

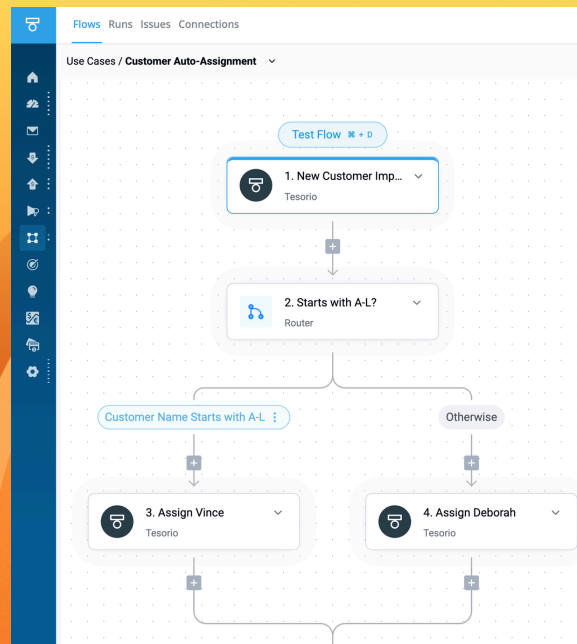
Workflows

NO-CODE AUTOMATION THAT PUTS FINANCE TEAMS IN CONTROL

Tesorio Workflows is an automation engine built directly into the Tesorio platform. It allows users to create workflows that automatically trigger actions based on defined criteria or events.

Whether you're assigning invoices, tagging missing POs, sending alerts, or updating customer records, Workflows makes it effortless.

[TAKE THE TOUR!](#)



Think of it as Zapier, but for Financial Operations

Most finance tools are rigid or IT-dependent. Workflows is a no-code solution that puts automation fully in your hands—easy to build, easy to scale.

Three Ways to Get Started:

Pre-Built Workflows

Leverage ready-made automations that require minimal setup, just plug and play.

Ready-to-Go Templates

Use flexible templates to tailor workflows to your specific finance operations.

Build Your Own Workflows

Design fully custom workflows that match your unique processes, end to end.



INTERCOM

"Tesorio Workflows is incredibly intuitive—far more user-friendly than other automation tools. It saves us hours of manual effort every week."

Russel McBain | Senior Collections Analyst

The Workflow Gallery

A community-powered library of pre-built workflows and template, some built and shared by finance teams at companies like Pendo and Intercom.

Built to save time. Shared to help you move faster.

How It Works

Triggers

Define the event that kicks off automation

Actions

Automatically execute tasks

Logic-Based Routing

Apply conditions to customize workflows for different scenarios.

Why Use Workflows?

Save Time Automate repetitive tasks like assigning tags and updating records.

Move Faster Trigger real-time alerts and updates—no delays, no bottlenecks.

Increase Accuracy Reduce manual errors by standardizing processes across your team.



"The flexibility of Workflows is a game-changer. We can configure automation exactly how we manage collections—saving us hours per week."

Melissa Zmuda | Senior Credit & Collections Manager

Take control of your finance operations—automate without limits. See Tesorio Workflows in action today.

LET'S CHAT →
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LEARN MORE →
tesorio.com