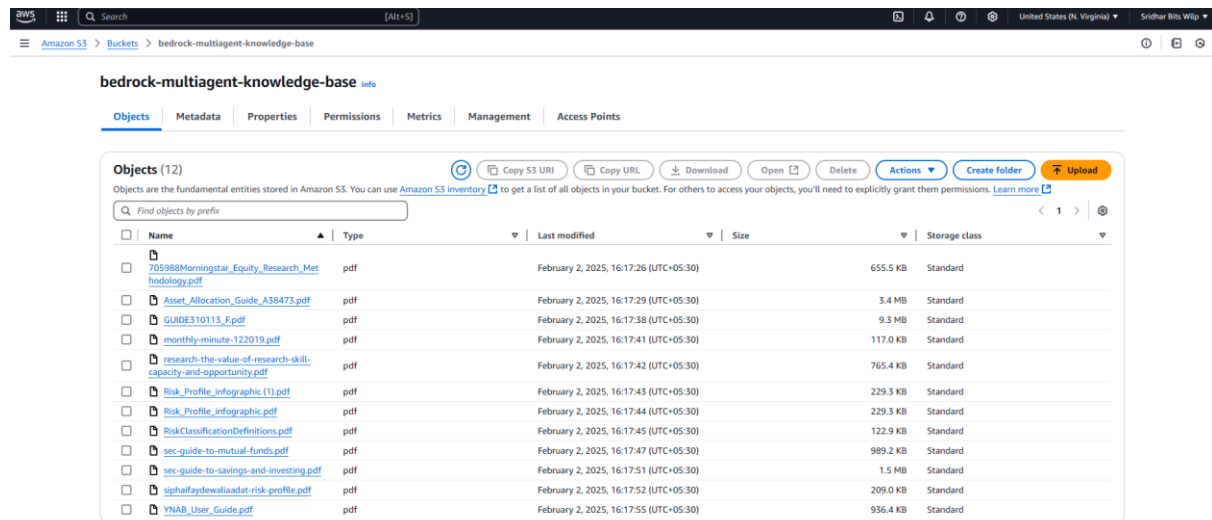


Step-by-Step Guide with Screenshots

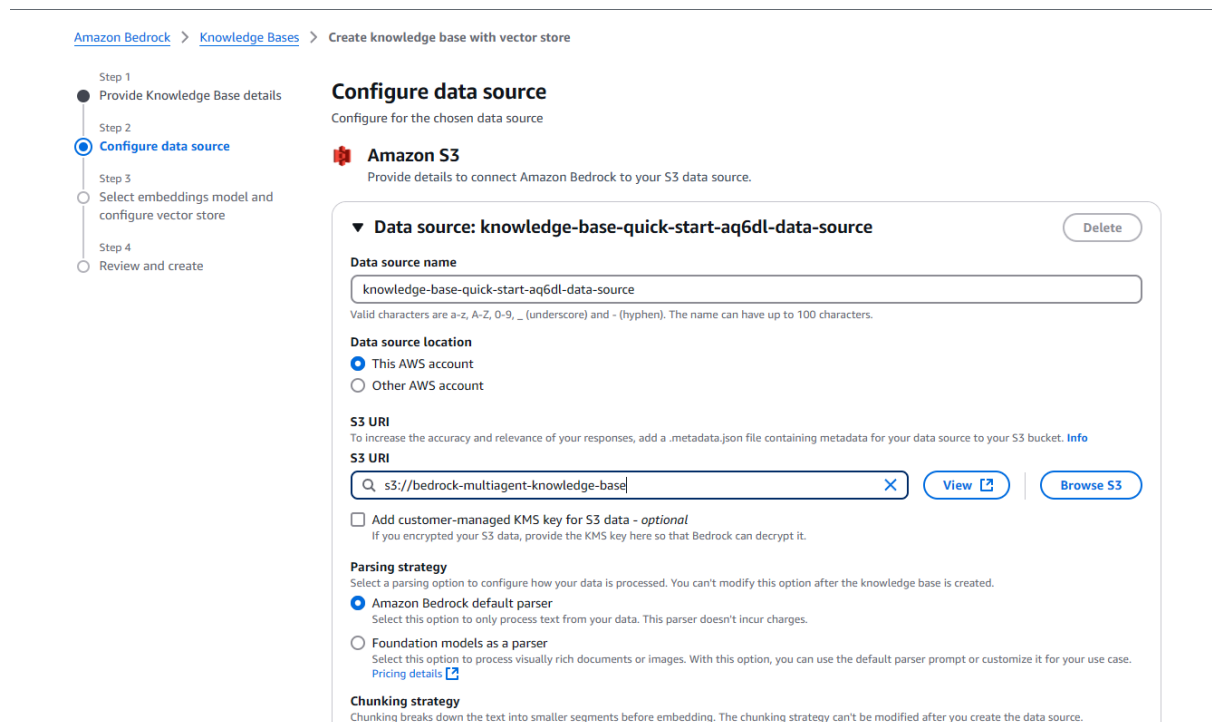
Prepare S3 Bucket for Knowledge Base

The S3 bucket is set up to store **financial guides, investment strategies, and budgeting frameworks**. These documents will be used by the **Budget Optimizer and Investment Advisor agents**.



Map the Knowledge Base with S3 in Bedrock

The S3 bucket is linked to the **AWS Bedrock Knowledge Base**, ensuring that agents can retrieve relevant financial data for decision-making.



Select the Embedding Model

Choosing an embedding model enables efficient **retrieval of knowledge base documents** for processing.

Step 4

Configure data source

Step 3

Select embeddings model and configure vector store


Step 4


Review and create


Bedrock can store, manage, and update your embeddings. The embeddings model and vector store cannot be changed after creation of Knowledge Base.


Embeddings model

Select an embeddings model to convert your data into an embedding. Pricing depends on the model. [Learn more](#)

 [Titan Text Embeddings v2](#)
By Amazon

 [Titan Embeddings G1 - Text v1.2](#)
By Amazon

 [Embed English v3](#)
By Cohere

 [Embed Multilingual v3](#)
By Cohere

► Additional configurations

Vector database

Create a new vector or choose an existing store so that Amazon Bedrock can store, update, and manage embeddings. [Learn more](#)


Vector store creation method

☒ Quick create a new vector store - *Recommended*
Choose one of the vector stores below to create a new vector store.

☐ Choose a vector store you have created
Select Amazon OpenSearch Serverless, Amazon Aurora, Pinecone, Amazon Aurora, MongoDB Atlas, Neptune Analytics (GraphRAG) or Redis Enterprise Cloud and provide field mappings.

Vector store

If you've used a vector store before, we recommend that you continue using it. Otherwise, choose the vector store that best fits your use case.

 Amazon OpenSearch Serverless

Create DynamoDB Table

A **DynamoDB table** is created to store **user transactions**, which will be accessed by the **Expense Analyzer agent**.

DynamoDB

Dashboard

Tables

Explore items

PartiQL editor

Backups

Exports to S3

Imports from S3

Integrations

Reserved capacity

Settings

DAX

Clusters

Subnet groups

Parameter groups

Events

Tables (1)

Any tag key

Any tag value

Find tables

multiAgent-UserTransactions

multiAgent-UserTransactions

Overview

Indexes

Monitor

Global tables

Backups

Exports and streams

Permissions

Additional settings

Protect your DynamoDB table from accidental writes and deletes

When you turn on point-in-time recovery (PITR), DynamoDB backs up your table data automatically so that you can restore to any given second in the preceding 1 to 35 days. Additional charges apply. [Learn more](#)

Edit PITR

General information

Partition key

Sort key

Capacity mode

Table status

Alarms

Point-in-time recovery (PITR)

Resource-based policy

Additional info

Items summary

DynamoDB updates the following information approximately every six hours.

Item count

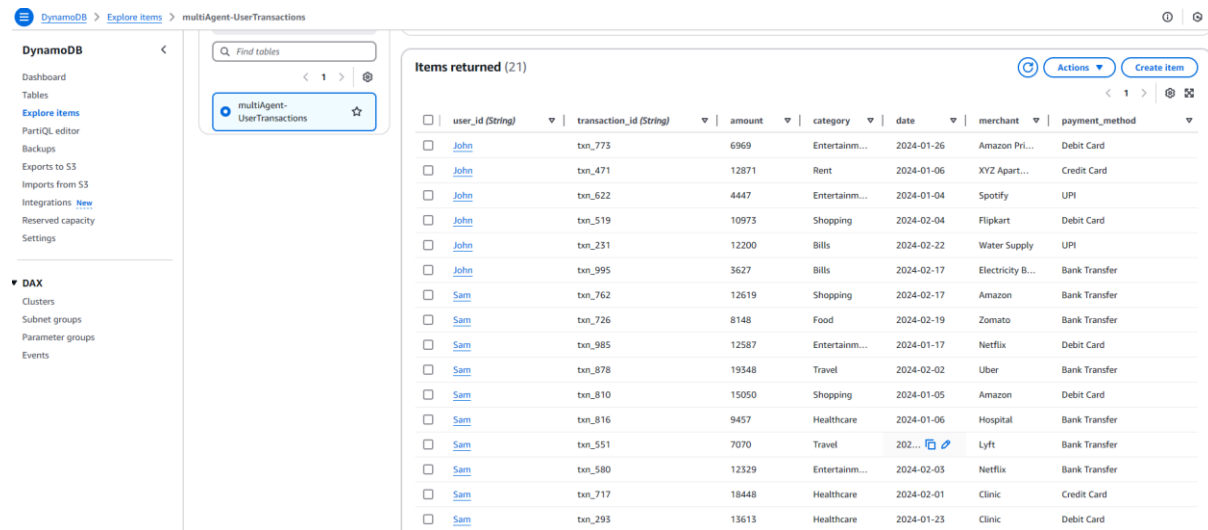
Table size

Average item size

Get live item count

Add Data to DynamoDB

Sample transaction data is added, including **user ID**, **transaction ID**, **category**, **amount**, and **merchant details**.

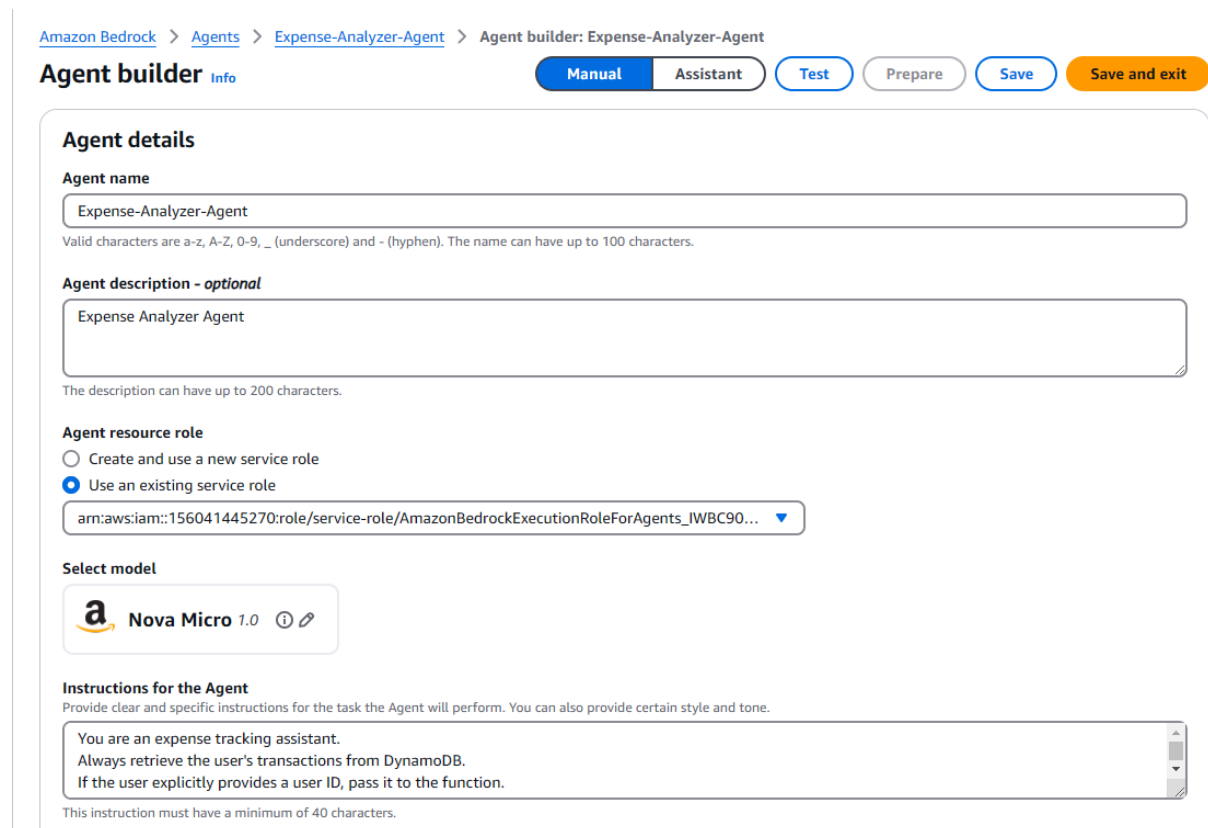


The screenshot shows the AWS DynamoDB console interface. On the left, the 'DynamoDB' sidebar is visible with options like Dashboard, Tables, Explore items, PartiQL editor, Backups, Exports to S3, Imports from S3, Integrations, Reserved capacity, and Settings. The main area displays the 'multiAgent-UserTransactions' table. A search bar at the top of the table area contains the text 'Find tables'. Below the search bar, the table name 'multiAgent-UserTransactions' is selected. The table contains 21 items, as indicated by 'Items returned (21)'. The table has columns: user_id (String), transaction_id (String), amount, category, date, merchant, and payment_method. The data is as follows:

user_id (String)	transaction_id (String)	amount	category	date	merchant	payment_method
John	txn_773	6969	Entertainm...	2024-01-26	Amazon Pri...	Debit Card
John	txn_471	12871	Rent	2024-01-06	XYZ Apart...	Credit Card
John	txn_622	4447	Entertainm...	2024-01-04	Spotify	UPI
John	txn_519	10973	Shopping	2024-02-04	Flipkart	Debit Card
John	txn_231	12200	Bills	2024-02-22	Water Supply	UPI
John	txn_995	3627	Bills	2024-02-17	Electricity B...	Bank Transfer
Sam	txn_762	12619	Shopping	2024-02-17	Amazon	Bank Transfer
Sam	txn_726	8148	Food	2024-02-19	Zomato	Bank Transfer
Sam	txn_985	12587	Entertainm...	2024-01-17	Netflix	Debit Card
Sam	txn_878	19348	Travel	2024-02-02	Uber	Bank Transfer
Sam	txn_810	15050	Shopping	2024-01-05	Amazon	Debit Card
Sam	txn_816	9457	Healthcare	2024-01-06	Hospital	Bank Transfer
Sam	txn_551	7070	Travel	2024-02-01	Lyft	Bank Transfer
Sam	txn_580	12329	Entertainm...	2024-02-03	Netflix	Bank Transfer
Sam	txn_717	18448	Healthcare	2024-02-01	Clinic	Credit Card
Sam	txn_293	13613	Healthcare	2024-01-23	Clinic	Debit Card

Create Bedrock Agent - Expense Analyzer

The **Expense Analyzer agent** is created with a selected **Foundation Model** and given **instructions** to fetch and analyze expenses.

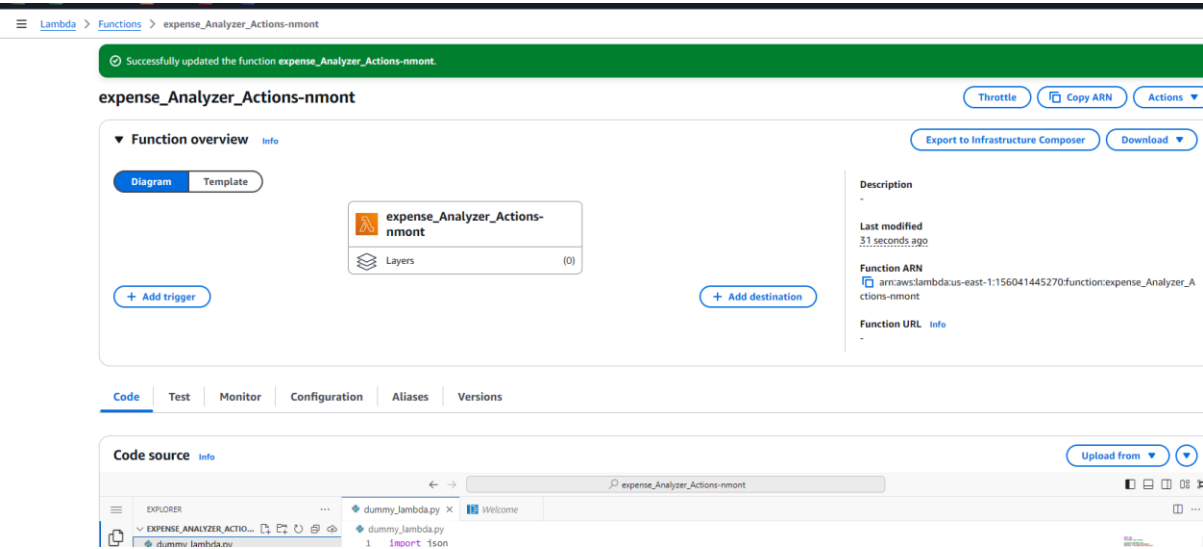


The screenshot shows the Amazon Bedrock Agent Builder interface for the 'Expense-Analyzer-Agent'. The top navigation bar includes 'Amazon Bedrock', 'Agents', 'Expense-Analyzer-Agent', and 'Agent builder: Expense-Analyzer-Agent'. Below the navigation bar, there are buttons for 'Manual', 'Assistant', 'Test', 'Prepare', 'Save', and 'Save and exit'. The main content area is titled 'Agent details' and contains the following sections:

- Agent name:** Expense-Analyzer-Agent. A note states: 'Valid characters are a-z, A-Z, 0-9, _ (underscore) and - (hyphen). The name can have up to 100 characters.'
- Agent description - optional:** Expense Analyzer Agent. A note states: 'The description can have up to 200 characters.'
- Agent resource role:** Use an existing service role. The selected role is 'arn:aws:iam::156041445270:role/service-role/AmazonBedrockExecutionRoleForAgents_IWBC90...'. The 'Create and use a new service role' option is also available.
- Select model:** Nova Micro 1.0. The Amazon logo is visible next to the model name.
- Instructions for the Agent:** Provide clear and specific instructions for the task the Agent will perform. You can also provide certain style and tone. The instructions are: 'You are an expense tracking assistant. Always retrieve the user's transactions from DynamoDB. If the user explicitly provides a user ID, pass it to the function.' A note states: 'This instruction must have a minimum of 40 characters.'

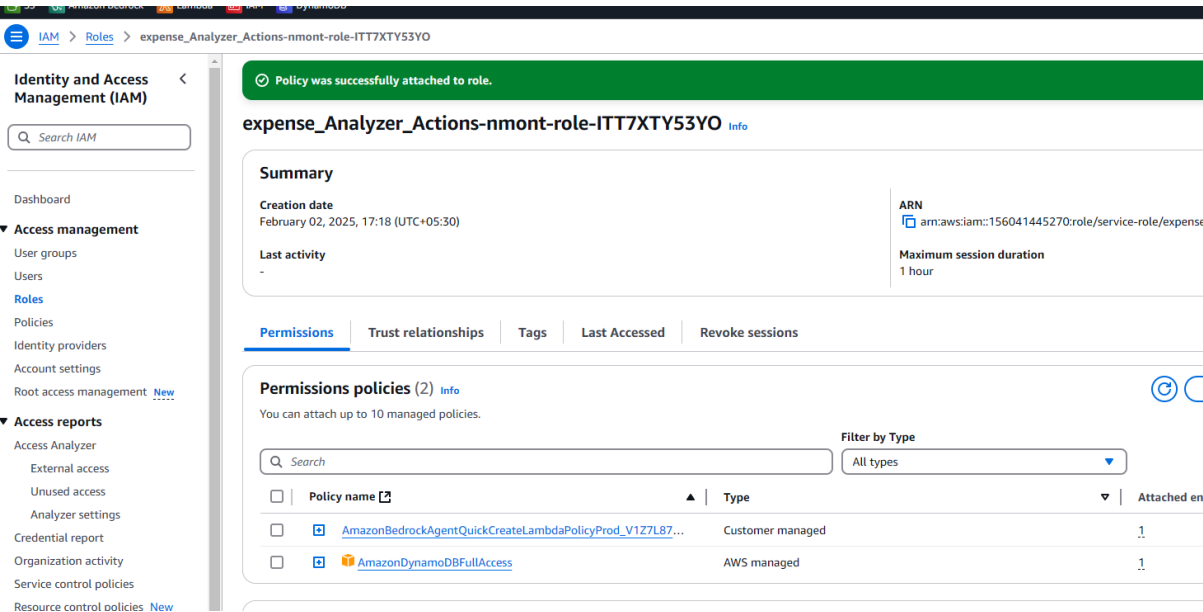
Lambda for Expense Analyzer

An AWS Lambda function is configured to **fetch data from DynamoDB** when the **Expense Analyzer agent is invoked**.



Update Lambda Policy for DynamoDB Access

The Lambda function is granted **permissions to read from DynamoDB**, ensuring smooth data retrieval.



Save, Prepare, and Test Each Agent

Each agent is tested **individually** to verify that it correctly retrieves data and performs its task.

Agent: Expense-Analyzer-Agent was successfully updated. Prepare the agent to keep its details up to date.

Amazon Bedrock > Agents > Expense-Analyzer-Agent > Agent builder: Expense-Analyzer-Agent

Agent builder Info

Manual Assistant Test Prepare Save Save and exit

Agent details

Agent name

Expense-Analyzer-Agent

Valid characters are a-z, A-Z, 0-9, _ (underscore) and - (hyphen). The name can have up to 100 characters.

Agent description - optional

Expense Analyzer Agent

The description can have up to 200 characters.

Agent resource role

☐ Create and use a new service role

☒ Use an existing service role

arn:aws:iam::156041445270:role/service-role/AmazonBedrockExecutionRoleForAgents_IWBC90...

Select model

Nova Micro 1.0

Instructions for the Agent

Provide clear and specific instructions for the task the Agent will perform. You can also provide certain style and tone.

You are an expense tracking assistant.
Always retrieve the user's transactions from DynamoDB.
If the user explicitly provides a user ID, pass it to the function.

This instruction must have a minimum of 40 characters.

Additional settings

Test Agent

Using ODT Chang

Prepare the Agent to test the latest changes.

Prepare

Enter your message here

Run

Agent: Expense-Analyzer-Agent was successfully updated. Prepare the agent to keep its details up to date.

Agent: Expense-Analyzer-Agent was successfully prepared.

Notifications 0 0 0 2 0 0 0

Amazon Bedrock > Agents > Expense-Analyzer-Agent > Agent builder: Expense-Analyzer-Agent

Agent builder Info

Manual Assistant Test Prepare Save Save and exit

Agent details

Agent name

Expense-Analyzer-Agent

Valid characters are a-z, A-Z, 0-9, _ (underscore) and - (hyphen). The name can have up to 100 characters.

Agent description - optional

Expense Analyzer Agent

The description can have up to 200 characters.

Agent resource role

☐ Create and use a new service role

☒ Use an existing service role

arn:aws:iam::156041445270:role/service-role/AmazonBedrockExecutionRoleForAgents_IWBC90...

Select model

Nova Micro 1.0

Instructions for the Agent

Provide clear and specific instructions for the task the Agent will perform. You can also provide certain style and tone.

You are an expense tracking assistant.
Always retrieve the user's transactions from DynamoDB.

Test Agent

Using ODT Chang

Here are your last 5 transactions:

- 2024-02-19 | Food | ₹8148.0 | Zomato
- 2024-02-17 | Shopping | ₹12619.0 | Amazon
- 2024-01-05 | Shopping | ₹15050.0 | Amazon
- 2024-01-06 | Healthcare | ₹9457.0 | Hospital
- 2024-02-02 | Travel | ₹19348.0 | Uber

Show trace >

Enter your message here

Run

Instructions for the Agent
Provide clear and specific instructions for the task the Agent will perform. You can also provide certain style and tone.

You are an expense tracking assistant.
Always retrieve the user's transactions from DynamoDB.
If the user explicitly provides a user ID, pass it to the function.

This instruction must have a minimum of 40 characters.

► **Additional settings**

Action groups (1) [Info](#)

Find action groups

< 1 > ⚙

Name	Description	State	Last updated
expense_Analyzer_Actions		Enabled	February 02, 2025, 17:22 (UTC+05:30)

Memory - New
Memory allows an agent to retain conversational contexts across multiple sessions and recall past actions and behaviors. [See supported models](#)

Enable session summarization
Enabling session summarization will generate a summary of each test session. [View session summaries](#)

☐ Enabled
☒ Disabled

Knowledge Bases (0) [Info](#)

Find Knowledge Base

< 1 > ⚙

Name	State	Instruction
No Knowledge Base		

test Agent

Using ODT [Change](#)

Show trace >

what is last 3 transaction

Here are your last 3 transactions:

- 2024-02-17 | Shopping | ₹12619.0 | Amazon
- 2024-01-05 | Shopping | ₹15050.0 | Amazon
- 2024-01-06 | Healthcare | ₹9457.0 | Hospital

Show trace >

Enter your message here

:

Run

Create Bedrock Agent - Budget Optimizer

The **Budget Optimizer agent** is created and **mapped to the Knowledge Base**, enabling it to retrieve budgeting strategies.

[Amazon Bedrock](#) > [Agents](#) > [Budget-Optimize-Agent](#) > Agent builder: Budget-Optimize-Agent

Agent builder [Info](#)

Manual Assistant Test Prepare Save Save and exit

Agent details

Agent name

Budget-Optimize-Agent

Valid characters are a-z, A-Z, 0-9, _ (underscore) and - (hyphen). The name can have up to 100 characters.

Agent description - optional

Budget optimization expert


The description can have up to 200 characters.

Agent resource role

☒ Create and use a new service role
☐ Use an existing service role

AmazonBedrockExecutionRoleForAgents_18X61SMFD0B

Select model

 **Nova Micro 1.0** On-demand ⓘ

Instructions for the Agent
Provide clear and specific instructions for the task the Agent will perform. You can also provide certain style and tone.

You are a financial budget optimization expert.
- Retrieve budgeting frameworks from the Knowledge Base.
- Apply financial rules such as 50/30/20 allocation for expenses.

This instruction must have a minimum of 40 characters.

► **Additional settings**

Map to Knowledge base which we created

IAM

DynamoDB

Amazon Bedrock > Agents > Budget-Optimize-Agent > Agent builder: Budget-Optimize-Agent > Knowledge Base details

multi-agent-knowledge-base

EditDelete

Knowledge base details

Name

multi-agent-knowledge-base

Status

ENABLED

Knowledge base instructions for agent

Retrieve budgeting frameworks and best practices. Use financial rules like the 50/30/20 allocation model. Provide savings suggestions based on income and spending patterns.

Test Budget Optimizer Agent

The agent is tested to ensure it can **retrieve financial rules** and provide budgeting recommendations.

[Alt+S]

United States (N. Virginia)

admin-user @ 1560-4144

Agent: Budget-Optimize-Agent was successfully prepared.

Amazon Bedrock > Agents > Budget-Optimize-Agent

Budget-Optimize-Agent

Create AliasTestEdit in Agent Builder

Agent overview

Name

Budget-Optimize-Agent

Description

Budget optimization expert

Creation date

February 02, 2025, 17:33 (UTC+05:30)

Permissions

arn:aws:iam::156041445270:role/service-role/AmazonBedrockExecutionRoleForAgents_18X615MFD0B

User Input

DISABLED

Idle session timeout

600 seconds

ID

EAGOCYEFPC

Status

PREPARED

Last prepared

February 02, 2025, 17:37 (UTC+05:30)

Agent ARN

arn:aws:bedrock:us-east-1:156041445270:agent/EAGOCYEFPC

Memory

Disabled

KMS key

-

Tags (0)

Manage Tags

Key

Value

No tags

Manage tags

Test

TestAlias: Working draft

InfoUsing ODTChange

Give me the Budget advice

Here are some budget advice based on the search results:

1. The YNAB (You Need A Budget) system is a popular budgeting method. It includes four simple rules:

• Rule 1: Give Every Dollar a Job. Plan how you'll use your money and put it to work for you.

• Rule 2: Save for a Rainy Day. Set aside money for unexpected expenses.

Enter your message here

Run

Create Bedrock Agent - Investment Advisor

The **Investment Advisor agent** is created and mapped to the **Knowledge Base**, allowing it to suggest investment strategies.

Agent: Investment-Advisor-Agent was successfully created.

Notifications 0 0 2 0 0

[Amazon Bedrock](#) > [Agents](#) > [Investment-Advisor-Agent](#) > Agent builder: Investment-Advisor-Agent

Agent builder Info

Manual Assistant Test Prepare Save Save and exit

Agent details

Agent name

Investment-Advisor-Agent

Valid characters are a-z, A-Z, 0-9, _ (underscore) and - (hyphen). The name can have up to 100 characters.

Agent description - optional

Investment Advisor Agent

The description can have up to 200 characters.


Agent resource role

☐ Create and use a new service role

☒ Use an existing service role

AmazonBedrockExecutionRoleForAgents_LBOD7PTIOXH

Select model

 Nova Micro 1.0

On-demand

Instructions for the Agent

Provide clear and specific instructions for the task the Agent will perform. You can also provide certain style and tone.

Retrieve investment strategies from the knowledge base.

- Recommend asset allocation based on risk profile.
- Suggest stocks, bonds, mutual funds, or fixed deposits.
- Provide estimated ROI based on historical market trends.

This instruction must have a minimum of 40 characters

Map to Knowledge base

IAM DynamoDB

Agent: Investment-Advisor-Agent was successfully created.

[Amazon Bedrock](#) > [Agents](#) > [Investment-Advisor-Agent](#) > [Agent builder: Investment-Advisor-Agent](#) > Add Knowledge Base

Add knowledge base

Knowledge Base: multi-agent-knowledge-base

Clear

Select Knowledge Base

Select a previously created Knowledge Base or create a new one by visiting Knowledge Base. [Learn more about Knowledge Bases.](#)

multi-agent-knowledge-base

Knowledge Base instructions for Agent

Specify instructions based on the design and type of information of the Knowledge Base. This will impact how the Knowledge Base interacts with the agent.

Retrieve investment strategies and asset allocation models. Recommend stocks, bonds, mutual funds, or FDs based on risk profile. Provide estimated ROI using historical market data.

Valid characters are a-z, A-Z, 0-9, _ (underscore) and - (hyphen). The instruction can have up to 150 characters.

Cancel

Add

Test Investment Advisor Agent

The agent is tested separately to verify that it **retrieves investment insights** from the Knowledge Base.

mazon Bedrock > Agents > Investment-Advisor-Agent

Investment-Advisor-Agent

Create AliasTestEdit in Agent Builder

Agent overview

Name

Investment-Advisor-Agent

Description

Investment Advisor Agent

Creation date

February 02, 2025, 17:44 (UTC+05:30)

Permissions

arn:aws:iam::156041445270:role/service-role/AmazonBedrockExecutionRoleForAgents_LBOD7PTIOXH

User Input

DISABLED

Idle session timeout

600 seconds

ID

EO3VTIU4YN

Status

PREPARED

Last prepared

February 02, 2025, 17:46 (UTC+05:30)

Agent ARN

arn:aws:bedrock:us-east-1:156041445270:agent/EO3VTIU4YN

Memory

Disabled

KMS key

-

Tags (0)Manage Tags

Results: Working draft

Info

recommends: typically, a conservative investor would prefer a higher allocation to debt instruments and cash equivalents, which offer stability and liquidity, while maintaining a lower allocation to equities that carry higher risk and volatility. Here's a suggested asset allocation for a conservative risk profile:

- 65% Debt (Bonds, Government Securities, etc.)
- 30% Cash (Cash equivalents, Money Market Funds, etc.)
- 20% Equity (Stocks, Equity Mutual Funds, etc.)

This allocation aims to minimize risk and loss of principal while maintaining some degree of liquidity and stability. It is important to

All Sub-Agents Created

A verification step to ensure that **Expense Analyzer, Budget Optimizer, and Investment Advisor agents** are set up correctly.

Agents (3)

Find Agents

DeleteEditCreate agent

< 1 > ⚙

	Name	Status	Description	Last updated
<input type="radio"/>	Expense-Analyzer-Agent	PREPARED	Expense Analyzer Agent	February 02, 2025, 17:28 (UTC+05:30)
<input type="radio"/>	Budget-Optimize-Agent	PREPARED	Budget optimization expert	February 02, 2025, 17:35 (UTC+05:30)
<input type="radio"/>	Investment-Advisor-Agent	PREPARED	Investment Advisor Agent	February 02, 2025, 17:46 (UTC+05:30)

Create Aliases for All Agents

Each agent is assigned an **alias** so they can be used in Supervisor agent.

Versions (1) Info

Delete

Find Version

< 1 > ⚙

	Version name	Status	Creation date
<input type="radio"/>	Version 1	PREPARED	February 02, 2025, 17:48 (UTC+05:30)

Aliases (1) Info

DeleteEditCreate

An alias points to a specific version of your Agent. Once you create and associate a version with an alias, you can test it. With an alias, you can also update the Agent version that your client applications use.

Find Alias

< 1 > ⚙

	Alias ID	Alias name	Description	Associated version	Throughput	Creation date	Last updated
<input type="radio"/>	KZKLGGLGLF	expense-analyzer-alias		Version 1	-	February 02, 2025, 17:48 (UTC+05:30)	February 02, 2025, 17:48 (UTC+05:30)

Versions (1) [Info](#)

[Delete](#)

< 1 >

	Version name ▾	Status ▾	Creation date ▲
<input type="radio"/>	Version 1	✓ PREPARED	February 02, 2025, 17:49 (UTC+05:30)

Aliases (1) [Info](#)

[Delete](#)[Edit](#)[Create](#)

An alias points to a specific version of your Agent. Once you create and associate a version with an alias, you can test it. With an alias, you can also update the Agent version that your client applications use.

< 1 >

	Alias ID ▾	Alias name	Description ▾	Associated version ▾	Throughput ▾	Creation date ▾	Last updated ▾
<input type="radio"/>	VPZXHQIBZ	investment-advisor-alias		Version 1	-	February 02, 2025, 17:49 (UTC+05:30)	February 02, 2025, 17:49 (UTC+05:30)

Versions (1) [Info](#)

[Delete](#)

< 1 >

	Version name ▾	Status ▾	Creation date ▲
<input type="radio"/>	Version 1	✓ PREPARED	February 02, 2025, 17:50 (UTC+05:30)

Aliases (1) [Info](#)

[Delete](#)[Edit](#)[Create](#)

An alias points to a specific version of your Agent. Once you create and associate a version with an alias, you can test it. With an alias, you can also update the Agent version that your client applications use.

< 1 >

	Alias ID ▾	Alias name	Description ▾	Associated version ▾	Throughput ▾	Creation date ▾	Last updated ▾
<input type="radio"/>	NE258OBOOG	budget-optimizer-alias		Version 1	-	February 02, 2025, 17:50 (UTC+05:30)	February 02, 2025, 17:50 (UTC+05:30)

Create Supervisor Agent & Enable Multi-Agent Collaboration

The **Supervisor Agent** is created to manage task delegation across **sub-agents**.

✔ Agent: Finance-Supervisor-Agent was successfully created.

[Amazon Bedrock](#) > [Agents](#) > [Finance-Supervisor-Agent](#) > Agent builder: Finance-Supervisor-Agent

Agent builder [Info](#)

ManualAssistantTestPrepareSaveSave and exit

Agent details

Agent name

Finance-Supervisor-Agent

Valid characters are a-z, A-Z, 0-9, _ (underscore) and - (hyphen). The name can have up to 100 characters.

Agent description - optional

Supervisor Agent

The description can have up to 200 characters.


Agent resource role



☒ Create and use a new service role

☐ Use an existing service role

AmazonBedrockExecutionRoleForAgents_H0486JXCYM

Select model

 Nova Micro 1.0 On-demand



Instructions for the Agent

Provide clear and specific instructions for the task the Agent will perform. You can also provide certain style and tone.

- Invoke the Expense Analyzer to retrieve user transaction history.

- Invoke the Budget Optimizer to suggest budgeting recommendations.

- Invoke the Investment Advisor to provide investment strategies.

- Consolidate responses into a structured financial plan.

This instruction must have a minimum of 40 characters.

Additional settings

Map Sub-Agents to Supervisor & Set Collaboration Instructions

Each sub-agent (**Budget Optimizer**, **Expense Analyzer**, **Investment Advisor**) is mapped to the Supervisor Agent, along with its **collaborator instructions**.

Orchestration strategy [Info](#)

Edit

Specify how the Agent processes information and coordinates a response. By default, orchestration is defined by advanced prompts that can be overridden or customized for advanced use cases.

Orchestration type Default	Orchestration Default	Post-processing Default
Pre-processing Default	Knowledge Base response generation Default	Session summarization Default

Multi-agent collaboration

Edit


Multi-agent collaboration allows this agent to delegate tasks to other collaborator agents. When you enable this, the agent becomes a supervisor agent that coordinates responses from agent collaborators.

Status

Enabled

Agent collaborators

0

 No agent collaborators found

When you enable multi-agent collaboration, to test this agent, it must be associated with other agent collaborators.

Map the Budget optimizer and give collaboration instruction

▼ **Agent collaborator : Budget-Optimize-Agent**

An agent in the multi-agent collaboration that orchestrates and returns a final response.

Collaborator agent

Budget-Optimize-Agent ▼

Agent alias

budget-optimizer-alias ▼

View

Collaborator name

An alternate name that appears only in collaboration instructions. It doesn't replace the original agent name.

Budget-Optimize-Agent

Valid characters are a-z, A-Z, 0-9, _ (underscore), and - (hyphen). Collaborator name must be 1–50 characters.

Collaborator instruction

Describes the task that the agent performs within the multi-agent collaboration. We recommend that you provide clear, specific scenarios. You can also provide style and tone. Refer to the agent using its collaborator name.

Use this agent to generate budgeting recommendations.
It retrieves budgeting strategies from the Knowledge Base.
It applies financial rules like the 50/30/20 model.

Collaboration instruction must be 40–2,000 characters.

☒ **Enable conversation history sharing**

When enabled, in future invocations, the supervisor agent can share context from previous responses with this collaborator agent.

Map the Expense analyzer and give collaboration instruction

▼ **Agent collaborator : Expense-Analyzer-Agent**

An agent in the multi-agent collaboration that orchestrates and returns a final response.

Collaborator agent

Expense-Analyzer-Agent ▼

Agent alias

expense-analyzer-alias ▼

View

Collaborator name

An alternate name that appears only in collaboration instructions. It doesn't replace the original agent name.

Expense-Analyzer-Agent

Valid characters are a-z, A-Z, 0-9, _ (underscore), and - (hyphen). Collaborator name must be 1–50 characters.

Collaborator instruction

Describes the task that the agent performs within the multi-agent collaboration. We recommend that you provide clear, specific scenarios. You can also provide style and tone. Refer to the agent using its collaborator name.

Use this agent to fetch user transactions from DynamoDB.
It retrieves recent transactions based on the user ID and provides insights into spending patterns.
Call this agent whenever a user asks about their expenses.

Collaboration instruction must be 40–2,000 characters.

☒ **Enable conversation history sharing**

When enabled, in future invocations, the supervisor agent can share context from previous responses with this collaborator agent.

Map the Investment advisor and give collaboration instruction

▼ Agent collaborator : Investment-Advisor-Agent

ⓘ

An agent in the multi-agent collaboration that orchestrates and returns a final response.

Collaborator agent

Investment-Advisor-Agent

Agent alias

investment-advisor-alias

View

Collaborator name

An alternate name that appears only in collaboration instructions. It doesn't replace the original agent name.

Investment-Advisor-Agent

Valid characters are a-z, A-Z, 0-9, _ (underscore), and - (hyphen). Collaborator name must be 1–50 characters.

Collaborator instruction

Describes the task that the agent performs within the multi-agent collaboration. We recommend that you provide clear, specific scenarios. You can also provide style and tone. Refer to the agent using its collaborator name.

It retrieves investment strategies from the knowledge base.

It suggests asset allocation based on the user's risk profile.

It recommends stocks, bonds, mutual funds, or fixed deposits.

It provides estimated returns based on historical market trends.

Collaboration instruction must be 40–2,000 characters.

☐ Enable conversation history sharing

When enabled, in future invocations, the supervisor agent can share context from previous responses with this collaborator agent.

Add collaborator

All Three Agents Successfully Mapped to Supervisor

The **Supervisor Agent** is now fully configured to coordinate between agents.

Multi-agent collaboration

Edit

Multi-agent collaboration allows this agent to delegate tasks to other collaborator agents. When you enable this, the agent becomes a supervisor agent that coordinates responses from agent collaborators.

Status

Enabled

Agent collaborators

3

Test the Supervisor Agent

The Supervisor Agent is tested with different queries to ensure it correctly **delegates tasks to sub-agents**.

Test Agent

Using ODT [Change](#)

I am Sam. Analyze my spending, show top 5

Hello Sam, here are the top 5 expenses based on your last 12 transactions:

1. ₹18448.0 | Healthcare | Clinic (Credit Card) on 2024-02-01

2. ₹15050.0 | Shopping | Amazon (Debit Card) on 2024-01-05

3. ₹13613.0 | Healthcare | Clinic (Debit Card) on 2024-01-23

4. ₹12619.0 | Shopping | Amazon (Bank Transfer) on 2024-02-17

5. ₹12587.0 | Entertainment | Netflix (Debit Card) on 2024-01-17

ⓘ

Hide trace

Multi-agent collaboration trace timeline

For agents with Multi-agent collaboration enabled, each subsequently invoked Agent collaborator is displayed. Each bar within the trace timeline can be clicked to show the specific breakdown for that Agent collaborator.

▼ (1)Finance-Supervisor-Agent

2.26s

(1.1)Expense-Analyzer-Agent

5.92s

Time (seconds)

0.00s1.00s2.00s3.00s4.00s5.00s6.00s7.00s8.00s

Trace

Session summaries

Trace (4)

Request ID 29fcfb5-30fd-4b52-bfb3-f095cabf83a7

Copy all

< g Trace

Routing Trace

Orchestration and Knowledge Base

Post-Processing Trace

>

Multi-agent collaboration trace timeline

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
Multi-agent collaboration trace timeline

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Multi-agent collaboration trace timeline

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Query Uses Two Agents



Hello John, here is your financial plan based on your spending:

Top 5 Expenses:

- ₹15000.0 | Rent | XYZ Apartments (Bank Transfer) on 2024-02-05
- ₹12871.0 | Rent | XYZ Apartments (Credit Card) on 2024-01-06
- ₹10973.0 | Shopping | Flipkart (Debit Card) on 2024-02-04
- ₹12200.0 | Bills | Water Supply (UPI) on 2024-02-22
- ₹9699.0 | Entertainment | Amazon Prime (Debit Card) on 2024-01-26

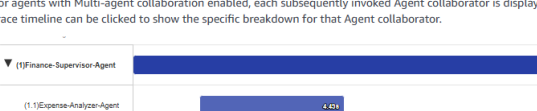
Budget Plan:

- Rent (Essential Spending - 50% of total income): ₹27871.0
- Shopping (Non-Essential Spending - 30% of total income): ₹10973.0
- Bills (Essential Spending - 25% of total income): ₹12200.0
- Entertainment (Non-Essential Spending - 20% of total income): ₹9699.0

To maintain this budget, ensure that you are covering all

Multi-agent collaboration trace timeline

For agents with Multi-agent collaboration enabled, each subsequently invoked Agent collaborator is displayed. Each bar within the trace timeline can be clicked to show the specific breakdown for that Agent collaborator.



Agent	Duration (seconds)
(1) Finance-Supervisor-Agent	16.04s
(1.1) Expense-Analyser-Agent	4.47s
(1.2) Budget-Optimizer-Agent	3.67s

Trace

Summary

Trace (6)

Request ID 4c0899a7-0dbd-468c-9f1e-ba0b82f58939

Trace

Routing Trace

Orchestration and Knowledge Base

Post-Processing Trace

Hello John, here is your financial plan based on your spending:

Budget Plan:

- Rent (Essential Spending - 50% of total income): ₹27871.0
- Shopping (Non-Essential Spending - 30% of total income): ₹10973.0
- Bills (Essential Spending - 25% of total income): ₹15827.0
- Entertainment (Non-Essential Spending - 20% of total income): ₹11416.0

To maintain this budget, ensure that you are covering all necessary housing expenses, look for areas to cut costs for shopping and entertainment, and aim to save at least 20% of your income.

Investment Recommendations:

For a moderate risk profile, a balanced approach that combines both risk and return potential is advisable. Here are some suggested asset allocations:

- Moderate Portfolio: This portfolio is designed for those who are equally concerned with risk and return. It includes:
 - 38% Domestic stocks

Multi-agent collaboration trace timeline

For agents with Multi-agent collaboration enabled, each subsequently invoked Agent collaborator is displayed. Each bar within the trace timeline can be clicked to show the specific breakdown for that Agent collaborator.

Agent	Time (seconds)
Finance-Supervisor-Agent	22.56s
Expense-Analyzer-Agent	4.07s
Budget-Optimize-Agent	3.96s
Investment-Advisor-Agent	2.97s


Trace | Session summaries

Trace (8)

Request ID 83c3cbdf-4582-427b-b85c-7b657814c3d8

[Copy all](#)

The Supervisor Agent is **wrapped with AWS Lambda and exposed via API Gateway**, allowing external services to interact with it. A **Postman request is shown hitting the API Gateway endpoint**.

https://[redacted]acute-api.us-east-1.amazonaws.com/dev/?query=I am Sam. Show my top 5 expenses

POST

https://[redacted]acute-api.us-east-1.amazonaws.com/dev/?query=I am Sam. Show my top 5 expenses

Send

Params

Authorization

Headers (7)

Body

Pre-request Script

Tests

Settings

Cookies

Query Params

	Key	Value	Bulk Edit
<input checked="" type="checkbox"/>	query	I am Sam. Show my top 5 expenses	
	Key	Value	

Body

Cookies

Headers (7)

Test Results

Status: 200 OK Time: 11.24 s Size: 910 B Save Response

Pretty

Raw

Preview

Visualize

JSON

```
1  {
2    "statusCode": 200,
3    "body": {"message": "Agent Response", "sessionId": "02e2d45f-bb20-4a00-9113-5c1b0a55d87c", "response": {"text": "bytes":
4      b'Here are your top 5 expenses based on the last 12 transactions:\\n1. ₹18448.0 | Healthcare | Clinic (Credit Card) on
2024-02-01\\n2. ₹15050.0 | Shopping | Amazon (Debit Card) on 2024-01-05\\n3. ₹15050.0 | Shopping | Amazon (Debit Card) on
2024-01-05\\n4. ₹13613.0 | Healthcare | Clinic (Debit Card) on 2024-01-23\\n5. ₹12619.0 | Shopping | Amazon (Bank Transfer) on
2024-02-17'}}}
```