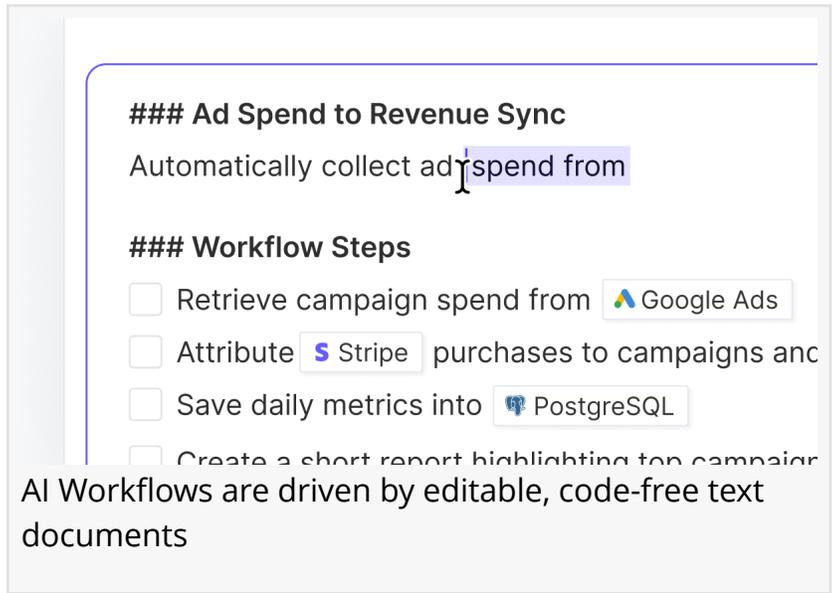# Sourcetable Launches AI Workflows for Business Automation on the Agentic Web

New AI Workflows turn spreadsheets into a control center for the Agentic Web, enabling organizations to automate research, analytics, and business operations.

SAN FRANCISCO, CA, UNITED STATES, March 10, 2026 /EINPresswire.com/ -- Sourcetable today announced AI Workflows (https://sourcetable.com/workflows), a new feature that allows users to turn any AI chat session into a reusable automation capable of coordinating data, applications, databases, and AI agents across an organization.

AI Workflows are driven by editable, code-free text documents

Workflows transform successful AI conversations into editable instruction sets that tell Sourcetable's AI and agents how to complete tasks automatically. With one click, users can convert a chat into a reusable process for research, data cleaning, dashboard generation, reporting, and operational workflows.

> AI chats are powerful, but they're ephemeral. Workflows turn great AI conversations into permanent capabilities organizations can run again and again."
>
> *Eoin McMillan, CEO of Sourcetable*

The release comes amid growing interest in autonomous AI agents that can operate software and coordinate workflows across applications. Organizations are increasingly exploring ways to connect AI systems with business software, data sources, and operational tools.

Sourcetable Workflows allow AI agents to reason across multiple applications, databases, APIs, and datasets simultaneously (see: https://sourcetable.com/connectors). This enables workflows to coordinate tasks across systems and data sources commonly used by modern organizations.

Workflows operate on top of Sourcetable's AI Superagents (

https://sourcetable.com/superagents),
which coordinate specialized agents
capable of planning and executing
multi-step tasks across tools and data
sources. The result is a new model for
automation that brings the emerging
Agentic Web directly into the
spreadsheet environment where many
teams already work.

Sourcetable Workflows allow teams to
automate common spreadsheet and
business intelligence tasks while
coordinating multiple external
applications.

Examples include:

Revenue and Sales Pipeline
Monitoring;
A workflow monitors new deals in
systems such as Salesforce or
HubSpot, enriches the data with
firmographic information from
external APIs, updates a spreadsheet-
based revenue model, and generates a weekly executive summary explaining pipeline trends
and forecast changes.

AI Workflow creation flow

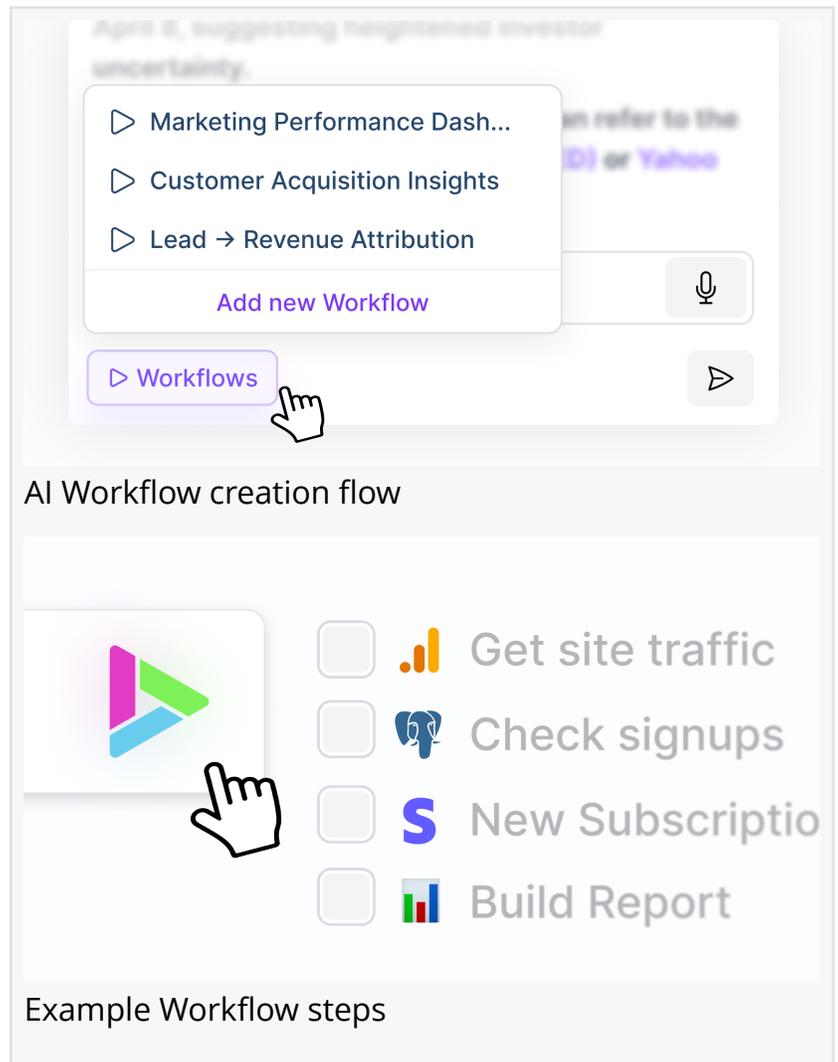Example Workflow steps

Automated Marketing Reporting:
Marketing teams can connect advertising platforms such as Google Ads and Meta Ads along with
web analytics data into a spreadsheet, automatically normalize campaign data, generate
performance dashboards, and create written campaign summaries highlighting key trends.

Customer Support Intelligence:
A workflow can analyze incoming support tickets from platforms such as Zendesk or Intercom,
categorize common issues using AI, track patterns in a spreadsheet dashboard, and generate a
weekly report identifying emerging product issues.

Research and Competitive Intelligence:
Teams can create workflows that collect information from multiple public sources, summarize
developments across an industry, track changes in pricing or positioning, and maintain a
continuously updated intelligence spreadsheet.

Finance and Operational Reporting:
Finance teams can connect accounting systems, operational databases, and payment platforms to automatically reconcile revenue data, detect anomalies, and generate monthly financial summaries or forecasting reports.

Lead Capture and CRM Updates:
A workflow can capture leads from website forms, enrich them using external data providers, score them using AI analysis, and route high-value leads into CRM systems and sales dashboards.

Product Analytics and Experiment Tracking:
Product teams can combine analytics data with experimentation results to track feature adoption, summarize A/B tests, and generate reports explaining changes in user behavior.

By combining spreadsheets, AI reasoning, and integrations with external systems, these workflows enable organizations to automate complex knowledge work that traditionally required manual analysis.

Enterprise Security for AI Workflows:
To support enterprise use, Sourcetable includes a secure credentialing system (patent-pending) with escrowed key management and fine-grained permission controls that limit what AI agents can access and which actions they can perform.

This security layer enables organizations to deploy agent-driven workflows across internal systems, databases, and third-party applications while maintaining control over credentials and data access.

Conceptually, Sourcetable Workflows build on ideas from spreadsheet macros and modern AI agent technologies, while remaining fully code-free and accessible to non-developers. Workflows are stored as editable text documents that teams can modify, reuse, and share across the organization.

Quote:
"AI chats are powerful, but they're ephemeral," said Eoin McMillan, Sourcetable's CEO. "Workflows turn great AI conversations into permanent capabilities your organization can run again and again."

AI Workflows are available today to Sourcetable users, and the company plans to extend workflows to third-party agents via a future MCP release.

Learn more at https://sourcetable.com

About Sourcetable:

Sourcetable is an AI-powered spreadsheet platform designed to help teams analyze data, automate workflows, and coordinate AI agents across business systems. By combining the familiar spreadsheet interface with advanced AI capabilities, Sourcetable enables organizations to transform data operations, automate knowledge work, and build intelligent workflows without writing code.

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