements, and watch every expiry, notice deadline, and price-list change so none of them catches you out. It is also where you work a live deal to a close, from setting a mandate through to signature. If a screen touches a contract, a vendor, or a renewal date, it lives in this chapter.

PROPOSALS

Where: Contracts & documents › Proposals · `/contracts`
Who: everyone

Vendor quotes and contracts you have submitted for benchmarking. Each one moves along a path: Uploaded, In review, Benchmarked, then Delivered when your report is ready.

On the screen

- **Status pills** — where each proposal sits in the review pipeline. You are emailed when a report is delivered.
- **Proposal page** — open a row to see its status path, the files you attached, and, once delivered, the benchmark report.
- **AI review** — on a proposal page you can run an AI redline scan of the vendor PDF that flags risky clauses with quotes from the document.

How to use it

1. Upload a proposal: vendor, contract type, your question, and the files (PDF or DOCX).
2. Open a proposal to track its status.
3. Read the report once it is delivered.

Related: Upload a proposal · Delivered reports

UPLOAD A PROPOSAL

Where: Contracts & documents › Proposals › New · `/contracts/new`
Who: everyone

A short wizard that sends a vendor quote or contract to our analysts for benchmarking. You will be emailed when the report is ready.

On the screen

- **Vendor and type** — pick the vendor and what kind of agreement this is, so it reaches the right analyst.
- **Your question** — optional but helpful: tell us what you want to know, for example whether the renewal uplift is fair.
- **Files** — drag in PDF or DOCX files. They are stored privately and only visible to your organization and our analysts.

How to use it

1. Choose the vendor and contract type.
2. Add your question so the analyst knows what you want answered.
3. Drag in the vendor PDF or DOCX and submit for review. Our team benchmarks it against the market and delivers a report.
4. Track progress afterwards on the Proposals list.

Tips

- Files are limited to PDF and DOCX and capped at 25 MB each. Very large files upload straight from your browser to storage.

Related: Proposals

COMPARE

Where: Contracts & documents › Compare · `/contracts/compare` · via **More** or Ctrl/⌘ K
Who: everyone

Side-by-side document comparison with an AI difference scan: two proposals or versions next to each other with the changes called out. The result opens with a verdict band (terms compared, which side is stronger where, watch-outs), then one card per term showing both sides' language with the stronger position highlighted, and an amber watch-out panel closing the read.

On the screen

- **Document panes** — the two documents side by side.
- **Difference scan** — the AI's read of what changed and what it means commercially.

How to use it

1. Pick two documents and run the scan.
2. Save the scan into the customer workspace to keep the read on file.

Tips

- Use this to check a renewal quote against last year's paper, or a redlined draft against the version you sent. For a year-over-year read on the same vendor, see the Time machine tool.

VENDORS

Where: Contracts & documents › Vendors · `/vendors`
Who: everyone

Every vendor across your proposals and agreements, one page per vendor, so you can see your whole relationship in one place.

On the screen

- **Vendor rows** — spend, agreements, proposals, and renewal dates rolled up per vendor.
- **Vendor page** — open a vendor for its contracts, benchmarks, market intel, and notes.

How to use it

1. Open a vendor to see everything you have with them.
2. Run an instant benchmark for a vendor from here.

WATCH

Where: Renewals & deals › Watch · `/watch` · via **More** or Ctrl/⌘ K
Who: everyone

One watchtower, two tabs. The **Terms** tab watches the vendor side: every change to a tracked vendor's published price list, diffed and priced at your seat counts. The **Billing** tab watches your side: what you are billed against what you are entitled to against what the market pays, checked daily. The two tabs share one underline tab row, and the old addresses (`/vendors/watch` for Terms watch, `/spend/watch` for Billing watch) redirect to the right tab, so old links, bookmarks, and emails keep working.

Terms watch

Where: Watch › Terms tab · `/watch`
Who: everyone

Every change to a tracked vendor's published price list, diffed on each refresh and priced at your own seat counts. This is the vendor side of the watch: what a vendor moved, and what that move would cost you at renewal. Every change is kept, so you can read a vendor's full price history any time.

On the screen

- **Email me when price lists change** — a switch at the top left turns on the price-change digest; nothing is sent until you turn it on, and every email carries a one-click unsubscribe that turns off only this email. Below it, follow the vendors you care about, or leave none selected to hear about every tracked change.
- **Browse the price-change archive by vendor** — a link into the per-vendor archive (see below).

- **Vitals row** — changes on your vendors in the last 90 days, vendors tracked, your annualized exposure at your next renewals, and the single biggest move in the window.
- **Your vendors** — a seismograph strip per vendor you hold: increases strike upward in brick, decreases downward in green, new SKUs in gold.
- **Market watch** — tracked vendors outside your estate. Changes here are context, not exposure, because nothing below touches a contract you hold.
- **Also watching for you** — cross-links to the Billing tab and to standing answers that changed.

How to use it

1. Read your vendors first: any strip with a recent brick strike is a price rise heading for a renewal you hold.
2. Use the switch to have price-list changes emailed to you, and follow the vendors you want to hear about.
3. Open a change to see the old and new price, the delta, and what it costs at your seat counts.
4. Switch to the Billing tab to see whether your invoices already reflect a move.

Related: Archive by vendor · Billing watch · Weekly report

Terms watch archive by vendor

Where: Terms watch › Browse the price-change archive by vendor · `/watch/archive`
Who: everyone

Every published price-list change Terms Watch has ever detected, kept and re-sorted by vendor. The index lists every vendor whose price list has moved, with how many changes it has, a breakdown of increases, cuts, new SKUs, and retirements, and when it last moved. Open a vendor to read its full history, newest first: each change shows the old and new price, the delta, and the grounded analyst note (what changed, why it likely changed, and the one action to take before renewal).

How to use it

1. From the Terms tab, follow **Browse the price-change archive by vendor**.
2. Scan the index (most-changed vendors first) or find the vendor you are about to renew.
3. Open the vendor to read its full price history and the note attached to each change.

Billing watch

Where: Watch › Billing tab · `/watch/billing`
Who: everyone

Every day, per vendor per SKU: what you are billed against what you are entitled to against what the market pays. Drift arrives with its corrective draft attached, and a correction only counts once later invoices confirm it. This is the customer side of the same seismograph as the Terms tab.

On the screen

- **Verdict band** — the headline number: how much a month is leaking, across how many vendors, with live bleed, open findings, vendors leaking, and corrections landed.
- **Leak board** — a row per leaking vendor with the SKUs where billed, entitled, and market prices disagree.
- **Needs confirmation** — connector-reported entitlements are held out of alerting until a human confirms the contracted figures. These are marked "confirm".
- **Also watching for you** — cross-links to the Terms tab and standing answers that changed.

How to use it

1. Read the verdict band for the live monthly bleed.
2. Open a leaking vendor to see the SKU-level findings and the corrective draft attached to each.
3. If the board is empty, confirm entitlements from a contract or connect a license source so the daily check has something to price against.

Tips

- An approved correction is proven or disproven against later invoices on Savings proof; mischarge disputes are tracked on Invoices.

Related: Terms watch

WEEKLY REPORT

Where: Benchmarks & market › Weekly report · `/vendors/weekly` · via **More** or Ctrl/⌘ K
Who: everyone

Every Monday the agent sweeps the week's enterprise software news for pricing and licensing changes, anything that moves costs or negotiating position, and files this wire. It is short on quiet weeks and longer only when something major breaks; items on vendors you hold are marked.

The page opens with a plain-language rundown of what each Monday update covers: price and discount moves, licensing and packaging changes, support, audit and end-of-life shifts, and the M&A or earnings news that changes your leverage, each with a read on what to do about it.

On the screen

- **What each week covers** — a short panel at the top listing the kinds of change the agent files each week.
- **The wire** — the week's report as an executive brief. Items touching a vendor you hold carry an "in your estate" eyebrow.
- **Subscribe card** — a switch at the top left turns on the Monday email; nothing is sent until you turn it on, and every email carries a one-click unsubscribe that turns off only this email. Below it, pick the vendors you care about so their items lead your copy.
- **Past weeks** — the archive strip below the brief; a gold dot marks a week where something major broke.
- **Browse the full archive by vendor** — a link into the per-vendor archive (see below).

How to use it

1. Read the latest wire, starting with the items marked as in your estate.
2. Use the switch in the subscribe card to have it emailed to you each Monday.
3. Open a past week from the archive strip to catch up, or open the archive by vendor to read one vendor's full history.

Tips

- Your weekly emails now arrive as one Monday brief: the vendor market wire (this report), renewals coming up, watchtower changes, and savings and wins in a single send. Turn any section off while keeping the rest under Settings › Notifications.

Related: Archive by vendor · Terms watch

Weekly report archive by vendor

Where: Weekly report › Browse the full archive by vendor · `/vendors/weekly/archive`
Who: everyone

Every weekly update the agent has ever filed, kept and re-sorted by vendor so nothing drops off. The index lists every vendor the agent has covered, with how many updates it has and when it was last mentioned; a gold dot marks a vendor with a major update on record. Open a vendor to read its full history: every price move, licensing change, and market shift on it, newest first, each linking back to the week it ran in.

How to use it

1. From the weekly report, follow **Browse the full archive by vendor**.
2. Scan the index (most-covered vendors first) or find the vendor you are about to renew.
3. Open the vendor to read its timeline, and click any **Week of** eyebrow to jump to the full weekly brief it came from.

BILLING WATCH

Where: Renewals & deals › Billing watch · `/spend/watch` · via **More** or Ctrl/⌘ K
Who: everyone

Every day, per vendor per SKU: what you are billed against what you are entitled to against what the market pays. Drift arrives with its corrective draft attached, and a correction only counts once later invoices confirm it. This is the customer side of the same seismograph as Terms watch.

On the screen

- **Verdict band** — the headline number: how much a month is leaking, across how many vendors, with live bleed, open findings, vendors leaking, and corrections landed.
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- **Also watching for you** — cross-links to Terms watch and standing answers that changed.

How to use it

1. Read the verdict band for the live monthly bleed.
2. Open a leaking vendor to see the SKU-level findings and the corrective draft attached to each.
3. If the board is empty, confirm entitlements from a contract or connect a license source so the daily check has something to price against.

Tips

- An approved correction is proven or disproven against later invoices on Savings proof; mischarge disputes are tracked on Invoices.

Related: Terms watch

AGREEMENTS

Where: Contracts & documents › Agreements · `/agreements` · via **More** or Ctrl/⌘ K
Who: everyone

Signed contracts you are tracking for spend and renewals. Set the expiry and notice period once, and the platform watches the deadlines for you.

On the screen

- **Expiry and notice window** — each agreement carries an expiry date and a 30, 60, or 90 day notice period. Your team is emailed when the window opens.
- **Files** — keep up to five documents per vendor for safe keeping. You can track up to forty vendor agreements.

How to use it

1. Add an agreement: vendor, expiry date, notice period, and the signed files.
2. See them sorted by deadline on Renewals.

Related: Renewals

RENEWALS

Where: Renewals & deals › Renewals · `/renewals`
Who: everyone

Every agreement sorted by expiry, so the next deadline is always at the top. When a notice window opens, your team is emailed automatically.

On the screen

- **Renewal horizon** — the page opens on the same 18-month strip your dashboard shows: every dated deal sized by spend, colored by risk, and led by its notice deadline. One timeline everywhere, so the dashboard and this page always agree.
- **Notice window** — the date by which you must tell the vendor you are cancelling or renegotiating. Rows show how many days of runway you have.
- **War room** — once a renewal crosses into its notice window, its vendor record leads with a live countdown, this week's playbook step, the negotiation brief, and the owner and approvers pinned, and the deal jumps to the top of your dashboard Today queue.
- **Calendar and pipeline** — the same renewals as a calendar and as a stage-by-stage pipeline you can work through.

How to use it

1. Open a renewal to plan the negotiation.
2. Turn a renewal into a tracked negotiation when you are ready to engage the vendor.
3. Build the full plan with the Renewal playbook.

Related: Renewal playbook · Negotiations

RENEWAL PLAYBOOK

Where: Renewals & deals › Renewal playbook · `/renewals/playbook`
Who: everyone

Name what is renewing and the platform builds the whole plan: a work-back timeline, the questions to ask, the plays to win, and the negotiation talking points. Turn on the agent and it watches the deadline and keeps you on track.

On the screen

- **Wizard** — pick an existing contract or just name the vendor and fill in the details. Contracts that already have a playbook offer "open" instead of starting a new one.
- **Work-back timeline** — the plan laid out backwards from the renewal date, so you know what to do when.
- **The agent** — turn it on and it tracks the deadline and prompts you at each step.

How to use it

1. Pick the contract that is renewing, or name the vendor and its details.
2. Let the platform build the timeline, the discovery questions, the plays, and the talking points.
3. Turn on the agent if you want it to watch the deadline for you.

Tips

- The step-by-step plan and the agent draw on your AI plan. Without one you still get the plan structure and the work-back timeline.

Related: Renewals · Managed renewals

MANAGED RENEWALS

Where: Renewals & deals › Managed renewals · `/renewals/managed` · via **More** or Ctrl/⌘ K
Who: everyone · activating the program is org owners only

Hand over the calendar: Vera runs every covered renewal under mandates you approve, and the fee is a percentage of savings verified against vendor invoices. Claimed figures never bill.

On the screen

- **The offer** — before you enroll: Vera negotiates and discloses itself as an AI, you decide the moments that matter, and the fee is a share of invoice-verified savings only.
- **Net position** — once enrolled: savings banked against fees paid, always shown net, with every figure traced to a vendor invoice.
- **The covered horizon** — covered renewals by state across the next fourteen months.
- **Waiting on you** — the escalation queue: mandate approvals, formal offers, and any decision the guardrails parked.
- **The fee ledger** — every fee line paired with the verified saving and the invoice that confirms it.

How to use it

1. Read the offer and the fee terms.
2. An owner activates the program, which signs a fee agreement and sets the standing mandate defaults.
3. Approve each deal's mandate before anything reaches a vendor, and clear the "waiting on you" queue as Vera works.

Tips

- Nothing reaches a vendor until you approve that deal's mandate, even with the standing defaults in place.

Related: Renewal playbook · Savings proof

NEGOTIATIONS

Where: Renewals & deals › Negotiations · `/negotiation` · via **More** or Ctrl/⌘ K
Who: everyone

A workspace for live deals. Each negotiation is a tracked thread from mandate to signature, so nothing agreed on a call gets lost.

On the screen

- **Mandate** — your target price, walk-away point, and approvals, set before you engage the vendor.
- **Tactics analysis** — paste a vendor email and the AI reads the tactic being used and suggests the counter.
- **Concession ledger** — every give and get on both sides, with a running value.
- **Commitments** — what the vendor promised, captured so it makes it into the contract.

How to use it

1. Start a negotiation from a renewal or an opportunity.
2. Set the mandate before you engage the vendor.
3. Analyze a vendor email for tactics, and log every give and get in the ledger.
4. Run a post-mortem when the deal closes.

Related: Renewals

BUYING BLOCS

Where: Renewals & deals › Buying blocs · `/blocs` · via **More** or Ctrl/⌘ K
Who: everyone

Buyers with the same vendor and the same renewal window, negotiating on one term sheet. You stay anonymous until mutual opt-in.

On the screen

- **Matchmaking strip** — where your renewal calendar lines up with other buyers of the same vendor.
- **Invitations** — a bloc you have been invited to: you see the shape (buyers, combined ACV, window, term sheet version), never the members.
- **Your blocs** — blocs you have joined, with a room to coordinate the shared negotiation.

How to use it

1. Review the matchmaking strip and your invitations.
2. Open an invitation to read the bloc's shape and thesis.
3. Join a bloc to enter its room; identities unlock only on mutual opt-in after you join.

Tips

- Blocs form around vendor families where several buyers renew in the same quarter, built on a shared Fair Renewal Rider term sheet.

Related: Fair Renewal Rider · Renewals

CLAUSE LIBRARY

Where: Contracts & documents › Clause library · `/clause-library` · via **More** or Ctrl/⌘ K
Who: everyone · requires an AI plan

Your organization's negotiation positions per clause: the preferred position, the fallback, and the walk-away for terms like auto-renewal, uplift caps, and liability. These positions feed the AI engines, so scans and drafts argue for your standard instead of a generic one.

On the screen

- **Position entries** — one entry per clause type with your preferred language, fallback position, and walk-away.
- **Contract comparison** — pick a contract and the AI reads it against your positions, clause by clause, showing where the document meets your standard, misses it, or is silent.

How to use it

1. Add or edit a position for each clause that matters to you.
2. Compare a contract against your positions to see where it stands.
3. See position coverage across all contracts on Coverage.

Related: Coverage · Clause positions (Settings)

COVERAGE

Where: Contracts & documents › Coverage · `/contracts/coverage` · via **More** or Ctrl/⌘ K
Who: everyone

Your clause library's must-have template, swept across every contract: which agreements carry your required protections, and which do not.

On the screen

- **Coverage grid** — contracts against must-have positions, with a verdict pill per cell: Present, Deviates, Missing, or Unclear.
- **Run coverage check** — loops the scan across the portfolio until every cell has a verdict.
- **Coverage report** — the white-paper read of where your protections are strong and where they are missing, generated below the grid.

How to use it

1. Run the coverage check to fill the grid.
2. Read the grid for any red Missing cells: agreements without a protection you require.
3. Generate the coverage report for the narrative summary.

Tips

- The must-have template comes from your Clause library positions, so keep those current first.

Related: Clause library

FAIR RENEWAL RIDER

Where: Renewals & deals › Fair Renewal Rider · `/rider`
Who: everyone

The standard addendum buyers attach to every software renewal: an indexed uplift cap, benchmark repricing, audit conduct rules, no retroactive true-ups, co-termination, and change of control protection. Versioned, public, and free to send.

On the screen

- **Adoption counter** — how many real renewals carry the rider through Redress. A standard works because everyone asks for the same thing.
- **Generator** — pick the contract that is renewing and the rider comes back as a ready-to-send Word document with the parties and renewal date filled in, or, when the vendor's paper on file is a DOCX, as tracked-change insertions inside their own document.
- **Reading room** — the rider itself, every clause annotated with why it is fair, the fallback tiers, and the vendor objection countered.
- **Clause changelog** — what changed in each version of the rider.

How to use it

1. Read the rider in the reading room to understand each clause.
2. Pick the renewing contract in the generator and choose the edition.
3. Download the Word document or the tracked-change redline and attach it to your renewal.

Related: Renewals · Buying blocs

VAULT

Where: Contracts & documents › Vault · `/vault` · via **More** or Ctrl/⌘ K
Who: everyone

Restricted document projects for sensitive work, for example an acquisition review. Each project is org-wide or limited to named people; documents in a restricted project stay hidden from everyone else.

On the screen

- **Project cards** — each project with its access level and document count.

- **Access levels** — org-wide projects are visible to your whole team; restricted projects only to the members you grant.

How to use it

1. Create a project and pick org-wide or restricted access.
2. Add documents, in bulk if needed.
3. Run diligence across a project when you want the deal-grade review.

Related: Diligence

DILIGENCE

Where: Contracts & documents › Diligence · `/diligence` · via **More** or Ctrl/⌘ K
Who: everyone · requires an AI plan

End-to-end document review for a deal: every contract in scope is read for change of control, assignment, exclusivity, termination, liability, and data terms, then assembled into a risk register and an analyst report.

On the screen

- **Scope picker** — run the review across all contracts or limit it to one vault project.
- **Risk register** — every finding with its severity and the clause it rests on.
- **Analyst report** — the synthesized read: what needs consent or renegotiation before the deal, and what is clean.

How to use it

1. Scope the documents into a vault project first, or run across all contracts.
2. Run a diligence review.
3. Work the risk register, starting with the highest-severity findings.

Related: Vault

REQUESTS

Where: Contracts & documents › Requests · `/requests` · via **More** or Ctrl/⌘ K
Who: everyone

One front door for new spend. Every request is triaged by the AI against what you already own, then routed into sourcing, renewals, or approvals.

On the screen

- **Triage verdicts** — the AI's read on each request: net-new, a renewal of something you own, a duplicate of existing capability, or over the approval threshold.

- **Routing** — send a triaged request onward as a sourcing project, a renewal, or an approval.

How to use it

1. Raise a request for the new spend.
2. Read the triage verdict.
3. Route it onward to sourcing, a renewal, or an approval.

Tips

- Owners can set up an intake address under Settings › Integrations so teammates email requests straight in.

Related: Sourcing

SOURCING

Where: Contracts & documents › Sourcing · `/sourcing` · via **More** or Ctrl/⌘ K
Who: everyone

Your RFP and RFI pipeline: every sourcing project with its stage, supplier count, and bid count. Open a project to run the work.

On the screen

- **Pipeline list** — projects by stage, with suppliers invited and bids received.
- **Project page** — requirements, suppliers, and bids side by side, through to the award decision.

How to use it

1. Start a sourcing project.
2. Or turn a purchase request into a project.
3. Work the project from requirements through to the award decision.

Related: Requests

Next: Chapter 02 · Benchmarks & research

02 · Benchmarks & research

This chapter covers the benchmarking half of the platform: instant self-serve price checks for hundreds of vendors, your whole portfolio scored against the market in one view, the analyst-delivered reports you get when you upload a proposal, the vendor grade book, and the research library. Reach for it whenever you need to know whether a price is fair, where the money is across your stack, or what a vendor is doing in the market.

INSTANT BENCHMARKS

Where: Benchmarks & market › Instant benchmarks · `/benchmarking`
Who: everyone

Self-serve price checks for more than 450 vendors and product lines, no upload needed. Answer a few questions about your deal and get a market comparison in about two minutes.

On the screen

- **Tool cards** — one tool per vendor or topic: Microsoft, Oracle, Salesforce, SAP, AWS, and more, grouped by category.
- **Peer comparison** — results show where your deal sits against a cohort of similar companies, with percentile bars.
- **Saved scenarios** — your past runs are saved so you can revisit or share them.

How to use it

1. Pick a vendor tool and run a check.
2. To score your whole stack at once instead of one vendor, open the Portfolio benchmark.
3. For a deeper expert review, upload the proposal for analyst benchmarking.

Tips

- The full set of vendor tools is the benchmark library below. The hub groups them by category so you can find yours fast, or press Ctrl/⌘ K and type the vendor name.

Related: The benchmark library · Portfolio benchmark

PORTFOLIO BENCHMARK

Where: Benchmarks & market › Portfolio benchmark · `/benchmarking/portfolio`
Who: everyone

Your whole software stack compared with the market in one view: which vendors look expensive, which look fair, and where the money is.

On the screen

- **Standing per vendor** — each vendor's position against market pricing, built from your proposals and agreements.
- **Savings prize** — the estimated annual amount on the table if above-market deals moved to the median.

How to use it

1. Open a vendor that looks above market to see the detail behind its standing.
2. See ranked savings opportunities in Opportunities.

Related: Opportunities · Benchmark all my vendors

BENCHMARK ALL MY VENDORS

Where: Benchmarks & market › Delivered reports › Benchmark all my vendors · `/reports/vendor-benchmark`
Who: everyone · requires an AI plan
You get: a three page portfolio benchmark you can download as Word · 1 to 3 minutes

A three page portfolio benchmark generated from every agreement you have uploaded: spend per vendor, market position where our reference data defends one, and an explicit insufficient-data note where it does not.

On the screen

- **Generate button** — scans your agreements, places each vendor in its peer cohort, writes the report, and checks every figure against your stored data. Takes 1 to 3 minutes.
- **Spend per vendor** — page one: portfolio vitals and an overview of annual spend by vendor, largest first.
- **Market position table** — page two: each vendor's position and the basis for it, a delivered analyst score, a cohort percentile with a ± range, market reference data, or insufficient data.
- **Data coverage** — page three names the vendors we cannot benchmark yet and the one step that closes each gap. We never estimate a position without data.

How to use it

1. Generate or regenerate the report.
2. Download as Word; the export matches the on-screen brief.
3. Close a data gap by adding a list price or seat count in the vendor's benchmark tool, which moves it from reference to ranked.

Tips

- This report reads from agreements, not one-off instant checks. The more complete your Agreements list, the more of your stack it can place.

Related: Portfolio benchmark · Delivered reports

DELIVERED REPORTS

Where: Benchmarks & market › Delivered reports · `/reports`
Who: everyone

Benchmark reports our analysts delivered for your proposals, plus anything still in flight with its estimated delivery date. This page is also your documents library: everything the platform has ever written for your organization lives in the All documents section below the shelf. Report covers on the shelf lead with the annual value found; the overall score sits as a small corner mark.

On the screen

- **Report page** — a metrics table with percentile bars, market low, median and high, an overall score, and the analyst summary.
- **In-flight benchmarks** — proposals still in review, with an estimated delivery date.
- **All documents** — every brief, memo, and report your organization has generated, one row each: the document, its type, the vendor or contract it covers, the download formats it supports, and when it was last updated. Sort by any column, search, page through large libraries, and export the list to CSV. A row opens the document itself, with the owning record one click away in the Context column.

How to use it

1. Open a report and walk the metrics.
2. Download the report as a PDF.
3. When you are hunting for something the platform wrote earlier, sort or search All documents instead of revisiting the record that produced it; the row opens the document itself.
4. Bookmark a report for later, and find it again in Saved.

Tips

- A delivered report comes from uploading a proposal for expert review, not from an instant check. Start one on the Proposals screen.

Related: Proposals · Saved

VENDOR SCORECARDS

Where: Benchmarks & market › Vendor scorecards · `/scorecards` · via **More** or Ctrl/⌘ K
Who: everyone

Every calibrated vendor graded as a counterparty: the renewal corridor behind our benchmarks turned into an A-to-F grade, plus how verified buyers rate the vendor's renewal fairness, audit conduct, and flexibility.

On the screen

- **The grade** — renewal economics from the calibrated corridor, not a popularity score.
- **Buyer ratings** — one review per organization, shown only as floored aggregates.
- **Public page** — each vendor has a public scorecard the whole market can cite.

How to use it

1. Rate a vendor you hold paper with.
2. Open the public page for a vendor you are renewing.

Related: Research · Vendors

RESEARCH

Where: Benchmarks & market › Research · `/research` · via **More** or Ctrl/⌘ K
Who: everyone

Our latest white papers and market notes: vendor pricing moves, licensing changes, and negotiation guidance.

The series you will find here

- **Negotiation Toolkit** — one per covered vendor: the levers, the counters, and how to run the deal.
- **Negotiation Intelligence Report** — for the major vendors: the seller's calendar, comp plan, and tactics decoded.
- **Renewal Outlook** (quarterly, top 10 vendors) — what your renewal will cost in the next 12 months and what to lock in now: announced price changes with dates, uplift corridors, and a month-by-month timing calendar.
- **Vendor Strategy & Viability Assessment** (annual, top 10 vendors) — where the vendor is taking pricing, packaging, and product, what that does to your cost curve, and a closing posture recommendation.
- Topical papers on specific market events, such as licensing policy changes and audit campaigns.

For covered vendors, the newest Renewal Outlook also appears automatically on that vendor's renewal, contract, and negotiation pages, and the assessment on the vendor's page, so the right paper is at hand where you work the deal.

On the screen

- **Filters** — narrow by vendor or search by title and topic.

- **Like button** — one press, one vote, with the live count beside it: what readers across the whole customer base found worth their time. Counts are anonymous; only totals are ever shown.
- **Most liked · top 25** — a sort option listing the 25 most liked papers platform-wide.
- **Bookmark icon** — save any paper to your Saved list.

How to use it

1. Read or download a paper, and press the thumbs up on anything that earned it.
2. Share a paper with a colleague by recommending it by email or creating a share link.
3. Short on time? Switch the sort to **Most liked** and read what everyone else rated.

Download limit: reading a paper in the viewer is unlimited, but file downloads are capped at ten per day and thirty per week per person so access stays fair across organizations. The allowance frees up on its own as your recent downloads age out. If you reach the limit and need more before then, ask us and a Redress admin can reset it for you right away. All platform limits are collected in Plans, allowances & limits.

Related: Saved · Vendor scorecards

THE BENCHMARK LIBRARY

Where: Benchmarks & market › Instant benchmarks › any vendor · `/benchmarking/[vendor]`
Who: everyone

The instant benchmarks hub is a front door to roughly 563 individual vendor tools, one page per vendor and product line, from Microsoft EA and RISE with SAP to Snowflake, CrowdStrike, and Autodesk, including the AI tool stack (AI coding assistants, model and inference APIs, GPU cloud, data labeling, voice, and video). Each page is a self-serve price check: you enter your own numbers and see where your deal lands against a cohort of comparable transactions, with no upload and no wait.

The library also covers professional services under its own category. Twenty services providers, from the strategy houses (McKinsey, BCG, Bain) and the Big 4 (Deloitte, PwC, EY, KPMG) through the global SIs (Accenture, IBM Consulting, Capgemini, NTT DATA), Booz Allen Hamilton, Slalom, Kyndryl, and the offshore majors (Cognizant, Infosys, TCS, Wipro, HCLTech, Tech Mahindra), are benchmarked on blended hourly rate per consultant rather than discount off list: enter your total fees and hours and see where your effective rate lands for that firm and engagement size, with your onshore/offshore delivery mix and commercial leverage as the levers.

The largest publishers are covered by product line rather than as one tool, because they do not price as one vendor. Oracle has its own deep set: the Fusion cloud applications (SCM, EPM, and the CX suite of Sales, Service, Marketing, CPQ, and Commerce), Analytics Cloud, the industry clouds (Health, Retail, Hospitality, Financial Services, Utilities, Communications, Transportation Management, Field Service, Primavera Cloud), and the on-prem license and ULA-family estates (E-Business Suite, Siebel, JD Edwards, Primavera P6, Pool of Funds, and Perpetual ULA). Salesforce is broken out into Sales, Service, Commerce, Experience, Revenue (CPQ), Field Service, Platform, Agentforce, CRM Analytics, and the Health, Financial Services, and Nonprofit clouds. ServiceNow covers ITSM, ITOM, CSM, HRSD, SPM, Security Operations, IRM, App Engine, Field Service Management, and the Now Assist AI add-on. SAP covers S/4HANA (on-prem and RISE), GROW, Analytics

Cloud, Datasphere, Integrated Business Planning, Fieldglass, Commerce Cloud, Sales & Service Cloud, Signavio, LeanIX, SuccessFactors, Ariba, Concur, and BTP. Pick the exact product line you are negotiating.

On the screen

- **Your deal panel** — the inputs on the left: currency, your net fee, unit count, an optional list value for the discount reading, region, industry, and any deal-structure levers such as term length or competitive presence. The verdict updates live as you type.
- **Where this lands** — a percentile band pinned under the inputs showing the middle 50% of your peer set with your deal marked, and the verdict pill (favorable, mid, or above market).
- **The verdict, the evidence, the play** — the results read as three chapters: the headline verdict and the annual gap to the market median, the cohort of comparable deals behind the number, then targets to ask for (a defensible floor at the median, a strong close, and a stretch anchor), the strike-window timing, your leverage, and ready counters to common vendor pushback.
- **Saved scenarios** — save a position to track it over time, feed the portfolio view, and get alerted when that vendor's market moves.
- **Action bar** — download the placement as a PDF, or create a share link (valid 30 days, optionally kept live so it recomputes against current data each time it is opened).

How to use it

1. Find your vendor from the hub cards, the search box, or the Ctrl/⌘ K palette, and open its page.
2. Enter your deal on the left. The verdict, targets, and play light up as soon as your deal is placed against a deep enough cohort.
3. Read the play and take the target and counters into the negotiation. Save the scenario or share the result with your team.

Tips

- When too few comparable deals match your position to rank it honestly, the page says so instead of showing a noisy percentile. Widen the region to all regions, or check the deal size.
- Amounts entered in another currency are converted to USD at a fixed, disclosed rate before the placement math.
- For vendors whose discount scales with deal size, such as Oracle cloud, your deal is ranked inside its own value tier, so a small deal is not judged against whale discounts and a large deal is held to the deeper discount its size should command.
- An instant check is a fast read you run yourself. For a full, hand-verified analysis of a specific quote or contract, upload it for analyst benchmarking; the vendor page links straight into the upload wizard with your vendor and deal value prefilled.

Related: Instant benchmarks · Proposals · Portfolio benchmark

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Next: Chapter 03 · Tooling & playbooks

03 · Tooling & playbooks

Instant benchmarks answer a few questions about one deal. The tools in this chapter go further: they read your own exports and documents, a usage report, a cost export, a signed contract, a photographed quote, and build a plan from your real numbers. The chapter closes with the vendor playbooks, full self-serve negotiation and migration engagements for ten major vendors.

Every tool is free to explore with sample data on any plan. Uploading your own data, and running the AI over it, requires a Professional or Enterprise plan, and each AI run counts against your plan allowance; the tool tells you when a step needs it, and Plans, allowances & limits defines every gate. Files you upload to the AI tools are read in memory and never stored, and the browser-only calculators parse your export on the page so your usage data never leaves it.

Each tool section below carries a **You get** line: the artifact the tool produces and roughly how long a run takes, so you know what you are waiting for before you start.

ALL TOOLS

Where: Tooling › All tools · `/tooling`
Who: everyone

The tooling hub: every upload-driven optimizer and calculator on one wall, grouped by job. Start here when you have your own data and want a plan built from it rather than a quick market check.

On the screen

- **Verdict Bar hero** — the dropper fronting the Contract intelligence group. Not sure which tool fits? Drop the document here and it routes itself (see below).
- **Instrument cards** — one card per tool, grouped under Portfolio optimization, Contract intelligence, Renewal playbooks, License optimization, Cloud spend, and AI spend. Each card names the situation it is for and the typical finding it surfaces.
- **Pointers between tools** — overlapping instruments point at each other: the Negotiation dossier carries a Most complete badge, Snap a quote points at Quote Face-Off, and each optimizer cross-links its vendor playbook. Follow the quiet line on a card when it fits your situation better.
- **Start here** — the spend optimization tool is featured as the first stop for a budget owner.
- **Narrated AI reports** — generating an AI report anywhere on the wall shows what the analyst engine is doing, step by step with a timer.

How to use it

1. If you know the tool you need, open its card.
2. If you only have a document, use the Verdict Bar dropper at the top and let it pick the engine.

3. Try any tool on sample data first to see the output before you bring your own.

VERDICT BAR

Where: Tooling › Verdict Bar · `/verdict`
Who: requires an AI plan
You get: the document classified, routed to the right engine, and judged, with red flags and the next step · about a minute

The one front door when you have a document and no idea which tool fits. Drop any quote, contract, order form, or invoice; it is classified, routed to the matching engine, and judged against the market in about a minute.

On the screen

- **Dropper** — drag in the document or pick a file.
- **Classification** — what the Verdict Bar decided the document is, and which engine it sent it to.
- **The verdict** — the routed engine's read: where the deal sits against the market and what to do next.
- **Recent runs** — your past verdicts, so you can reopen one.

How to use it

1. Drop the document.
2. Watch it classify and route.
3. Open the verdict and follow through into the engine it chose.

Related: Contract decode · Snap a quote · Your first verdict

SPEND OPTIMIZATION

Where: Tooling › Spend optimization · `/tooling/spend-optimization`
Who: requires an AI plan
You get: a five to ten page savings plan of about twenty prioritized moves · a minute or two

The savings plan for your whole software budget. Rank your top vendors by annual spend, see every renewal date on one calendar, and get an analyst-grade plan of about twenty prioritized moves to lower the run rate, written by Claude Opus 4.8 and checked against your own agreements.

On the screen

- **Vendor picker** — take your top 10, 25, 50, or 100 vendors by annual spend, or choose them yourself.
- **The board** — spend per vendor, every renewal on one eighteen month calendar, and the market position wherever the data defends one.
- **The plan** — a five to ten page optimization plan of about twenty recommendations across right-sizing, renegotiation, consolidation, terms, and timing, each anchored to a renewal date.

- **Groundedness** — every figure is checked against your stored agreements before the plan is shown.

How to use it

1. Pick your vendor set by spend, or hand-pick it.
2. Generate the plan and let Opus compose it. This takes a minute or two.
3. Walk the plan move by move; take any move deeper with Vera, or book the analyst walkthrough.

Related: Portfolio benchmark · Opportunities

CONTRACT DECODE

Where: Tooling › Contract decode · `/tooling/contract-decode`
Who: everyone · metered by plan
You get: a clause-by-clause plain-English decode, up to ten paste-ready asks, and a term-by-term benchmark · the first read streams at once, the deep read follows within a few minutes

Upload one vendor contract and watch the AI decode it live: what every consequential clause means in plain English, up to ten changes worth asking for with paste-ready language, the terms already in your favor, and a term-by-term market benchmark.

On the screen

- **Upload** — drop the contract or quote. The file is analyzed in memory and never stored.
- **Live decode** — clauses explained as the pass runs, with a preliminary read first and the deep read behind it.
- **Ask list** — the changes to request, ranked, each with language you can paste into a redline.
- **Market benchmark** — where the deal stands term by term.
- **Saved decodes** — your past decodes; each saves to your workspace and can be forwarded with a share link.

How to use it

1. Upload the contract.
2. Read the clause-by-clause decode and the ask list.
3. Save it, or forward the share link to a colleague.

Related: Negotiation dossier · Clause library

NEGOTIATION DOSSIER

Where: Tooling › Negotiation dossier · `/tooling/dossier`
Who: everyone · your own data requires a Professional or Enterprise plan
You get: six exportable documents, from the market benchmark to the priced walk-away · pieces stream in over several minutes

Drop one contract and the whole negotiation package assembles itself with no further input: the deal placed against peer reference data, the decoded contract with its leverage-ranked ask list, a combined five-page analyst brief, the strategy and tactics playbook, a live web-researched vendor intel briefing, and the credible walk-away alternative priced with crossover math.

On the screen

- **Upload** — one contract in. The file is analyzed in memory and never stored.
- **Assembly list** — each document lands in the list as it finishes: benchmark, decode, brief, playbook, vendor intel, and the alternative.
- **Downloads** — each piece exports as its own exec-brief PDF.
- **Saved dossiers** — the dossier saves to your workspace; reopening one resumes any unfinished step.

How to use it

1. Upload the vendor contract.
2. Let the package assemble; the pieces stream in as they complete.
3. Download the whole pack or the single document you need for the meeting.

Related: Contract decode · Negotiations

SNAP A QUOTE

Where: Tooling › Snap a quote · `/tooling/snap-a-quote`
Who: everyone · metered by plan
You get: every line item checked against list, the market verdict, and the counter to send · about a minute

Photograph, screenshot, or drop any vendor quote and get an instant verdict: every line item read off the paper, each SKU checked against published list prices, the deal placed against comparable deals, and the counter to send back.

On the screen

- **Capture** — a phone photo, a screenshot, or the PDF. The capture is read in memory and never stored.
- **Line items** — every line read off the quote, with each SKU checked against list.
- **Verdict line** — where the whole deal sits against comparable deals.
- **The counter** — the response to send back.
- **Saved snaps** — only the verdict saves to your workspace.

How to use it

1. Snap or drop the quote.
2. Read the line-by-line check and the verdict.
3. Send the counter.

Related: Verdict Bar · Quote Face-Off

QUOTE FACE-OFF

Where: Tooling › All tools › Quote Face-Off · `/tooling/quote-faceoff` · via **More** or Ctrl/⌘ K
Who: everyone · metered by plan
You get: the aligned tale of the tape, the best-mix "Franken-quote" priced, and an analyst memo with the counter · a few minutes

Drop two or three competing quotes for the same need, vendor direct, reseller, or CSP. The board aligns equivalent SKUs into one tale of the tape, benchmarks every line, marks who wins where, and builds the Franken-quote: the best mix across all papers, priced.

On the screen

- **Quote droppers** — two or three competing quotes in, PDF or image, dropped anywhere on the panel. They are read in memory and never stored.
- **Tale of the tape** — equivalent SKUs aligned across the quotes, each line benchmarked, the winner marked per line.
- **The Franken-quote** — the best mix across all papers, priced, so you can see what the ideal combination would cost.
- **Analyst memo** — which quote to take, which terms to pull from the losers, and the counter to send.
- **Save and export** — file the whole result (tale of the tape, Franken-quote, and memo) to Deliverables, download it as a Word brief, or print it, from the actions under the verdict.

How to use it

1. Drop the competing quotes for the same need.
2. Read the tale of the tape line by line, then the Franken-quote.
3. Take the memo's counter back to your preferred supplier, and save the result to Deliverables so the comparison is on file.

Related: Snap a quote · Sourcing

AUDIT LETTER DECODER

Where: Tooling › All tools › Audit letter decoder · `/tooling/audit-decoder` · via **More** or Ctrl/⌘ K
Who: everyone · metered by plan
You get: who is really auditing you, a business-day countdown, demanded versus implied, and the first-hour response plan · about a minute

The moment a software audit letter lands, drop it here, PDF or a phone photo. The decoder identifies who is actually auditing you (Oracle GLAS, a Big Four firm on IBM's behalf, a voluntary SAM engagement), turns the stated deadline into a business-day countdown, separates what is demanded from what is merely implied, and hands you the three things not to do first.

On the screen

- **Dropper** — the audit letter as a PDF or photo. It is read in memory and never stored.
- **Who is auditing** — the real party behind the letterhead and what that means for how formal this is.
- **Deadline countdown** — the stated deadline as business days remaining.
- **Demanded vs implied** — what the letter actually requires against what it merely suggests you owe.
- **The response plan** — the three things not to do first, then the plan, linked to your contracts on file and the full defense playbook pre-filled.

How to use it

1. Drop the letter the day it arrives, before anyone replies to the auditor.
2. Read who is auditing and the demanded-versus-implied split.
3. Follow the response plan into the defense playbook.

Related: Verdict Bar · Diligence

RATE CARD BENCHMARK

Where: Tooling › All tools › Rate Card Benchmark · `/tooling/rate-benchmark` · via **More** or Ctrl/⌘ K
Who: everyone · metered by plan
You get: every day rate placed against its market band, the annualized overpay per line, and an analyst memo · a few minutes

Upload a services rate card or SOW and see every day rate on the ladder: the market band per role, delivery region, and vendor tier, your rate as the dot, and the annualized overpay per line. Services hide 30 to 40% of software spend; this is where it surfaces.

On the screen

- **Upload** — the rate card or SOW, dropped anywhere on the panel. It is read in memory and never stored.
- **The ladder** — one row per role with the market band and your rate marked against it.
- **Role mapping** — correct the AI's role mapping inline if a title was misread; the ladder reprices as you fix it.
- **Analyst memo** — which lines to contest, the blended-rate trap, and the counter-structure to propose.

How to use it

1. Upload the rate card or SOW.
2. Fix any role mappings the AI got wrong.
3. Take the memo, and the overpay lines, into the negotiation.

Related: Contract decode · The benchmark library

TIME MACHINE

Where: Tooling › Time machine · `/tooling/time-machine` · via **More** or Ctrl/⌘ K
Who: everyone · metered by plan
You get: a narrated diff of the two papers and the real price walk line by line · a minute or two

Drop last year's paper and this year's for the same vendor. The machine narrates what actually changed: the terms you won, the protections that quietly disappeared, and the real price walk line by line. Renewals smuggle in term degradation, and the machine reads for it so you do not have to.

On the screen

- **Two uploads** — last year's document and this year's. Neither is stored.
- **The narrative** — what you gained, what you lost, and where.
- **Price walk** — the real increase line by line, not just the headline number.
- **Saved reads** — the walk delta is kept with each saved read.

How to use it

1. Upload both versions of the same vendor's contract.
2. Read the narrated diff, watching for dropped protections.
3. Take the findings into the renewal.

Related: Compare · Renewal playbook

SELF PLAY

Where: Tooling › Self play · `/tooling/self-play` · via **More** or Ctrl/⌘ K
Who: requires an AI plan
You get: eight full negotiation transcripts, the outcome distribution, and the swing move priced · several minutes; leave it running

Name the vendor and the annual price, and the machine plays your renewal to completion eight times: your negotiator on one side, the vendor's rep in persona on the other, four strategies against two rep temperaments. It is a simulation against a modeled counterparty, not a prediction.

On the screen

- **Setup** — the vendor and the current annual price.
- **Outcome distribution** — the eight results drawn as a thousand strands.
- **Transcripts** — the full script of each of the eight matches.
- **The swing move** — the sequencing decision that separated the good closings from the bad ones, with its dollar figure.

- **Save and export** — file the distilled result (verdict figures, strategy comparison, and key excerpts) to Deliverables, download it as a Word brief, or print it, from the actions above the strands.

How to use it

1. Enter the vendor and your annual price.
2. Run the eight matches; this takes a while.
3. Read the swing move, then read the transcripts where it played out.
4. Save the run to Deliverables so the read survives the session.

Related: Negotiations · Negotiation dossier

CLOUD COST OPTIMIZER

Where: Tooling › Cloud cost optimizer · `/tooling/cloud-cost` · via **More** or Ctrl/⌘ K
Who: everyone · your own exports require a Professional or Enterprise plan
You get: an executive brief, a full FinOps report, and a phased action plan · a minute or two after the export parses

Pick your hyperscaler and upload a daily cost export from OCI, AWS, Azure, or GCP. The AI reads the spend shapes, sizes the recoverable savings, and hands you an executive brief, a full FinOps report, and a phased action plan you can track.

On the screen

- **Provider and upload** — choose the cloud and drop the cost export. The file is parsed in your browser and never uploaded.
- **Savings by workstream** — the recoverable spend, grouped.
- **Executive brief and full report** — the short read and the deep read.
- **Action plan** — a phased plan you can work through and track.
- **Upload-over-upload tracking** — a resource-level export unlocks a per-instance explorer and run-rate movement since your last upload.

How to use it

1. Select the provider and upload the daily cost export.
2. Read the brief, then the full report.
3. Work the phased plan, and re-upload later to track the run rate.

Related: Workload comparator

WORKLOAD COMPARATOR

Where: Tooling › Workload comparator · `/tooling/workload-compare` · via **More** or Ctrl/⌘ K
Who: everyone · your own data requires a Professional or Enterprise plan
You get: each workload priced across the four clouds, the winner named, and the optimal placement report · the list math is instant, the AI report takes a minute or two

Describe your workloads or import an inventory CSV and see what each one costs on AWS, Azure, GCP, and OCI at list, which platform wins and why, and what the optimal placement saves across the portfolio.

On the screen

- **Workload input** — describe workloads by hand or import an inventory.
- **Cost per cloud** — each workload priced across the four platforms at list.
- **Winner and why** — which platform wins each workload, with the reason.
- **Optimal placement** — the best split across the portfolio and an AI FinOps placement report.

How to use it

1. Describe or import your workloads.
2. Read which cloud wins each one.
3. Take the placement report into your architecture and pricing talks.

Related: Cloud cost optimizer

M365 OPTIMIZATION

Where: Tooling › M365 optimization · `/tooling/m365-optimization` · via **More** or Ctrl/⌘ K
Who: everyone · your own data requires a Professional or Enterprise plan
You get: inactive seats, tier right-sizing, Copilot sizing, and a per-user reassignment plan · a minute or two after upload

Upload your Microsoft 365 usage export to find inactive accounts, right-size E7/E5/E3/E1 tiers, and size Copilot, with a playbook that includes the savings plan and a per-user reassignment list.

On the screen

- **Usage upload** — your M365 usage export, analyzed in your browser so your user data never leaves the page.
- **Inactive accounts** — the seats nobody is using.
- **Tier right-sizing** — where E7/E5/E3/E1 assignments are heavier than the usage warrants, and Copilot sizing.
- **Playbook** — the savings plan and the per-user reassignment list.

How to use it

1. Upload the usage export.
2. Review the inactive and oversized seats.
3. Work the reassignment list into your next true-up or renewal.

Related: EA renewal playbook · Spend optimization

AGENTFORCE OPTIMIZER

Where: Tooling › Agentforce optimizer · `/tooling/agentforce` · via **More** or Ctrl/⌘ K
Who: everyone · your own data requires a Professional or Enterprise plan
You get: a Flex Credit commitment sized at minimum, medium, and growth · a minute or two

Upload your Salesforce Digital Wallet consumption export, layer in planned agent use cases, and size the right Flex Credit commitment, minimum, medium, or growth, before you sign.

On the screen

- **Consumption upload** — your Digital Wallet export.
- **Planned use cases** — the agent workloads you expect to add.
- **Commitment sizes** — the recommended Flex Credit commitment at minimum, medium, and growth.
- **Save analysis** — file the sized result into your Documents library as a durable document you can reopen any time.

How to use it

1. Upload the consumption export.
2. Add the use cases you are planning.
3. Take the sized commitment into the Agentforce conversation.

Related: Salesforce SELA

VCF LICENSING

Where: Tooling › VCF licensing · `/tooling/vcf-licensing` · via **More** or Ctrl/⌘ K
Who: everyone
You get: your billable core count, three priced scenarios, and the negotiation playbook · counts are instant in your browser, the AI playbook takes a minute or two

Upload your RVTools export to see exactly how many VCF cores Broadcom will bill you for under the 16-core minimum, build three pricing scenarios against real-world discount bands, and get an AI negotiation playbook.

On the screen

- **RVTools upload** — your inventory export, analyzed in your browser so it never leaves the page.
- **Billable cores** — the VCF core count Broadcom will charge, with the 16-core-per-CPU minimum applied.
- **Three scenarios** — pricing built against real discount bands.
- **Playbook** — the AI negotiation guidance for the reprice.
- **Save analysis** — file the result into your Documents library as a durable document; host names are stripped before anything is stored.

How to use it

1. Upload the RVTools export.
2. Read the billable core count and the three scenarios.
3. Use the playbook to negotiate the VCF reprice.

Related: Playbooks

CLAUDE OPTIMIZER

Where: Tooling › Claude optimizer · `/tooling/anthropic-optimizer` · via **More** or Ctrl/⌘ K
Who: everyone · your own data requires a Professional or Enterprise plan
You get: a commit-readiness check and a committed-spend deal sized at three levels · a minute or two

Upload your Claude Console usage export or size each workload from prompt counts, add the seat side of the contract, run the commit-readiness check, and size the committed-spend deal, minimum, medium, or maximum, before you sign.

On the screen

- **Usage or prompt profiles** — upload the Console export, or size workloads from prompt counts.
- **Seats** — add Team or Enterprise seats to the model.
- **Commit-readiness check** — whether your run rate is stable enough to commit.
- **Deal sizes** — the committed-spend deal at minimum, medium, and maximum.
- **Save analysis** — file the sized result into your Documents library as a durable document you can reopen any time.

How to use it

1. Upload the usage export or build workloads from prompt profiles.
2. Add the seat side and run the readiness check.
3. Take the sized commitment into the agreement.

Related: Anthropic EA playbook · OpenAI optimizer

OPENAI OPTIMIZER

Where: Tooling › OpenAI optimizer · `/tooling/openai-optimizer` · via **More** or Ctrl/⌘ K
Who: everyone · your own data requires a Professional or Enterprise plan
You get: a commit-readiness check and a committed-spend deal sized at three levels · a minute or two

Upload your OpenAI usage export or size each workload from prompt counts, add the ChatGPT seat side of the contract, run the commit-readiness check, and size the committed-spend deal, minimum, medium, or maximum, before you sign.

On the screen

- **Usage or prompt profiles** — upload the usage export, or size workloads from prompt counts.
- **Seats** — add ChatGPT Team or Enterprise seats.
- **Commit-readiness check** — whether your run rate is ready to commit.
- **Deal sizes** — the committed-spend deal at minimum, medium, and maximum.
- **Save analysis** — file the sized result into your Documents library as a durable document you can reopen any time.

How to use it

1. Upload the usage export or build workloads from prompt profiles.
2. Add the seat side and run the readiness check.
3. Take the sized commitment into the deal.

Related: Claude optimizer

VENDOR PLAYBOOKS

Where: Tooling › All tools › Renewal playbooks · `/tooling#wall-renewal-playbooks`
Who: everyone · your own data requires a Professional or Enterprise plan
You get: a guided engagement you can pause and resume, with live models and an executive report at the end · runs over days, not minutes

Full renewal and migration engagements, run yourself. The playbooks live as cards in the tool wall's Renewal playbooks group; the old separate Playbooks page redirects there. Each playbook is a guided Prepare, Analyze, Execute, Deliver journey for one vendor, with live recalculation as you change inputs, work-back timelines, a negotiation desk, and an executive report at the end. Everything runs in your browser and progress saves as you go; every playbook works fully on its sample estate on any plan, and uploading your own data is the Professional or Enterprise step.

On the screen

- **Playbook cards** — one card per vendor engagement, ten in all.
- **The stages** — inside each, the Prepare, Analyze, Execute, Deliver path with its live models.
- **Executive report** — the CFO business case and the exec report the journey produces.

Because every playbook shares that shape, each entry below gives its route, what the engagement is for, the key moves it walks you through, and when to reach for it.

Microsoft EA

`/tooling/ms-ea-renewal` · Run a Microsoft Enterprise Agreement renewal from scoping to the CFO business case.

Key moves

- Scope the renewal cycle and load your license estate.
- Surface defensible savings across E5, Copilot, and the Azure MACC.
- Work the timeline and the negotiation desk.
- Finish with the CFO business case and an executive report.

When to use it: your Microsoft EA renewal is inside 12 months.

RISE with SAP

`/tooling/rise-with-sap` · Model the move from ECC or on-premise S/4HANA to RISE on the numbers, not SAP's narrative.

Key moves

- Rebuild the FUE count from usage evidence and baseline your current run rate.
- Decompose SAP's offer and price the alternatives against it.
- Work the migration timeline and the commercial asks.
- Finish with a five-year TCO business case and an executive report.

When to use it: SAP is pushing you from ECC or on-premise toward RISE.

Oracle ULA

`/tooling/oracle-ula-certification` · Decide renew versus certify on the numbers, then exit clean.

Key moves

- Assess the license position and review the contracts and entities in scope.
- Maximize deployments on VMware before the certification count is taken.
- Work the cloud and certification rules, and control what Oracle gets to see.
- Exit with the licenses banked and support unchanged.

When to use it: your Oracle ULA is approaching its certification date.

IBM ELA

`/tooling/ibm-ela` · Decide whether to renew the bundle or right-size out of it.

Key moves

- Decompose IBM's renewal quote line by line.
- Drop shelfware subscription and support while keeping the perpetual licenses.
- Remediate ILMT before it becomes audit leverage.
- Sign inside IBM's year-end close with the CFO case and an executive report.

When to use it: your IBM ELA renewal quote just landed.

Adobe ETLA

`/tooling/adobe-etla` · Run an Adobe ETLA renewal inside the one window the agreement allows.

Key moves

- Pull the Admin Console evidence on real seat activity.
- Cut inactive seats and right-profile All Apps and Acrobat.
- Decompose the generative-AI padding out of the proposal.
- Price the VIP alternative and sign inside Adobe's fiscal year close.

When to use it: your Adobe ETLA renewal window is opening.

Salesforce SELA

`/tooling/salesforce-sela` · Renew the Salesforce wrap on your measured usage, not the quote.

Key moves

- Segment the Unlimited base against real usage.
- Clear the add-on shelfware.
- Right-size the Agentforce commitment to the measured conversation burn.
- Sign inside the January 31 year-end close with the CFO case.

When to use it: your Salesforce SELA renewal is on the horizon.

Anthropic EA

`/tooling/anthropic-ea` · Size an Anthropic enterprise agreement off your own forecast.

Key moves

- Load the Console usage and right-size the model mix behind your evals.
- Wire caching and the Batch API, and trim inactive seats.
- Size the commitment against the true-up risk curve.
- Sign with rollover, price protection, and the CFO case in hand.

When to use it: Anthropic put an enterprise agreement on the table.

Workday

`/tooling/workday-renewal` · Negotiate a Workday renewal against the market, not the bundle.

Key moves

- Benchmark your discount off list against the peer corridor.
- Decompose the ask and the expansion bundled into it.
- True the worker bands down to reality in the only window they reopen.
- Keep the Workday-loyal implementation partner out of the negotiation room, and sign inside the January 31 close.

When to use it: your Workday renewal quote bundles more than you asked for.

ServiceNow

`/tooling/servicenow-renewal` · Renew ServiceNow on your numbers, against a corridor that runs past 45%.

Key moves

- Benchmark your discount off list.
- True down idle seats and modules in the only window one-way pricing allows.
- Cap the uplift at 5% or lower, and refuse every product without a funded owner.
- Keep the ServiceNow-loyal implementor out of the commercial room, and start a year early so a credible no earns the one-time license credits.

When to use it: your ServiceNow renewal is coming and the uplift looks steep.

Third-party support

`/tooling/third-party-support` · Move stable OEM support to a third-party provider on your terms.

Key moves

- Decide eligibility product by product.
- Run a blind tender across every provider without disclosing what you pay the OEM.
- Sign far below the standard OEM rate.
- Use the incumbent re-tender path for estates already on third-party support.

When to use it: you pay OEM support on stable products you barely call.

Next: Chapter 04 · Insight

04 · Insight

The intelligence layer over everything you have uploaded. It turns your proposals, agreements, and invoices into spend and concentration analytics, ranks the savings still on the table, proves negotiated savings against the invoices that followed, reads your documents for search and grouping, and connects you to an anonymous community of other verified buyers. Where a screen leans on AI, it is marked below and needs an AI plan.

PORTFOLIO

Where: Spend & savings › Portfolio · `/portfolio`
Who: everyone

The position and risk lens on your estate, built automatically from proposals and agreements that carry an annual value. Portfolio, Spend, and Renewals share a tab row at the top with a one line note on what each covers, and every chart lives on exactly one of them: this page argues where you stand and where the risk sits, and links to the others for values and dates.

On the screen

- **Vitals** — tracked annual spend, benchmarked proposals, renewals in notice, and realized savings.
- **Data confidence meter** — how complete your estate records are, blended from pricing, dates, benchmarks, categories, and owners. It names the three highest-impact fields to add next, each a deep link straight to the exact records that need them.
- **Spend mix** — the category donut beside the concentration read: how dependent you are on your biggest vendors, top three share included.
- **Treemap** — every vendor sized by spend and colored by standing.
- **Market position** — where your deals sit against the market, with the upcoming renewals beside it.
- **Vendor risk** — the vendors carrying elevated risk right now.

How to use it

1. Scan the vitals and the spend mix to see where the money and the dependence sit.
2. Read market position for the leverage, then the vendor risk strip for what needs attention.
3. Add annual values to agreements to enrich this view; renewal outlook lives on Renewals insights and exports on Spend, one click away.

Tips

- The richer your annual values, the sharper every chart here. Missing values leave gaps.

Related: Spend · Opportunities · Agreements

MONTHLY BRIEFING

Where: Spend & savings › Monthly briefing · `/briefing` · via **More** or Ctrl/⌘ K
Who: everyone · requires an AI plan
You get: a five minute spoken brief, chaptered so you can skip · a minute or two to generate

Your portfolio as a five minute spoken brief, one per month: what renewed, what is landing, where the leverage is, and the one number that matters. Chaptered, skimmable, and grounded in the same data as every page in the app.

On the screen

- **Player** — the current month's brief, split into chapters so you can jump to the part you want.
- **Generate** — builds this month's briefing from your live portfolio when one is not already waiting.

How to use it

1. Open Monthly briefing and press play, or generate the current month if the player is empty.
2. Skip between chapters to reach renewals, spend, or leverage directly.

Related: Portfolio · Vera AI

ESTATE MAP

Where: Spend & savings › Estate map · `/portfolio/map` · via **More** or Ctrl/⌘ K
Who: everyone

Your whole software estate on one canvas: every vendor sized by spend and colored by market position, for the quarterly leadership conversation. It runs the same deterministic portfolio scan as Portfolio, promoted to a full canvas with a matching slide export.

On the screen

- **The map** — one tile per vendor, area sized by annual spend, color set by benchmark position. Vendors we cannot benchmark yet read as "Not benchmarked yet".
- **Totals** — spend, vendor and contract counts, the share of spend that is benchmark covered, and the headroom to market across the estate.
- **Off-map note** — how many vendors carry no annual value and so do not appear on the canvas.

How to use it

1. Read the biggest tiles first: that is where the money and the leverage are.
2. Click a tile to open that vendor's page.
3. Export the canvas as a slide for the board deck.

Related: Portfolio · Strategy

ANOMALIES

Where: Spend & savings › Anomalies · `/anomalies` · via **More** or Ctrl/⌘ K
Who: everyone

What the weekly watchdog found while scanning your portfolio: unusual uplifts, missed notice windows about to bite, duplicated spend, and other things worth a look.

On the screen

- **Findings list** — each anomaly with its severity and the evidence behind it.
- **Triage controls** — mark a finding resolved or not relevant; the watchdog will not raise it again.

How to use it

1. Open a finding and check the evidence.
2. Act on it, then resolve or dismiss findings you have handled.

Related: Billing watch · Invoices

RIGHTS REGISTER

Where: Spend & savings › Rights register · `/obligations` · via **More** or Ctrl/⌘ K
Who: everyone · requires an AI plan

Everyone benchmarks the price; this page harvests the contract rights you already paid for. A quote-anchored pass reads each contract and records your buyer-side rights (true-downs, swap windows, price holds, SLA credits, benchmark and termination clauses) with their exercise windows, then the weekly watchdog alerts you when a right is about to expire unused.

On the screen

- **Register** — every harvested right, its status, and the exact clause it was read from, so you can act with the contract in hand.
- **Harvest stats** — active rights, contracts scanned, and how many are still pending a harvest.
- **Right families** — before anything is harvested, the six kinds of right the harvester looks for, plus the one step that unlocks the register.

How to use it

1. Upload contracts and index them on Document search, then harvest here.
2. Work the rights with a near expiry so nothing you paid for lapses unused.

Related: Document search · Clause library

OPPORTUNITIES

Where: Spend & savings › Opportunities · `/opportunities` · via **More** or Ctrl/⌘ K
Who: everyone

Every benchmarked vendor that is above market, ranked by the annual prize: what you would save if the deal moved to the market median.

On the screen

- **Prize column** — the estimated annual saving per vendor. The list is sorted so the biggest lever is on top.

How to use it

1. Start at the top, where the money is.
2. Turn an opportunity into a tracked negotiation.
3. Book an analyst to pressure-test the plan if the deal is large.

Related: Portfolio benchmark · Negotiations

GUARANTEES

Where: Spend & savings › Guarantees · `/guarantees` · via **More** or Ctrl/⌘ K
Who: everyone

Engagements where the fee is at risk: if invoice-verified savings land under the guaranteed floor by the end of the measurement window, the fee is waived. Every guarantee settles on invoice evidence, never on claims. There is nothing to create here; guarantees are underwritten by Redress on engagement start, only where the dataset is deep enough to stand behind a floor.

On the screen

- **Guarantee rows** — per vendor: the guaranteed annual floor, the savings verified so far, the measurement window, and the status (Open, or Settled with the floor met or the fee waived).
- **Certificate** — open a guarantee for the pinned projection, confidence, model version, and settlement.

How to use it

1. Track open guarantees against their window and the savings verified to date.
2. Open the certificate for the full underwriting detail.
3. Ask your Redress engagement lead whether your next renewal qualifies.

Related: Managed renewals · Savings proof

EXPERT BENCH

Where: Benchmarks & market › Expert Bench · `/experts` · via **More** or Ctrl/⌘ K
Who: everyone

Vetted negotiators and ex-vendor insiders you can bring into a deal: former EA desk leads, LMS auditors, and commercial architects, presented by verified track record under bench codenames.

On the screen

- **Track record** — verified from engagement records when the expert joins, re-checked annually.
- **Engagement shapes** — a working session, a fixed-scope review, or a full embedded engagement.
- **The intro** — the advisory desk confirms the quote and you meet the expert by name on the first call.

How to use it

1. Open the profile matching your biggest renewal.
2. File a session request with the deal in one line.

Related: Advisory

SAVINGS PROOF

Where: Spend & savings › Savings proof · `/savings`
Who: everyone

Every claimed saving proven or disproven against the invoices that followed: the ledger of what your negotiations actually returned against your benchmarked baselines.

On the screen

- **Savings ledger** — each outcome with the baseline, the negotiated price, the annual saving, and the term total.
- **Cumulative curve** — annual savings stacked by the month each outcome was recorded.

How to use it

1. Record a negotiated outcome as each deal closes.
2. Export the ledger as CSV for finance.
3. Find the next saving to go after in Opportunities.

Related: Verified wins · Opportunities

VERIFIED WINS

Where: Spend & savings › Savings proof › Verified wins tab · `/savings/wins`
Who: everyone

A tab on Savings proof, sharing its underline tab row. The bragging layer on top of the ledger: mint a public, revocable badge from any invoice-verified saving, follow your Deal Score against the calibrated corridors, and (owners only) list your organization on the opt-in board.

On the screen

- **Ready to mint** — only savings confirmed against a real invoice appear here; claims never mint.
- **Deal Score** — where your confirmed deals land inside the corridors, 100 being the strong end.
- **The board** — opt-in, owners only, ranked under whatever name you choose; it opens at five listed orgs.

How to use it

1. Mint a badge from a verified saving and copy the public link.
2. Check your Deal Score against the corridors.

Related: Savings proof · Vendor scorecards

SPEND

Where: Spend & savings › Spend · `/spend`
Who: everyone

The values and finance lens: spend analytics over time, built from the annual values on your proposals and agreements, with invoice actuals beside them. Headline numbers paint immediately and the heavier charts stream in.

On the screen

- **Category breakdown and trend** — spend by category and over time, including what renews when.
- **Forecast and actuals** — the forward forecast, and invoice actuals when you have imported them.
- **Vendor chart** — spend by vendor, with a CSV export.
- **Exports** — every estate export in one card: the Excel and PDF reports and the raw CSVs. Portfolio links here.

How to use it

1. Read the trend to see where spend is growing and what renews next.
2. Add missing annual values on agreements to fill the picture.
3. Concentration lives on Portfolio; the link under the category chart takes you there.

Related: Portfolio · Invoices

INVOICES

Where: Spend & savings › Invoices · `/invoices` · via **More** or Ctrl/⌘ K
Who: everyone

Invoice line-item intelligence: what the vendor actually billed, reconciled line by line against what you contracted. Every line gets a verdict with the dollars at stake.

On the screen

- **Line verdicts** — per line: ok, price above contract, billed over entitlement, off-contract item, or uplift-cap breach.
- **Forward-in address** — connect the invoice rail to get a private email address; invoices forwarded there are processed automatically.

How to use it

1. Upload an invoice, or set up email-in so they process automatically.
2. Work the lines flagged above contract or over entitlement, dollars first.

Tips

- Setting up the forward-in address is an owner action under Settings › Integrations.

Related: Billing watch · Anomalies

STRATEGY

Where: Spend & savings › Strategy · `/strategy` · via **More** or Ctrl/⌘ K
Who: everyone

An annual, board-ready read on your software stack: category strategies, vendor posture, and the year's negotiation calendar in one document.

On the screen

- **Category sections** — per software category: current position, market movement, and the recommended play.

How to use it

1. Generate or refresh the strategy.
2. Export it for the board.

Related: Portfolio · Estate map

VENDOR CALENDAR

Where: Renewals & deals › Vendor calendar · `/vendor-calendar` · via **More** or Ctrl/⌘ K
Who: everyone

Vendor fiscal quarter and year ends. Vendors discount hardest when their quarter is closing, so this is when to time your asks.

On the screen

- **Quarter markers** — each vendor's fiscal calendar with quarter ends highlighted.

How to use it

1. Line a renewal up against the vendor's quarter end for the deepest discount window.

Related: Renewals

MEETING PACKS

Where: Renewals & deals › Meeting packs · `/meetings` · via **More** or Ctrl/⌘ K
Who: everyone · requires an AI plan

Connect a read-only calendar feed and the agent watches for vendor meetings. Before each one, a pre-call pack is waiting: where you stand, what is open, the numbers to cite, and the three questions to ask. Zero-click preparation.

On the screen

- **Connect the calendar feed** — add your private ICS feed (Outlook: Publish calendar; Google: Secret address in iCal format). The agent reads only titles and times.
- **Pack cards** — one per spotted vendor meeting, with a headline and three panels: Where we stand, Open items, and Ammunition.
- **The three questions to ask** — the questions to put to the vendor on the call.

How to use it

1. Connect a read-only calendar feed under Settings › Integrations.
2. The agent checks the calendar every 20 minutes; when a meeting title mentions a tracked vendor, the pack lands here before the call.
3. Read the pack before you dial in.

Related: Vera AI · Vendor calendar

DOCUMENT SEARCH

Where: Contracts & documents › Document search · `/doc-search` · via **More** or Ctrl/⌘ K
Who: everyone

Full-text search across every contract and proposal you have uploaded, so you can find the clause instead of the file.

On the screen

- **Results with context** — matches show the surrounding sentence and link into the document.

How to use it

1. Search for a term like auto-renewal or uplift.
2. Open the matching document.

Related: Document clusters · Rights register

DOCUMENT CLUSTERS

Where: Contracts & documents › Document clusters · `/doc-clusters` · via **More** or Ctrl/⌘ K
Who: everyone

Your contracts grouped automatically by what the documents actually say, subject matter rather than folder names. The grouping is deterministic text math; the AI only names the groups.

On the screen

- **Cluster cards** — each group with its AI-written name and the documents inside it.

How to use it

1. Run or refresh the clustering.
2. Open a document from its group.

Related: Document search

REVIEW TABLES

Where: Contracts & documents › Review tables · `/review-tables` · via **More** or Ctrl/⌘ K
Who: everyone · requires an AI plan
You get: a quote-backed answer grid across all your contracts, exportable to Excel · fills a few documents at a time

Ask the same questions across many contracts at once. Each column is one question (termination notice, renewal cap, liability cap) and the AI fills in a quote-backed answer for every document.

On the screen

- **Columns** — your questions. Start from a template or add your own, up to twelve.
- **Fill table** — extracts every missing answer, a few documents at a time, with the supporting clause behind each cell.
- **Export** — the whole grid as an Excel workbook, quotes included.

How to use it

1. Create a table from the Termination & renewal template, or add your own columns.
2. Fill the table, then click a filled cell to see the exact clause it came from.

Related: Document search · Clause library

DATA HEALTH

Where: Spend & savings › Data health · `/data-health` · via **More** or Ctrl/⌘ K
Who: everyone

What the platform cannot see for your organization and what filling each gap unlocks. The scan runs on every load; a prioritized plan tells you which gap to close first.

On the screen

- **Completeness score** — the share of data checks you have covered. Each open gap names the feature it would unlock.
- **Audit exposure** — an estimate of your license compliance exposure, built from the entitlement data connected so far.
- **AI plan** — the gaps ranked by value, refreshed whenever the underlying gaps change.

How to use it

1. Close the highest-value gap first.
2. Connect a data source to fill the entitlement gaps (an owner action under Settings › Integrations).

Related: Integrations

COMMUNITY POLLS

Where: Benchmarks & market › Community polls · `/polls` · via **More** or Ctrl/⌘ K
Who: everyone

Quick polls answered by other software buyers on the platform. Vote to see how your peers answered; individual ballots stay private.

On the screen

- **Results bars** — unlock after you vote, so results are not biased by peeking.

How to use it

1. Vote on an open poll to reveal how peers answered.

Related: Platform pulse · Buyer Network

PLATFORM PULSE

Where: Benchmarks & market › Platform pulse · `/pulse` · via **More** or Ctrl/⌘ K
Who: everyone

What other teams on the platform are using, published from real usage. Aggregate counts only; no team is ever named.

On the screen

- **The pulse report** — which features teams across the platform use most, drawn from real usage.

How to use it

1. Read the published pulse to see what peers lean on, and try a feature you have not.

Related: Community polls

BUYER NETWORK

Where: Benchmarks & market › Buyer Network · `/buyer-network` · via **More** or Ctrl/⌘ K
Who: everyone

Vendor-anchored discussion with other verified software buyers. Everyone posts under a stable desk handle with banded, platform-verified credential chips; nobody sees a name, an email, or a company. This is one of two rooms under the Buyer Network umbrella: a shared tab strip links these threads with the one-to-one Buyer intros.

On the screen

- **Your desk** — the pseudonym you post as. It stays yours, so a reputation can build on it.
- **Credential chips** — verified buyer and estate bands computed from platform data, never self-claimed.
- **The house read** — the calibrated renewal corridor for the vendor under discussion, beside every thread.

How to use it

1. Open a thread on a vendor you are renewing, or filter the board to one vendor.
2. Switch to Buyer intros from the tab strip when you want a private one-to-one.

Related: Buyer intros · Vendor scorecards

BUYER INTROS

Where: Benchmarks & market › Buyer intros · `/network` · via **More** or Ctrl/⌘ K
Who: everyone

The Buyer Network's intro room: talk to another buyer who runs the same vendor, one to one. Anonymous until you both accept, with contact details shared only on a mutual yes. The shared tab strip links back to the Buyer Network threads.

On the screen

- **Open requests** — who else is asking to talk, shown as alias, country, and industry only.
- **Your state** — the request you have posted and any matches in flight.
- **Directory** — other buyers you can reach out to; helping earns credits, and the directory ranks helpers first.

How to use it

1. Post that you want to talk about a vendor, or volunteer on an open request.
2. Mutually accept, reveal, and only then share contact details.

Related: Buyer Network

Next: Chapter 05 · Team, AI & assistant

05 · Team, AI & assistant

This chapter covers the shared-work queues where your team hands work back and forth (tasks, approvals, and team coverage), Vera the AI analyst grounded in your own portfolio and documents, the automations and deliverables built on top of her, and the ways your team talks to each other and to our analysts. Everything here is about getting work assigned, answered, and moving.

TASKS

Where: Team & AI › Tasks · `/tasks`
Who: everyone

Shared to-dos for your team: follow-ups on renewals, negotiation actions, and anything else worth not forgetting.

On the screen

- **Assignees and due dates** — tasks can be assigned to teammates and linked to vendors or renewals.

How to use it

1. Create a task and assign it to the teammate who owns it.
2. Link it to the vendor or renewal it belongs to, and set a due date.
3. To see just the items assigned to you rather than the whole team, open My work.

Related: My work · Team

APPROVALS

Where: Team & AI › Approvals · `/approvals` · via **More** or Ctrl/⌘ K
Who: everyone

Sign-offs your team routes through the platform, for example a negotiation mandate waiting for a budget owner.

On the screen

- **Pending list** — what is waiting on you versus what you have sent to others.

How to use it

1. Review the items waiting on you and approve or decline each one.
2. Track anything you have sent to others in the same list until it clears.

Related: Deal approvals setup · My work

TEAM

Where: Team & AI › Team · `/team` · via **More** or Ctrl/⌘ K
Who: everyone

Who owns what across your organization, and more importantly what nobody owns: renewals without an owner, open tasks, and assigned findings.

On the screen

- **Member rows** — each teammate with the renewals, tasks, and findings on their plate.
- **Unowned renewals** — agreements with no renewal owner. Assign these before a notice window gets missed.

How to use it

1. Scan the unowned renewals first and assign an owner to each one.
2. Use the member rows to balance who is carrying what.

Tips

- Owners can invite a teammate from here when there is more work than people to cover it.

Related: Renewals · Members

VERA AI

Where: Team & AI › Vera AI · `/ask`
Who: everyone · requires an AI plan

Vera is an AI analyst grounded in your actual portfolio and uploaded documents. Ask about a price, a clause, a vendor's tactics, or how the platform works.

On the screen

- **Chat** — answers cite whether a figure comes from your contracts or from market experience. Your conversation is saved and private to you, and the assistant keeps a long-term memory of durable facts about you (reviewable and deletable under Assistant memory).
- **Playbook agents** — purpose-built agents that turn a proposal into a deliverable, for example an executive brief or negotiation talking points.

How to use it

1. Ask about any vendor, price, or clause in plain language.

2. Run a playbook agent on a proposal to generate a brief or talking points.
3. Open Vera anywhere in the app with **Ctrl/⌘ J**, so you never have to leave the page you are on.

Tips

- Vera answers only from your organization's own contracts and our market data, and every figure is tagged with its source so you can tell a stored number from a market estimate.
- Vera's long-term memory is fully reviewable and deletable under Settings › Assistant memory.

Related: Assistant memory · Deliverables · Workflow agents

WORKFLOW AGENTS

Where: Team & AI › Workflow agents · `/workflows` · via **More** or Ctrl/⌘ K
Who: everyone

Multi-step automations your team builds without code: chain an AI analysis into an email, a Slack post, or a task, then run the chain manually, on every proposal upload, or weekly.

On the screen

- **Builder** — pick a trigger, then stack steps in order. Use `{{vendor}}` and `{{title}}` in any field to pull in details from whatever set the run off.
- **Recent runs** — every run keeps a per-step record; open one to read the AI memo it produced.

How to use it

1. Build a workflow with an AI analysis step.
2. Run it now and open the run record to read what it produced.
3. Set a workflow to fire on every proposal upload when you want it to run itself.

Related: Vera AI · Proposals & upload

DELIVERABLES

Where: Team & AI › Deliverables · `/studio` · via **More** or Ctrl/⌘ K
Who: everyone · requires an AI plan

Every AI-generated brief, report, and memo in one place, rendered in the white-paper format you can export and share.

On the screen

- **Deliverable cards** — each document with its vendor, type, and date. Open one to read, export, or regenerate it.

How to use it

1. Open a deliverable to read it in full.
2. Export it, or regenerate it when the underlying data has moved on.
3. Create a new one from Vera AI by running a playbook agent.

Related: Vera AI

ADVISORY

Where: Team & AI › Advisory · `/advisory` · via **More** or Ctrl/⌘ K
Who: everyone

Book time with a buyer-side analyst: a human expert who has negotiated with your vendor before, for the moments a report is not enough.

On the screen

- **Booking form** — pick the topic and a time; the analyst comes prepared having read your relevant contracts.

How to use it

1. Book a session, choosing the topic and a time that works.
2. If it can wait, message the team instead and they will pick it up in Chat.

Related: Chat · Expert Bench

PARTNER PORTAL

Where: Team & AI › Partner portal · `/partner` · via **More** or Ctrl/⌘ K
Who: members of a partner-program firm (the rail entry appears only when VendorBenchmark has enabled partner access for your organization)

Your client book. Every client organization linked to your firm on one table: their contract dates, their next renewal with its notice deadline, and how engaged the account is. Visibility is deliberately narrow, dates and activity only; each client's files, prices, benchmark results, and spend stay inside their own workspace.

On the screen

- **Vitals** — clients, renewals inside 90 days across the whole book, meetings awaiting a reply, and client active days over the last 30.
- **Client book** — one row per linked client: contracts, next renewal (vendor and date), renewals inside 90 days, members, active members this week, and last activity. Rows with a renewal inside 90 days are tinted.
- **Grow your book** — invite a client company by name and email, with an optional personal note. The invitation email and its landing page go out under your firm's brand, and the open invitations list shows each one's status with resend and revoke.

- **White label** — your brand on the client experience: display name, brand color, and tagline, with a live preview. The logo comes from Settings › Branding. Only workspace owners can edit it.
- **Meetings** — every meeting between your firm and your clients, with its status.

How to use it

1. Open a client row for the full picture: renewal dates with notice deadlines and stages, contract term dates, and engagement.
2. Watch the **Active, 7d** and **Last activity** columns: a quiet client two months before a renewal is the account to call first.
3. Invite a new client from **Grow your book**. When they accept, their workspace opens on a free trial, already linked to your book, and it carries a "served by" mark for your firm. Invitations are single use, live 30 days, and can be revoked or re-sent with a fresh link.
4. Set your brand once under **White label**; every invitation and every client workspace mark uses it from then on.
5. Propose a meeting from the client page: up to three times and an agenda. The client's workspace owners get a notification, confirm one time or decline, and both sides see the answer.
6. Need the full record for an engagement? Ask the client to invite you into their workspace as a member; the portal never opens their files.

Clients join your book two ways: your own invitations, or a link made by the VendorBenchmark team after a client agrees in the engagement paperwork. If a client is missing, contact your partner manager.

Related: Notifications · Members

SAVED

Where: Team & AI › Saved · /saved · via **More** or Ctrl/⌘ K
Who: everyone

Reports and research you bookmarked with the bookmark icon, kept in one list so you can find them again.

On the screen

- **Saved items** — everything you bookmarked, newest first.

How to use it

1. Open a saved report or paper straight from the list.
2. Add to the list by clicking the bookmark icon on any report or research paper.

Related: Delivered reports · Research

REFERRALS

Where: Team & AI › Referrals · `/referrals` · via **More** or Ctrl/⌘ K
Who: everyone

Your personal referral code. When a company you refer becomes a paying customer, you earn ten percent of their spend for their first twelve months. We email you when a referral signs up and again when they subscribe.

On the screen

- **Your code and link** — share these; signups through them are credited to you automatically.
- **How it works** — the four steps up front: share, they sign up, they subscribe, you get paid, with the email you receive at each step.
- **Referral status** — who signed up, who is now paying, and what you have earned.
- **Payout terms** — payouts clear thirty days after we receive the customer's payment, and we contact you for your payout details once a referral starts earning.

How to use it

1. Copy your referral link and share it with a company that would benefit.
2. Watch the referral status list to see who signed up and what you have earned.
3. Watch your inbox: when you first get your code we email you a short "how it works" explainer, then we email you again the moment a referral signs up and when they become a paying subscriber, with what the referral is worth and how the payout works.

CHAT

Where: top bar (chat icon) · `/chat`
Who: everyone

Your team's real-time chat: channels for the whole organization, a private support line to our analyst team, and the AI assistant on call in any channel.

On the screen

- **Channels** — team-wide rooms; #general is always there, and anyone can add more.
- **Vera AI team** — the private support thread; only you and our team see it.
- **@assistant** — mention the assistant in any channel to get an AI answer grounded in your portfolio, visible to the whole team.

How to use it

1. Message your team in a channel, or start a new one for a specific deal.

2. Ask the AI with **@assistant** when you want an answer the whole channel can see.
3. Message the **Vera AI team** thread to reach our analysts directly.

Related: Vera AI · Advisory

NOTIFICATIONS

Where: top bar (bell) · `/notifications`
Who: everyone

One triage inbox for everything that happened while you were away, folded into a single list: notifications (delivered reports, notice windows opening, replies, and mentions), watchtower changes, and money-critical signals. Money items are flagged calmly, never alarmist.

On the screen

- **Unread markers** — new items are highlighted; opening one takes you to the record it is about.
- **Needs-decision filter** — narrow the list to the items actually waiting on a decision, so signals you only need to be aware of drop away.
- **Per-signal mute** — mute any single signal you do not want to keep hearing about, without turning off its whole category.

How to use it

1. Scan the highlighted unread items, or switch to the needs-decision filter to see only what is waiting on you.
2. Click through to the record behind any item to act on it.
3. Mute a signal you have handled or do not care about; the rest keep flowing.

Related: My work

Next: Chapter 06 · Settings & account

06 · Settings & account

Everything about you and your organization's setup lives here: your profile and how you sign in, what the AI has learned about you, your plan and billing, your teammates and their roles, the security and compliance controls that govern your data, and the connections to your other systems. Settings are grouped into four sections, You, Workspace, Security & compliance, and Connections. Some tabs are visible only to organization owners; each section below says who can see it.

PROFILE

Where: Settings › You › Profile · `/settings/account`
Who: everyone

Your personal details: your name, job title, timezone, photo, the vendors you follow, and your password. This is also where you connect your Microsoft account.

On the screen

- **Name, title, and timezone** — how you appear to teammates and the timezone used for dates and digests.
- **Photo** — drag an image on or click to upload; used for your avatar across the app.
- **Followed vendors** — the vendors you want updates about; they drive your weekly report and vendor alerts.
- **Newsletter opt-in** — turn the product and benchmark newsletter on or off.
- **Password** — set a new password without leaving the page.
- **Microsoft account** — connect Microsoft so contract files and calendar data can flow in (when your organization has it configured).
- **Invite a colleague** — a quick invite card; only owners can actually send invites.

How to use it

1. Fill in your name, title, and timezone, then save.
2. Add the vendors you care about so your alerts and weekly report are relevant.
3. Use **Change password** to rotate your password whenever you need to.

Related: Security · Members

SECURITY

Where: Settings › You › Security · `/settings/security`
Who: everyone

Protect your account with two-factor authentication and see the devices where you are signed in. Owners also set the organization-wide two-factor policy here.

On the screen

- **Two-factor authentication** — register an authenticator app and turn on the rotating six-digit code required at sign-in.
- **Backup codes** — one-time recovery codes to use if you lose your authenticator; the count remaining is shown.
- **Active sessions** — the sessions signed in to your account, with the option to sign out everywhere else.
- **Organization policy (owners)** — require two-factor for every member of the organization.

How to use it

1. Open your authenticator app (Google Authenticator, 1Password, Authy, and the like) and scan the code shown.
2. Enter the six-digit code to confirm, then save your backup codes somewhere safe.
3. Review active sessions and sign out any you do not recognize.

Tips

- Turning on two-factor is the single highest-value thing you can do for your account. If your organization requires it, you will be held here until you set it up.

Related: Security Center · Two-factor authentication

AI PERSONALIZATION

Where: Settings › You › AI personalization · `/settings/ai`
Who: everyone

What the platform has learned about how you like output, in plain language and fully under your control. The more you use Vera AI, the more its answers match your preferences.

On the screen

- **Learned preferences** — each thing the AI has picked up about how you like answers, newest first.
- **Remove** — delete any single preference; it stops shaping your answers immediately.

How to use it

1. Review the list to see what the AI has inferred.
2. Remove anything that is wrong or that you would rather it not use.

Tips

- This list is private to you. Your organization's shared negotiation memory is separate, on the Memory tab.

Related: Memory · Vera AI

MEMORY

Where: Settings › You › Memory · `/settings/memory`
Who: everyone

What your organization learned in past negotiations and how it likes to negotiate. Briefs, mandates, and Ask all open with this record, so it is worth keeping current.

On the screen

- **Negotiation posture** — your organization's stance and preferences, editable by owners.
- **Remembered facts** — the individual things learned across past negotiations, each of which you can edit or remove.

How to use it

1. Check the posture reflects how your organization actually negotiates.
2. Prune or correct any remembered fact that is out of date.

Related: AI personalization

BILLING

Where: Settings › Workspace › Billing · `/settings/billing`
Who: everyone (only owners can change the plan or pay)

See what plan your workspace is on, how much of your allowance you have used, your benchmark credits, and, if you own the organization, upgrade.

On the screen

- **Current plan** — your plan, its status, and price, with contract, benchmark, AI, and Vera allowances at a glance.
- **Usage this period** — how many AI reports and agent requests you have used against your cap, plus your personal AI token usage over the last window.
- **AI allowance meter** — on seat-priced plans, the percent of your monthly allowance used and roughly how many runs are left; the allowance is yours alone, not pooled.
- **Plans** — the sellable plans side by side, with the option to upgrade.
- **Manage billing** — owners with a billing account can open the Stripe portal to update payment details.

How to use it

1. Check where you sit against your allowance for the period.
2. If you own the organization and need more, pick a plan and upgrade; payments are handled securely by Stripe.
3. Not an owner? Ask an owner to upgrade, or message the team.

Related: Members

DESKTOP APP

Where: Settings › Workspace › Desktop app · `/settings/desktop-app`
Who: everyone

Install Vera AI as its own app on your Windows laptop: its own window, taskbar icon, and Start menu entry, on the same account and data as the browser.

On the screen

- **Download for Windows** — the installer, with version and size shown; it installs for your user only, no admin rights needed.
- **How to install** — the numbered steps, including what to do if Windows shows a "Windows protected your PC" screen.
- **What you get** — drop a contract onto the window or from Explorer, native Windows notifications, Vera on top of any app, Windows Hello lock, and automatic updates.
- **Removing it** — uninstall any time from Windows Settings; your account and data are untouched.

How to use it

1. Click **Download for Windows** and run the downloaded installer.
2. If Windows warns about a new app, choose **More info**, then **Run anyway**.
3. Sign in with the same email, password, and two-factor code you use in the browser.

Tips

- A macOS version is planned. Until then, Mac users get the same workspace in the browser.

MEMBERS

Where: Settings › Workspace › Members · `/settings/members`
Who: org owners only

Invite teammates, set their role, and manage everyone in your organization. Owners also see pending invitations and any join requests waiting for them.

On the screen

- **Member list** — everyone in the organization with their role, last sign-in, and recent activity trail.
- **Invite** — send an email invitation and set the new person's role.
- **Pending invitations** — invites not yet accepted, with a delivery status when an email bounced or was delayed.
- **Roles** — change a member's role or block a member from the workspace.
- **Join requests and domain capture** — approve people who asked to join, and optionally let anyone on your email domain join automatically.

How to use it

1. Click **Invite**, enter the person's email, choose their role, and send.
2. Watch pending invitations for delivery problems and resend if needed.
3. Adjust roles as responsibilities change; block anyone who should no longer have access.

Tips

- If an invite shows as bounced, check the address; the person never received the email.

Related: Team activity · Deal approvals

TEAM ACTIVITY

Where: Settings › Workspace › Team activity · `/settings/activity`
Who: org owners only

What each member actually does on the platform, which features they use, and an on-demand report that turns the numbers into an adoption plan.

On the screen

- **Usage verdict** — how alive the workspace is this week: active members, page views, most-adopted feature, and features nobody has touched.
- **Per-member table** — each member's last sign-in, page views over 7 and 30 days, recorded actions, features tried, and last screen.
- **Recent activity** — the last recorded actions across the workspace, named, newest first.
- **The usage report** — an analyst read of the numbers that you can generate on demand.

How to use it

1. Scan the verdict to gauge overall adoption.
2. Use the per-member table to spot who has not started and which features go unused.
3. Generate the usage report when you want a written adoption plan to act on.

Related: Members · Audit log

DEAL APPROVALS

Where: Settings › Workspace › Deal approvals · `/settings/approvals`
Who: org owners only

An optional sign-off chain: up to ten approvers who must clear a deal before it is signed. Off by default; turn it on when your organization needs a documented approval step.

On the screen

- **Enable and mode** — turn the chain on and choose how sign-off works.
- **Approvers** — add up to ten people from your organization as the required approvers.
- **Recent sign-off requests** — every request negotiators have sent through the chain, with how many approvers have cleared it.

How to use it

1. Turn on deal approvals and pick your approvers.
2. Negotiators request sign-off from a deal's page under Negotiations; approvers vote from their queue.
3. Track progress in the recent requests list.

Related: Approvals

BRANDING

Where: Settings › Workspace › Branding · `/settings/branding`
Who: org owners only

Put your organization's logo on the documents you export. Once a logo is set it co-brands the exported CFO executive brief and the boardroom deck and brief alongside the Vera AI brand. With no logo set, exports are unchanged.

On the screen

- **Logo upload** — upload your logo; a preview shows how it will appear on an exported document.

How to use it

1. Upload a logo image.
2. Export a CFO brief or a boardroom deck to see it applied, alongside the Vera AI brand.

NOTIFICATIONS

Where: Settings › Workspace › Notifications · `/settings/notifications`
Who: everyone (owners get the extra alert and webhook controls)

Tune which alerts reach you and on which channel. Owners can also post alerts to Slack or Teams and set the AI copilot's alert rules.

On the screen

- **Weekly briefings** — three vendor-intelligence emails, each at most once a week, each strictly opt-in: price list updates per vendor (what moved, by how much, what to do), vendor licensing news (the Monday wire across the 50 most-negotiated vendors, your vendors leading), and the weekly knowledge briefing (new analyst research and what shipped). Every one of these emails carries a one-click unsubscribe that works without signing in, and this card is the standing in-platform switch. When a briefing is on, a link under it leads to its vendor picker (Watch for price lists, the Weekly report page for the wire).
- **Alert preferences** — for each kind of alert, choose in-app, email, both, or off.
- **Monday brief sections** — your weekly emails arrive as one Monday brief with four sections: the vendor market wire, renewals coming up, watchtower changes, and savings and wins. Turn any section off here while keeping the rest.
- **AI copilot preferences (owners)** — the digest, anomaly watch, board report, community and outcome network sharing, and dispute alert thresholds.
- **Webhooks (owners)** — post alerts to a Slack or Teams channel.

How to use it

1. Pick your weekly briefings: price lists, licensing news, knowledge, any mix. Off is always one toggle (or one email click) away.
2. Turn off any alert kind you do not want, or move it to a single channel.
3. Choose which Monday brief sections you receive; the others still land in the app.
4. Owners: set the copilot alert rules and connect a chat channel if the team wants alerts there.

SECURITY CENTER

Where: Settings › Security & compliance › Security Center · `/security-center`
Who: everyone (owners see and manage every control; members see the policies that apply to them and their own devices)

Your organization's live security posture on one page: two-factor coverage, single sign-on, retention, API credentials, the audit stream, recent security events, and your sign-in devices. Live state, not marketing.

On the screen

- **Posture tiles** — two-factor coverage across members, sign-on method, active API keys, and audit events in the last 30 days.
- **Controls** — each security control with its current state and, for owners, a link to manage it.
- **Recent security events** — sign-ins, permission changes, and credential events.

- **Your sign-in devices** — the devices seen on your account, with a link to manage active sessions.

How to use it

1. Read the posture tiles for a one-glance health check.
2. Owners: work down the controls list and tighten anything that reads as merely "Available" rather than "In force."
3. Check your devices and sign out anything unfamiliar from Settings › Security.

Related: Security · Trust center · Audit log

CLAUSE POSITIONS

Where: Settings › Security & compliance › Clause positions · `/settings/clause-library`
Who: everyone

Your negotiation playbook as data: the positions, pre-approved language (ideal, fallback, and walk-away), and must-have clauses that every AI review holds your contracts to. This is the settings surface behind the workspace Clause library.

On the screen

- **Positions** — each clause position with its pre-approved language and walk-away line.
- **Must-have flag** — mark a position as required so the coverage check sweeps for it across every contract.

How to use it

1. Add or edit a position and its ideal, fallback, and walk-away language.
2. Mark the positions your organization will not sign without as must-have.
3. AI reviews then insert your language verbatim wherever a contract deviates.

Related: Clause library · Security baseline

SECURITY BASELINE

Where: Settings › Security & compliance › Security baseline · `/settings/security-baseline`
Who: everyone

The data-protection and security requirements every vendor contract should meet. These are the rules the DPA check enforces when it reviews a contract.

On the screen

- **Baseline requirements** — your written data-protection and security requirements; a default is offered as a starting point.
- **Rulepacks** — pre-built requirement sets you can switch on.

- **Network and session policy** (owners only) — pin the workspace to known networks and bound session lifetimes: an IP allowlist that takes exact addresses and CIDR ranges, a maximum session age in hours, and an idle timeout in minutes.

How to use it

1. Edit the baseline to match what your organization requires of vendors.
2. Turn on any rulepacks that apply.
3. The DPA check then measures each contract against this baseline.
4. Owners setting a network policy: the card shows your current IP with one click to add it, and the allowlist refuses to switch on unless your own address is covered, so you cannot lock yourself out at enable time. Every denial lands in your audit log, and a policy change takes up to a minute to reach every server.

Note: if your office IP later changes, everyone including owners is blocked until the policy is updated from an allowed network; prefer ranges over single addresses if your egress IP rotates.

Related: Clause positions

SINGLE SIGN ON

Where: Settings › Security & compliance › Single sign on · `/settings/sso`
Who: org owners only

SAML single sign-on and SCIM provisioning for your organization, for teams that manage access through an identity provider.

On the screen

- **SSO configuration** — connect your SAML identity provider and choose whether sign-on is enforced for your domain.
- **Break-glass policy** — a plain statement of the one exception when Require SSO is on: org owners keep password sign-in so a broken identity provider cannot lock the whole tenant out. Every break-glass sign-in is written to your audit log as `auth.sso_breakglass`. Members and admins have no bypass.
- **SCIM tokens** — provisioning tokens so your identity provider can create and deactivate accounts automatically.

How to use it

1. Enter your identity provider's SAML details.
2. Decide whether to enforce single sign-on for everyone on your email domain.
3. Issue a SCIM token if you want automatic user provisioning.

Related: Security Center

DATA CONTROLS

Where: Settings › Security & compliance › Data controls · `/settings/data`
Who: org owners only

Retention, export, and deletion for your organization's data, plus your consent choices for the community and outcome network. Every hard deletion writes a deletion certificate you can hand to an auditor.

On the screen

- **Retention policy** — automatically delete contracts a set number of months after they are uploaded, rows and files both. Leave it blank to keep contracts until you delete them. The sweep runs daily, and each automatic removal writes a deletion certificate.
- **Data location** — a read-only statement of where data physically lives: the United States (Vercel and Supabase US regions). EU residency is on the roadmap and tracked publicly on the security page's claim ladder.
- **Deletion certificates** — one row per completed hard deletion: date, scope (contract or organization), what was deleted, and how many files were removed. "View certificate" opens a print-ready document listing rows removed by table, the storage paths removed, the actor, and the UTC timestamp; use your browser's print dialog to save it as a PDF.
- **Community and outcome network consent** — opt in or out of contributing anonymized data to the community benchmarks and outcome network.
- **Reseller quotes** — recent quotes shared for benchmarking.
- **Export and deletion** — request an export or a deletion of your organization's data.

How to use it

1. Set a retention period if your policy requires one; blank keeps contracts until you delete them.
2. Choose whether to contribute to the community and outcome network.
3. Request an export or deletion when you need it; our team processes deletion requests and confirms by email.
4. After any deletion, open its certificate from the Deletion certificates list to verify what was removed.

Related: Trust center · Audit log

AUDIT LOG

Where: Settings › Security & compliance › Audit log · `/settings/audit`
Who: org owners only

Who did what in your organization, including views and downloads of contract files. A transparency and compliance record you can filter, search, and export.

On the screen

- **Filters** — narrow to file downloads, uploads, report links, deletions, or member changes.
- **Activity table** — each event with the actor, the source device and IP, and when it happened.
- **Saved views** — save a filter you return to often.
- **Export and stream** — download the full log as CSV, or stream events to your SIEM with an audit webhook.

How to use it

1. Pick a filter or search for an actor or activity.
2. Save a view if you audit the same slice regularly.
3. Export to CSV, or set up an audit webhook under Integrations for continuous streaming.

Related: Security Center · Integrations

TRUST CENTER

Where: Settings › Security & compliance › Trust center · `/trust`
Who: everyone

How your data is protected, told in three commitments: kept apart (tenant isolation), kept sealed (encryption and access), and kept yours (audit, deletion, and eyes-off AI). The masthead proves the isolation claim with live numbers.

On the screen

- **Kept apart** — tenant isolation at the database, least-privilege access, and roles matched to clearance.
- **Kept sealed** — private contract storage with short-lived signed links, encryption in transit and at rest, and multifactor authentication.
- **Kept yours** — the audit record, data deletion, and how the AI handles your data.
- **Data journey** — a diagram of the path a contract actually takes through the platform.

How to use it

1. Read the three chapters to understand the controls applied to your data.
2. Share this page with security reviewers who ask how the platform protects information.

Related: Security Center · Data controls · Figures ledger

FIGURES LEDGER

Where: Settings › Security & compliance › Figures ledger · `/trust/figures`
Who: everyone

Every number the platform has cited for you, in one place. The ledger lists each figure across your reports and briefs, linked to the source fact it traces to and the day that fact was current, so any number you forward can be stood behind.

On the screen

- **Cited figures** — one row per number the platform has printed for you, with the document it appeared in, the source fact behind it, and the date that fact was current.
- **Search and sort** — narrow to a vendor, a document, or a value, and sort by any column.
- **Not-yet-traceable note** — the ledger is honest about the figures it cannot trace to a stored fact yet, rather than hiding them.

How to use it

1. Look up any number a report or brief shows to see the fact it came from and when it was current.
2. Search for the vendor or figure a reviewer is questioning and hand them the source in one step.

Related: Trust center · Audit log

INTEGRATIONS

Where: Settings › Connections › Integrations · `/settings/integrations`
Who: org owners only

Connect the systems your team already uses: contract intake, tickets and calendars, spend and identity data, your warehouse, and the SAM and ITAM tools that know what you own and use.

On the screen

- **Workflow hub** — contract intake (five email-in rails, DocuSign, Ironclad, Drive/SharePoint/Box folder watch), renewal workflow (Jira, ServiceNow, calendar invites, Slack, Teams), spend and usage sources (Coupa, Okta, Entra ID, the CSV importers, Smart import), warehouse export, and signed JSON event webhooks.
- **Agent Negotiation Protocol** — the opt-in card for structured agent-to-agent negotiation, with a link to the public spec.
- **Procurement and ERP (P2P)** — purchase orders, requisitions, and supplier records from your procure-to-pay systems, with maverick spend flagged.
- **License and deployment discovery (SAM / ITAM)** — connect the systems that know your entitlements and deployments; the license intelligence table shows entitled vs deployed vs active per vendor, with estimated shelfware.
- **Recent activity** — the latest sync results for each connected source.

How to use it

1. Pick a system, enter its credentials or copy the intake address it needs, and connect.

2. Let the first sync run, then review the license and procurement intelligence tables.
3. Add an audit webhook if you want to stream events to your SIEM.

Related: Audit log · API · The integration catalog

API

Where: Settings › Connections › API · `/settings/api`
Who: org owners only

API keys, webhooks, and the MCP connector, so you can connect Claude, ChatGPT, or any other tool to your benchmark data.

On the screen

- **API keys** — create, view, and revoke keys; keys expire within a year.
- **Connect** — the base URL and details for connecting an external tool or the MCP connector.

How to use it

1. Create an API key and store it securely; you see the full value only once.
2. Point your tool or the MCP connector at the connection details shown.
3. Revoke any key you no longer use.

Related: Integrations

That covers the settings. When you are not sure where a screen belongs, start from the manual index and follow the chapter that matches the rail group you are looking at.

Next: Chapter 07 · Common workflows

07 · Common workflows

The chapters before this one document the platform screen by screen. This chapter is the other way in: start from what you are trying to get done, and follow the steps across whatever screens it touches. Twenty workflows cover the jobs teams run most, and each one links back to the reference sections for detail.

BENCHMARK A PROPOSAL END TO END

Get an analyst benchmark on a vendor quote or contract, from upload to a report you can forward.

Steps

1. Open Proposals and choose **Upload a proposal**.
2. Pick the vendor and contract type, add your question (for example "is this renewal uplift fair?"), and drag in the PDF or DOCX.
3. Submit for review. The proposal moves along the path Uploaded, In review, Benchmarked, Delivered. You are emailed when the report is ready.
4. While you wait, run an instant benchmark or an AI redline scan on the same document for an immediate read.
5. When it lands, open Delivered reports: walk the metrics table, the percentile bars, and the analyst summary, then download the PDF or Word version.

See also: Proposals · Delivered reports

GET AN INSTANT PRICE READ, NO UPLOAD

When you need a number in minutes rather than a full analyst report.

Steps

1. For a quick self-serve check, open Instant benchmarks, pick the vendor tool, answer a few questions about your deal, and read where it lands against the peer cohort.
2. To judge a specific document instead, drop it into the Verdict Bar: it classifies the file, routes it to the matching engine, and returns a verdict with red flags in about a minute.
3. To understand what a contract actually says, run Contract decode: plain-English risks, ten asks with paste-ready language, and a market benchmark.

See also: Instant benchmarks · Verdict Bar · Contract decode

TRACK AGREEMENTS AND NEVER MISS A NOTICE WINDOW

Set an agreement up once and let the platform watch the deadline for you.

Steps

1. Open Agreements and choose **Add agreement**.
2. Select the vendor, set the expiry date, and choose a 30, 60, or 90 day notice period. Add the annual value so it feeds your spend and portfolio analytics.
3. Upload up to five files per vendor for safe keeping.
4. Open Renewals to see every agreement sorted by expiry, the next deadline on top. When an agreement enters its notice window, your team is emailed automatically.

See also: Agreements · Renewals · Vendor calendar

PLAN AND RUN A RENEWAL NEGOTIATION

Turn an upcoming expiry into a worked deal with a plan, a mandate, and a record of what was agreed.

Steps

1. From Renewals, open the renewal you want to work.
2. Build the plan in the Renewal playbook: the step-by-step negotiation plan, the model, and the exec report. Turn on the agent if you want it to prep and remind.
3. Set your leverage with the Clause library (your preferred positions) and attach the Fair Renewal Rider so every renewal carries your standard protections.
4. Open a tracked Negotiation: set the mandate (target, walk-away, approvals), paste vendor emails for tactic analysis, and log every give and get in the concession ledger.
5. Capture what the vendor promised under Commitments so it makes it into the contract. Run a post-mortem when the deal closes.

See also: Renewal playbook · Negotiations · Opportunities

PROVE AND SHARE YOUR SAVINGS

Turn a claimed saving into one proven against real invoices, then a shareable badge.

Steps

1. Open Savings proof: each negotiated saving is reconciled against the invoices that followed, so a claim becomes proven or disproven.

2. Once a saving is invoice-verified, go to Verified wins and mint a public, revocable badge, and watch your Deal Score against the calibrated corridors.
3. Owners can list the organization on the opt-in board under whatever name you choose.

See also: Savings proof · Verified wins · Invoices

PREPARE FOR A VENDOR MEETING

Walk into the call with the numbers already in hand.

Steps

1. For a single deal, drop the contract into the Negotiation dossier: one upload assembles the benchmark, the decoded asks, an analyst brief, the strategy playbook, live vendor intel, and the credible alternative priced.
2. To have it done for you automatically, connect your calendar so Meeting packs preps a pack before each vendor meeting.
3. Check the Vendor calendar to time your ask against the vendor's fiscal quarter end, when discounts run deepest.

See also: Negotiation dossier · Meeting packs

SET UP YOUR WORKSPACE (OWNERS)

The one-time setup an org owner does so the whole team gets value. These steps need owner access.

Steps

1. Invite your team under Members and set each person's role.
2. Connect your systems under Integrations: SAM and ITAM sources, storage, Slack, and Teams.
3. Turn on Single sign on (SAML or OIDC) and review Data controls for retention and export.
4. Set Branding so exported reports carry your identity, and tune Notifications and alert rules.
5. Load the sample portfolio from the dashboard to explore, then remove it before entering real data.

See also: Settings & account · Getting started

RESPOND TO A VENDOR AUDIT LETTER

An audit letter rewards a considered first move and punishes a fast one. Slow the clock down and answer from your contracts, not from memory.

Steps

1. The day the letter lands, drop it into the Audit letter decoder: who is actually auditing you, the deadline as a business-day countdown, what is demanded versus merely implied, and the three things not to do first.
2. Do not reply to the auditor yet, and do not run any vendor-supplied measurement tool until the plan says so.
3. Follow the decoder into the pre-filled defense playbook, and open the audit-defense analyses from the proposal record's right rail if the vendor's paper is on file.
4. Check your position on Data health: the audit exposure estimate tells you how defensible your entitlement picture is before you engage.
5. If the exposure is large, bring in a vetted specialist from the Expert Bench or book Advisory.

See also: Audit letter decoder · Expert Bench

DISPUTE AN INVOICE THAT DOES NOT MATCH YOUR CONTRACT

Turn a suspicion of overbilling into a documented, dollars-first dispute.

Steps

1. Get the invoice in: upload it on Invoices, or set up the forward-in address so invoices process automatically.
2. Read the line verdicts: price above contract, billed over entitlement, off-contract item, or uplift-cap breach, each with the dollars at stake.
3. Cross-check Billing watch: if the vendor moved its price list, the corrective draft is already attached to the finding.
4. Send the correction, then watch the following invoices: a correction only counts once later invoices confirm it, and the confirmed saving lands on Savings proof.

See also: Invoices · Billing watch

HAND YOUR RENEWAL CALENDAR TO VERA

Let the AI run covered renewals under mandates you approve, with fees only on invoice-verified savings.

Steps

1. Read the offer on Managed renewals: Vera discloses itself as an AI, you approve the moments that matter, and claimed figures never bill.
2. An org owner activates the program, signs the fee agreement, and sets the standing mandate defaults.
3. Approve each deal's mandate before anything reaches a vendor; the standing defaults never skip this step.

4. Clear the **Waiting on you** queue as Vera works: mandate approvals, formal offers, and any decision the guardrails parked.
5. Track the net position, savings banked against fees paid, with every figure traced to a vendor invoice.

See also: Managed renewals · Savings proof

RUN DILIGENCE FOR AN ACQUISITION

Deal-grade contract review with the sensitive documents locked down.

Steps

1. Create a restricted Vault project and grant only the deal team access; documents in a restricted project stay hidden from everyone else.
2. Add the target's contracts to the project, in bulk if needed.
3. Run Diligence scoped to that project: every contract is read for change of control, assignment, exclusivity, termination, liability, and data terms.
4. Work the risk register from the highest severity down; each finding cites the clause it rests on.
5. Read the analyst report for what needs consent or renegotiation before the deal, and what is clean.

See also: Vault · Diligence

TEAM UP WITH OTHER BUYERS ON A RENEWAL

When several buyers renew the same vendor in the same window, one term sheet beats four separate negotiations.

Steps

1. Check the matchmaking strip on Buying blocs: it shows where your renewal calendar lines up with other buyers of the same vendor.
2. Open an invitation to read the bloc's shape: buyers, combined ACV, window, and term sheet version. You stay anonymous until mutual opt-in.
3. Join the bloc to enter its room, and negotiate on the shared Fair Renewal Rider term sheet.
4. For a private one-to-one instead, use Buyer intros to talk to another buyer who runs the same vendor.

See also: Buying blocs · Fair Renewal Rider

CHOOSE BETWEEN COMPETING QUOTES

Two or three quotes for the same need, one defensible decision.

Steps

1. Drop the quotes into Quote Face-Off: equivalent SKUs are aligned line by line, every line is benchmarked, and the best mix across all papers is priced as the Franken-quote.
2. Read the analyst memo: which quote to take, which terms to pull from the losers, and the counter to send.
3. For one quick quote on its own, Snap a quote gives the line-by-line check and the counter in about a minute.
4. Running a formal process? Work it as a Sourcing project through to the award decision.

See also: Quote Face-Off · Sourcing

SET YOUR CLAUSE STANDARD AND SWEEP THE ESTATE

Decide once what your organization signs, then measure every contract against it.

Steps

1. Build your positions in the Clause library: the preferred language, the fallback, and the walk-away for each clause that matters, and mark the non-negotiables as must-have.
2. Run Coverage to sweep the must-have template across every contract: Present, Deviates, Missing, or Unclear per cell.
3. Chase the red Missing cells first: agreements without a protection you require.
4. Ask bespoke questions across the estate with Review tables: one question per column, a quote-backed answer per document.
5. From now on, every AI review argues for your standard instead of a generic one, inserting your pre-approved language wherever a contract deviates.

See also: Clause library · Coverage

CONNECT YOUR DATA AND CLOSE THE GAPS

The platform gets sharper with every source you connect. This is the highest-leverage hour an owner spends.

Steps

1. Open Data health: the completeness score, and every gap ranked by the feature filling it unlocks.
2. Connect the systems that know what you own under Integrations: SAM and ITAM sources, procurement, contract intake, and the invoice forward-in address.
3. Add annual values to your Agreements so Portfolio, Spend, and the Estate map fill in.
4. Index your documents on Document search, then harvest your paid-for rights into the Rights register.
5. Come back to Data health and work the next gap; the plan reranks as you close them.

See also: Data health · Integrations

TAKE A PURCHASE REQUEST FROM INTAKE TO AWARD

One front door for new spend, so nothing is bought twice.

Steps

1. Raise the request on Requests, or let teammates email requests straight in through the intake address an owner set up.
2. Read the AI triage verdict: net-new, a renewal of something you own, a duplicate of existing capability, or over the approval threshold.
3. Route it onward: a Sourcing project for net-new spend, a renewal for something you own, or an approval.
4. In sourcing, run requirements, suppliers, and bids side by side through to the award decision.

See also: Requests · Sourcing

BUILD THE BOARD PACK

The quarterly leadership story, told from your live data instead of a hand-built deck.

Steps

1. Start from Portfolio for the spend and concentration picture.
2. Export the Estate map as a slide: every vendor sized by spend and colored by market position.
3. Generate the annual Strategy document: category strategies, vendor posture, and the year's negotiation calendar.
4. Add the proof: the savings ledger from Savings proof exports as CSV for finance.
5. For the monthly cadence in between, the Monthly briefing is the five minute spoken version.

See also: Estate map · Strategy

WATCH A VENDOR'S MARKET MOVES

Know what a vendor did to its pricing before they tell you at renewal.

Steps

1. Follow the vendor on Terms watch and turn on the price-change digest; every published price-list change arrives diffed and priced at your seat counts.

2. Subscribe to the Monday Weekly report so licensing, audit, and M&A news on your vendors leads your copy.
3. Before a renewal, read the vendor's full history in the archives, its grade on Vendor scorecards, and the latest Research on it.
4. Check Billing watch to see whether your invoices already reflect a move.

See also: Terms watch · Weekly report

RIGHT-SIZE LICENSES BEFORE A RENEWAL OR TRUE-UP

Walk into the true-up with the surplus already found, instead of paying for shelfware another year.

Steps

1. Run the optimizer that matches the estate: M365 optimization for Microsoft seats, Cloud cost optimizer for hyperscaler spend, VCF licensing for VMware cores, or the Claude and OpenAI optimizers for AI commitments.
2. Review the inactive and oversized assignments the tool surfaces, and the per-user reassignment plan where the tool builds one.
3. Fold the findings into the renewal: the matching vendor playbook turns them into the negotiation case.
4. For the budget-wide view across every vendor, run Spend optimization.

See also: Spend optimization · Vendor playbooks

GET UNSTUCK

Every help surface, in the order to try them.

Steps

1. The round help button at the bottom right explains the current screen and answers questions about it in place.
2. Press **Ctrl/⌘ J** to open Vera over whatever you are looking at; ask about a price, a clause, or how the platform works.
3. Check Troubleshooting for the symptom-first fixes, and Plans, allowances & limits if a feature looks locked.
4. Message our team from Chat: the "Vera AI team" thread reaches our analysts directly.
5. For deal help rather than product help, book Advisory or engage the Expert Bench.

See also: Troubleshooting · Chat

Next: Chapter 08 · Glossary & FAQ

08 · Glossary & FAQ

The words the platform uses, and the questions people ask most. If a term on screen is unfamiliar, it is probably defined here.

GLOSSARY

Proposal — a vendor quote or contract you upload for our analysts to benchmark. It moves along a path: Uploaded, In review, Benchmarked, Delivered. Lives under Proposals.

Agreement — a signed contract you track for spend and renewals, not necessarily uploaded as a document. Lives under Agreements.

Instant benchmark — the self-serve price check you run yourself against market data. No upload, no analyst, a result in about two minutes. See Instant benchmarks.

Analyst benchmark — the deliverable our team produces from an uploaded proposal: metrics, market ranges, and a written narrative. Delivered to Delivered reports.

Report — any delivered narrative document you read or forward: the analyst benchmark, board reports, strategy reports.

Deliverable — the umbrella for every generated artifact: reports, briefs, playbooks, memos, and scans. They collect in Deliverables.

Brief — a short AI-generated executive summary of one thing: a contract, a vendor, or a renewal.

Playbook — a structured negotiation guide, either generated by an agent or curated for a specific vendor. See Playbooks.

Vendor — the company you are buying from. Called a supplier only inside the Sourcing module, where RFP language applies.

Verdict — the fast, classified read the Verdict Bar returns on any dropped quote, contract, or invoice.

Notice window — the period before an agreement expires during which you must tell the vendor if you are cancelling or renegotiating. Set as 30, 60, or 90 days. Your team is emailed automatically when it opens.

Percentile — where your deal sits against a cohort of comparable buyers. A lower percentile on price usually means a better deal for you.

Corridor — the calibrated range of renewal outcomes behind our benchmarks. Vendor grades and your Deal Score are read from it.

Deal Score — where your invoice-verified deals land inside the corridors, with 100 being the strong end. Tracked on Verified wins.

Buying bloc — an opt-in group of buyers of the same vendor who renew in a coordinated window under one term sheet, anonymous until mutual opt-in. See Buying blocs.

Fair Renewal Rider — the versioned standard addendum you attach to every renewal: uplift cap, benchmark repricing, audit conduct, and change-of-control protection. See Fair Renewal Rider.

Vera — the AI analyst, grounded in your contracts and our market data. The feature is branded Vera AI and opens anywhere with Ctrl or Cmd J. See Vera AI.

Licensing and negotiation jargon

The vendor-side vocabulary the chapters use. You do not need to be a licensing veteran to use the platform, but these twelve terms come up constantly.

List price — the vendor's published price before any discount. **Net price** is what you actually pay; the gap between them is your discount, and benchmarks often measure it.

ACV — annual contract value: what an agreement costs per year, the number most benchmarks and blocs coordinate on.

Uplift — the percentage increase a vendor applies at renewal. An **uplift cap** is a contract clause limiting it; the Fair Renewal Rider indexes it.

True-up — the periodic reconciliation where you pay for usage above what you licensed. A **true-down**, reducing counts to actual usage, is rarer and usually only possible in the renewal window.

Shelfware — licenses you pay for but nobody uses. The optimizers in Chapter 03 exist largely to find it.

EA / ELA — an Enterprise Agreement (Microsoft's term) or Enterprise License Agreement (IBM's and others'): a large multi-year bundle covering many products, renegotiated as one deal.

ULA — Oracle's Unlimited License Agreement: deploy as much as you like during the term, then **certify** your deployment counts at exit to bank the licenses. The certification date drives the whole Oracle ULA playbook.

MACC — the Microsoft Azure Consumption Commitment: a contracted amount of Azure spend, negotiated inside the EA.

FUE — full user equivalent, the license metric RISE with SAP prices on; rebuilding the FUE count from real usage is the first move of the RISE playbook.

SOW — statement of work: the services document that carries day rates and deliverables. Priced against the market by the Rate Card Benchmark.

Third-party support — maintenance for a vendor's product bought from an independent provider instead of the vendor, typically far below the OEM rate. See the third-party support playbook.

Co-termination — aligning several agreements to end on the same date so they renew as one negotiation instead of dribbling out through the year.

Contract status path

Every proposal moves through four fixed statuses:

1. **Uploaded** — received, waiting for an analyst to pick it up.
2. **In review** — an analyst is benchmarking it.
3. **Benchmarked** — the final quality check before delivery. Still internal.

4. **Delivered** — the report is ready and you have been emailed.

FAQ

Who can see the documents I upload?

Only your own organization and our analysts. Files are stored privately, never on a public URL, and downloads use short-lived signed links. Data is isolated per organization at the database level, so another customer can never see your records.

What file types and sizes can I upload?

Proposals and contracts accept PDF and DOCX. The Verdict Bar also accepts photos and screenshots. Limits are shown on each upload screen (proposals up to 25 MB, Verdict Bar files up to 30 MB, images up to 3.5 MB). Files are checked on type, size, and signature, not just the extension.

How is my account protected?

With your password plus optional two-factor authentication (a rotating six-digit code from an authenticator app), which you turn on under Security. Accounts with elevated access are required to use it.

Why does a benchmark say "insufficient data"?

We never estimate a market position without data to defend it. When a vendor lacks reference coverage, the report says so plainly and names the one step that closes the gap, usually adding a list price or seat count in that vendor's benchmark tool.

What is the difference between an instant benchmark and an analyst benchmark?

An instant benchmark is self-serve: you answer a few questions and get a market comparison immediately. An analyst benchmark is a deliverable our team produces from a document you upload, with metrics, ranges, and a written narrative.

Can I try the platform without entering real contracts?

Yes. Load the sample portfolio from the dashboard to explore populated screens, and remove it in one click. Sample rows never mix with your real data.

How do I move around quickly?

Press **Ctrl or Cmd K** anywhere to open the command palette and jump to any page, tool, or vendor. Press **Ctrl or Cmd J** to open Vera over whatever you are looking at. The round help button at the bottom right explains the current screen.

Which actions are limited to org owners?

Inviting and managing members, connecting integrations, configuring single sign on, setting branding and notification rules, and data controls. Regular members can use every workspace and tooling feature but not these org-level settings.

Do the AI features cost extra?

AI-powered features (marked "requires an AI plan" in this manual) depend on your plan including AI, and each run counts against a periodic allowance. Everything else works on any plan. Plans, allowances & limits defines every gate and cap, and your own usage is always visible under Billing.

Which plan do I need for a feature?
The plan matrix in Plans, allowances & limits lists what each plan includes, from the Free single-contract decoder to Enterprise's included analyst benchmarks and advisory sessions. Every tool is free to explore with sample data on any plan.

How do referrals work?
Every account has a referral code under Referrals. Refer a company and earn 10% of their spend for their first 12 months.

Something is broken, or my question is not here.
Start with Troubleshooting, which walks the most common symptoms. Otherwise message our team from Chat (the "Vera AI team" thread) or email info@redresscompliance.com.

Next: Chapter 09 · Record & detail pages

09 · Record & detail pages

Lists get you to a record; the record page is where the work happens. Proposals, vendors, agreements, and reports all open into a detail page built from the same parts, so once you know the pattern you can read any of them. This chapter covers that shared anatomy and then the three detail pages you open most.

THE RECORD PAGE PATTERN

Every detail page in the platform is laid out the same way, top to bottom:

- **Breadcrumb** — where you are, and one click back to the list.
- **Highlights header** — a vendor logo, the record title and status, and a row of the key facts (the numbers you would read out on a call). Actions for the record sit here on the right.
- **Related records strip** — one hop to everything connected: the vendor, the matching renewal, the delivered report, the contract this one renews.
- **Tabs** — the main content, as underline tabs (the active one carries a blue border). The same tab pattern is used everywhere, never boxed or segmented.
- **Right rail** — supporting tools and context beside the tabs: AI analyses, access controls, and comments.

Because the pattern is fixed, the tab names change but the way you move around does not. Negotiation deal rooms open with the same highlights header (target, latest quote round, concession balance, open commitments, last activity), so a live deal reads like every other record.

THE PROPOSAL RECORD

Where: open any row under Proposals · `/contracts/<id>`

Everything about one uploaded proposal, from the moment you submit it to the delivered report.

On the screen

- **Status path** — the four-step path Uploaded, In review, Benchmarked, Delivered, with the date each step was reached and, while it is with our team, who is working on it and how long it has been in the current step.
- **Highlights** — vendor, category, status, who uploaded it, and the delivered date. If the AI redline found the quote below the vendor's usual discount band, a "below band" badge appears here.
- **First read** — when you have an instant AI read on the document, it leads the page so you get a number before the analyst report lands.
- **Workspaces strip** — the deeper analyses that already have a result: the redline review, the SOW rate review, the walk-away alternative, and the negotiation brief.

The tabs — always in the same order, Report, Plan, Ask, Files, Details, at every stage; only the tab that opens first changes.

- **Report** — once delivered, this opens first, and a small line points here from any other tab: the white-paper narrative, the negotiation playbook, and the metrics table with percentile bars (see The benchmark report below). Before delivery it shows the request-a-benchmark card with the estimated delivery date.
- **Plan** — the step-by-step engagement plan for this vendor, with AI guidance on each activity.
- **Ask** — ask questions about this specific document and get answers grounded in its text.
- **Files** — the PDF or DOCX files you uploaded, opened with a short-lived signed link.
- **Details** — the extracted fields (seats, annual value, uplift cap, term dates, source language), your notes, and what you asked us. You can re-extract or export a redline from here.

The right rail

- **AI analyses** — grouped as Review (proposal review, SOW review, second opinion, renewal vs current), Model (what-if scenarios, entitlements, credible alternative), and Compliance (audit defense, audit workbench, security & DPA check). Rows with a stored result open first; the rest sit behind one entry. In the what-if modeler you can save a scenario by name, reload it any time, compare two side by side with the levers and the difference between them, and pin the chosen case to the negotiation plan.
- **Access** — whether the proposal is visible to the whole organization or restricted to named people, managed by the owner, the uploader, or an admin.
- **Comments** — a thread on the record, and you can comment on a specific metric or clause.

See also: Proposals · Delivered reports · Contract decode

THE VENDOR RECORD

Where: open any row under Vendors · `/vendors/<vendor>`

Your whole relationship with one vendor on a single page.

On the screen

- **Highlights** — annual value, the renewal countdown and date, proposals (and how many delivered), and tracked research, with an "in notice window" badge when a deadline is close.
- **War room mode** — when a renewal crosses into its notice window, the record leads with a live countdown, this week's playbook step, the negotiation brief, and the owner and approvers pinned. The same deal also jumps to the top of your dashboard Today queue, so a live renewal never runs off screen.
- **Proposal pipeline** — this vendor's proposals across the status path.
- **Vendor profile** — your position and percentile, the typical discount off list once a benchmark exists, and the plays to expect from this vendor (quarter-end pressure, high anchor, bundling misdirection, and more).

- **Workroom** — the renewal, any live negotiation, watchdog findings, and the deliverables on this vendor, each one click away.
- **QBR pack** — the quarterly business review pack for this vendor opens with a delta cover built from your published benchmarks: the three moves that matter, your position change, savings realized, and the percentile trajectory since last quarter, on one page. It reads calmly in a vendor's first quarter, before there is a history to compare.
- **Deeper tabs** — the tabs are the whole map: position and risk reads live under Analysis, intelligence briefs under Research, and the activity log under Log.

How to use it

1. Read the highlights and the vendor profile to see whether this vendor looks above or below market and what plays to expect.
2. Check Intelligence before a renewal for the latest pricing and licensing moves.
3. Use the related records strip to jump to the vendor's agreements, proposals, and delivered reports, or open the war room straight from the renewal alert.

See also: Vendors · Vendor scorecards · Terms watch

THE BENCHMARK REPORT

Where: the Report tab on a delivered proposal, or open it from Delivered reports

The deliverable itself: a senior-analyst read of your deal against the market, not a bare table of numbers.

On the screen

- **The narrative** — the white-paper report leads: an executive summary, your market position, section-by-section analysis, prioritized recommendations, and a bottom line. Every figure is grounded in stored data and citation-tagged, and the opening reads once, with one verification story for the whole page.
- **The section rail** — on wide views and shared report pages, a slim rail beside the document lists every section: click to jump, and it tracks where you are as you read.
- **Negotiation playbook** — the metrics turned into specific asks you can take into the room.
- **Metrics table** — each metric with your value, the market low, median, and high, a percentile, and notes. The signature percentile bar shows where each one sits: the cohort's middle half shaded, the median ticked, your deal flagged, and the dollar gap to median on the bar. You can pick the peer cohort the comparison uses.
- **Overall score** — one number summarizing how the deal stacks up.
- **Delta and trend** — how the report changed against earlier snapshots, when there is a history.
- **Section notes** — pin a comment thread to any section of the report, reply, and resolve it before you forward. Notes stay internal to your team and never appear on a shared link, a PDF, a Word file, or the slides.
- **Downloads and sharing** — export the report as PDF or Word (the export matches the on-screen brief), hand it to a teammate, or create a share link.

- **Reading panel** — once you share a report link, this panel shows how it is being read: total opens, unique readers, the sections read most, and time spent on the recommendations. It carries no IP or personal data and honors Do Not Track.
- **What happened?** — thirty days after your report is delivered, the Report tab asks one question: did you win a reduction, did the vendor hold, or are you still negotiating? You answer once per contract. A won reduction with an annual figure opens a reconcilable savings record against your invoices automatically, and your answer sharpens the benchmark over time.

How to use it

1. Read the narrative first; it interprets the numbers rather than restating them.
2. Drop to the metrics table to see the exact gaps, and switch the cohort if a tighter peer set applies to you.
3. Take the negotiation playbook and the recommendations into your negotiation, and export or share the report with your budget owner.
4. Pin notes to the sections your team needs to weigh in on, resolve them, then forward the clean report.
5. When the prompt appears a month on, tell us what happened; a won reduction flows straight to Savings proof.

See also: Delivered reports · Benchmark a proposal end to end

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Next: Chapter 10 · Plans, allowances & limits

10 · Plans, allowances & limits

Every plan gate and platform limit mentioned anywhere in this manual, collected on one page. When a chapter says a feature "requires an AI plan" or is "metered by plan", this is the page that defines what that means. Your own workspace's plan, usage, and remaining allowances are always visible under Billing.

HOW THIS MANUAL DESCRIBES PLAN GATING

The manual uses a small, fixed vocabulary so you always know what a gate means:

- **requires an AI plan** — the feature needs a plan that includes AI: Growth, Professional, or Enterprise. The Free plan has no AI features; the 30 day Trial includes a small starter allowance instead (see the table below).
- **metered by plan** — the feature works on your plan, but each run counts against a periodic allowance (for example AI analyses per month). The Billing page shows the meter.
- **your own data requires a Professional or Enterprise plan** — the tool is free to explore with sample data on any plan, but uploading your own exports or documents and running the AI over them needs Professional or Enterprise.
- **org owners only** — not a plan gate at all: the feature is on every plan but only organization owners can use it.

Allowance windows are rolling, not calendar months: "per month" means the last 30 days, "per week" the last 7. An allowance frees up on its own as older runs age out of the window.

THE PLANS

Five plans, priced annually. Owners can compare and upgrade under Billing; payments are handled by Stripe.

	FREE	TRIAL (30 DAYS)	GROWTH	PROFESSIONAL	ENTERPRISE
Contracts tracked	1	2	50	250	1,000
Self-serve instant benchmarks	—	Oracle ULA only	All	All	All
Conversational AI (Vera, Ask, briefs)	—	—	✓	✓	✓
Analyst benchmarks included	—	—	—	—	4 per month
Own-data uploads to tools	—	—	—	✓	✓
AI tool reports on your own data	—	—	—	✓	✓
Live voice (call copilot, sparring room)	—	—	—	—	✓
Advisory sessions included	—	—	—	—	4 per month
SSO, SCIM, and the API	—	—	—	—	✓

Plans without included analyst benchmarks can still send proposals for expert review by purchasing benchmark credits from the Billing page.

AI ALLOWANCES BY PLAN

Each run of an AI feature counts against the matching allowance. All counts are per rolling window as described above.

ALLOWANCE	TRIAL	GROWTH	PROFESSIONAL	ENTERPRISE
AI analyses (reports)	10 in total	2 / month	5 / month	20 / month
AI agent requests (playbook agents)	1 in total	—	20 / month	100 / month
Proposal redline scans	1 in total	2 / month	5 / month	10 / month
Side-by-side compare scans	1 in total	2 / month	5 / month	10 / month
Cloud cost analyses (own uploads)	—	—	5 / month	10 / month

When an allowance runs out, the feature says so in place and the Billing meter shows when the window frees up. Owners can upgrade at any time; the higher allowance applies immediately.

PLATFORM LIMITS

The fixed limits that apply regardless of plan. Each links to the section where the limit matters.

LIMIT	VALUE	WHERE IT APPLIES
Proposal and contract files	PDF and DOCX only, 25 MB each	Upload a proposal
Verdict Bar documents	up to 30 MB	Verdict Bar
Photos and screenshots	up to 3.5 MB	Snap a quote, Verdict Bar images
Tracked vendor agreements	up to 40	Agreements
Files per vendor agreement	up to 5	Agreements
Research file downloads	10 per day, 30 per week per person	Research
Review table columns	up to 12 questions	Review tables
Deal approval chain	up to 10 approvers	Deal approvals
Benchmark share links	valid 30 days	The benchmark library
API keys	expire within one year	API
Spend optimization vendor set	top 10, 25, 50, or 100 by spend	Spend optimization

File uploads are validated on type, size, and file signature, not just the extension, and every upload screen states its own limits in place.

Related: Billing · Troubleshooting · Glossary & FAQ

Next: Chapter 11 · Troubleshooting

11 · Troubleshooting

When something does not behave the way the manual says it should, start here. Each section opens with the symptom and gives you the checks in the order most likely to fix it. If none of them do, the last section tells you how to reach a human.

A PAGE FROM THIS MANUAL IS NOT IN YOUR RAIL

By default the rail shows the core set of destinations most people use weekly; everything else still exists, it is just not pinned. Three ways to reach any page in this manual:

1. Press **Ctrl/⌘ K** and type the page name. This always works.
2. Open **More** at the foot of the Workspace group for the full searchable catalog.
3. Switch to the full rail with the control at the foot of the rail if you prefer to see everything.

Sections whose destination sits outside the core rail carry a "via More" marker on their **Where** line throughout this manual.

YOUR UPLOAD WAS REJECTED

1. Check the type: proposals and contracts accept **PDF and DOCX only**. Rename tricks do not help, because the file signature is checked, not the extension.
2. Check the size: 25 MB per proposal file, 30 MB in the Verdict Bar, 3.5 MB for photos and screenshots. All limits are listed in Plans, allowances & limits.
3. Very large files upload straight from your browser to storage, which can take a moment on a slow connection. Leave the tab open until the file shows as attached.
4. A scanned contract inside an image-only PDF still uploads fine; the AI tools read it with vision.

A BENCHMARK SAYS THERE IS NOT ENOUGH DATA

That message is deliberate: the platform never estimates a market position it cannot defend. To get a ranked verdict:

1. Widen the region filter to all regions, or check that the deal size is realistic.
2. Add a list price or seat count in that vendor's benchmark tool; the data coverage page names the one step that closes each gap.
3. For a vendor outside the library's coverage, upload the proposal for analyst benchmarking instead.

AN AI FEATURE IS GREYED OUT OR ASKS YOU TO UPGRADE

1. Check whether your plan includes AI: the Free plan has none and the Trial has a small starter allowance. See the plan table.

2. If the plan is right, the allowance may be spent: the Billing meter shows what you have used and when the rolling window frees up.
3. Only org owners can upgrade. If you are not one, the feature names who is, or check the workspace summary at the foot of the rail.

YOU HIT THE RESEARCH DOWNLOAD LIMIT

Downloads are capped at 10 per day and 30 per week per person so access stays fair across organizations. Reading papers in the viewer is unlimited. The allowance frees up on its own as recent downloads age out; if you need more right away, message the team from Chat and an admin can reset it.

AN INVITE NEVER ARRIVED

1. Owners: check **Pending invitations** under Members. A bounced or delayed delivery status means the email never landed; fix the address and resend.
2. Ask the invitee to check their spam folder for a Vera AI sender.
3. If your organization has domain capture on, the person can also sign up directly with their work email and be approved as a join request.

ALERT OR DIGEST EMAILS ARE NOT ARRIVING

1. The Terms watch and Weekly report emails are **off until you turn them on**, with the switch at the top left of each page. Nothing is sent by default.
2. Check Notifications settings: each alert kind can be in-app, email, both, or off.
3. A one-click unsubscribe in any email turns off only that email, but check you did not use one by accident.
4. Still nothing? Check spam, then message the team.

MEETING PACKS ARE NOT APPEARING

1. The calendar connection must be a read-only ICS feed (Outlook: Publish calendar; Google: Secret address in iCal format), connected under Settings › Integrations by an owner.
2. The agent checks the feed about every 20 minutes, so a meeting created moments ago may not have a pack yet.
3. The meeting title must mention a tracked vendor by name. "Sync with Dave" produces nothing; "Salesforce renewal call" produces a pack.

YOU LOST YOUR AUTHENTICATOR DEVICE

Use one of the one-time **backup codes** you saved when you set up two-factor; each works once. Then register the new device under Security. If the backup codes are gone too, ask an org owner to contact our team from Chat and we will verify you another way.

YOU CANNOT SIGN IN THROUGH SINGLE SIGN ON

If your organization enforces SSO for your email domain, the password form will not work and you must sign in through your identity provider. Access problems there (a deactivated IdP account, a group you were removed from) are fixed by your own IT team, not in Vera AI. Org owners can review the configuration under Single sign on.

A SHARE LINK STOPPED WORKING

Benchmark share links are valid for 30 days unless they were created as kept-live links. Open the scenario or report again and create a fresh link; the old one cannot be revived. Research share links can also be revoked by the person who created them.

SAMPLE DATA IS SHOWING IN YOUR VIEWS

Sample rows never mix with your real data and never feed your alerts; they exist so screens are not empty while you explore. Remove the whole sample portfolio in one click from the dashboard. If you see a row you believe is sample data after removal, it is not: check who uploaded it on the record's activity tab.

CHARTS AND ANALYTICS LOOK EMPTY OR THIN

Portfolio, Spend, and the Estate map build from proposals and agreements that carry an **annual value**. Add the missing values on Agreements and the charts fill in immediately. Data health ranks every gap by what filling it unlocks.

SOMETHING IS BROKEN, OR NOTHING HERE HELPS

- Message our team from Chat: the "Vera AI team" thread is private between you and our analysts.
- Or email **info@redresscompliance.com**.
- For screen-by-screen help in place, the round help button at the bottom right explains the current page, and **Ctrl/⌘ J** opens Vera over whatever you are looking at.

Next: Chapter 12 · Integrations, clients & deployment

12 · Integrations, clients & deployment

The technical chapter, written for the IT, security, and procurement-ops people who wire Vera AI into an estate. It answers three questions: how data gets in and out (the integration catalog), what runs on your machines (thin and thick clients), and where the platform itself can run (the four deployment models). Nothing here is required to use the platform; everything here makes it stronger.

HOW THE PLATFORM IS DELIVERED

Where: the standard service · `app.vendorbenchmark.com`

Vera AI is delivered as a managed cloud platform (SaaS). The application, database, storage, and backups are operated by us; your team signs in from a browser and maintains nothing. The technical posture, in the terms a security review asks about:

- **Tenant isolation** — every organization's rows are isolated at the database layer with row-level security, tested with real cross-organization attempts, not filtered in application code.
- **File handling** — contract files live in private encrypted storage. There are no public URLs; every download uses a signed link that expires in about a minute, and every view and download lands on the audit trail.
- **Encryption** — TLS in transit, encryption at rest for the database and file storage.
- **Identity** — SAML and OIDC single sign-on, SCIM provisioning, and TOTP multi-factor are available on the standard service (see Single sign on).
- **Auditability** — an exportable audit log records who did what, including file views and downloads, and can stream to your SIEM.
- **Updates** — continuous. Features, security fixes, and fresh benchmark data ship without any action from you.

The Trust center tells this story with live numbers, and the Security Center shows your own workspace's posture against it.

CLIENTS: WHAT RUNS ON YOUR MACHINES

The platform is thin-client first: the browser is the primary interface and nothing needs to be installed. Around it sit a thick-client desktop app and several headless surfaces.

The browser (thin client)

Who: everyone

Any modern browser is a full client. All processing happens server side, with one deliberate exception: the browser-local calculators. Several tools (Cloud cost optimizer, VCF licensing, M365 optimization) parse your usage export as a file **in the page itself**, so raw usage data never leaves your machine unless a step explicitly sends approved figures for analysis; each tool states which side of that line it works on. Files sent to the AI tools are read in memory and never stored.

The Windows desktop app (thick client)

Who: everyone · install is per user, no admin rights

A native shell around the same account and data, for teams that live in the platform daily: its own window and taskbar identity, drag a contract from Explorer straight onto it, native Windows notifications for deliveries and notice windows, Vera summonable over any app, Windows Hello lock, and automatic updates. Install it from Settings › Desktop app. It is a client, not a data store: uninstalling it touches nothing in your workspace. A macOS build is planned; until then Mac users get the identical workspace in the browser.

Chat clients: Vera in Slack and Microsoft Teams

Who: connected by an org owner

Vera answers inside your own Slack workspace or Teams tenant: ask about a price, a clause, or a renewal without leaving chat, with every figure tagged to its source exactly as in the app. Connected under Integrations.

Email as an interface

Who: addresses are provisioned by an org owner

Five inbound rails give every teammate an integration that needs zero training, because it is just email:

- **Contract email-in** — forward a vendor proposal to your intake address and it lands in Proposals.
- **Deal email-in** — forward a live vendor thread onto the deal record, where the negotiation ghost writer can draft the reply.
- **Invoice email-in** — forward invoices and they reconcile billed against contracted on Invoices.
- **Purchase request email-in** — teammates raise Requests by mail, straight into triage.
- **Ask an agent by email** — send a question plus a document and the answer comes back to your inbox.

The API, MCP, and agent-to-agent

Who: org owners only (keys)

- **REST API** — create keys under Settings › API; keys expire within a year and are shown once.
- **MCP connector** — point Claude, ChatGPT, or any MCP-capable tool at your workspace so your own AI assistants can query your benchmark data with your permissions.
- **Agent Negotiation Protocol** — the open, published protocol for structured buyer-agent-to-vendor-agent negotiation, with a hash-chained transcript; the spec and artifacts are public at `app.vendorbenchmark.com/agent-protocol`.

THE INTEGRATION CATALOG

Where: Settings › Connections › Integrations · `/settings/integrations`
Who: org owners only

The page is one calm scroll, arranged the way this section is: contract intake first, then renewal workflow, spend and usage data, data out, and automation, with the two deep estates, procurement (P2P) and license discovery (SAM / ITAM), at the foot. Every connector ships with the same operating rules: credentials are stored encrypted and used only server side, read-only scopes are requested wherever the source system offers them, every sync is logged under **Recent activity**, and connector-reported entitlement figures are held for human confirmation before they can drive an alert (you will see them marked "confirm" on Billing watch). Disconnecting a source stops its syncs immediately.

Contract intake

Get the paper in without anyone uploading by hand. Half of these connectors are just private email addresses, provisioned in one click and shared with your whole team.

CONNECTOR	WHAT IT DOES
Email-in	A private intake address; forwarded proposals become tracked contracts
Deal email-in	Forward a live vendor thread onto the deal record; the ghost writer can draft the reply
Invoice email-in	Forwarded invoices reconcile billed against contracted on Invoices
Purchase request email-in	Teammates raise Requests by mail, straight into triage
Ask an agent by email	Send a question plus a document; the answer returns to your inbox
DocuSign	Completed envelopes flow in as signed agreements
Ironclad	Executed contracts sync from your CLM
Google Drive folder watch	Drop files in a folder, they arrive here
SharePoint folder watch	Same, for Microsoft estates
Box folder import	Bulk import from a Box folder

Renewal and deal workflow

Push the work to where your team already lives.

CONNECTOR	WHAT IT DOES
Jira	Renewal tasks and findings as issues in your project
ServiceNow (tickets)	The same, as ServiceNow tickets
Calendar invites	Notice windows and renewal deadlines as calendar events
Calendar feed (meeting packs)	A read-only ICS feed; vendor meetings get a pre-call pack
Slack	Alerts to a channel, plus Vera in your workspace
Microsoft Teams	Alerts to a channel, plus Vera in your tenant

Spend and usage data

The money and the activity behind it: what you pay, and who actually uses what you pay for.

CONNECTOR	WHAT IT DOES
Coupa	Spend actuals by API
Okta usage	Who actually signs in to which app
Microsoft Entra ID usage	The same, for Microsoft estates
Spend actuals import	A CSV from Coupa, SAP Ariba, Zip, or a NetSuite GL export, or any generic spend CSV
Seat usage import	A CSV of per-app seat activity
Smart import	One-off bulk loads: the AI reads whatever columns your export has and maps them for you

Data out and automation

Your data is yours to take with you, continuously.

CHANNEL	WHAT IT CARRIES
Warehouse export	Contracts, renewals, savings, and spend tables to Snowflake or BigQuery
Event webhooks	Signed JSON events (deliveries, status changes, findings) to any endpoint, including Zapier or Make; verify the signature before trusting a payload
Audit webhook	The audit log streamed to your SIEM
File exports	Every report as PDF, Word, or PowerPoint; ledgers and tables as CSV or Excel

The integrations page also carries the **Agent Negotiation Protocol** card: an org owner opts your workspace into structured agent-to-agent negotiation there, and the public spec lives at `app.vendorbenchmark.com/agent-protocol` (see The API, MCP, and agent-to-agent).

Procurement and ERP (P2P)

Purchase orders, requisitions, and supplier records, so spend that never touched a contract still shows up, with maverick spend flagged. Beneath the connector cards, the **Procurement intelligence** table turns the synced records into a supplier-by-supplier read.

CONNECTOR	SOURCE
Coupa	API connection
SAP Ariba	API connection (US, EU, APAC endpoints)
NetSuite	Token-based API connection
Oracle Fusion Cloud Procurement	API connection
SAP S/4HANA	API connection
File exports	Coupa, NetSuite GL, Ariba, Zip, or CSV when an API connection is not approved

License and deployment discovery (SAM / ITAM)

Connect the systems that know what you own and what is deployed; the **License intelligence** table beneath the cards then shows entitled against deployed against active per vendor, with estimated shelfware. This is the data that powers Data health, Billing watch, and audit exposure. Each connector card opens on a click to show its credential form and carries a mode badge: API connection, file import, or both.

CONNECTOR	SOURCE
ServiceNow SAM Pro	Entitlements and license positions
Flexera One	Entitlements and deployments (US, EU, APAC endpoints)
Snow License Manager / Snow Atlas	Entitlements and usage
USU / Aspera SmartTrack	Entitlements
Microsoft 365	Seat assignments and last-activity via Microsoft Graph
Microsoft Intune	Device and app inventory
Jamf Pro	Apple estate inventory
ServiceNow CMDB	Deployed software inventory
Oracle LMS / ULA position	Your measured Oracle deployment position
SaaS management platforms	Zylo, Zluri, Torii, or Productiv, via their CSV exports
Cloud billing	AWS Cost & Usage Report, Azure cost export, or Google Cloud billing export, feeding Spend and the Cloud cost optimizer

How to use it

1. Start with identity: SSO and SCIM first, so access is governed from day one.
2. Open the cheapest intake rails: email-in addresses and a folder watch cost minutes and remove the manual-upload habit.

3. Connect one SAM or usage source and one spend source, then follow Data health, which ranks every remaining gap by the feature it unlocks.
4. Turn on data out last: the warehouse export and the audit webhook make the platform a citizen of your data estate rather than an island.

Related: Integrations (settings reference) · API · Connect your data and close the gaps

DEPLOYMENT MODELS

Who: Cloud is the standard service; the other three are Enterprise conversations

Most teams run the standard Cloud service and are live the same day. For organizations whose policies require more, three further models exist; they are scoped with your security team rather than sold as checkboxes. Bring your requirements to the Advisory desk or the team Chat, and the full comparison lives at vendorbenchmark.com/deployment.

01 · Cloud (available today)

The managed multi-tenant platform described at the top of this chapter. Live the same day, always current, full benchmark network access, Enterprise controls (SSO, SCIM, MFA, audit) on by default, and the lowest cost of the four. The trade-offs are the ones inherent to shared infrastructure: isolation is enforced in the database rather than by separate hardware, the hosting region is ours, and contract files are processed outside your network perimeter, encrypted and access-logged.

02 · Dedicated cloud (Enterprise agreements)

A single-tenant deployment provisioned and operated exclusively for you: dedicated database, dedicated file storage, dedicated encryption keys, your own subdomain or custom domain, hosted in the region your policy requires. It answers the two requirements shared multi-tenancy cannot: data residency mandates, and security policies that rule out a shared database regardless of how it is isolated. Still zero operations work for your team; updates arrive on an agreed maintenance cadence rather than continuously, and it is priced as a dedicated environment above the standard plans. Time to first benchmark: days.

03 · Hybrid connector (Enterprise early access)

For a hard "documents cannot leave the network" policy. A lightweight connector (one container) runs inside your environment and reads contracts locally: it extracts the commercial terms, shows your team exactly what it found, and sends **only the figures you approve** to the cloud for benchmarking. The documents themselves never cross your boundary, and you still get the full market comparison, negotiation targets, and renewal calendar. Document-centric features (clause-level review, full-text document search) run reduced or stay local, and your team operates and updates the one connector. Time to first benchmark: weeks, including your security review.

04 · Self-hosted (by arrangement)

The full platform inside your own boundary, for defense, government, and the strictest financial mandates. We deliver versioned releases your team deploys into your own cloud account or data center, with our runbooks and support; your team owns upgrades, backups, scaling, and restores, audit events stream straight into your SIEM, and market data arrives as periodic snapshots rather than a live network connection. It is the most control and the most work of the four, which is why it is scoped as a joint engagement. Time to first benchmark: months.

The four at a glance

	CLOUD	DEDICATED CLOUD	HYBRID CONNECTOR	SELF-HOSTED
Best for	Most teams	Residency mandates, no shared database	Documents cannot leave the network	Air-gapped and sovereign environments
Who operates it	Us	Us, on your dedicated infrastructure	You run one connector, we run the rest	Your team, with our support
Contract files live	Our encrypted cloud storage	Your dedicated storage, your keys, your region	Inside your network, never uploaded	Your infrastructure, entirely
Updates	Continuous	Agreed cadence	Cloud continuous, connector by you	Versioned releases you apply
Benchmark network	Full	Full	Full, for approved figures	Periodic snapshots
Time to first benchmark	Same day	Days	Weeks	Months

Related: Trust center · Plans, allowances & limits

This is the last chapter. Back to the manual index.

13 · Your AI agents

The platform runs a workforce on your behalf: analysts that write documents, watchdogs that monitor your portfolio and the market, autopilots that act under a mandate you set, and the workflows your own team composes. This chapter explains the four classes, lists every agent, and walks you through building one. The one rule behind all of them: an agent must show its work. Every run is logged, every figure is grounded in your stored data, and nothing leaves the platform without a gate you chose.

THE AGENT CENTER

Where: Team & AI › Agents · `/agents`
Who: everyone

The one pane of glass over every agent working for your organization: what is on duty, what each one did in the last 30 days, and where its work lands.

On the screen

- **Your workforce** — the headline band: agents on duty, runs in the last 30 days, runs waiting on an approval, and the hours given back.
- **Workflows** — the agents your team built, each with its trigger, run count, last run, and a status dot (on, paused, or last run failed). Open one on the workflow desk to edit or run it.
- **Autopilots** — the agents that act on your behalf: the Renewal Autopilot (watch, draft, or negotiate under a mandate) and the negotiation ghost writer.
- **Watchdogs** — the standing monitors: portfolio anomalies, vendor price lists, billing drift, earnings signals, contract hygiene, and more. Each card names its cadence and what it reads.
- **Analysts** — the document writers: the six playbook specialists, your custom analysts, and the scheduled reporters (the Monday wire, meeting packs, the board report, the monthly briefing).
- **See its work** — every card links to the page where that agent's output lands, so nothing it does is invisible.

How to use it

1. Scan the headline band; anything waiting on an approval is your queue, not the machine's.
2. Follow a card's See its work link to read what an agent produced.
3. Use New agent to add to the workforce.

Related: Workflow agents · Vera AI

BUILD AN AGENT

Where: Team & AI › Agents › New agent · `/agents/new`
Who: everyone · building workflows needs edit access · drafting needs an AI plan

One wizard for all three buildable classes. Pick the job, and the wizard routes you: document writing goes to the custom analyst builder, monitoring shows you the watchdogs already on duty, and routine automation drafts a workflow from one sentence.

On the screen

- **Three doors** — Write documents for me (Analyst), Watch something and tell me (Watchdog), Do the steps I always do (Workflow).
- **Describe it in a sentence** — for workflows: state the goal in plain language and the AI drafts the chain: trigger, steps, and the approval gate where anything would leave the platform.
- **Review the draft** — the drafted chain as a step map and a numbered list. Rename it, change the trigger, or rewrite the goal and draft again. Full per-step settings live on the workflow desk after saving.
- **Test with my data** — runs the chain end to end without sending anything outside the platform, so you read the output before the agent earns a trigger.
- **Turn it on** — enables the agent and shows you exactly where its work will land.

How to use it

1. Pick the door that matches the job.
2. For a workflow: describe the goal in one sentence. A goal that names the vendor, the cadence, and the audience drafts best.

1. Press **Draft the agent** and read the drafted chain: the name, the trigger, the step map, and where the approval gate sits. Rename it, change the trigger, or rewrite the goal and draft again.

1. Save the agent, test with your data, read the run on the workflow desk, then turn it on.

Tips

- Drafts are conservative on purpose: anything that emails a person outside a pure internal note gets a Wait for approval step. Remove it on the workflow desk only when you trust the chain.
- A goal that names the vendor, the cadence, and the audience drafts best: "Every Monday, review our Microsoft position and email the owners a short memo when anything moved."

THE FOUR CLASSES

Analysts write documents. On demand (the six playbook specialists plus up to six custom analysts your org defines) or on a schedule (the Monday vendor wire, the meeting pack before each vendor call, the monthly board report, the spoken monthly briefing). Their output lands in your documents library or on the page named on their card.

Watchdogs monitor and flag. They run on the platform's clock, read only the data named on their card, and surface findings on their home pages, in the Today queue, and by the email digests you turn on. You do not build watchdogs; you tune what each one tells you from its own page.

Autopilots act under a mandate. The Renewal Autopilot works your renewal calendar at the autonomy you choose: watch and remind, draft for your approval, or negotiate under a mandate with fees only on invoice-verified savings. The negotiation ghost writer drafts vendor replies from forwarded email threads. Every action an autopilot takes is logged on the record it touched.

Workflows are yours. A trigger plus up to eight steps: AI analysis, classification, extraction, an if then gate, a wait for approval, then email, Slack, a reply to the sender, or a task. Build them in the wizard or by hand on the workflow desk.

THE ROSTER

Every standing agent the platform runs for you, the clock it runs on, and where its work lands. Workflows are not listed because they are yours: the Center shows each one your team builds, with its own trigger and run history.

Watchdogs

WATCHDOG	CADENCE	FINDINGS LAND ON
Portfolio watchdog	Weekly, Tuesday	Anomalies
Terms watch	Daily	Watch
Billing watch	Daily	Billing watch
Benchmark alerts	Daily	Notifications
Earnings radar	Weekly, Wednesday	Vendors
Vendor viability	Weekly, Wednesday	Vendors
Ecosystem watch	Weekly, Thursday	Vendors
Contract hygiene	Weekly, Saturday	Data health
Commitment chase	Weekly, Monday	Negotiations
Standing answers	Daily	Vera AI

Autopilots

AUTOPILOT	RUNS	WHAT IT DOES
Renewal Autopilot	Daily	Works your renewal calendar at the autonomy you set (Managed renewals)
Negotiation ghost writer	On every forwarded email	Drafts vendor replies from forwarded threads (Workflow agents)

Analysts

ANALYST	RUNS	OUTPUT LANDS ON
The six playbook specialists: Benchmarking, Contract Flexibility, Legal Terms, License Specialist, Executive Brief, Negotiation Talking Points	On demand	Your documents library
Your custom analysts, up to six	On demand	Your documents library
Weekly vendor report	Every Monday morning	Weekly report
Meeting pack analyst	Before each vendor meeting	Meeting packs
Board reporter	Monthly, on the 1st	Delivered reports
Monthly briefing, spoken	Monthly, on the 2nd	Monthly briefing

TRUST AND GUARDRAILS

- **Grounded output.** Analyst and workflow memos read your live portfolio data; figures are checked against stored records, and missing facts come back empty, never invented.
- **Approval gates.** A Wait for approval step pauses any workflow run until a named human decides; rejections end the run. Autopilot mandates cap what can be conceded before a human is pulled in.
- **Run records.** Every workflow run keeps a per-step record you can open. Watchdog findings link to the evidence behind them.
- **Plan limits.** AI-marked agents need the org's plan to include AI, and runs count against your plan allowance (Plans, allowances & limits).

TROUBLESHOOTING

- **It did not run.** Check the agent's card in the Center: a paused status dot means it is switched off; a workflow with a weekly trigger runs about once a week, not at a fixed hour.
- **It ran but the output is wrong.** Open the run record and read the step where it went wrong; tighten the instructions on the workflow desk, or for analysts, edit the custom analyst's brief.
- **Too noisy.** Watchdog digests have per-page switches; workflows can gain an if then gate so only significant runs notify anyone.
- **Nothing sends.** A run showing Waiting for approval is paused on a human; the approvers were emailed and can also decide from the run page.