



**Recur™**

User Guide

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# Table of Contents

<b>Introduction</b>	1
<b>Getting Started</b>	2
System Requirements.....	2
Quick Start.....	2
<b>Launching the Application</b>	3
Viewing Privacy Policy.....	4
Viewing Terms of Service.....	5
<b>Signing up or Logging in For Recur</b>	6
Signing up for Recur.....	6
Logging into Recur.....	7
Resetting Password.....	8
<b>Adding Subscriptions</b>	11
Connecting a Bank (Recommended).....	11
Add subscriptions manually.....	16
Import from CSV (optional).....	18
<b>Using the Dashboard Page (Overview page)</b>	23
<b>Subscriptions Page</b>	25
Adding a Subscription.....	26
Edit Subscription.....	27
Deleting a Subscription.....	28
<b>Using Analytics Page</b>	30
Analytics Overview.....	31
Category Breakdown.....	32
Switching Views.....	33
Spending by Month.....	33
Subscriptions (Cost).....	34
Insight Panel.....	35
<b>Account Settings</b>	36
Profile Information.....	37
Security Settings.....	38
Two-Factor Authentication (2FA).....	39
Account Deletion.....	41
<b>User Preferences</b>	42
Notifications.....	43
Appearance.....	44
Reminders & Insights.....	45
<b>Using AI Optimization</b>	46
Launching the AI Subscription Helper.....	47
Data Used for AI Analysis.....	48
<b>Logging out of your Recur Account</b>	49
<b>Glossary</b>	50
Subscription.....	50
Renewal Date.....	50
CSV Import.....	50
Plaid API.....	50
AI Subscription Helper.....	50
Two-Factor Authentication (2FA).....	50
Dashboard (Overview Page).....	50
Dark Mode.....	50
Insight Panel.....	50

## Introduction

Subscription costs can accumulate quickly and unexpectedly. Many users lose track of recurring charges over time, causing wasted money and poor visibility into personal spending. Recur provides a simple, powerful way to organize your subscriptions, monitor monthly spending, and discover opportunities to save money.

Unlike a basic spreadsheet, Recur allows you to:

- Track all monthly, yearly, and custom recurring payments.
- Add, edit, and delete recurring transactions.
- Import subscriptions from a CSV file or through bank integration.
- Visualize spending through charts and analytics.
- Summarize subscription cost over time.
- Compare monthly and yearly subscriptions.
- Set reminders for upcoming renewals or cancellations.
- Use AI-powered insights to optimize and reduce subscription expenses.

Recur provides a clean and intuitive interface so you can manage your financial commitments with confidence.

# **Getting Started**

## **System Requirements**

Web browser (Chrome, Firefox, Edge, or Safari recommended)

A Recur account

Internet connection

## **Quick Start**

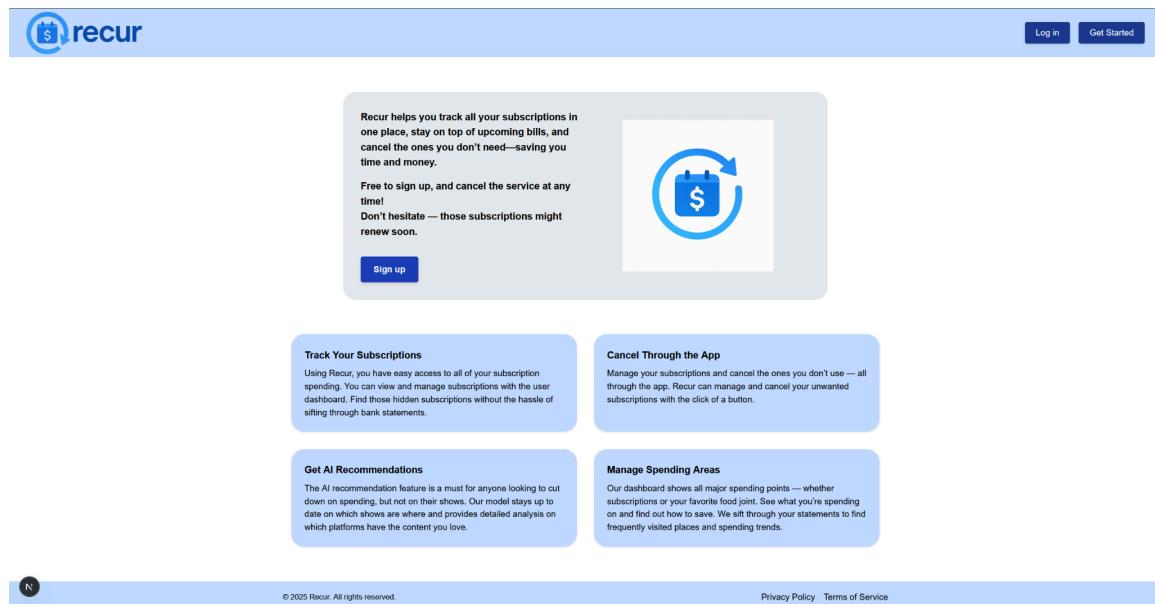
1. Visit the Recur website and navigate to the “Get Started” button on the top right and click.
2. Enter your information (name and email) and create a password that meets Recur’s password strength requirements to sign up for Recur.
3. Check your email that used to sign up to confirm your signup.
4. Log in to Recur.
5. Begin adding subscriptions using one of the available methods (connect a bank, manually, csv).
6. Once done, your Recur account is ready to use.

All password creation and password reset pages include built-in password strength checking to help ensure account security.

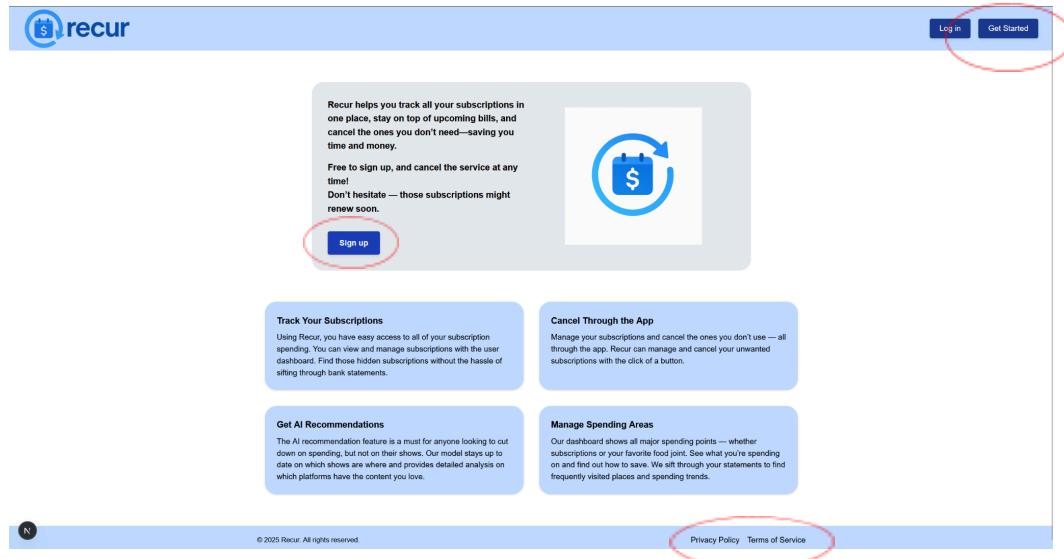
# Launching the Application

To launch the application, access Recur through your browser and log in using your email and password.

<https://frontend-psi-ten-16.vercel.app>



From the splash page you can click on the “Log in” button to go to the sign in page, “Get Started” or “Sign up” to go to the sign up page. On the bottom right of the page in the footer you can click on “Privacy Policy” to go to our privacy policy or “Terms of Service” to go to our terms of service.



## Viewing Privacy Policy

Click on the Privacy Policy in the footer the page (doesn't matter which page you are on):



Privacy Policy page:

A screenshot of the Recur Privacy Policy page. The page has a light blue header with the Recur logo on the left and "Log in" and "Get Started" buttons on the right. Below the header is a white content area with a dark blue sidebar on the left. The main content is titled "Privacy Policy" and includes sections like "Information We Collect", "How We Use Your Information", "Sharing of Information", "Data Security", "Your Choices", and "Contact". At the bottom of the page is a dark blue footer bar with the text "Dark mode" and a small icon.

## Viewing Terms of Service

Click on Terms of Service in the footer the page (doesn't matter which page you are on):



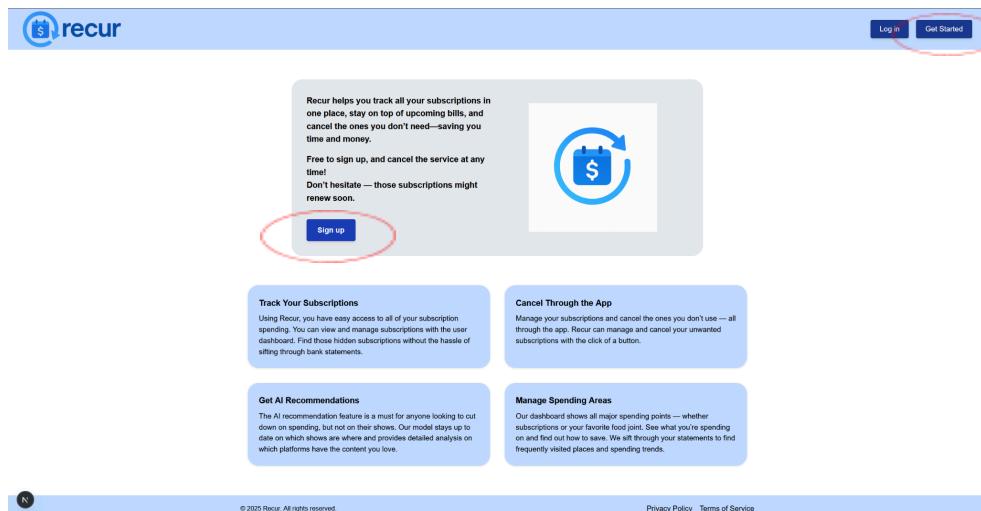
Terms of Service page:

A screenshot of the Recur Terms of Service page. The page has a light blue header with the Recur logo on the left and "Log in" and "Get Started" buttons on the right. Below the header is a white content area with a dark grey border. The title "Terms of Service" is at the top, followed by a small note about last update. The main content is organized into numbered sections: 1. Use of Service, 2. Accounts, 3. No Financial Advice, 4. Billing &amp; Cancellations, 5. Acceptable Use, 6. Limitation of Liability, 7. Changes to Terms, and 8. Contact. Each section contains a brief description of the terms.

# Signing up or Logging in For Recur

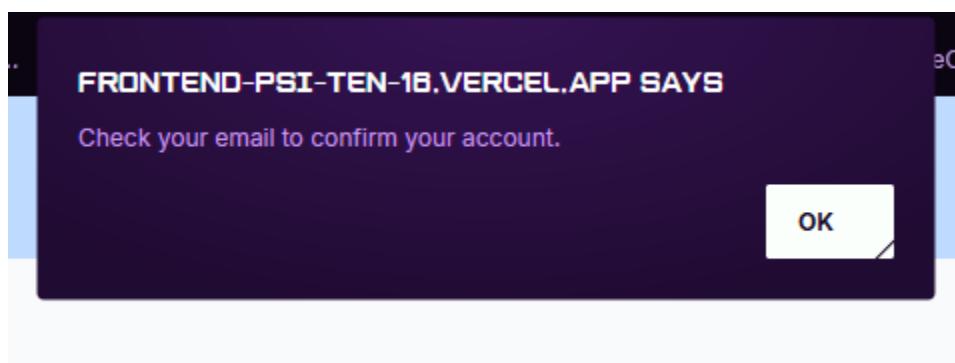
## Signing up for Recur

To sign up for Recur click on the “Sign up” and “Get Started” buttons on the splash page

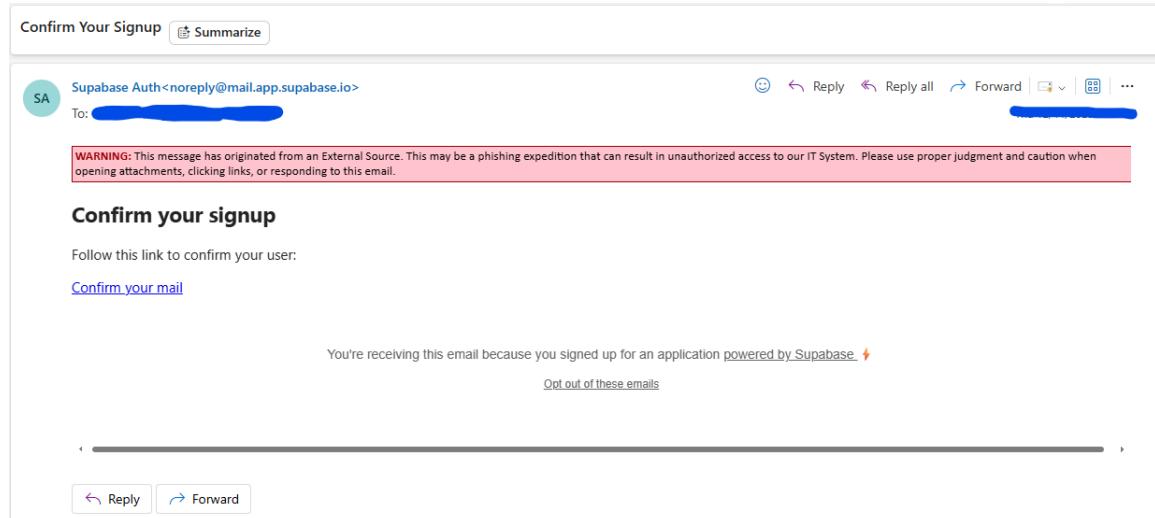


Fill out all the fields by entering personal information, a valid email address, and a password that meets Recur's password strength requirements.

Once you click sign up you will get an alert telling you to check your email to confirm your account.



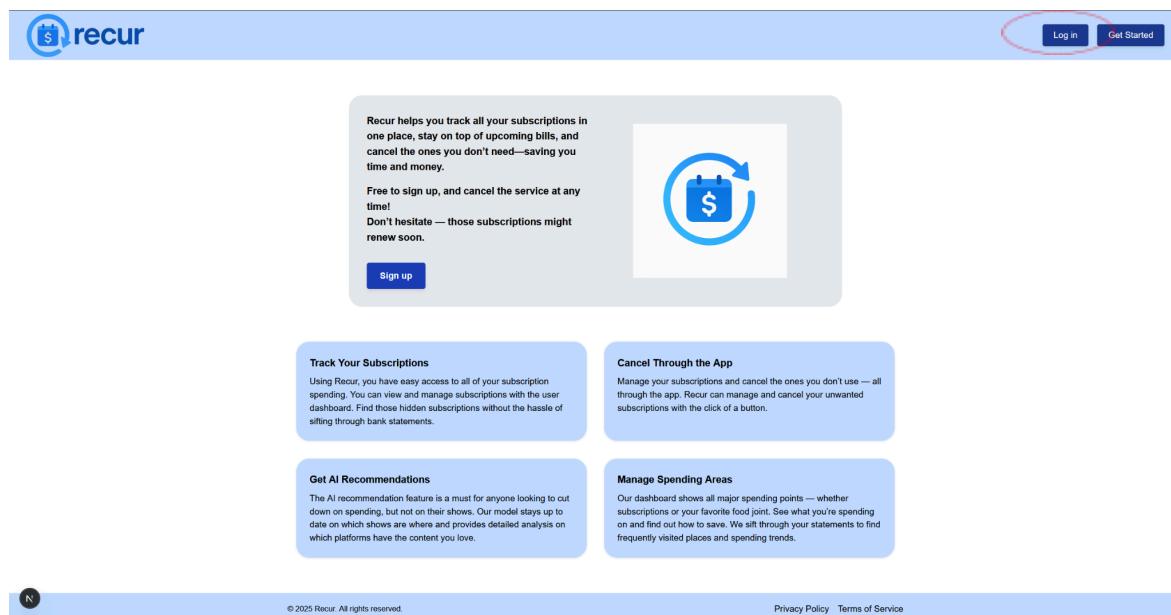
Go to your email you used to sign up and find the email sent from Supbase and confirm your sign up.



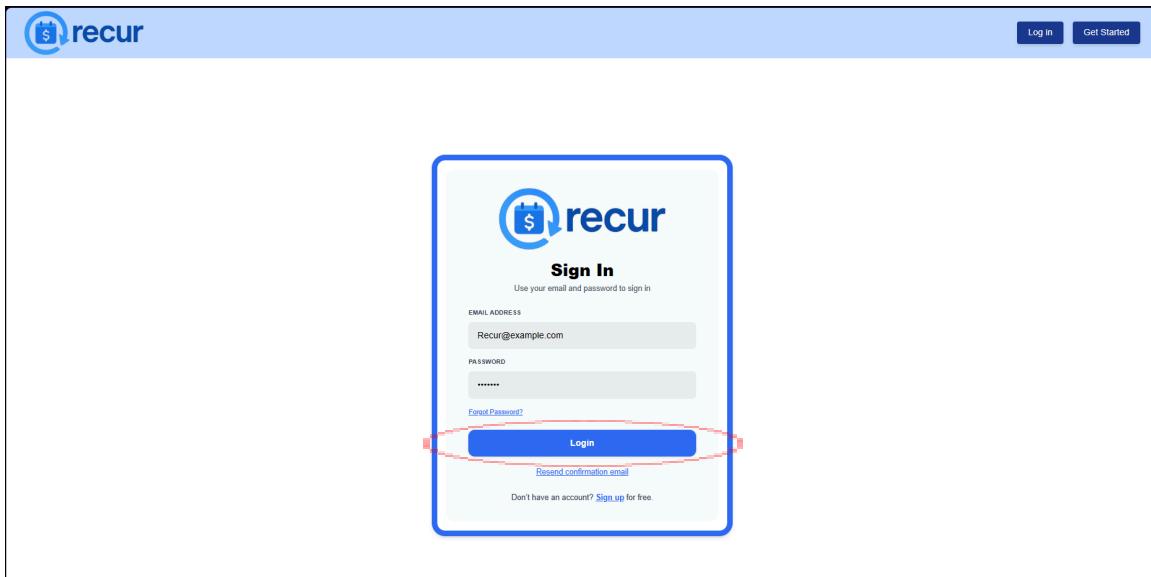
Once you confirm your email, log in to setup your Recur account.

## Logging into Recur

At the splash page, click on the “Log in” button at the top of the page.



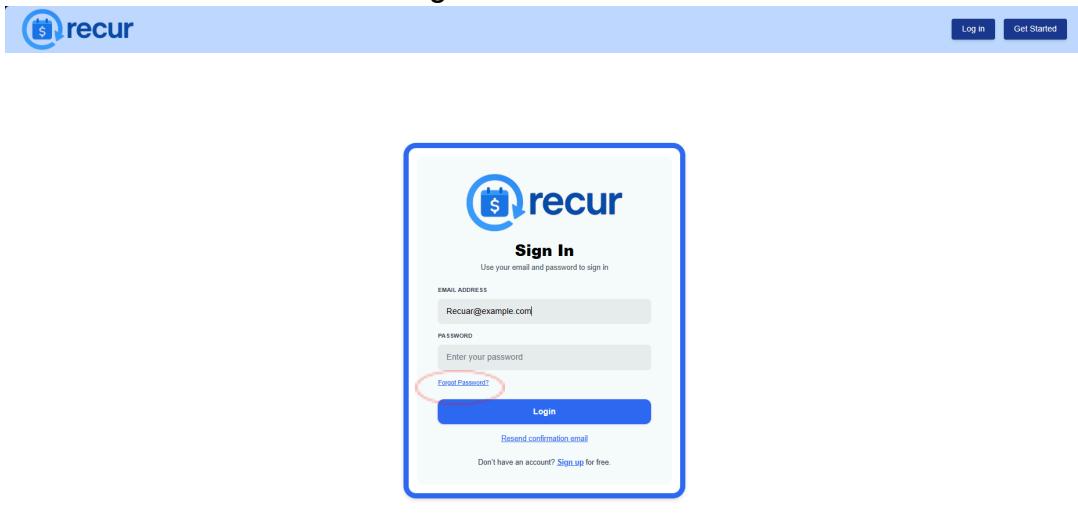
At the login page, enter your Recur account information that you created or already have and click the Log in button at the middle of the page.

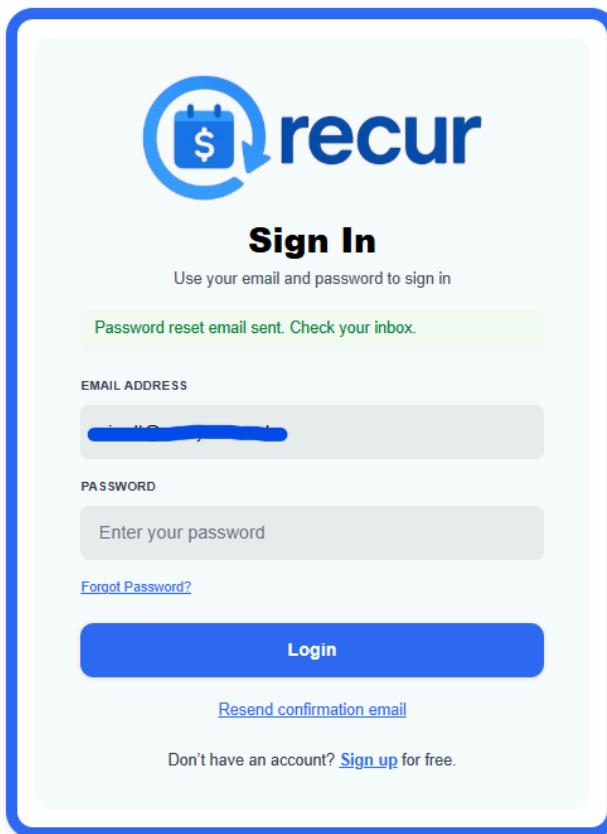


Note that if you don't have an account already, you can also click on the "Sign up for free" underneath the login button.

## Resetting Password

If you have forgotten your Recur account password you can reset the password by going to the log in page and entering your email that you used for your account and then click on "Forgot Password?"

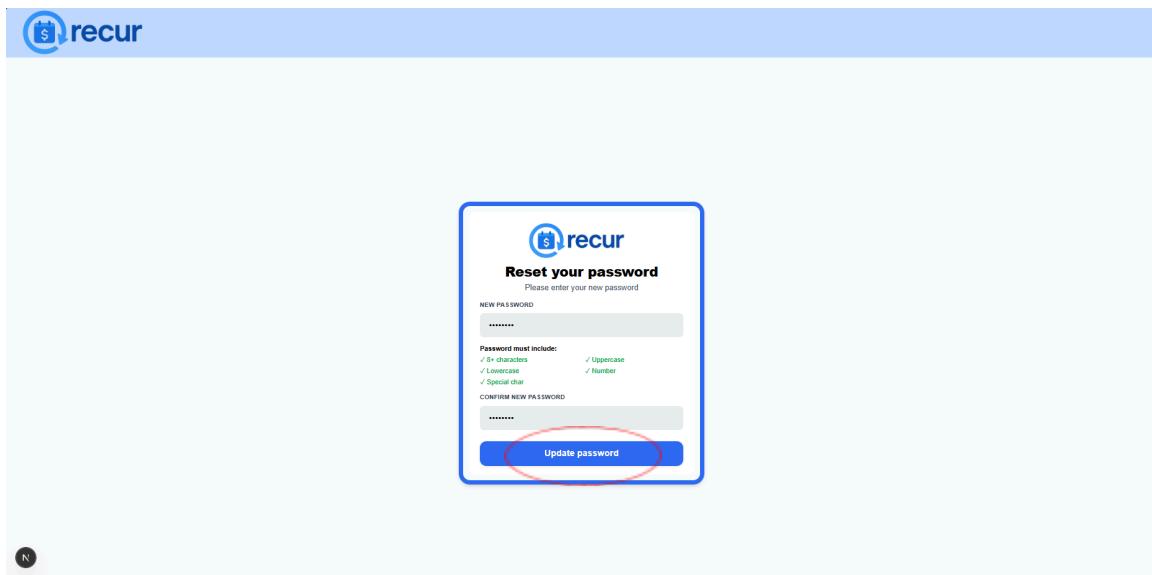




Check your email that you used to create your Recur account to check for your reset password email that you will receive from Supabase. Once you access this link click on the “Reset Password” link to go to the reset password page.

An email message from "Supabase Auth&lt;noreply@mail.app.supabase.io&gt;" to "O [REDACTED]". The subject is "Reset Your Password". The body of the email contains a warning about phishing and a "Reset Password" link, which is circled in red. Below the link is a note about receiving the email because of a sign-up. At the bottom are "Reply" and "Forward" buttons.

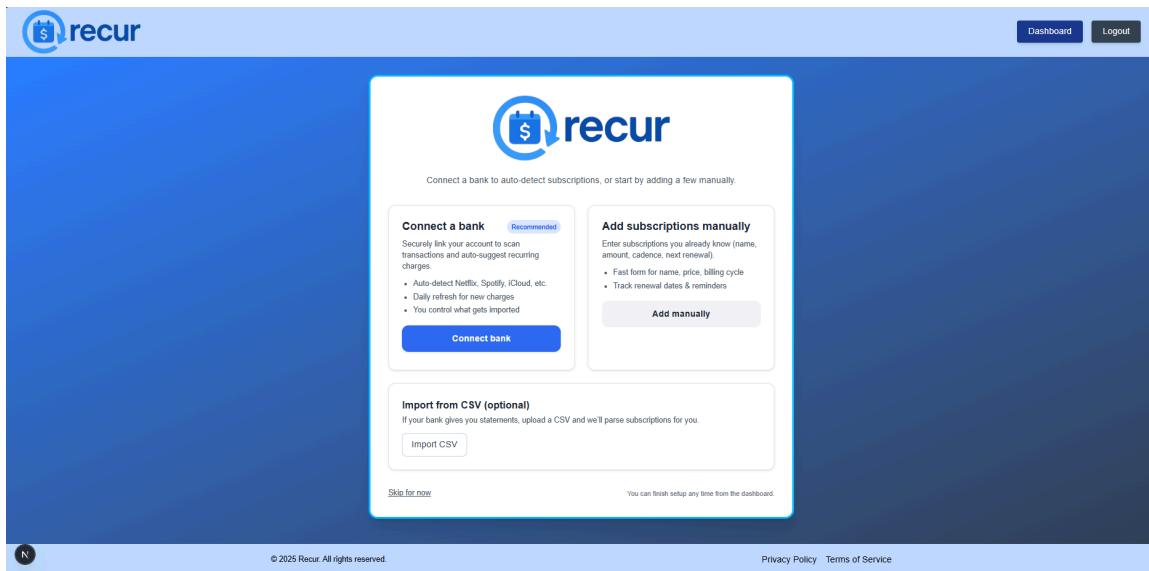
Once at the reset password page just enter a new password following Recur's password strength guidelines.



Once you are done just click on the “Update Password” button to update your password. Once you click on the button it will tell you that your password has been updated and will redirect you to the login page to sign in.

# Adding Subscriptions

After you have created an account and signed in the first time you will be brought to this page.



Where you can choose the following ways to add subscriptions to your account:

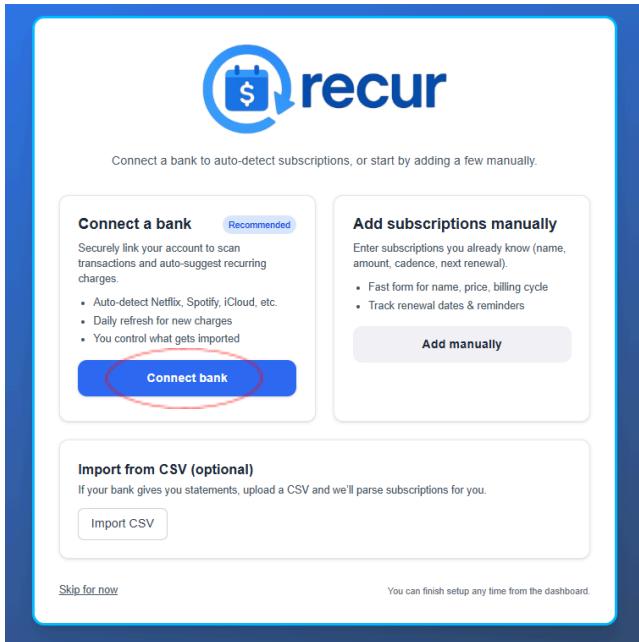
- “Connect a bank (recommended)”
  - Uses Plaid Sandbox API to connect to a dummy account to pull recurring transactions and show them in your Recur account.
- “Add subscriptions manually”
  - Enter subscriptions you already know (name, amount, cadence, next renewal) manually.
- “Import from CSV (optional)”
  - Download a template file and fill in your transactions using your bank statement data, then upload the CSV to add them to your account.

If you don't want to add anything you can skip for now as you can always come back to this page to add more.

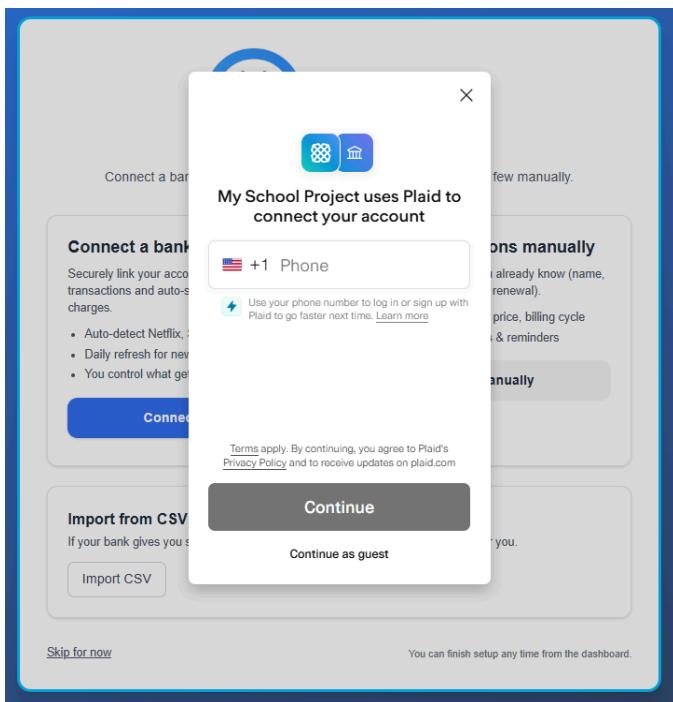
## Connecting a Bank (Recommended)

Using Plaid Sandbox API (will be using a dummy account) you can connect to your bank account in order to pull your recurring transactions to show them in your Recur account.

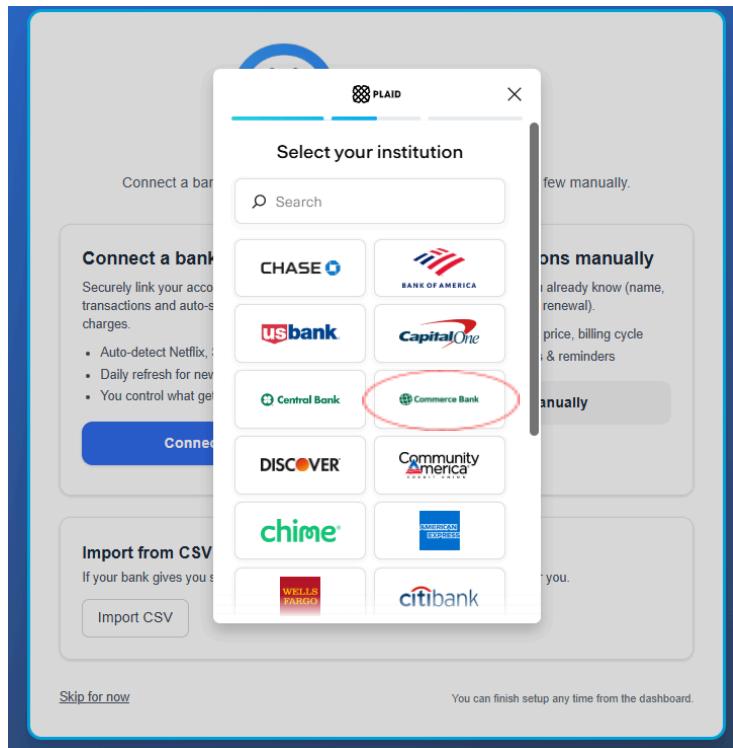
Click on the “Connect bank” button



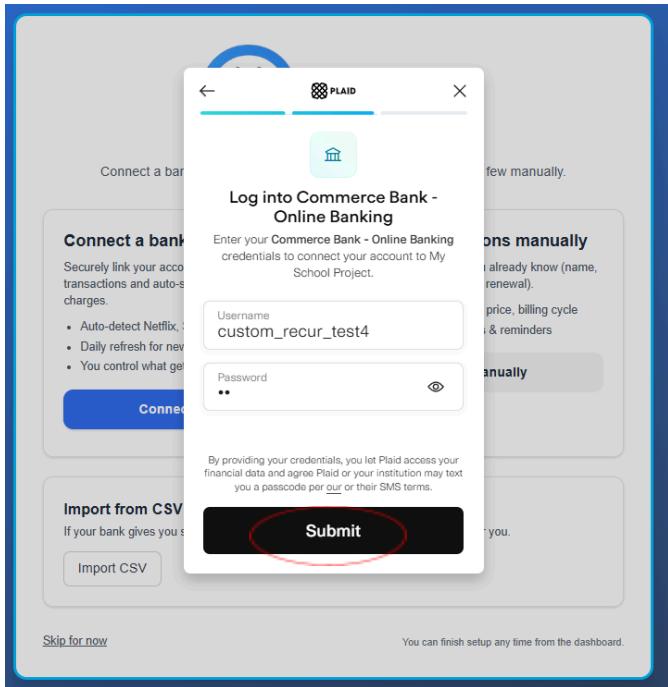
This will allow you to connect to a bank account using Plaid Sandbox API.



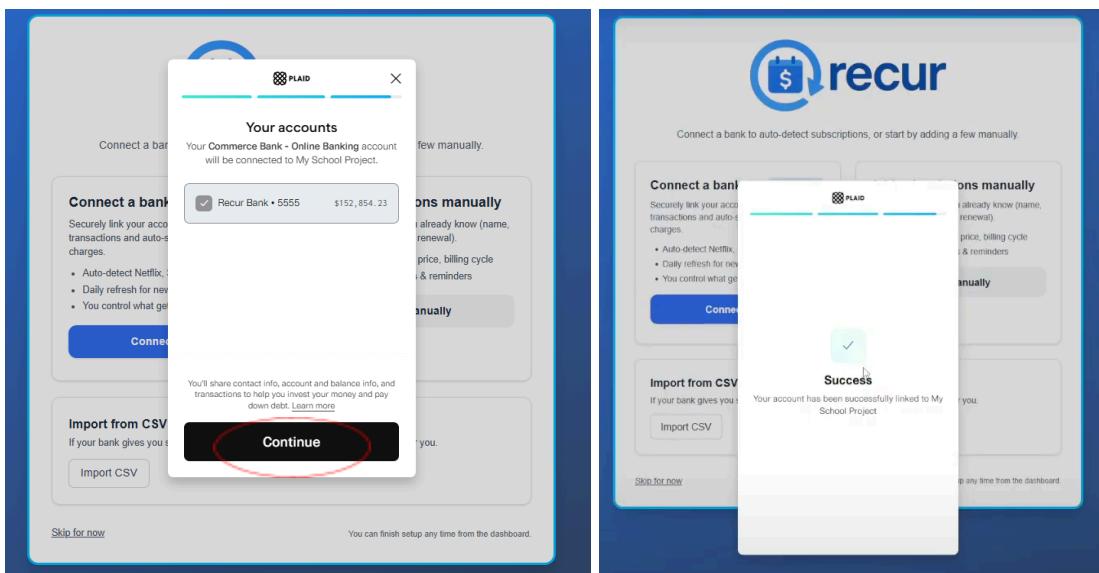
Click on continue as guest (this is how the project was set up) and choose Commerce Bank as your bank account.



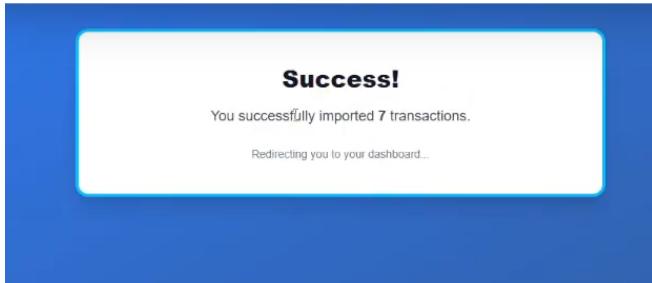
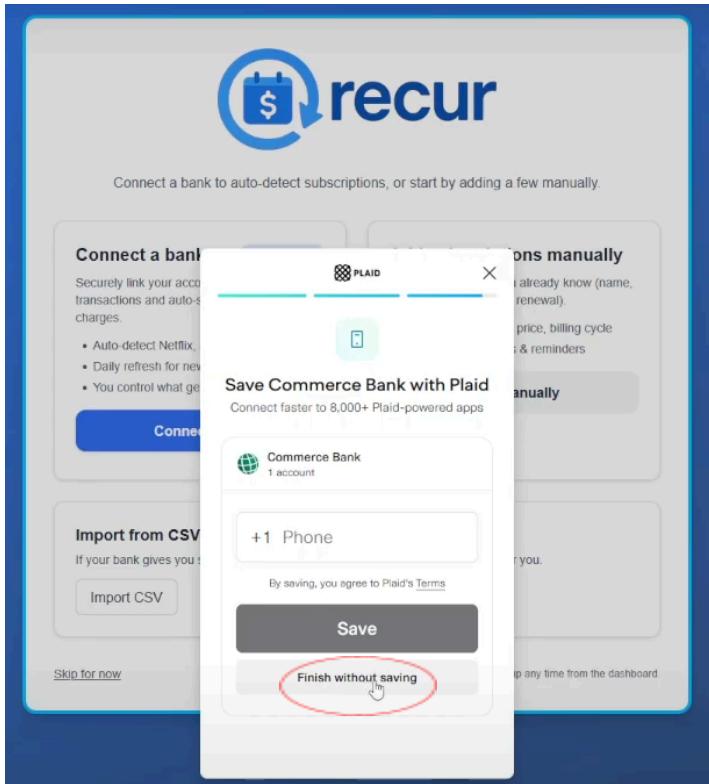
At the Log into Commerce Bank - Online Banking page, enter your commerce bank account information and click submit. (For this project custom\_recur\_test4 was the username and the password was 12).



Select your bank account and click continue.



Click on finish without saving and you will see a message that you have successfully imported transactions and it will redirect you to your dashboard with those subscriptions.



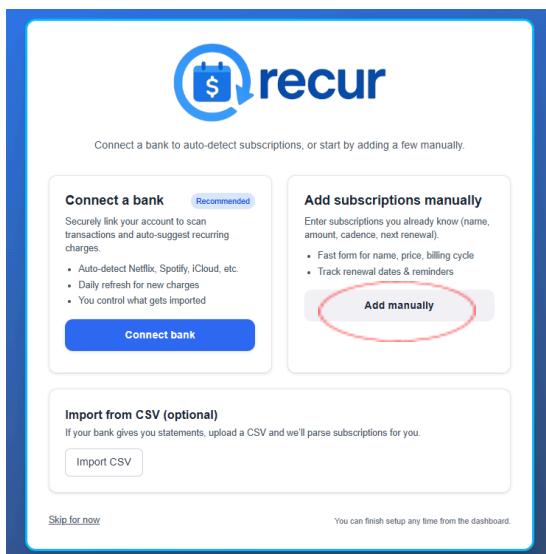
You will now see your dashboard with those imported transactions.

Subscription	Renewal Date	Price
Amazon Prime	Reviews on 12/15/2025	\$13.99
Twitch	Reviews on 12/19/2025	\$4.99
Disney Plus	Reviews on 12/20/2025	\$14.99

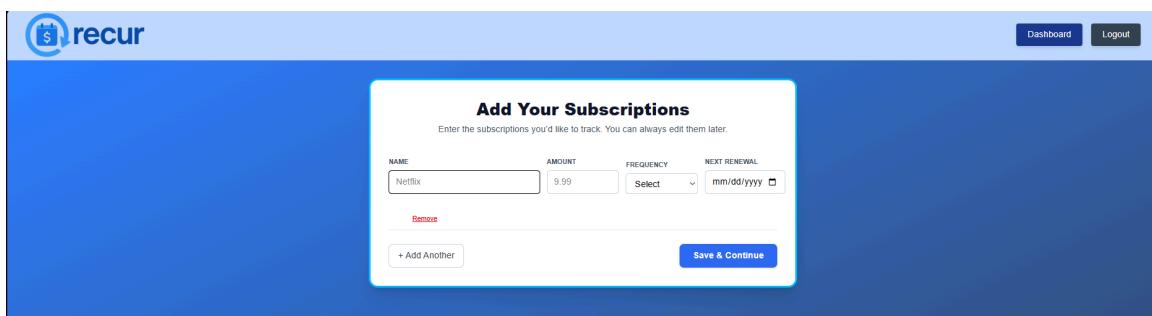
## Add subscriptions manually

Manually input your subscriptions that you have.

Click on the add manually button.



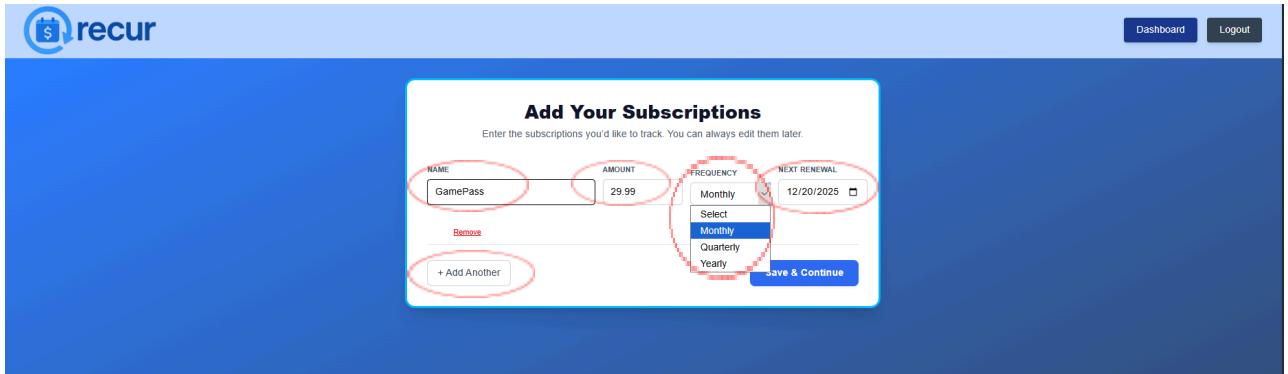
You will be redirected to a page where you can manually add your subscriptions.



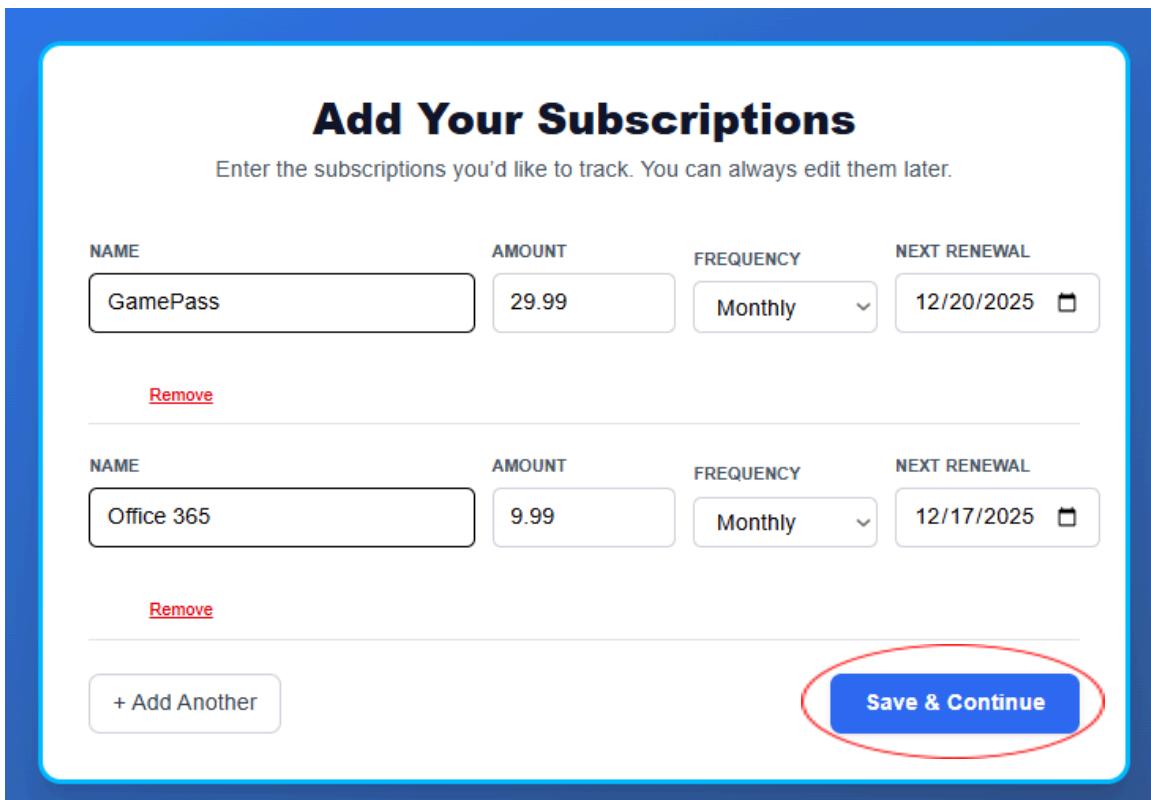
On this page you fill out the following:

- Name (enter your subscription name).
- Amount (price of subscription you spend monthly).
- Frequency (choose between monthly, quarterly, yearly).
- Next Renewal (enter the date of the next renewal).

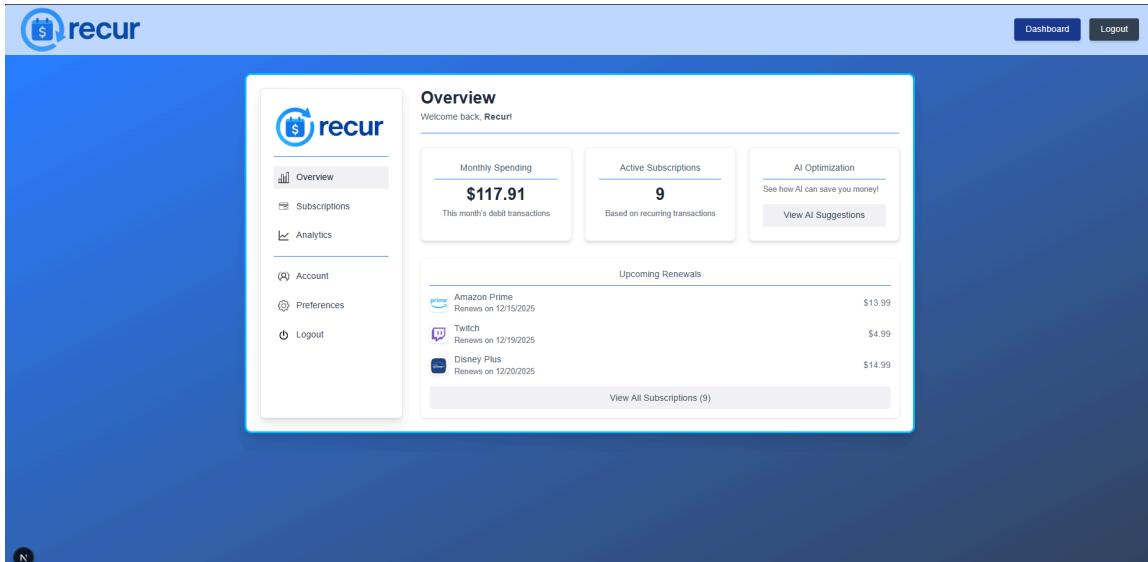
By clicking on the “+ Add Another” button, it will allow you to add more subscriptions



Once you are done adding your subscriptions click on the “Save & Continue” button.



You will then be redirected to your dashboard with your subscriptions added to your Recur account.



## Import from CSV (optional)

You can download our custom csv template and then fill it out with data from your bank statement.

Click on the “Import CSV” button.



Connect a bank to auto-detect subscriptions, or start by adding a few manually.

### Connect a bank

Recommended

Securely link your account to scan transactions and auto-suggest recurring charges.

- Auto-detect Netflix, Spotify, iCloud, etc.
- Daily refresh for new charges
- You control what gets imported

[Connect bank](#)

### Add subscriptions manually

Enter subscriptions you already know (name, amount, cadence, next renewal).

- Fast form for name, price, billing cycle
- Track renewal dates & reminders

[Add manually](#)

### Import from CSV (optional)

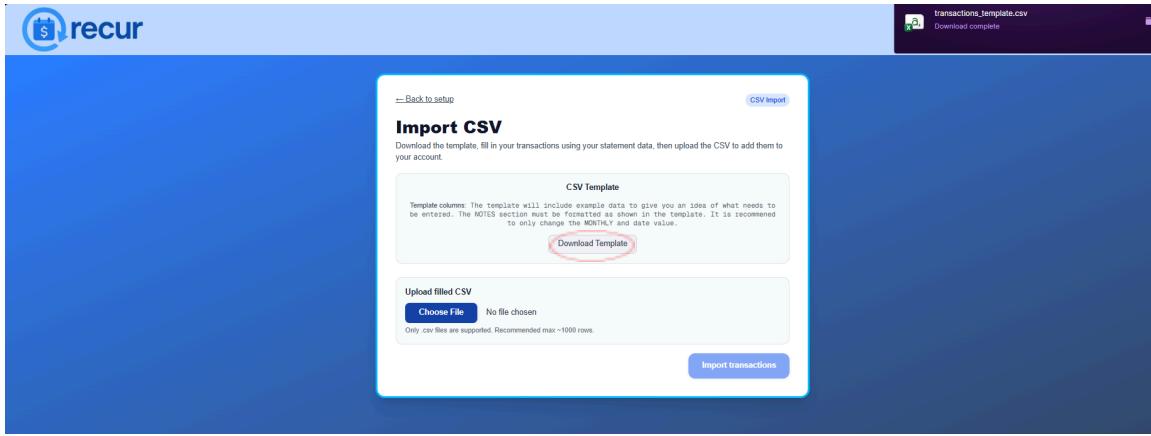
If your bank gives you statements, upload a CSV and we'll parse subscriptions for you.

[Import CSV](#)

[Skip for now](#)

You can finish setup any time from the dashboard.

At the Import CSV page, download the CSV template by clicking on the "Download Template" button in the middle.



Open up the “transactions\_template.csv” file you just downloaded and fill it out.

Not filled out:

A1	tx_date	type	merchant	description	category	amount	currency	is_recurring	recurrence_id	notes
1	#####	debit	Apple Mus	Apple Music Subscript	Subscription	10.99	USD	TRUE		Frequency: Monthly - Next renewal: 2025-11-23
2	#####	debit	Netflix	Netflix sub	Subscription	15.99	USD	TRUE	netflix-001	Frequency: Monthly - Next renewal: 2025-11-25
3	#####	credit	Refund Co	Refund for Refund		50	USD	FALSE		Refund for returned item
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										

Filled out:

A	B	C	D	E	F	G	H	I	J
1	tx_date	type	merchant	description	category	amount	currency	is_recurring	recurrence_id
2	10/23/2025	debit	Apple Music	Apple Music manual entry	Subscription	10.99	USD	TRUE	
3	10/25/2025	debit	Netflix	Netflix subscription	Subscription	15.99	USD	TRUE	netflix-001
4	10/28/2025	credit	Refund Co	Refund for returned item	Refund	50	USD	FALSE	
5									
6									
7									
8									

Once you have finished filling out the CSV template file click on the “Choose File” button and select the CSV file that you have just filled out to upload.

[← Back to setup](#)

[CSV Import](#)

## Import CSV

Download the template, fill in your transactions using your statement data, then upload the CSV to add them to your account.

**CSV Template**

Template columns: The template will include example data to give you an idea of what needs to be entered. The NOTES section must be formatted as shown in the template. It is recommended to only change the MONTHLY and date value.

[Download Template](#)

**Upload filled CSV**

**Choose File** No file chosen  
Only .csv files are supported. Recommended max ~1000 rows.

**Import transactions**

You then should click on the “Import transactions” button to import your transactions from the csv file. You also see a message telling you it was imported successfully.

[← Back to setup](#)

[CSV Import](#)

## Import CSV

Download the template, fill in your transactions using your statement data, then upload the CSV to add them to your account.

**CSV Template**

Template columns: The template will include example data to give you an idea of what needs to be entered. The NOTES section must be formatted as shown in the template. It is recommended to only change the MONTHLY and date value.

[Download Template](#)

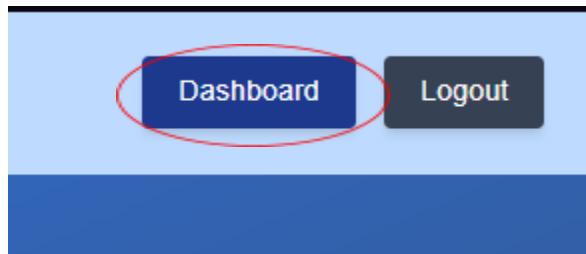
**Upload filled CSV**

**Browse...** transactions\_template(1).csv  
Only .csv files are supported. Recommended max ~1000 rows.

Imported 1 transactions successfully.

**Import transactions**

You will then be able to go to your dashboard and see the subscriptions you added by clicking on the “Dashboard” button on the top right.



A screenshot of the Recur app's dashboard. On the left, a sidebar menu includes "Overview", "Subscriptions", "Analytics", "Account", "Preferences", and "Logout". The main area is titled "Overview" and shows "Welcome back, Curtis!". It features three cards: "Monthly Spending" (\$83.96), "Active Subscriptions" (5), and "AI Optimization". Below these are sections for "Upcoming Renewals" (listing Office 365, GamePass, and HelloFresh) and a "View All Subscriptions (5)" button.

## Using the Dashboard Page (Overview page)

The Dashboard is the home screen of the Recur application. It provides an overview of your subscriptions activity and real-time updates including:

- Total number of active subscriptions.
- Total monthly spending.
- Buttons to view all subscriptions, analytics, or run AI optimization, to go account settings, go to preferences, and logout.

Overview page terms:

- Monthly Spending: This month's debit transactions (how much you are spending this current month).
- Active Subscriptions: Based on recurring transactions (current subscriptions you have active).
- AI Optimization: See how AI can save you money!
- Upcoming Renewals: See which subscriptions are close to renewing.

Overview page buttons (note that the buttons on the left serve as the navigation buttons for this application):

- Overview: Takes you to the Dashboard page.
- Subscriptions: Takes you to your subscription page where you can see all your subscriptions, add more, edit, and delete.
- Analytics: Takes you to the analytics page where you can view the analytics of your subscriptions.
- Account: Takes you to your account settings where you can make changes to your account.
- Preferences: Takes you to your preferences page where you can make changes about the appearance of the Recur application and notification you receive.
- View AI Suggestions: See how AI can save you money!
- View ALL Subscriptions: Take you to the Subscriptions page.
- Logout: Logs you out of your account.

**Overview**

Welcome back, Recur!

Monthly Spending

**\$117.91**

This month's debit transactions

Active Subscriptions

**9**

Based on recurring transactions

AI Optimization

See how AI can save you money!

View AI Suggestions

Upcoming Renewals

Subscription	Renewal Date	Price
Amazon Prime	Renews on 12/15/2025	\$13.99
Twitch	Renews on 12/19/2025	\$4.99
Disney Plus	Renews on 12/20/2025	\$14.99

View All Subscriptions (9)

# Subscriptions Page

The Subscriptions page provides a complete listing of all subscriptions currently stored in the Recur application. From this screen, you may view renewal dates, update existing subscription information, or remove subscriptions entirely.

To access the Subscriptions page, choose “Subscriptions” from the navigation menu on the left or click the “View All Subscriptions” button in the dashboard.

The screenshot shows the Recur application's dashboard. On the left, there is a sidebar with the Recur logo at the top. Below the logo are four main navigation items: Overview (with a bar chart icon), Subscriptions (with a list icon, highlighted with a red oval), and Analytics (with a line graph icon). Underneath these are Account (key icon), Preferences (gear icon), and Logout (power icon). The main content area is titled "Overview" and includes a welcome message "Welcome back, Recur!". It features three cards: "Monthly Spending" (\$117.91, debit transactions), "Active Subscriptions" (9, based on recurring transactions), and "AI Optimization" (with a "View AI Suggestions" button). Below these is a section titled "Upcoming Renewals" which lists three subscriptions: Amazon Prime (renews 12/15/2025, \$13.99), Twitch (renews 12/19/2025, \$4.99), and Disney Plus (renews 12/20/2025, \$14.99). At the bottom of this section is a button labeled "View All Subscriptions (9)" also highlighted with a red oval.

The Subscriptions page will display all of your active subscriptions and allow you to add more, edit, or delete your subscriptions.

The screenshot shows the "Subscriptions" page. The left sidebar is identical to the dashboard, with the "Subscriptions" item selected and highlighted with a red oval. The main content area is titled "Subscriptions" and includes a welcome message "Welcome back, Recur!". At the top right is a blue "Add More" button. Below this is a table titled "Subscriptions" listing ten active subscriptions:

Subscription	Renewal Date	Price	Edit	Remove
GamePass	Renews 12/19/2025	\$29.99	<button>Edit</button>	<button>Remove</button>
Office 365	Renews 12/16/2025	\$9.99	<button>Edit</button>	<button>Remove</button>
Netflix	Renews 12/30/2025	\$14.99	<button>Edit</button>	<button>Remove</button>
Spotify	Renews 12/28/2025	\$9.99	<button>Edit</button>	<button>Remove</button>
Crunchyroll	Renews 12/25/2025	\$8.99	<button>Edit</button>	<button>Remove</button>
Apple Music	Renews 12/22/2025	\$9.99	<button>Edit</button>	<button>Remove</button>
Disney Plus	Renews 12/20/2025	\$14.99	<button>Edit</button>	<button>Remove</button>
Twitch	Renews 12/19/2025	\$4.99	<button>Edit</button>	<button>Remove</button>
Amazon Prime	Renews 12/15/2025	\$13.99	<button>Edit</button>	<button>Remove</button>

## Adding a Subscription

To add a subscription just click on the “Add More” button on the top and it will redirect to the same page that you see once you create an account. The steps to add are the same as before and are covered already in this document.

The screenshot shows the Recur Subscriptions dashboard. On the left is a sidebar with navigation links: Overview, Subscriptions (which is selected and highlighted in grey), Analytics, Account, Preferences, and Logout. The main area is titled "Subscriptions" and displays a list of ten active subscriptions with their logos, names, renewal dates, and prices. Each row has "Edit" and "Remove" buttons. At the top right of the main area is a blue "Add More" button, which is circled in red to indicate it's the target for the "Add More" link.

Subscription	Renews	Price	Edit	Remove
GamePass	12/19/2025	\$29.99	<a href="#">Edit</a>	<a href="#">Remove</a>
Office 365	12/16/2025	\$9.99	<a href="#">Edit</a>	<a href="#">Remove</a>
Netflix	12/30/2025	\$14.99	<a href="#">Edit</a>	<a href="#">Remove</a>
Spotify	12/28/2025	\$9.99	<a href="#">Edit</a>	<a href="#">Remove</a>
Crunchyroll	12/25/2025	\$8.99	<a href="#">Edit</a>	<a href="#">Remove</a>
Apple Music	12/22/2025	\$9.99	<a href="#">Edit</a>	<a href="#">Remove</a>
Disney Plus	12/20/2025	\$14.99	<a href="#">Edit</a>	<a href="#">Remove</a>
Twitch	12/19/2025	\$4.99	<a href="#">Edit</a>	<a href="#">Remove</a>
Amazon Prime	12/15/2025	\$13.99	<a href="#">Edit</a>	<a href="#">Remove</a>

Page after clicking Add More:

The screenshot shows the Recur setup page for adding subscriptions. It features two main sections: "Connect a bank" (Recommended) and "Add subscriptions manually". The "Add subscriptions manually" section contains a form with fields for name, price, and billing cycle, along with a "Fast form" and "Track renewal dates & reminders" option. Below this is a large "Add manually" button. There's also an "Import from CSV (optional)" section with an "Import CSV" button and a "Skip for now" link. A note at the bottom says "You can finish setup any time from the dashboard."

Follow the steps from earlier in this document to add subscriptions (refer to the “Adding Subscriptions” section of this document).

## Edit Subscription

To edit a Subscription click on the edit button next the subscription you want to edit.

The screenshot shows the Recur web interface. On the left is a sidebar with icons for Overview, Subscriptions (which is selected), Analytics, Account, Preferences, and Logout. The main area is titled "Subscriptions" and displays a list of ten subscriptions with their logos, names, renewal dates, and prices. Each item has an "Edit" and a "Remove" button. The list includes GamePass, Office 365, Netflix, Spotify, Crunchyroll, Apple Music, Disney Plus, Twitch, and Amazon Prime.

Subscription	Renews	Price	Action
GamePass	12/19/2025	\$29.99	Edit Remove
Office 365	12/16/2025	\$9.99	Edit Remove
Netflix	12/30/2025	\$14.99	Edit Remove
Spotify	12/28/2025	\$9.99	Edit Remove
Crunchyroll	12/25/2025	\$8.99	Edit Remove
Apple Music	12/22/2025	\$9.99	Edit Remove
Disney Plus	12/20/2025	\$14.99	Edit Remove
Twitch	12/19/2025	\$4.99	Edit Remove
Amazon Prime	12/15/2025	\$13.99	Edit Remove

Fill out or change the Subscription Name, Price, and Renewal Date and click “Save” on the Edit Subscription pop up to save changes.

The screenshot shows the same Recur interface as above, but with a modal dialog box overlaid on the "GamePass" row. The dialog is titled "Edit Subscription" and contains three input fields: "Name" (set to "GamePass"), "Price" (set to "14.99"), and "Renewal date" (set to "12/20/2025"). At the bottom of the dialog are "Cancel" and "Save" buttons, with "Save" being highlighted by a red oval. The background list of subscriptions remains visible.

Subscription	Renews	Price	Action
GamePass	12/19/2025	\$29.99	Edit Remove
Office 365	12/16/2025	\$9.99	Edit Remove
Netflix	12/30/2025	\$14.99	Edit Remove
Spotify	12/28/2025	\$9.99	Edit Remove
Crunchyroll	12/25/2025	\$8.99	Edit Remove
Apple Music	12/22/2025	\$9.99	Edit Remove
Disney Plus	12/20/2025	\$14.99	Edit Remove
Twitch	12/19/2025	\$4.99	Edit Remove
Amazon Prime	12/15/2025	\$13.99	Edit Remove

Before GamePass was \$29.99, now it is \$14.99.

The screenshot shows the Recur app's main interface. On the left is a sidebar with the Recur logo at the top, followed by navigation links: Overview, Subscriptions (which is selected and highlighted in grey), Analytics, Account, Preferences, and Logout. The main content area is titled "Subscriptions" and displays a list of active subscriptions. Each subscription entry includes the service logo, name, renewal date, price, an "Edit" button, and a red "Remove" button. The list includes GamePass, Office 365, Netflix, Spotify, Crunchyroll, Apple Music, Disney Plus, Twitch, and Amazon Prime. The GamePass entry shows a price of \$14.99, while the others range from \$4.99 to \$14.99.

Subscription	Renews	Price	Action Buttons
GamePass	12/19/2025	\$14.99	Edit Remove
Office 365	12/16/2025	\$9.99	Edit Remove
Netflix	12/30/2025	\$14.99	Edit Remove
Spotify	12/28/2025	\$9.99	Edit Remove
Crunchyroll	12/25/2025	\$8.99	Edit Remove
Apple Music	12/22/2025	\$9.99	Edit Remove
Disney Plus	12/20/2025	\$14.99	Edit Remove
Twitch	12/19/2025	\$4.99	Edit Remove
Amazon Prime	12/15/2025	\$13.99	Edit Remove

## Deleting a Subscription

To delete a subscription that you are no longer paying for click on the “Remove” button on the subscription you want gone.

This screenshot is identical to the one above, showing the Recur app's Subscriptions page. However, the "Remove" button for the GamePass subscription has been clicked, as evidenced by the red oval highlighting it. All other elements, including the other subscriptions and their details, remain the same.

Subscription	Renews	Price	Action Buttons
GamePass	12/19/2025	\$14.99	Edit Remove
Office 365	12/16/2025	\$9.99	Edit Remove
Netflix	12/30/2025	\$14.99	Edit Remove
Spotify	12/28/2025	\$9.99	Edit Remove
Crunchyroll	12/25/2025	\$8.99	Edit Remove
Apple Music	12/22/2025	\$9.99	Edit Remove
Disney Plus	12/20/2025	\$14.99	Edit Remove
Twitch	12/19/2025	\$4.99	Edit Remove
Amazon Prime	12/15/2025	\$13.99	Edit Remove

Click on the ok to confirm deleting the subscription.

The screenshot shows the Recur app interface. At the top, a dark overlay displays the message "Delete all transactions for Twitch from your transaction history?" with "OK" and "Cancel" buttons. Below this, the main "Subscriptions" screen is visible, featuring a header "Subscriptions" and "Welcome back, Recur!". A table lists various subscriptions with their logos, names, renewal dates, prices, and "Edit" and "Remove" buttons. The "Twitch" entry from the previous screenshot has been removed.

Subscriptions			
GamePass	Renews 12/19/2025	\$14.99	<button>Edit</button> <button>Remove</button>
Office 365	Renews 12/16/2025	\$9.99	<button>Edit</button> <button>Remove</button>
Netflix	Renews 12/30/2025	\$14.99	<button>Edit</button> <button>Remove</button>
Spotify	Renews 12/28/2025	\$9.99	<button>Edit</button> <button>Remove</button>
Crunchyroll	Renews 12/25/2025	\$8.99	<button>Edit</button> <button>Remove</button>
Apple Music	Renews 12/22/2025	\$9.99	<button>Edit</button> <button>Remove</button>
Disney Plus	Renews 12/20/2025	\$14.99	<button>Edit</button> <button>Remove</button>
Twitch	Renews 12/19/2025	\$4.99	<button>Edit</button> <button>Remove</button>
Amazon Prime	Renews 12/15/2025	\$13.99	<button>Edit</button> <button>Remove</button>

Now the Twitch Subscription is gone.

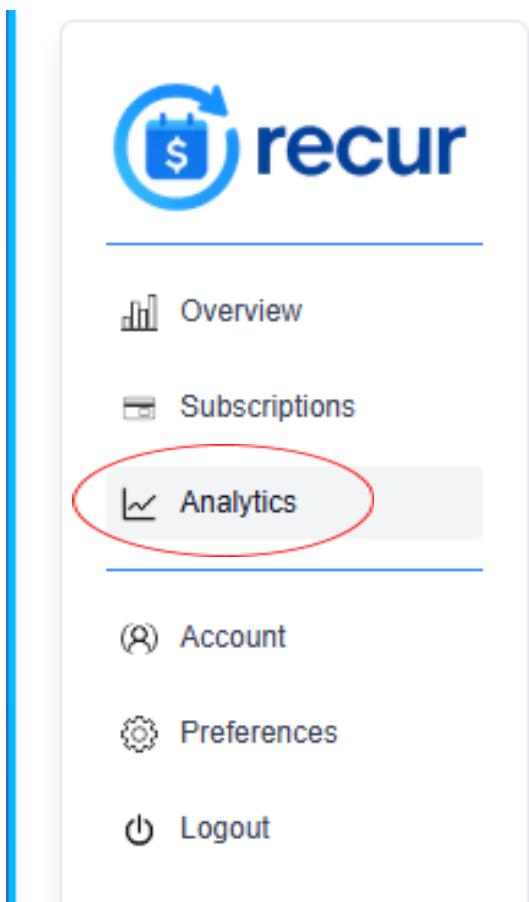
This screenshot shows the same "Subscriptions" screen after the Twitch entry was deleted. The list now contains the following items:

Subscriptions			
GamePass	Renews 12/19/2025	\$14.99	<button>Edit</button> <button>Remove</button>
Office 365	Renews 12/16/2025	\$9.99	<button>Edit</button> <button>Remove</button>
Netflix	Renews 12/30/2025	\$14.99	<button>Edit</button> <button>Remove</button>
Spotify	Renews 12/28/2025	\$9.99	<button>Edit</button> <button>Remove</button>
Crunchyroll	Renews 12/25/2025	\$8.99	<button>Edit</button> <button>Remove</button>
Apple Music	Renews 12/22/2025	\$9.99	<button>Edit</button> <button>Remove</button>
Disney Plus	Renews 12/20/2025	\$14.99	<button>Edit</button> <button>Remove</button>
Amazon Prime	Renews 12/15/2025	\$13.99	<button>Edit</button> <button>Remove</button>

## Using Analytics Page

The Analytics page provides users with a detailed summary of their subscription spending over time. From this page, you may view total spending, yearly projections, category breakdowns, month-by-month spending trends, and insights designed to help reduce subscription costs.

To go to the Analytics page, choose "Analytics" from the navigation menu on the left side of the Recur application.



## Example of Analytics page:

The screenshot shows the Recur Analytics page. At the top, it displays "Monthly Spending" (\$97.92) based on 8 subscriptions and "Yearly Spending" (\$1175.04) projected monthly. The "Top Service" is GamePass at \$14.99/mo. Below this, there's a "Category Breakdown" chart showing spending across Subscription, Streaming, Music, Anime, and Shopping categories. A note indicates a total monthly spend of \$97.92/mo. To the right, a table lists active subscriptions with their logos, names, monthly costs, and yearly totals. An insight at the bottom suggests saving \$14.99/mo by pausing GamePass.

Subscription	Cost	Renewal Date
Office 365	\$9.99/mo \$119.88 / yr	Renews on January 11, 2026
GamePass	\$14.99/mo \$179.88 / yr	Renews on January 11, 2026
Netflix	\$14.99/mo \$179.88 / yr	Renews on December 30, 2025
Spotify	\$9.99/mo \$119.88 / yr	Renews on December 28, 2025
Crunchyroll	\$8.99/mo \$107.88 / yr	Renews on December 25, 2025
Apple Music	\$9.99/mo \$119.88 / yr	Renews on December 22, 2025
Disney Plus	\$14.99/mo \$179.88 / yr	Renews on December 20, 2025
Amazon Prime	\$13.99/mo \$167.88 / yr	Renews on December 15, 2025

## Analytics Overview

At the top of the Analytics page, the following summary boxes are displayed:

- **Monthly Spending:** Shows your total monthly spending based on the number of active subscriptions.
- **Yearly Spending:** Projects your yearly cost using your current monthly spending.
- **Top Service:** Displays your most expensive active subscription along with its monthly price.

These values update automatically whenever subscriptions are added, edited, or removed.

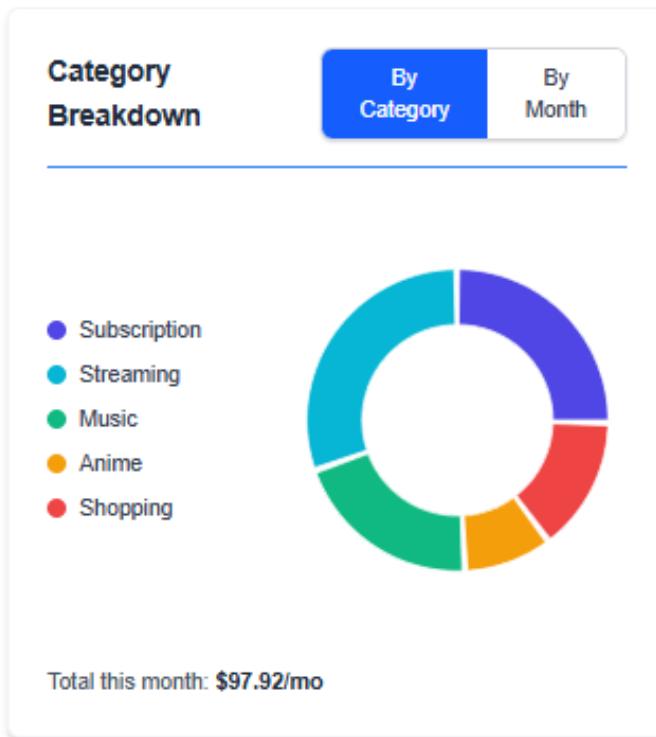
## Category Breakdown

The Category Breakdown panel summarizes your spending for the current month by subscription category.

Each category is represented by a color-coded segment in a donut chart.  
Categories may include:

- Subscription
- Streaming
- Music
- Anime
- Shopping
- Other Subscription Types

Beneath the chart, the total spending for the month is displayed.

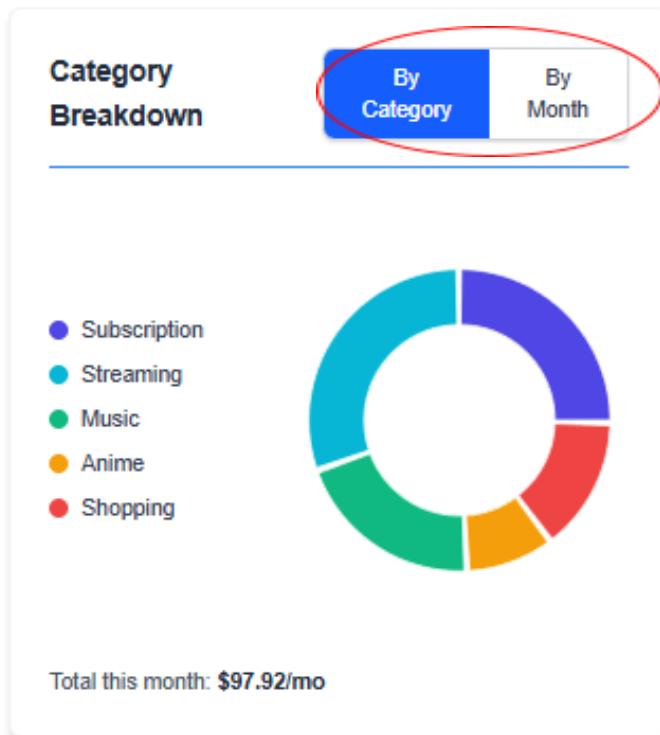


## Switching Views

The category Breakdown includes two modes:

- By Category - Groups spending by subscription type.
- By Month - Displays a bar chart showing spending for each month of the selected year.

To switch between chart types, choose the **By Category** or **By Month** tab.



## Spending by Month

Users may view a month-to-month breakdown of spending for the selected year.

When "By Month" is selected, a bar chart shows:

- Total spending per month.
- The progression of spending over the year.
- Visual changes as new subscriptions are added.

Each bar represents the total amount paid in that month.



## Subscriptions (Cost)

On the right side of the Analytics page, a list of subscriptions is displayed, ordered by cost.

Each subscription entry includes:

- Subscription name and icon.
- Upcoming renewal date.
- Monthly and yearly cost calculations.

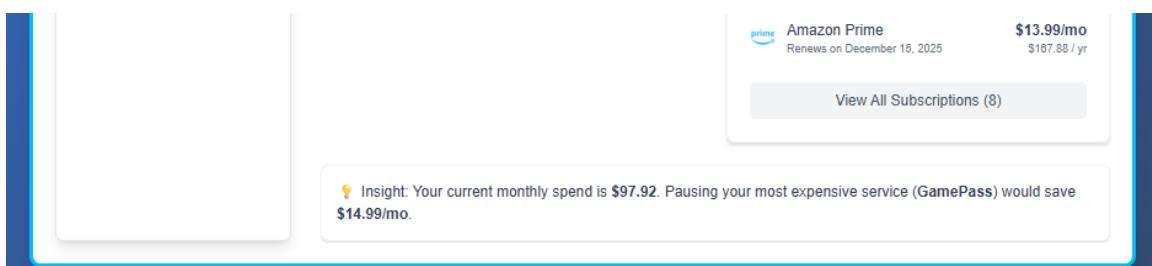
Selecting View All Subscriptions brings you the Subscriptions page.

Subscriptions (Cost)		
 Office 365	<b>\$9.99/mo</b>	
Renews on January 11, 2026	\$119.88 / yr	
 GamePass	<b>\$14.99/mo</b>	
Renews on January 11, 2026	\$179.88 / yr	
 Netflix	<b>\$14.99/mo</b>	
Renews on December 30, 2025	\$179.88 / yr	
 Spotify	<b>\$9.99/mo</b>	
Renews on December 28, 2025	\$119.88 / yr	
 Crunchyroll	<b>\$8.99/mo</b>	
Renews on December 25, 2025	\$107.88 / yr	
 Apple Music	<b>\$9.99/mo</b>	
Renews on December 22, 2025	\$119.88 / yr	
 Disney Plus	<b>\$14.99/mo</b>	
Renews on December 20, 2025	\$179.88 / yr	
 Amazon Prime	<b>\$13.99/mo</b>	
Renews on December 15, 2025	\$167.88 / yr	
<a href="#">View All Subscriptions (8)</a>		

## Insight Panel

At the bottom of the Analytics page, Recur provides an automatic insight generated from your spending data to save you money. The Insight panel may highlight.

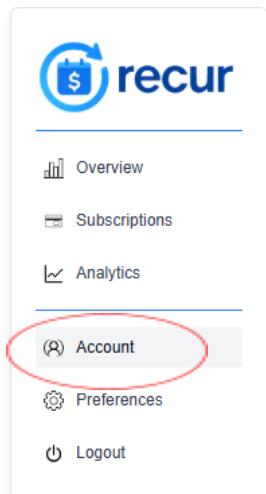
At the button of the page.



The screenshot shows the Recur Analytics page with a blue header bar at the top. Below the header, there's a section titled "Subscriptions (Cost)" containing a table of eight subscriptions. At the bottom of this section is a button labeled "View All Subscriptions (8)". A red oval highlights this button. To the right of the main content area, there's a white box with a blue border containing an "Insight" message. The message states: "💡 Insight: Your current monthly spend is \$97.92. Pausing your most expensive service (GamePass) would save \$14.99/mo." Above this message, there's another button labeled "View All Subscriptions (8)".

# Account Settings

To manage your account information, update your security settings, or delete your Recur account, choose Account from the navigation panel. The Account Settings page displays your profile information, password options, two-factor authentication status, and account deletion tools.

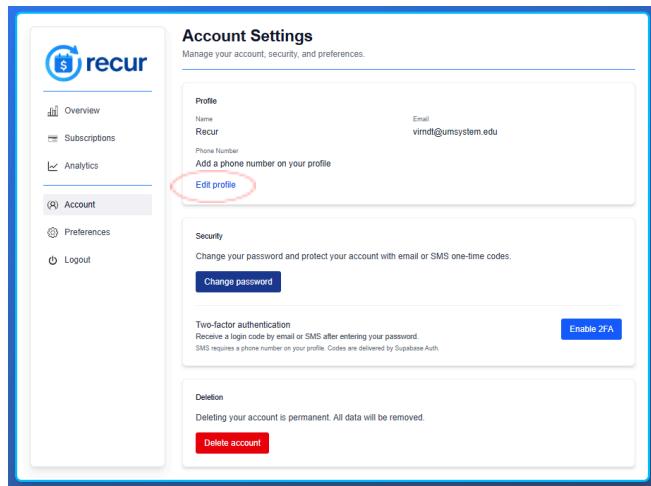


Redirects you to the Account Settings page.

A screenshot of the "Account Settings" page. The page has a dark blue header with the Recur logo and the title "Account Settings". Below the header is a sub-header: "Manage your account, security, and preferences." The page is divided into three main sections: 1) "Profile": Displays the name "Recur" and email "virndt@umsystem.edu". It includes a "Phone Number" section with a placeholder "Add a phone number on your profile" and a "Edit profile" button. 2) "Security": Allows changing the password with a "Change password" button. It also includes a "Two-factor authentication" section with instructions and a "Enable 2FA" button. 3) "Deletion": States that deleting the account is permanent and all data will be removed, with a prominent "Delete account" button.

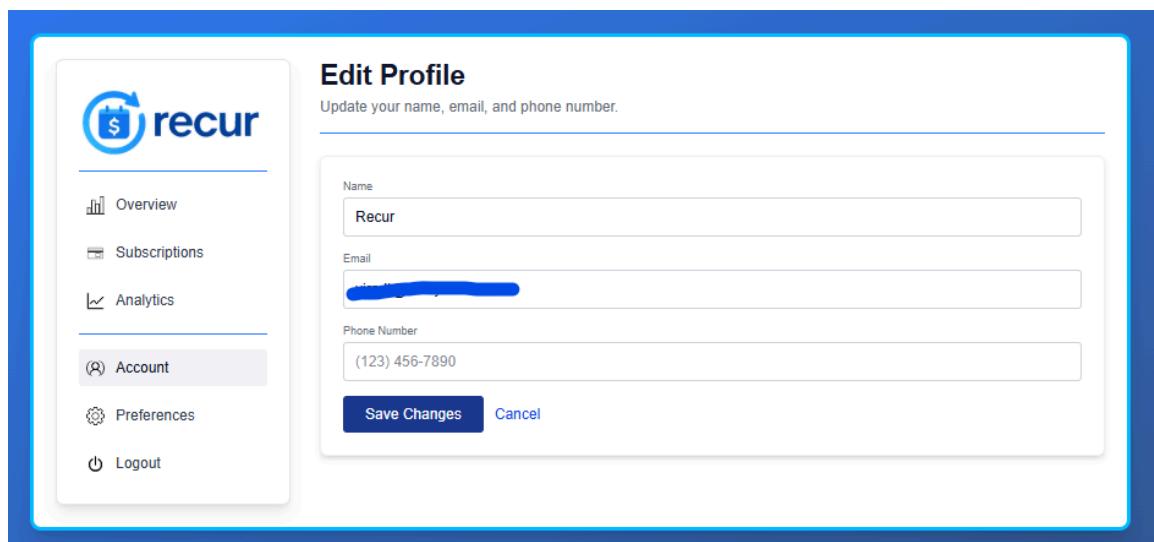
## Profile Information

Clicking on the blue “Edit profile” text brings you to the Edit Profile page.



The screenshot shows the Recur software's account settings page. On the left is a sidebar with links: Overview, Subscriptions, Analytics, Account (which is selected and highlighted in blue), Preferences, and Logout. The main content area is titled "Account Settings" with the subtitle "Manage your account, security, and preferences". It has three sections: "Profile" (Name: Recur, Email: vimdi@umsystem.edu, Phone Number: None, with a link to "Add a phone number on your profile" which is also circled in red), "Security" (Change password button), and "Two-factor authentication" (Enable 2FA button). At the bottom is a "Deletion" section with a "Delete account" button.

Redirected to Edit Profile Page.



The screenshot shows the Recur software's edit profile page. The sidebar is identical to the previous screenshot. The main content area is titled "Edit Profile" with the subtitle "Update your name, email, and phone number". It has three input fields: "Name" (Recur), "Email" (redacted), and "Phone Number" ((123) 456-7890). Below the fields are "Save Changes" and "Cancel" buttons.

The Profile section displays the personal information associated with your account, including:

- Name
- Email Address
- Phone Number (optional)

To edit your profile information:

1. Click on any of the available text fields (Name, Email, Phone Number) and type the changes you want to your account.
2. Click the “Save Changes” button to save changes.
3. Click the “Cancel” button to cancel changes.

The screenshot shows the 'Edit Profile' page in the Recur software. On the left is a sidebar with navigation links: Overview, Subscriptions, Analytics, Account (which is selected and highlighted in grey), Preferences, and Logout. The main content area is titled 'Edit Profile' with the sub-instruction 'Update your name, email, and phone number.' It contains three input fields: 'Name' (containing 'RecurGuy'), 'Email' (with content redacted), and 'Phone Number' (containing '1112223333'). Below these fields are two buttons: a blue 'Save Changes' button with white text and a 'Cancel' button. At the bottom of the form, a green success message reads 'Profile updated successfully.'

There will be a small message telling you that your profile updated successfully.

## Security Settings

The Security Section provides tools for protecting your account.

### Changing Your Password

To change your password:

1. In the Account Settings page click on the “Change Password” button in the Security section.
2. You will be taken to the Reset Password page.
3. Enter your new password and confirm it. Make sure to follow Recur’s password strength guide lines.

**Account Settings**  
Manage your account, security, and preferences.

**Profile**

Name: RecurGuy  
Email: virndt@umsystem.edu  
Phone Number: 1112223333  
[Edit profile](#)

**Security**

Change your password and protect your account with email or SMS one-time codes.  
[Change password](#)

**Two-factor authentication**

Receive a login code by email or SMS after entering your password.  
SMS requires a phone number on your profile. Codes are delivered by Supabase Auth.  
[Enable 2FA](#)

**Deletion**

Deleting your account is permanent. All data will be removed.  
[Delete account](#)

Redirects you to reset password page. To exit this page click the “Dashboard” button on the top left.

**Reset your password**  
Please enter your new password

**NEW PASSWORD**  
New password

**Password must include:**

- 8+ characters
- Lowercase
- Special char
- Uppercase
- Number

**CONFIRM NEW PASSWORD**  
Confirm new password

**Update password**

Enter your new password and click the update button.

## Two-Factor Authentication (2FA)

Recur includes a placeholder option for enabling two-factor authentication.

Two-factor authentication is **not available in the current version** due to Supabase requiring a paid plan to send verification codes. As a result:

- Choosing the “Enable 2FA” button has no functional effect.

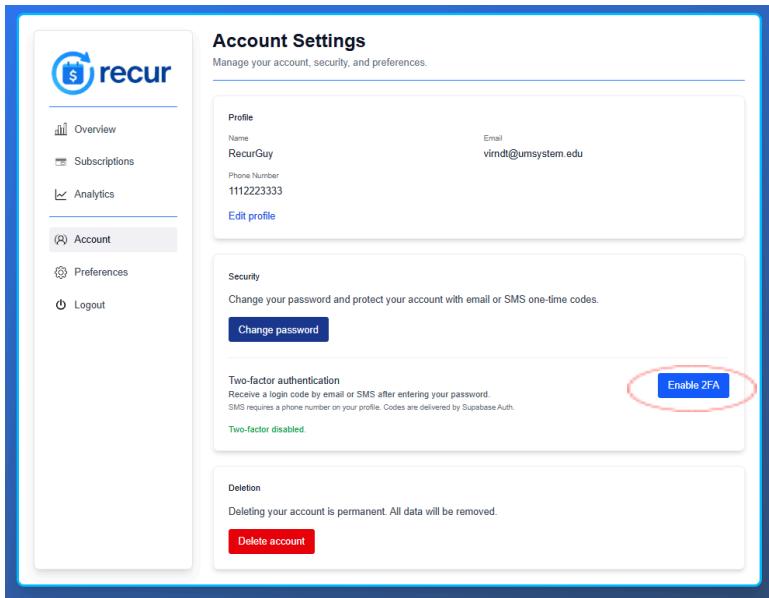
- Users are not prompted for 2FA codes during login.
- The feature remains disabled for all accounts.

In the demonstration environment, 2FA buttons and descriptions are present only for future expansion and do not alter account behavior.

If implemented in future versions, 2FA would allow users to receive verification codes via:

- Email
- SMS text (requires a phone number on file)

### Clicking on Enable 2FA



Results in this version, but serves no functionality since Supabase requires a paid plan to use this feature.

The screenshot shows the Recur application's account settings interface. On the left, a sidebar lists navigation options: Overview, Subscriptions, Analytics, Account (which is selected and highlighted in grey), Preferences, and Logout. The main content area is titled "Account Settings" and describes it as managing account, security, and preferences. It contains three main sections: "Profile" (with fields for Name, Email, and Phone Number), "Security" (with a "Change password" button and a "Disable 2FA" button), and "Two-factor authentication" (with instructions, a "Save Method" button, and a note about email codes). At the bottom is a "Deletion" section with a warning about permanent account removal and a large red "Delete account" button.

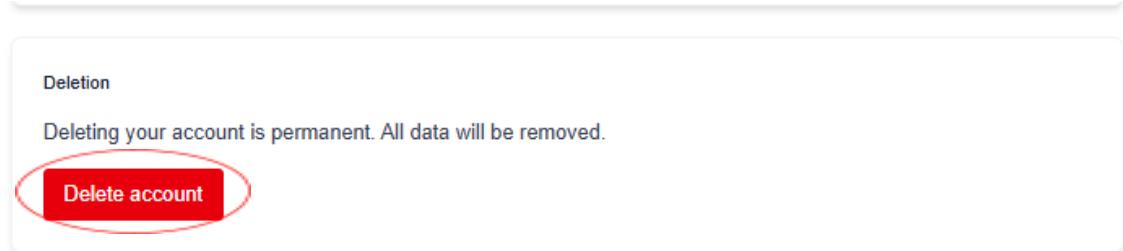
## Account Deletion

To permanently remove your account, choose the “Delete account” button in red from the Deletion section.

Deleting your account:

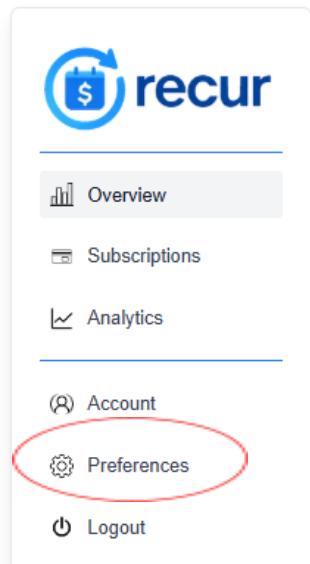
- Removes your Recur account.
- Deletes all stored subscriptions.
- Deleted all imported transactions.
- Erases all analytics and users settings.

This action is permanent and cannot be undone.



# User Preferences

To customize your Recur experience, choose Preferences from the navigation menu. The Preferences page allows you to adjust notification settings, change the application appearance, and access reminder and insight tools.



Redirects you to the Preferences page.

A screenshot of the Recur Preferences page. The page title is 'Preferences' with the subtitle 'Customize your Recur experience.' It is divided into three main sections: Notifications, Appearance, and Reminders &amp; Insights. In the Notifications section, 'Email notifications' is set to 'On' and 'Weekly summary' is set to 'Off'. In the Appearance section, the 'Light' theme is selected. In the Reminders &amp; Insights section, there are options for 'Renewal nudges' and 'Cost highlights', each with a 'Manage reminders' or 'See insights' button.

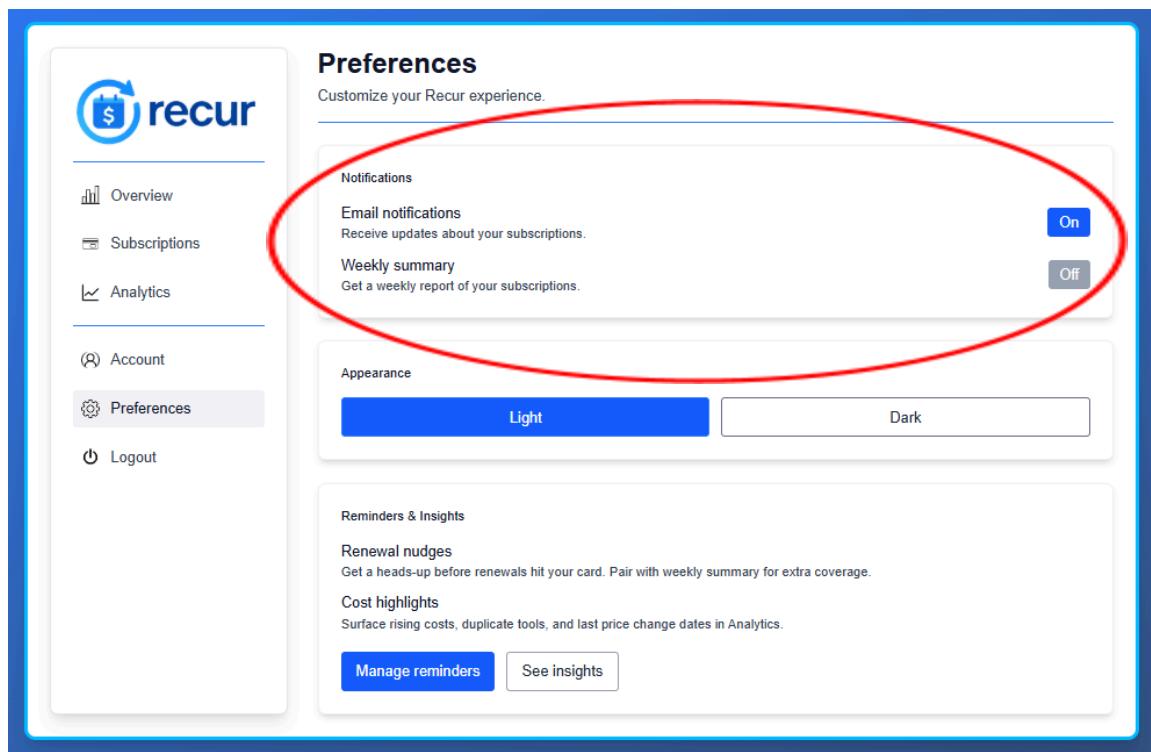
## Notifications

The Notifications section provides controls for enabling or disabling automated email-based updates about your subscriptions.

The following options are available:

- Email Notifications: receive email updates about subscription activity.
- Weekly Summary: Receive a weekly summary report of your subscription spending.

Note: These options are present for future functionality but **are not active in the current version**. Toggling these settings does not enable email delivery.



## Appearance

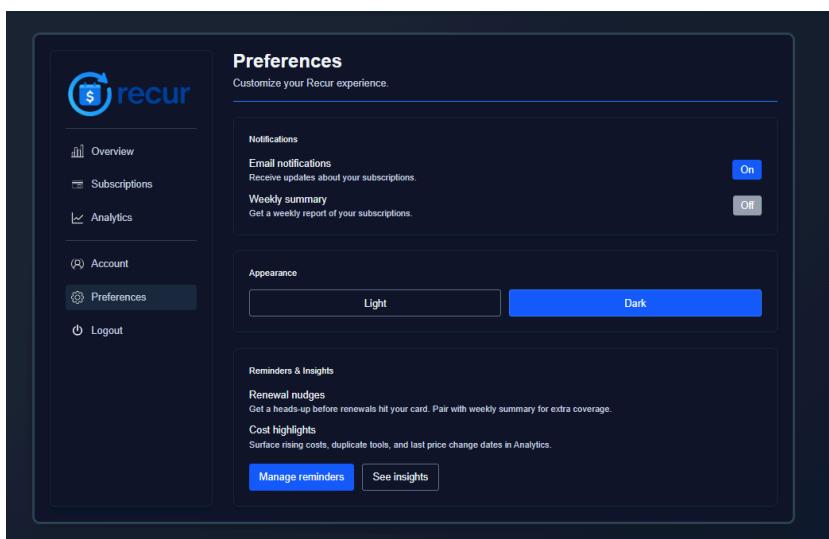
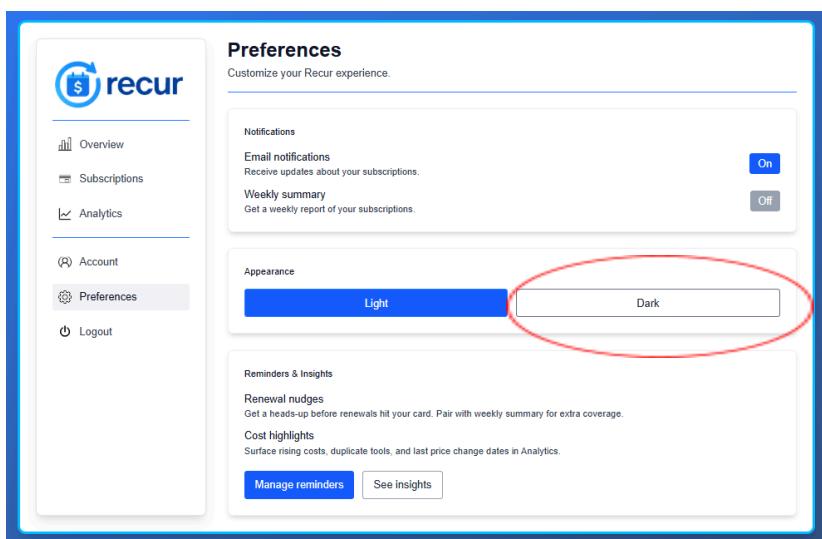
The Appearance section allows you to set the visual theme of Recur.

There are two options available:

- Light Mode (default)
- Dark Mode

Choosing a mode immediately updates the interface and your selected theme is saved in the database and will persist across sessions, even after logging out and back in.

Clicking on Dark Mode.



## Reminders & Insights

This section provides access to tools that help users stay ahead of subscription renewals and identify potential cost-saving opportunities.

Clicking on "Manage reminders" brings you to the Subscription page and clicking on "See insights" brings you to the Analytics page.

**Reminders & Insights**

**Renewal nudges**  
Get a heads-up before renewals hit your card. Pair with weekly summary for extra coverage.

**Cost highlights**  
Surface rising costs, duplicate tools, and last price change dates in Analytics.

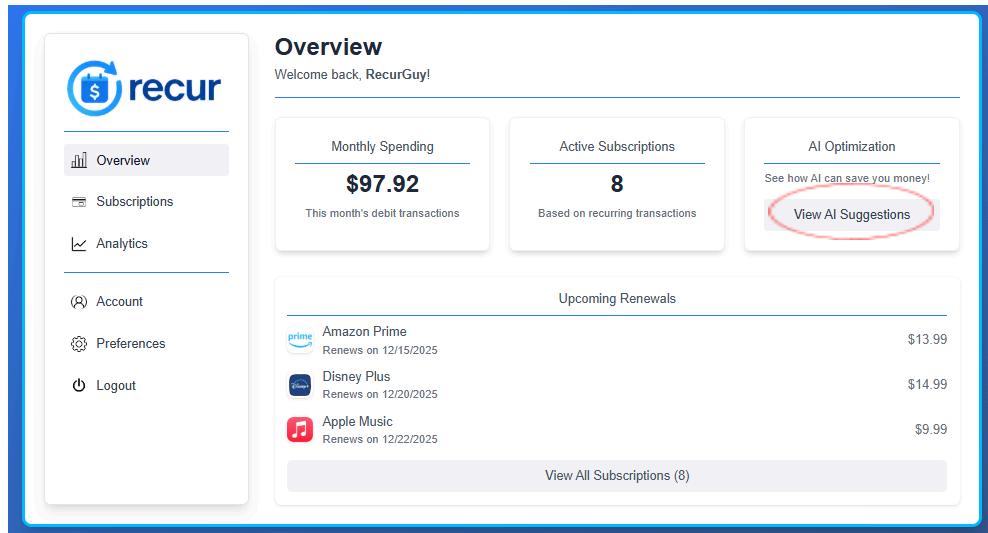
[Manage reminders](#)   [See insights](#)

# Using AI Optimization

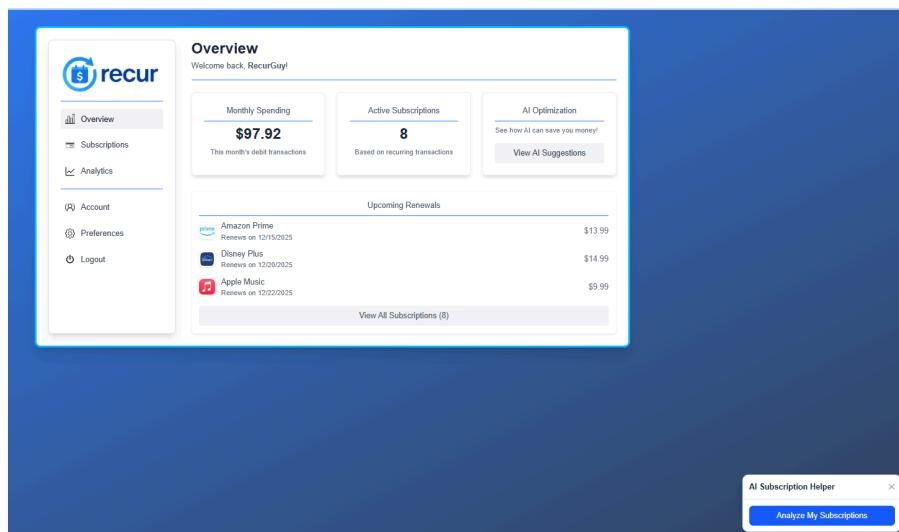
The AI Optimization feature provides intelligent recommendations to help users reduce subscription spending. Using a built-in AI model, Recur analyzes your active subscriptions and generates a summary of potential savings, redundant services, and cost-reducing alternatives.

To access AI Optimization, choose View AI Suggestions from the Overview page.

Click on the “View AI Suggestions” button.



Brings up the AI Subscription Helper in the bottom right corner of the screen.

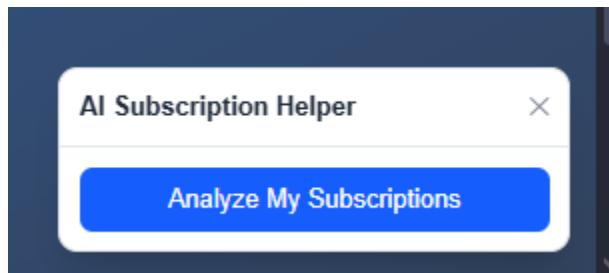


## Launching the AI Subscription Helper

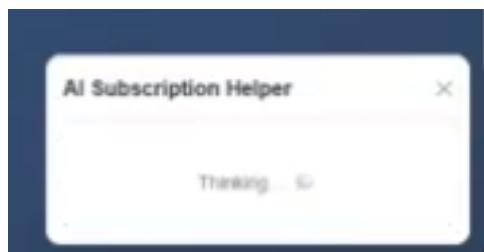
At the bottom-right corner of the Overview page, the **AI Subscription Helper** panel appears.

This panel contains an action button labeled **Analyze My Subscriptions**.

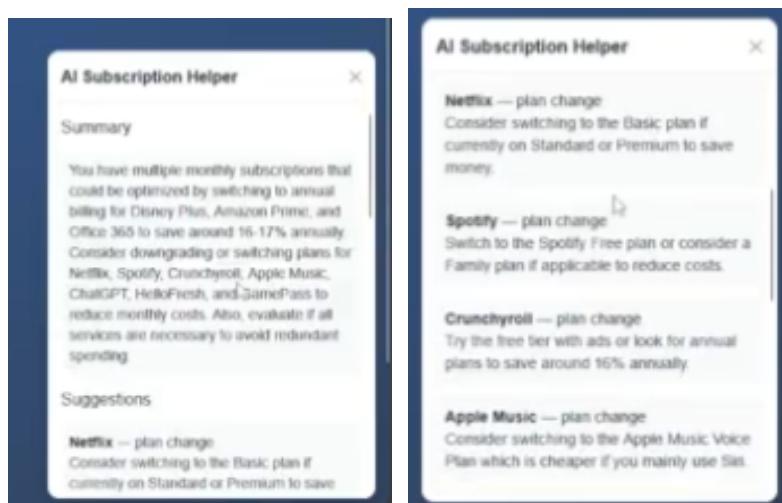
1. Choose **Analyze My Subscriptions** to begin the AI review.



2. The helper panel displays a temporary “Thinking...” message while generating results.



3. Once complete, the panel expands to show a detailed summary and list of recommendations.



## Data Used for AI Analysis

To ensure user privacy and maintain minimal data exposure, the AI only receives:

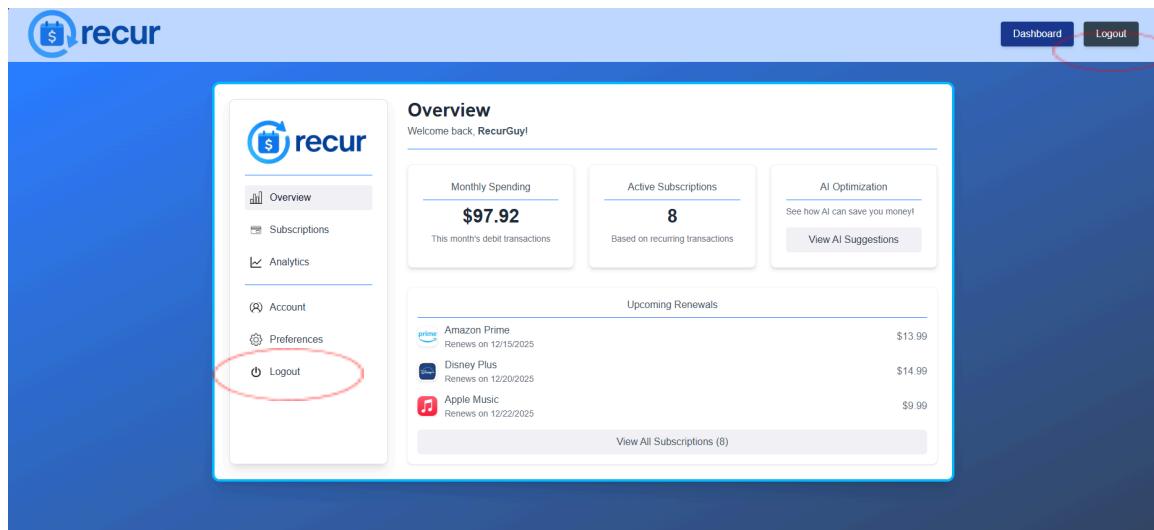
- Subscription name
- Price
- Renewal date

**No personal information, payment credentials, or other sensitive data is sent to the AI.**

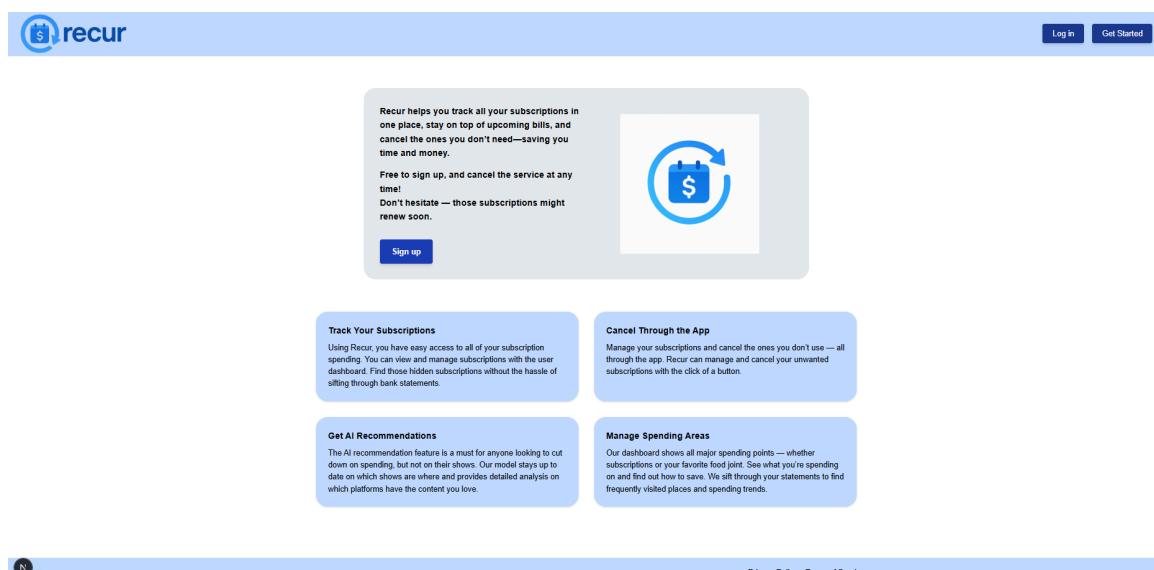
This limited dataset allows the AI to produce meaningful cost-saving advice without exposing private user details.

# Logging out of your Recur Account

To log out of your Recur just click the “Logout” button in the left side navigation or click the “Logout” top right of the page.



You will then be redirected to the splash page.



# Glossary

## **Subscription**

A recurring charge for a service (e.g., Netflix, Amazon Prime). Recur tracks details such as price, renewal date, and billing frequency.

## **Renewal Date**

The next scheduled date when a subscription will charge your account again.

## **CSV Import**

A feature that allows users to upload subscription data using a preformatted “transactions\_template.csv” file.

## **Plaid API**

A banking integration used to securely import recurring transactions from a connected financial account (sandbox mode for this project).

## **AI Subscription Helper**

A built-in AI tool that analyzes subscriptions and provides cost-saving suggestions, redundancy warnings, and optimization recommendations.

## **Dashboard (Overview Page)**

The main landing page after login, showing total monthly spending, active subscriptions, upcoming renewals, and AI optimization access.

## **Two-Factor Authentication (2FA)**

An additional security method involving email or SMS codes. Present as a placeholder in the current version; not functional due to service restrictions.

## **Dark Mode**

An alternate visual theme that changes the interface to darker colors. This selection persists across sessions and is stored in the user profile.

## **Insight Panel**

A section on the Analytics page providing automated suggestions based on spending, such as highlighting the most expensive service or potential savings.