

15 Free Automation Tools

1) Zapier (Free Plan)

What it is: No-code glue that connects apps together.

Best for: Simple intake, logging, and handoffs.

Quick start: Trigger: Gmail label → Action: add row to Google Sheet.

Gotcha: 100 tasks/month goes fast—filter aggressively.

2) Make.com

What it is: Visual automation builder with branching logic.

Best for: More complex workflows than Zapier can handle.

Quick start: Webhook → route valid vs exception rows → log results.

Gotcha: Credits are the limit; noisy data burns them quickly.

3) n8n (Self-Hosted)

What it is: Low-code automation you control and host yourself.

Best for: Finance data that can't leave your environment.

Quick start: Schedule → pull data → transform → save to database.

Gotcha: Requires light technical setup (Docker helps).

4) Node-RED

What it is: Lightweight, open-source flow automation.

Best for: Simple API-to-sheet or alert pipelines.

Quick start: HTTP input → JavaScript transform → output node.

Gotcha: Minimal guardrails; you own the logic.

5) Google Sheets + Apps Script

What it is: Spreadsheet + JavaScript automation in the cloud.

Best for: Small automations without installing anything.

Quick start: Apps Script → fetch data → schedule daily trigger.

Gotcha: Script quotas exist; keep jobs small.

15 Free Automation Tools

6) Gmail Filters & Labels

What it is: Native email routing rules.

Best for: Invoice intake, approvals, audit trails.

Quick start: Filter by sender → label → auto-forward.

Gotcha: Filters stack—test carefully to avoid loops.

7) Power BI Desktop (Free)

What it is: Free modeling and visualization tool for Windows.

Best for: Prototyping finance dashboards and models.

Quick start: Load data → Power Query cleanup → build measures.

Gotcha: Sharing requires paid licenses later.

8) Looker Studio

What it is: Google's free, browser-based dashboard tool.

Best for: Shareable executive dashboards.

Quick start: Connect Google Sheets → build KPI board → share link.

Gotcha: Many third-party connectors cost money.

9) Metabase (Open Source)

What it is: Self-hosted BI with a friendly UI.

Best for: FP&A self-service dashboards and alerts.

Quick start: Docker run → connect database → schedule email reports.

Gotcha: Hosting and access control are on you.

10) Apache Superset

What it is: SQL-first, open-source analytics platform.

Best for: Complex finance reporting and multi-entity views.

Quick start: Docker quickstart → connect data → build waterfall.

Gotcha: More power = more setup complexity.

15 Free Automation Tools

11) DuckDB

What it is: Fast, local analytics engine for files.

Best for: Joining messy CSVs and large extracts instantly.

Quick start: Query CSV/Parquet files directly with SQL.

Gotcha: Not multi-user; designed for single-machine use.

12) OpenRefine

What it is: Point-and-click data cleaning tool.

Best for: Vendor masters, chart of accounts cleanup.

Quick start: Import CSV → cluster duplicates → export clean file.

Gotcha: Local tool only; no automation scheduling.

13) Airbyte (Open Source)

What it is: Open-source ELT tool with hundreds of connectors.

Best for: Centralizing SaaS finance data.

Quick start: Deploy → pick source → pick destination → sync.

Gotcha: Infrastructure cost is time, not money.

14) Tabula

What it is: Free PDF table extractor.

Best for: Bank statements and broker reports (text PDFs).

Quick start: Draw box around table → export CSV.

Gotcha: Doesn't work on scanned PDFs.

15) Camelot (Python)

What it is: Scriptable PDF table extraction library.

Best for: Repeatable monthly statement extraction.

Quick start: Read PDF → export tables to CSV.

Gotcha: Requires OCR first for scanned PDFs.