ToolGPA

NOVEMBER 2026

Cassidy AI

The Insider's Guide

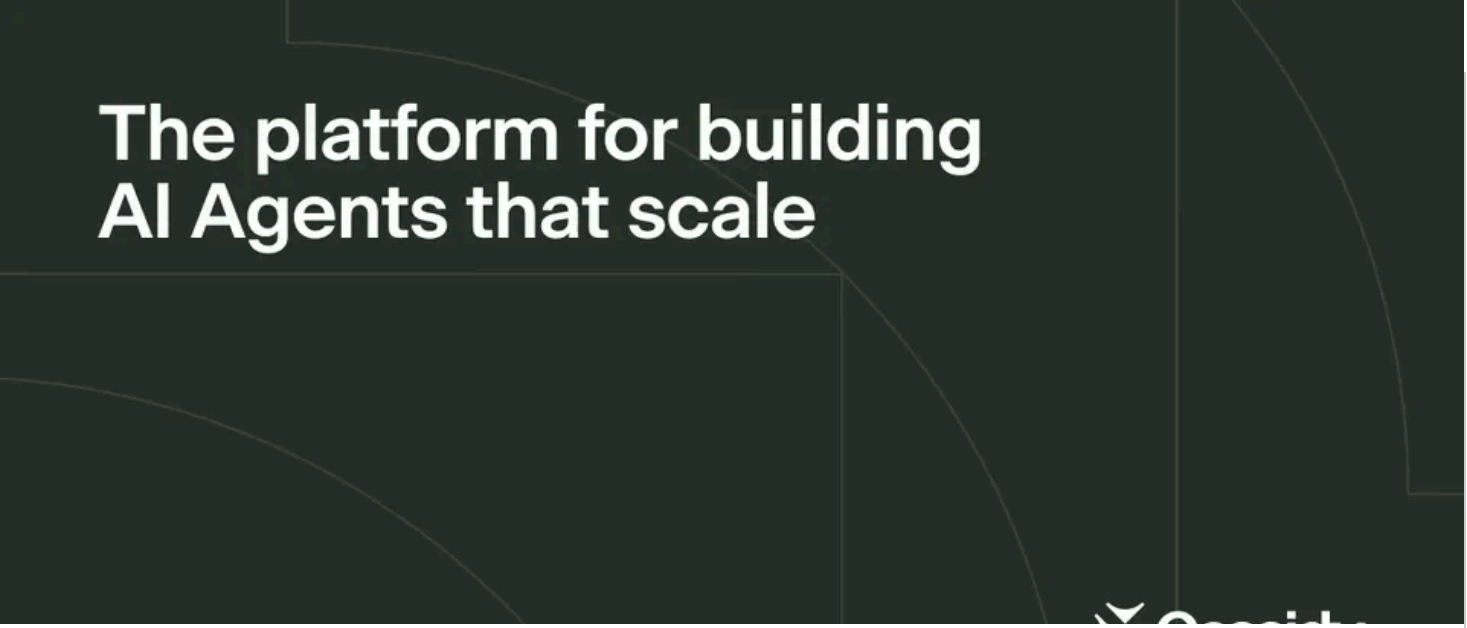
No-code agents and workflows grounded in company knowledge



Every plan, grade, refund rule and rival among AI agents, read from Cassidy AI's own pages.

Made by Cassidy · checked Nov 13, 2026 · toolgpa.com

1.8
GPA



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Who made this guide, what else is on the site, and how to cite it

ToolGPA put this guide together from Cassidy AI's own pages, its app-store listings and our grades. Every fact in it is on Cassidy AI's page too, where it is kept up to date. Checked Nov 13, 2026.

Welcome

What it is, who it suits, its grades and the ten things to know first

1.8

GPA, above 30 of the 178 other AI agents we grade

Cassidy is a platform for business teams to build AI agents and multi-step workflows without code. Agents draw on a knowledge base synced from tools such as Google Drive and SharePoint, and can run on models from OpenAI, Anthropic and Google. The vendor aims it at insurance, professional services, manufacturing and similar document-heavy businesses.

To get you started, here are **7 things to know about Cassidy AI**, taken from its own pages and our grades.

> **No price is published, both plans go through Book a demo, and SSO, audit logs and retention controls are Business only.**
>
> From our report card of Cassidy AI

1 **Best for no-code AI agents on company knowledge**

Cassidy builds agents and workflows from plain language and company documents.

2 **It runs on Web**

Web, with a browser extension too.

3 Agents

Agents are created in plain language and connected to company sources. They can be used in Slack, Microsoft Teams, Google Chat, a browser extension, Office add-ins, or through an API.

4 Workflows

Multi-step automations with scheduled and custom triggers, conditional logic, human-in-the-loop approval steps, retries and bulk runs.

5 Knowledge base

Stores company documents as pages and keeps them in step with sources such as Google Drive and SharePoint. Sync is every 24 hours on Starter and instant on Business.

6 A 1.8 GPA, above 30 of 178

That is against the other AI agents we grade, on value, the free plan, features, ease of use and platforms.

7 Keep it

To replace Cassidy AI you would be making an AI agent, with the models and the safeguards behind it. That is not a weekend's work, with an AI app builder or without one.

Cassidy AI at a glance

PRICING Paid	FREE PLAN No
FREE TRIAL None stated	RUNS ON Web, Browser extension
MADE BY Cassidy	CATEGORY AI Agents
OUR GRADE 1.8 GPA, weak	

The report card

Best for no-code AI agents on company knowledge

Cassidy builds agents and workflows from plain language and company documents. No price is published, both plans go through Book a demo, and SSO, audit logs and retention controls are Business only.

TOOLGPA REPORT CARD	Cassidy AI	Graded Nov 13, 2026
SUBJECT	GRADE	COMMENT
Value for money	C	No price is published, and both Starter and Business go through Book a demo, so we rate it at the ordinary grade.
Free plan and trial	F	No free plan and no trial; both plans start at a demo.
Features	C	Agents, workflows, a knowledge base and a meeting recorder, with model choice. Starter has 5 agents, 5 workflows and 10,000 credits a month, and knowledge sync is every 24 hours there.
Ease of use	C	Agents and workflows to build and sources to connect. We found no store rating.
Platforms and integrations	B	Web app plus a browser extension, with Slack, Teams, Google Chat, Salesforce, HubSpot, Notion, Zendesk, Drive and SharePoint connections and an API. No desktop or phone app.
Grade point average		Weak, out of 4.0 **1.8**

An A is worth 4 points, a B 3, a C 2, a D 1 and an F nothing. The GPA is the average of the five.

Who Cassidy AI is for

- ✓ Fits if you want agents that read your company documents inside Slack or Teams
- ✓ Works for small teams on Starter's 3 seats

Who it is not for

- ✗ Skip it if you want a price, since both plans are behind a demo
- ✗ Tight if you grow past Starter: 3 seats, 5 agents and 5 workflows
- ✗ Watch out: SSO, audit logs and retention controls are on Business only
- ✗ Skip it if you want desktop or phone apps, because there aren't any

Good to know

Good for

- ✓ Operations teams in insurance, benefits and professional services
- ✓ Companies that want agents tied to their own documents without engineers
- ✓ Organizations that need SSO, audit logs and SOC 2 reporting

Worth knowing

- ⓘ No price is published. Both the Starter and Business plans are reached through Book a demo.
- ⓘ Starter is listed with 3 seats, 1 workspace, 5 agents, 5 workflows, 10,000 AI credits a month and 30,000 pages of storage.
- ⓘ SSO, audit logs and data retention controls are listed under Business only.
- ⓘ Only the browser extension and add-ins run outside the web app; there are no desktop or mobile apps listed.

What it costs

Every plan, the free plan, ways to pay less and how prices have moved

Cassidy AI's current pricing could not be confirmed from its own site.

> **No price is published, and both Starter and Business go through Book a demo, so we rate it at the ordinary grade.**
>
> From our grade for value for money

We could not confirm Cassidy AI's current prices from its own site, so this guide lists no plans. cassidyai.com has them.

PART 03 · FEATURES

What it does

Its main features, where it runs, what it works with and who makes it

2

Places it runs: Web and Browser extension

No-code agents and workflows grounded in company knowledge. Here is what it does, as its own site describes it, and what it covers: meeting notes, workflow automation, AI agents, no-code.

> **Agents, workflows, a knowledge base and a meeting recorder, with model choice.**

From our grade for features

Agents

Agents are created in plain language and connected to company sources. They can be used in Slack, Microsoft Teams, Google Chat, a browser extension, Office add-ins, or through an API.

Workflows

Multi-step automations with scheduled and custom triggers, conditional logic, human-in-the-loop approval steps, retries and bulk runs.

Knowledge base

Stores company documents as pages and keeps them in step with sources such as Google Drive and SharePoint. Sync is every 24 hours on Starter and instant on Business.

Meeting recorder

Captures and transcribes meetings so the transcript can feed agents and trigger workflows. Starter gets limited hours.

Model choice

The pricing page lists OpenAI models, Claude models and Google Gemini, with a limited choice on Starter.

Where it runs

Web

Browser extension

What it works with

Google Drive

SharePoint

Slack

Microsoft Teams

Salesforce

HubSpot

Notion

Zendesk

Cassidy AI is made by Cassidy.

PART 04 · STANDING

Where it stands

Its grades against its category, and whether to keep it or make your own

30/178

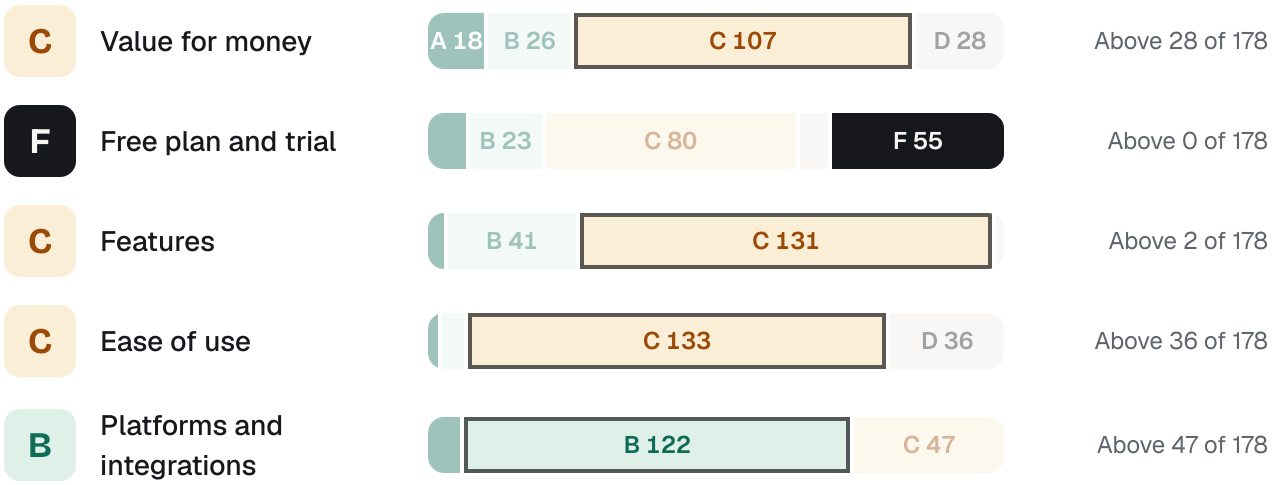
Other AI agents it is graded above

Cassidy AI's GPA of 1.8 is higher than 30 of the 178 other AI agents we grade, and level with 33.

It stands best on platforms and integrations (B, above 47 of 178) and worst on free plan and trial (F, above 0).

Each grade against the category

Every bar is all 179 AI agents we grade, cut by the letter each got. Cassidy AI's own letter is outlined.



Keep it, or make your own?

Whether this is something you could build for yourself with an AI app builder, and what you would give up.

Keep it

To replace Cassidy AI you would be making an AI agent, with the models and the safeguards behind it. That is not a weekend's work, with an AI app builder or without one.

That makes this kind of software worth paying for, not this one in particular: 115 of the 178 other AI agents grade higher.

What you could not

- An AI agent, with the models and the safeguards behind it.
- Connections to other products, each kept working as those products change.
- A builder that other people can use without writing code.
- A bot that joins your calls and turns the talk into notes.

What this rests on. Cassidy AI's listing: what it does, where it runs, what it plugs into and what it costs. It is a judgement about the kind of software this is. We have not built a replacement for it, and making your own means looking after it too. How we decide, and every tool's verdict.

The alternatives

The tools it is most often weighed against, side by side



Dust, Relevance AI, Lindy, Gumloop and Vellum

The 5 tools Cassidy AI is most often weighed against, with where each one differs from it.

2.2 GPA

Dust

Free trial · from $24/mo

Platform for building AI agents on your company's knowledge.

- Cassidy AI also covers meeting notes and no-code.
- Dust also covers AI search.

Cassidy AI and Dust compared in full

2.0 GPA

Relevance AI

From $19/mo

Low-code platform for building AI agents and multi-agent teams.

- Only Relevance AI lists iOS and Android apps.
- Cassidy AI also covers meeting notes.
- Relevance AI also covers chat assistant.

Cassidy AI and Relevance AI compared in full



2.4 GPA

Lindy

Free trial · from $29.99/mo

AI teammate for Slack that works across your team's tools.

- Cassidy AI also covers no-code.
- Lindy also covers chat assistant and inbox filtering.

Cassidy AI and Lindy compared in full



2.0 GPA

Gumloop

Free trial · from $37/mo

AI agent builder for teams, with unlimited seats on shared credits.

- Only Cassidy AI lists a browser extension.
- Cassidy AI also covers meeting notes.

Cassidy AI and Gumloop compared in full



2.6 GPA

Vellum

Free plan · from $30/mo

Personal AI assistant with long-term memory that acts across apps.

- Vellum has a free plan. Cassidy AI does not.
- Only Vellum lists macOS, Windows, iOS and Android apps.
- Vellum is open source and self-hostable, according to its own site.

Cassidy AI and Vellum compared in full

Quick answers

The questions people ask about it, each answered in a line or two

10

Questions, each answered in a line or two

The short version of everything above, for when you only need the answer. Each one is told in full in its part of the guide.

Is Cassidy AI free?

No. Cassidy AI is a paid product.

What platforms does Cassidy AI work on?

Cassidy AI is available on Web. It also has a browser extension.

Does Cassidy AI have an Android app?

No Android app was listed when its pages were read on Nov 13, 2026. Cassidy AI is listed for Web.

Does Cassidy AI have an iPhone app?

No iPhone app was listed when its pages were read on Nov 13, 2026. Cassidy AI is listed for Web.

Is Cassidy AI open source?

Cassidy AI is not described as open source on its own site, as read on Nov 13, 2026.

What does Cassidy AI integrate with?

Cassidy AI's listing names Google Drive, SharePoint, Slack, Microsoft Teams, Salesforce, HubSpot, Notion and Zendesk.

Who makes Cassidy AI?

Cassidy AI is made by Cassidy.

What are the alternatives to Cassidy AI?

The closest alternatives to Cassidy AI in our directory are Dust, Relevance AI, Lindy, Gumloop and Vellum.

How does Cassidy AI compare with other AI agents?

Cassidy AI's GPA of 1.8 is higher than 30 of the 178 other AI agents we grade, and level with 33.

Could I make my own version of Cassidy AI?

To replace Cassidy AI you would be making an AI agent, with the models and the safeguards behind it.

Where this guide comes from

The prices, plans, platforms and features were read from Cassidy AI's own pages on Nov 13, 2026, and the grades were given on Nov 13, 2026. Graded from this listing, whose facts were read from Cassidy's own pages on 13 November 2026. Not based on using the product, and shorter than our full reviews.

Every tool we list gets five grades, A to F, each with its reason, and a GPA that averages them. How each is decided is at toolgpa.com/grades. This guide is ToolGPA's own work; it is not made, paid for or approved by Cassidy. Prices change, so check cassidyai.com before you buy.

cassidyai.com/pricing

cassidyai.com

About ToolGPA

Who made this guide, what else is on the site, and how to cite it

7,721

Tools graded, in 95 categories

ToolGPA grades software the way a school report grades a pupil: five subjects, a letter for each with the reason written beside it, and a GPA that averages them. Prices, plans and platforms are read from each maker's own pages and dated, so you always know how fresh a figure is.

Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Every tool on the site has a guide like this one, free to download and pass on. It all lives at toolgpa.com.

7,721	95	739	579
tools graded	categories	price changes on record	apps priced in 12 countries

What else is on toolgpa.com

Cassidy AI, kept up to date

Everything in this guide, with prices and grades as they are today

toolgpa.com/tools/cassidy-ai

How grades are given

The rules behind every letter and every GPA

toolgpa.com/grades

Value charts

What each tool costs against what it scores, for every category

toolgpa.com/charts

Compare

Any two tools side by side, plan by plan

toolgpa.com/compare

Price changes

Every price rise and cut on record, each with its source

toolgpa.com/price-changes

Prices by country

What apps cost on the App Store in 12 countries

toolgpa.com/prices-by-country

Pay less

Every public discount: yearly billing, students, nonprofits

toolgpa.com/save

Keep or make

Which tools are worth paying for, and which you could build yourself

toolgpa.com/keep-or-make

Scan for the live page

Prices and grades as they are today

Quoting this guide?

Please name ToolGPA and link to the live page, so readers can check the figures for themselves:

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ToolGPA, "Cassidy AI: The Insider's Guide",
checked Nov 13, 2026.
https://toolgpa.com/tools/cassidy-ai
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Know someone choosing between AI agents?

Send them this guide: toolgpa.com/tools/cassidy-ai/guide

ToolGPA elsewhere: youtube.com/@toolgpa

See our other guides

The best-graded AI agents after Cassidy AI, each with an Insider's Guide of its own.

AI Agents Insider's Guide

Every one of the 179 AI agents we grade, compared

Genspark Insider's Guide

AI workspace with an agent for research, slides, sheets and docs

3.2 GPA

Manus Insider's Guide

General AI agent for research, slides, websites and browser tasks

3.2 GPA

OpenClaw Insider's Guide

Open-source personal AI agent you run yourself and message in chat

3.2 GPA

ToolGPA

Choosing software? Every tool graded, every price dated.

Compare tools at toolgpa.com ›

Everything in this guide is ToolGPA's own summary of what Cassidy AI's pages, its app-store listings and public reviews said on the dates shown. Grades are our judgement under the rules at toolgpa.com/grades. Every grade, review and ranking on ToolGPA is our own judgement. No company can pay for a grade or change one. Cassidy AI is a trademark of its owner, and this guide is not made, paid for or approved by Cassidy. Prices and plans change: check cassidyai.com before you buy.