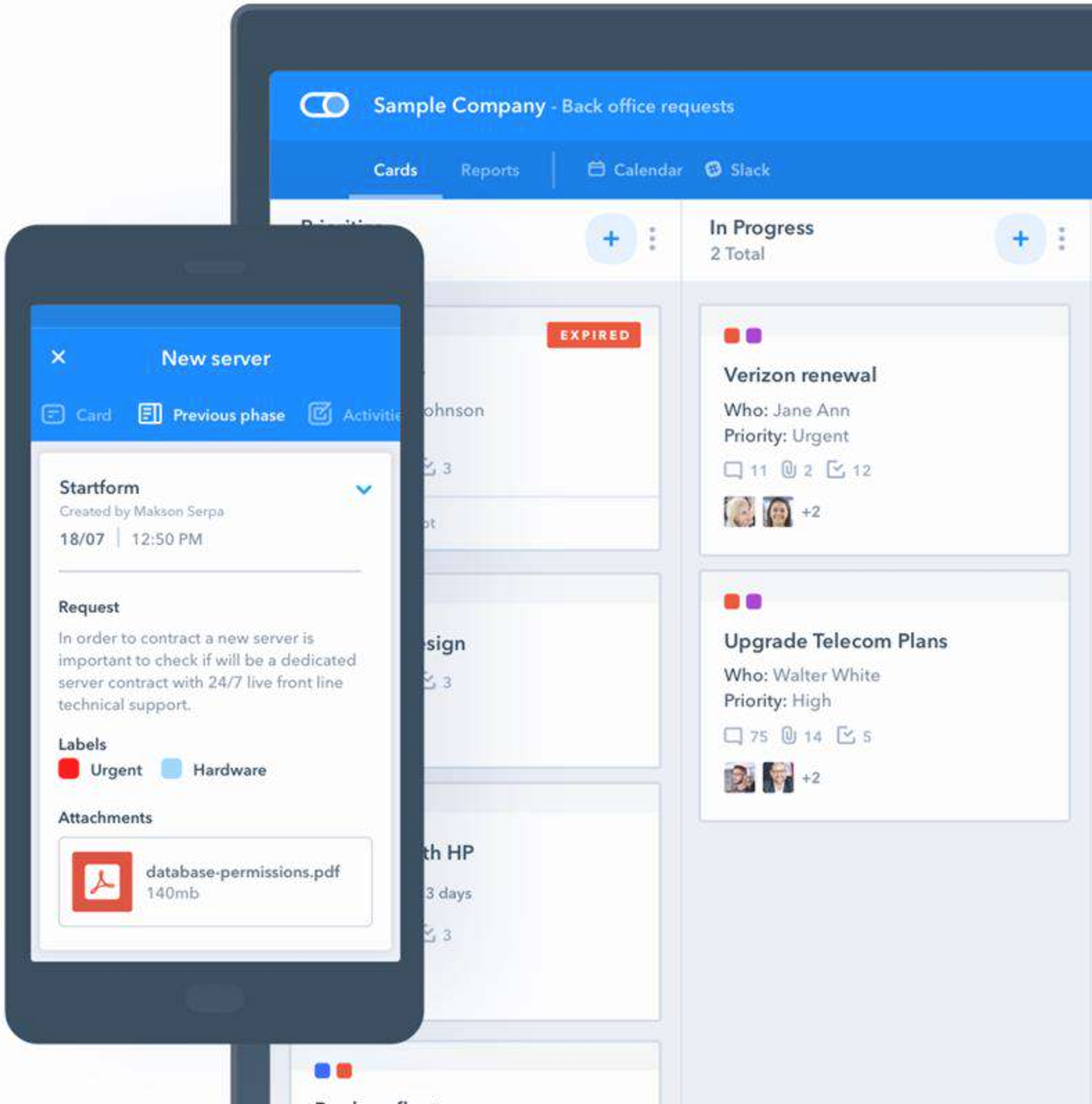
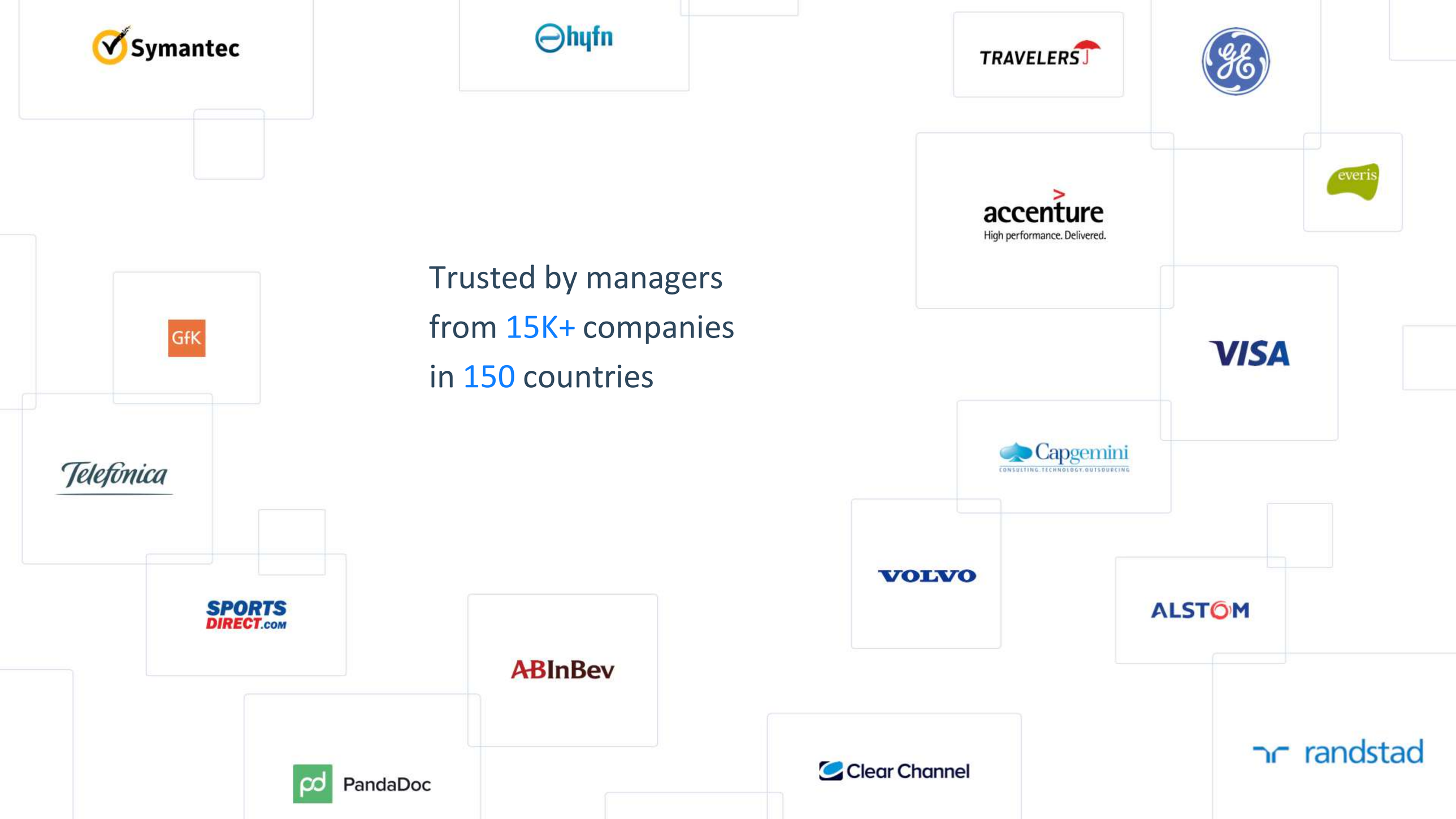
# The process excellence platform

Our customers are better positioned to respond quickly to changing operational dynamics while still ensuring standards of execution.

pipefy



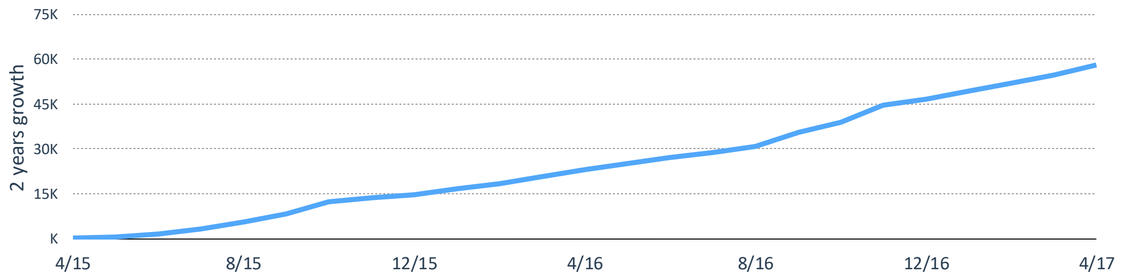



Trusted by managers
from 15K+ companies
in 150 countries

# 15-20% Growth
## Month over month

Pipefy's growth is in the top 2% of SaaS companies*

Pipefy is also backed by top-tier Silicon Valley venture capital.



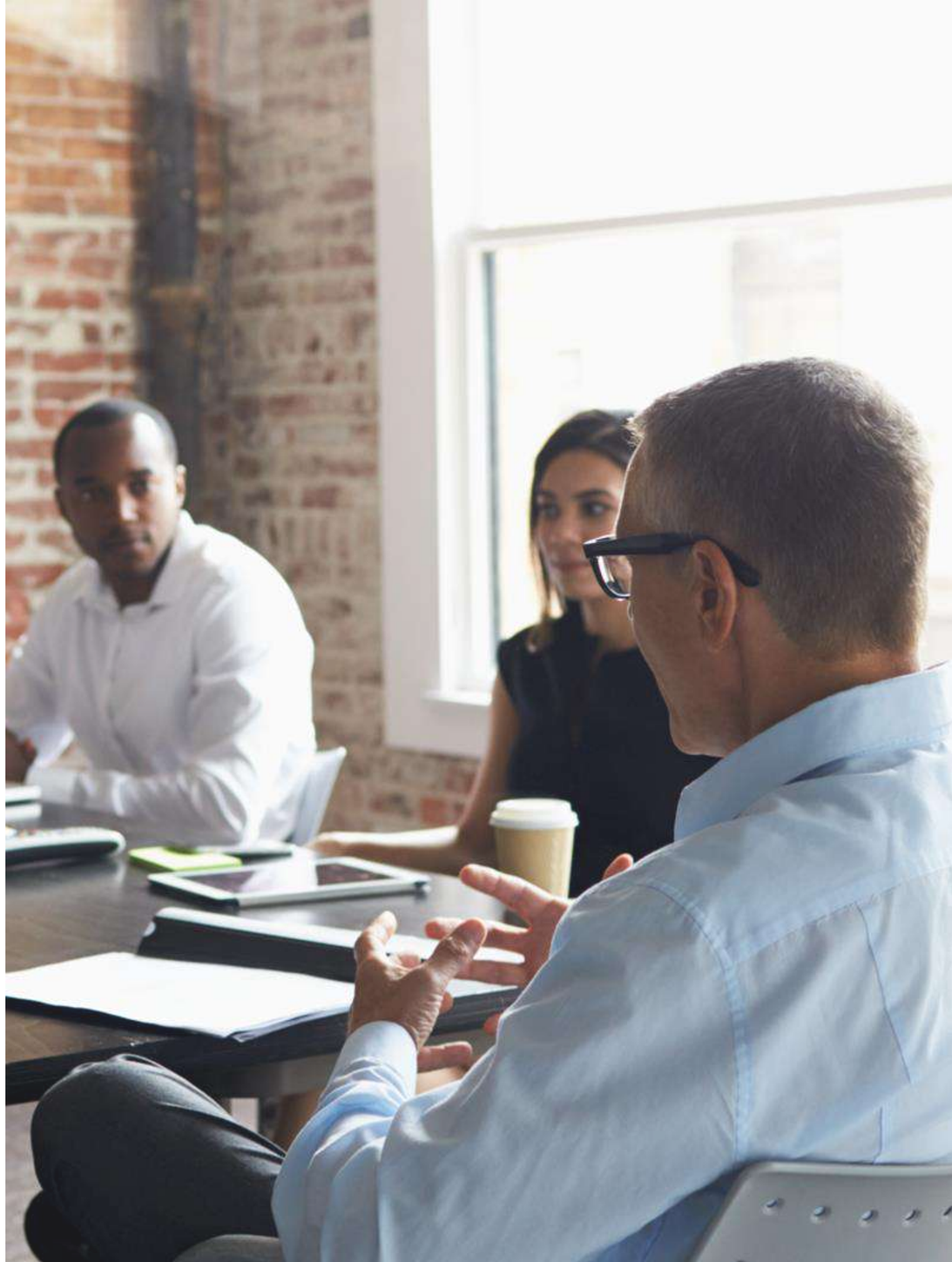

Pipefy investors:

FOUNDERS FUND

TRINITY VENTURES

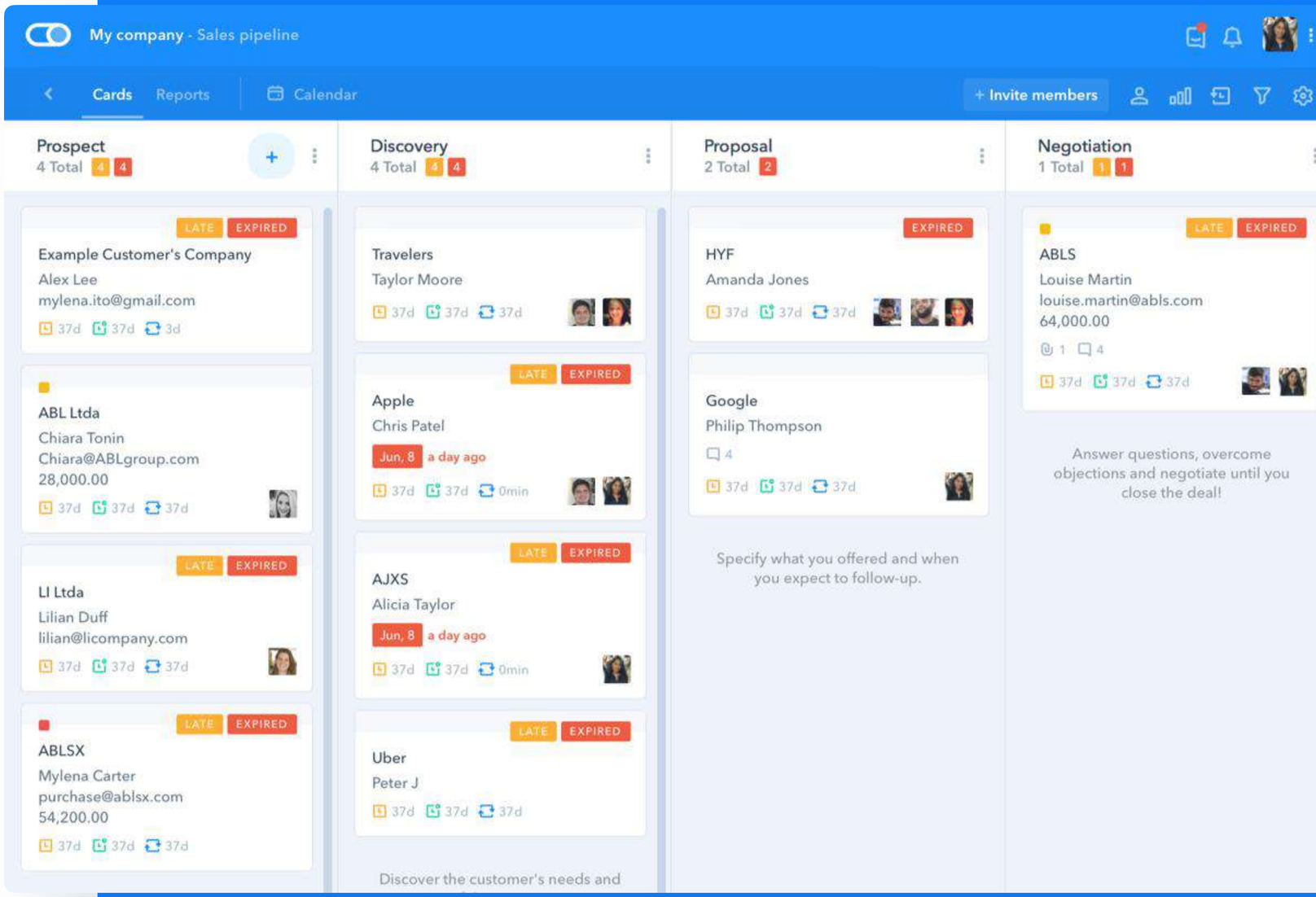
VALOR CAPITAL GROUP, LLC

Redpoint



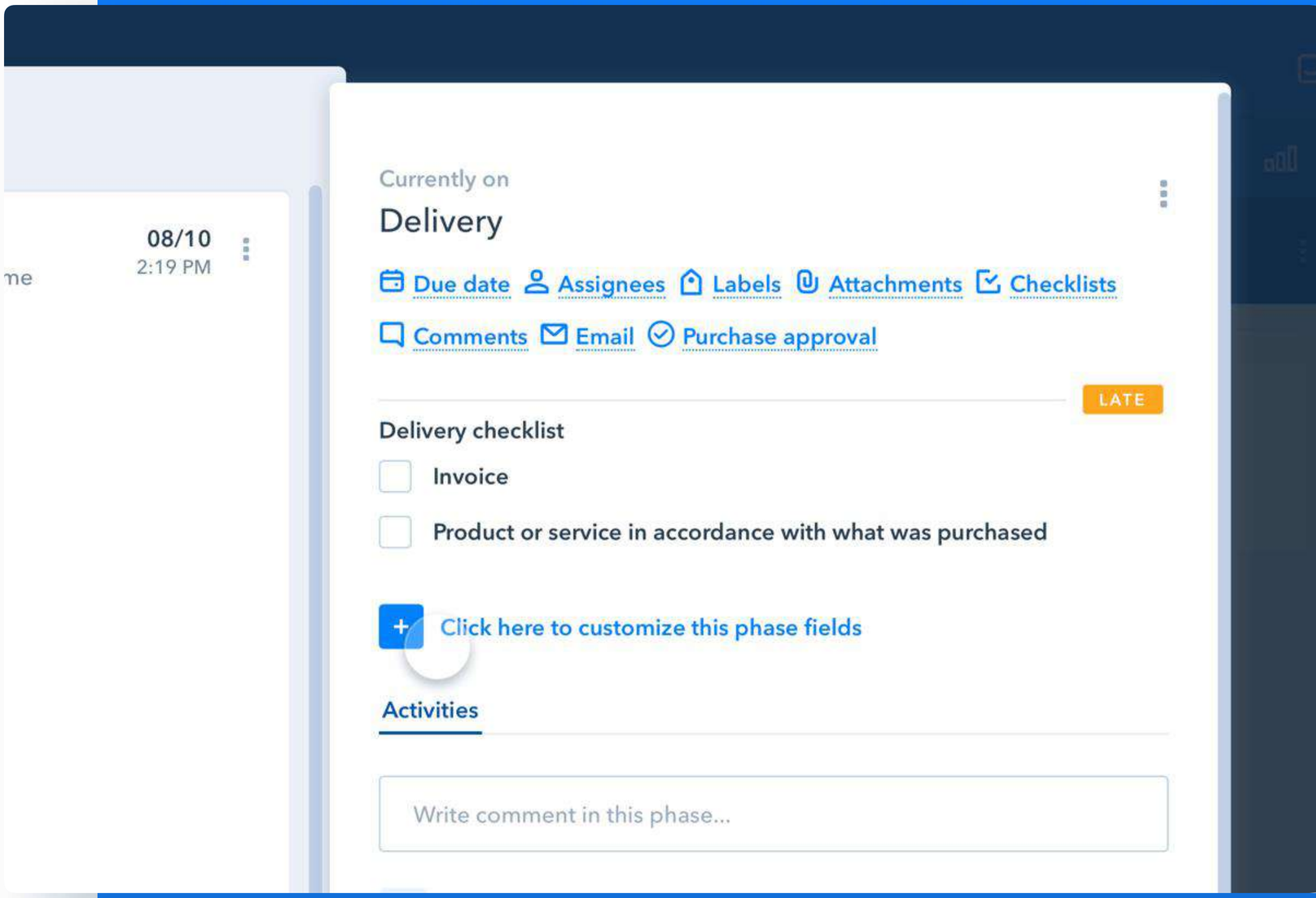
# Pipefy

Pipefy is an online platform which allows its managers to create and execute any type of process without technical knowledge nor IT support..



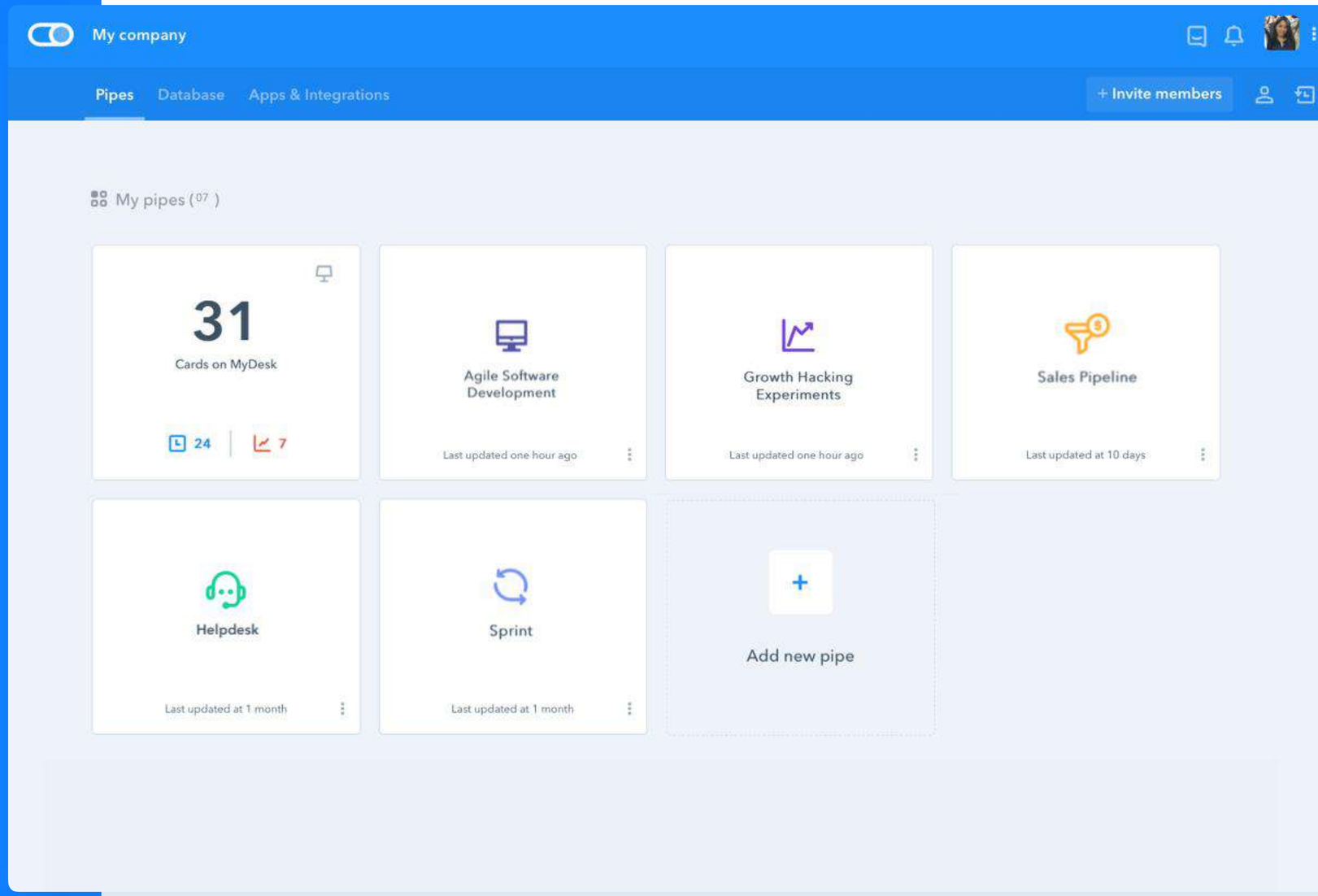
100%
## Customizable

Easily configure workflow processes and avoid spending months building and investing in infrastructure. Set your processes  workflow to match your company’s exact needs.



**This is your organization.**

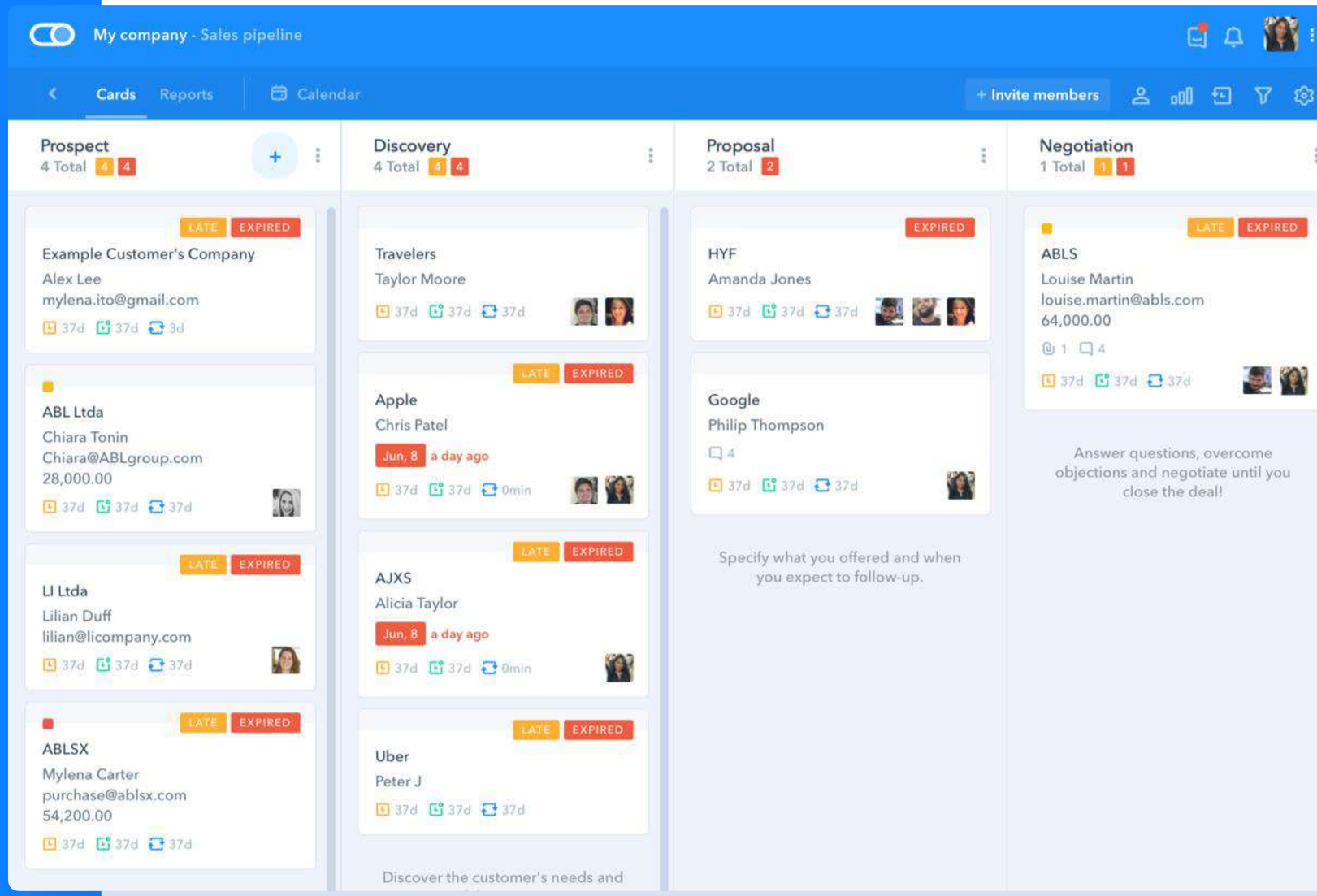
In it you have an overview
of all your team’s
processes.



## This is a pipe.

At Pipefy your processes are called pipes.

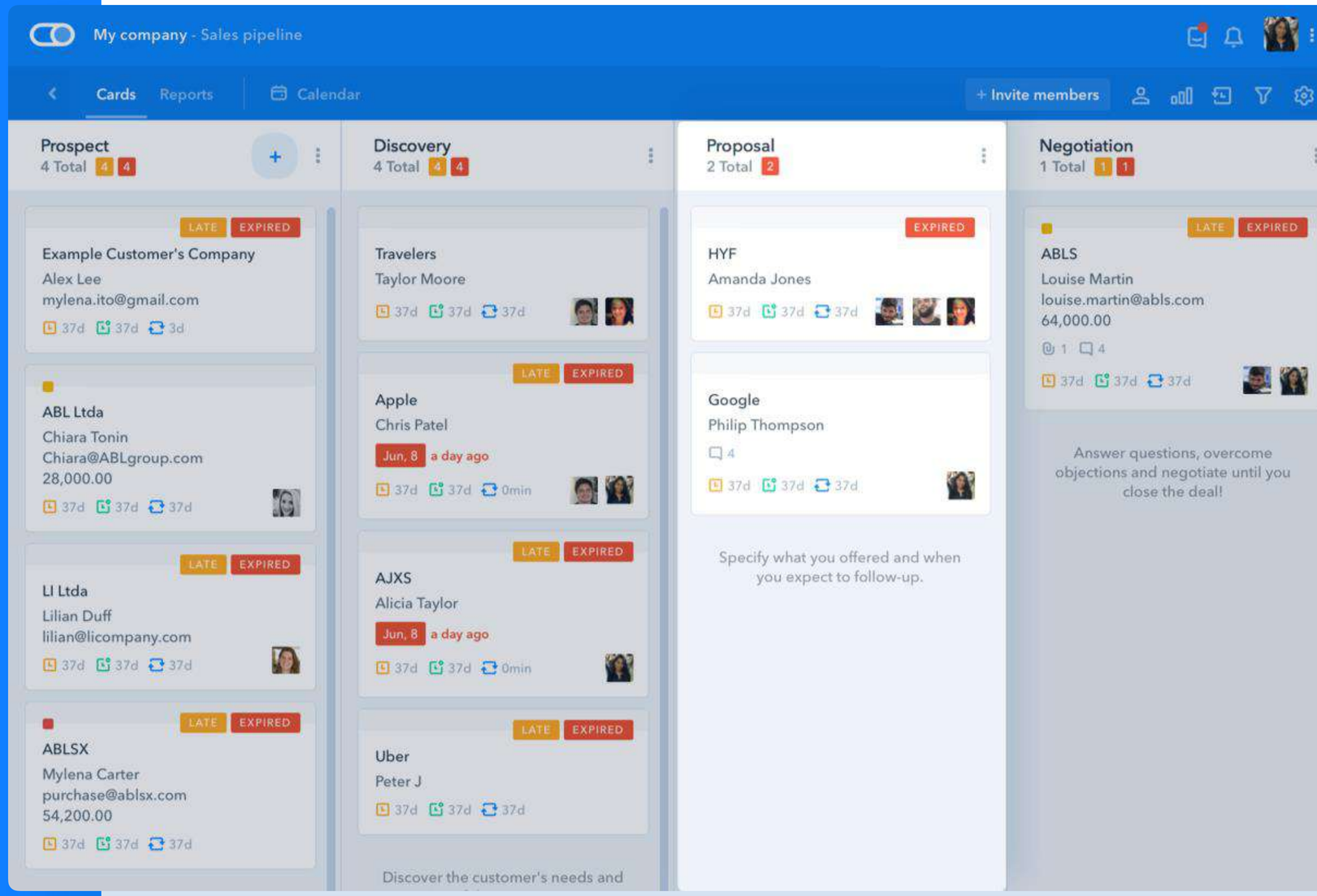
Each pipe is divided into phases.



## This is a phase.

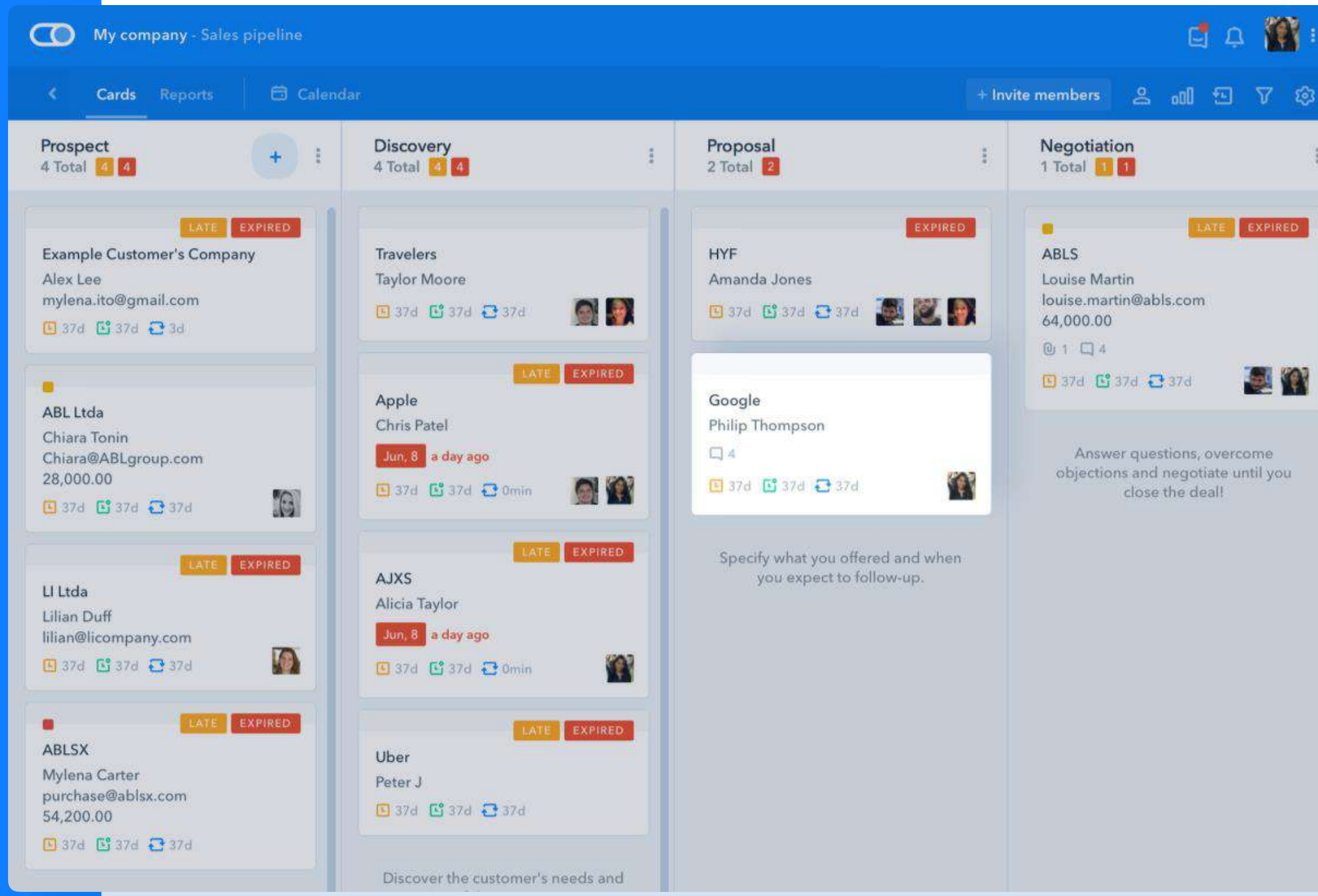
Each pipe is divided into phases.

Phases are the steps of the process of the execution.



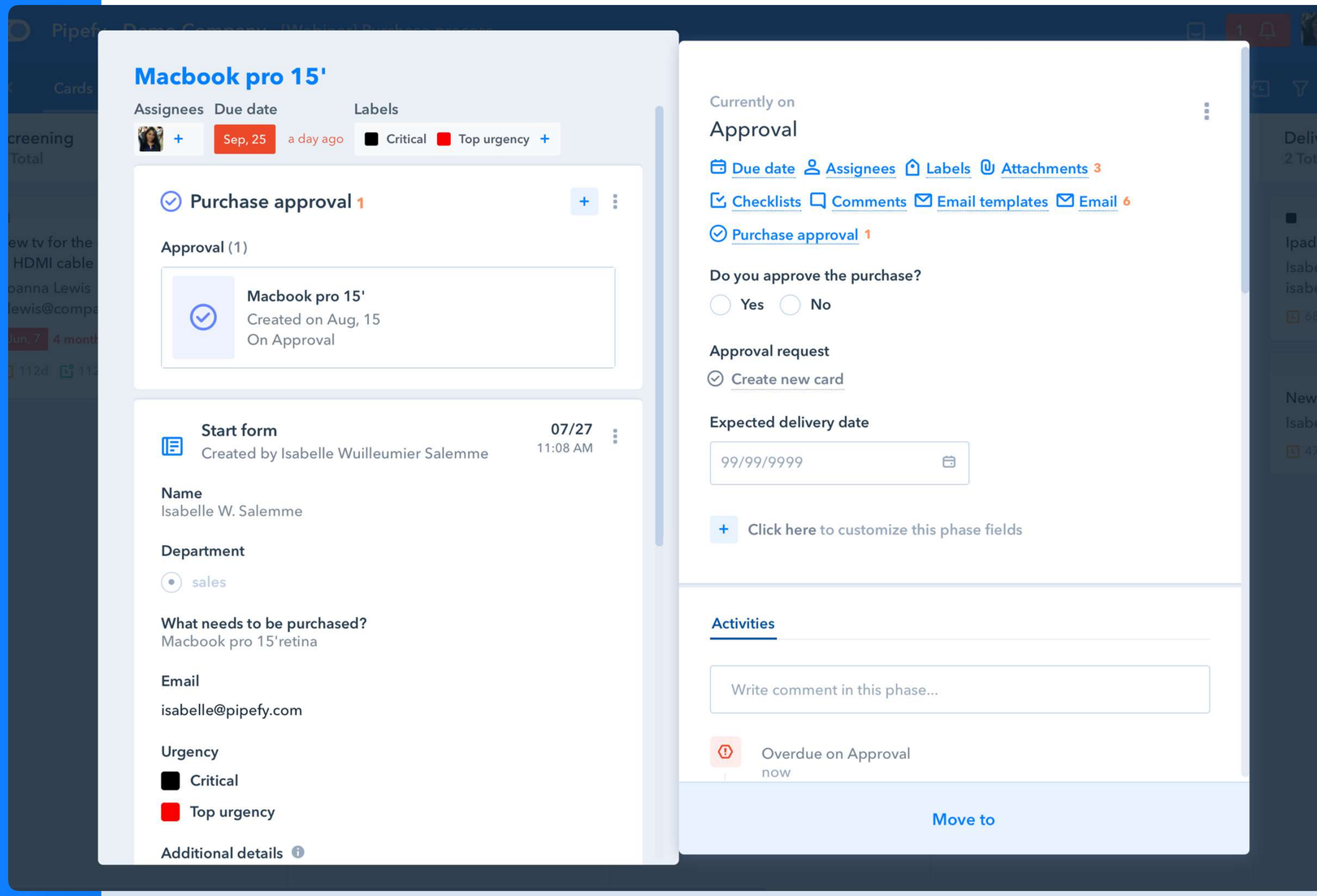
## This is a card.

Cards are visual representations of detailed info which you wish to include in your pipe

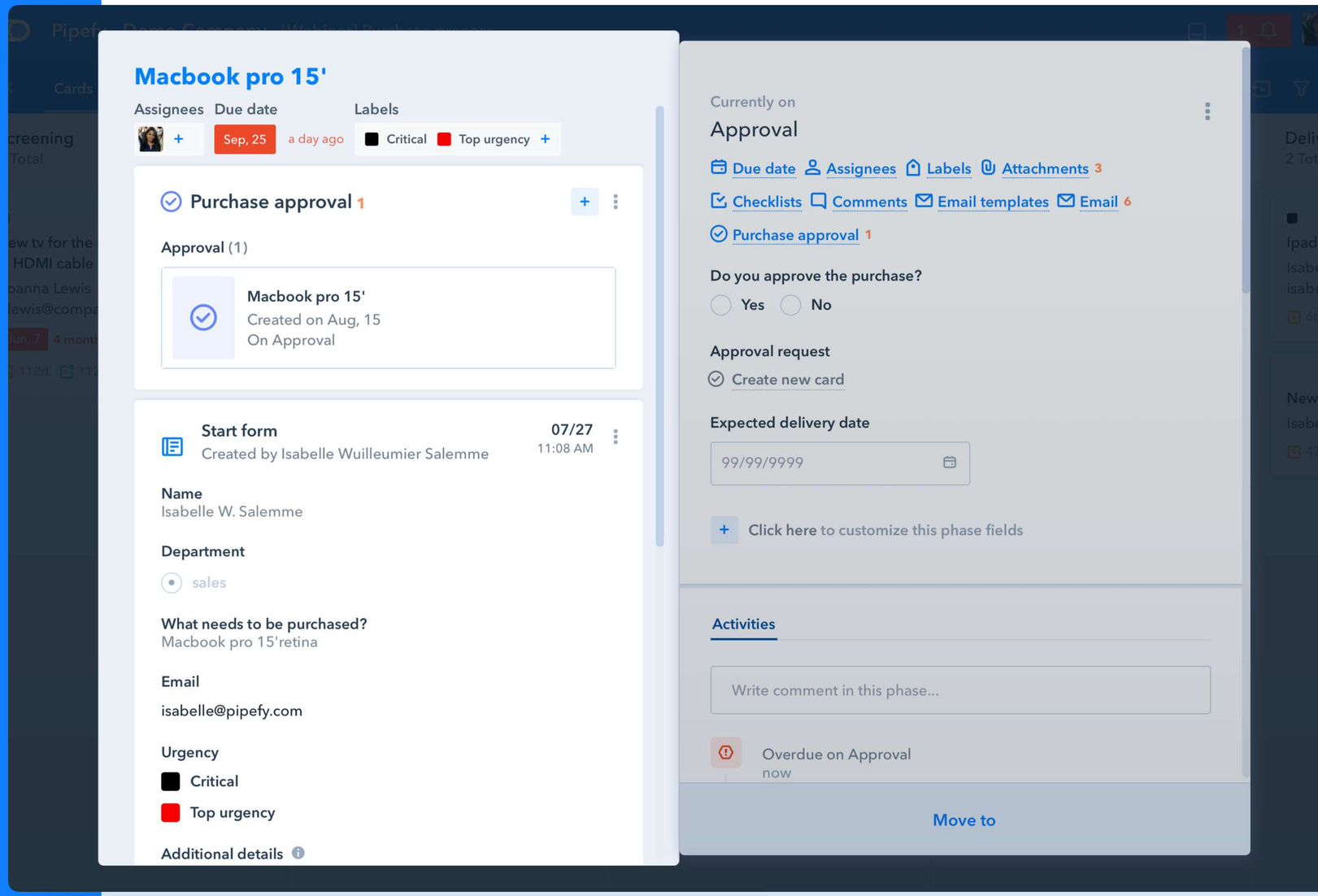


## This is an open card.

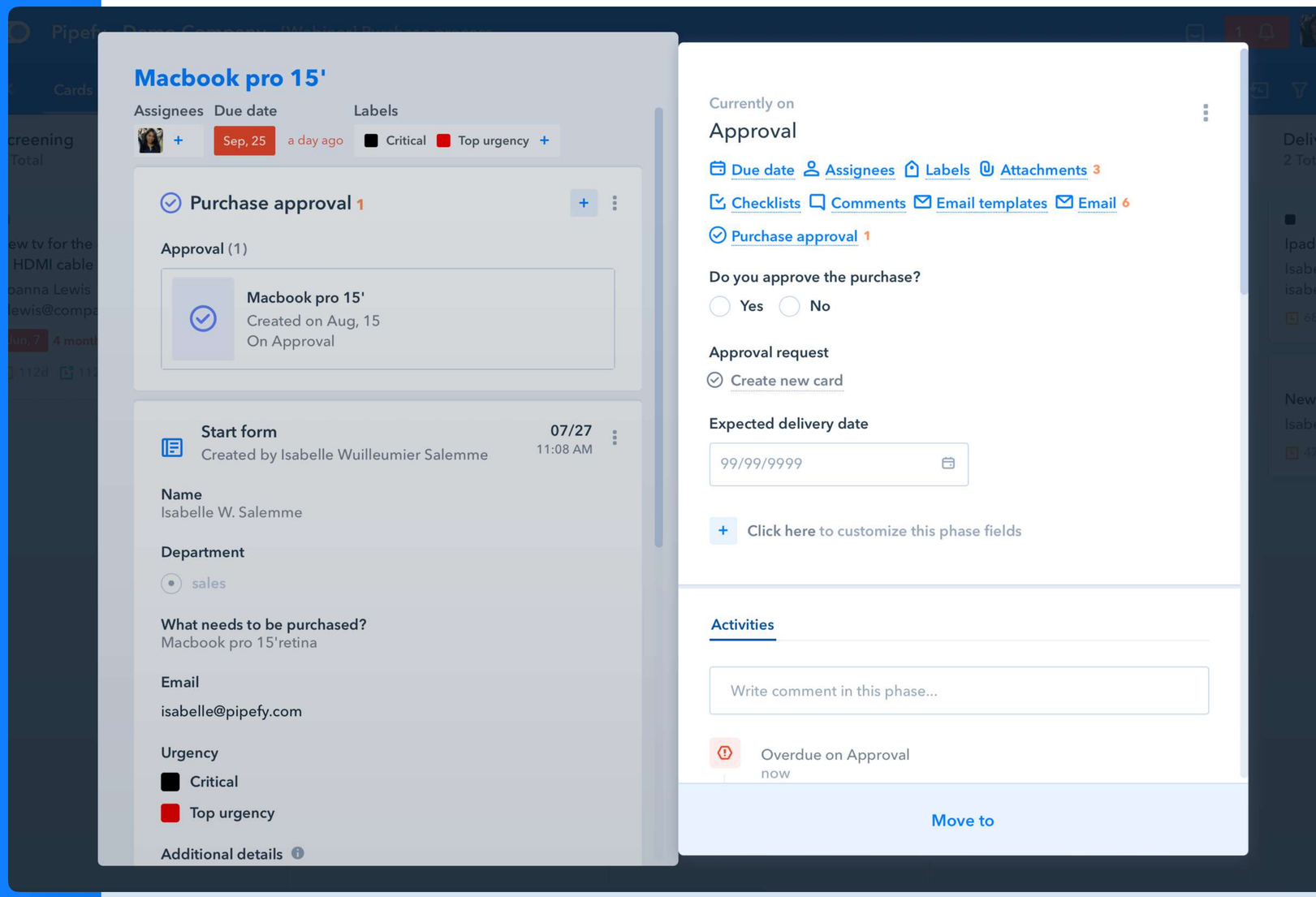
Your processes done your way: You can assure that your team members always follow the same execution steps creating customized fields in each phase.



On the left is the info inserted into previous phases of the process.



On the right are the steps to be followed to move the card into the next phase



# Have a business operations challenge you're looking to solve?

- Software development and deployment are bottlenecks;
- Small customizations take time and require third-party involvement;
- Activities do not have execution standards or even the standards do exist, however nobody follows them, compromising the quality in execution;
- Tasks are constantly overdue and keeping track of deadline dates is difficult;
- You can't identify where (or who) is your process' bottleneck;
- The information are not shared and end up and spread out throughout the organization.

# Pipefy for all business functions

## Operations and Procurement

- Product approval process
- Quality assurance
- Product life cycle
- Materials and services ordering
- Resource tracking and management

## Finance and Administration

- Contract management
- Vendor and contract approvals
- Invoice processing
- Expense/travel approvals
- Expense management

## Customer Service and Support

- Help desk
- Field service automation
- Customer satisfaction lifecycle
- Customer complaint management
- Customer communication

## Sales and Marketing

- Proposal and contract generations
- Quote to case
- Demand generations
- Customer activity and billing
- Account and pipeline reviews

## Information Technology

- Help desk
- Service provisioning
- Mobile enablement
- Internal process automation
- Extending existing systems

## Human Resources

- Employee recruitment
- Employee on boarding
- Leave requests
- Timesheet tracking
- Compliance and notifications

# How Pipefy delivers efficiency

### No-Code

Easily configure workflow processes and avoid spending months building and investing in infrastructure.

### Seamless Automations

Set-up event-based automation to improve efficiency and quality of outcomes.

### Easy SLA management

Control your SLAs: always know what's late or on-time, and better manage productivity.

### Centralized Internal & External Communications

Manage internal and external communications in a single platform, and easily integrate with other tools.

### Powerful Reports

Analyze process data and discover ways to improve your workflow productivity by generating reports regularly.

### Reduced operational risks

Reduce operational risks by centralizing all process workflows and information in Pipefy’s secure database.

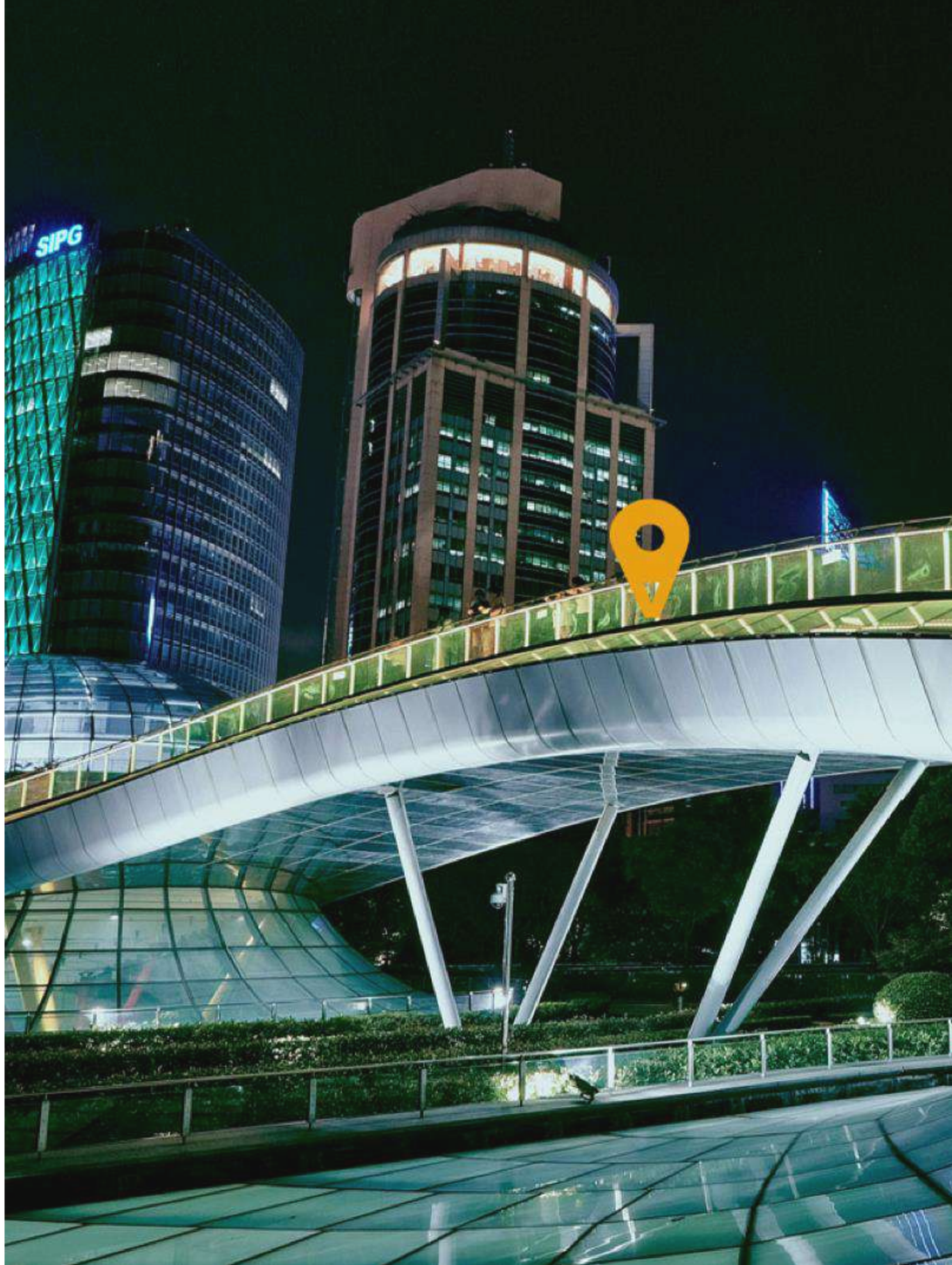
# Customer Case
## Telefonica

> “Pipefy has changed the way we manage our company’s main process [...] It’s a very simple platform on which to create and manage all types of processes and is extremely user friendly. Discovering Pipefy has been a game changer for our company’s efficiency!”

# Customer Case
## Accenture

> “Pipefy has revolutionized the way we see and build processes in Accenture. Its flexibility and ease of use has made us improve our productivity and delivery quality on several processes and projects we manage.”

view complete case



# Security

The Pipefy’s provider’s actual physical infrastructure is hosted and managed by Heroku within the Amazon Web Services (AWS).
We meet the market’s highest security and compliance standards.

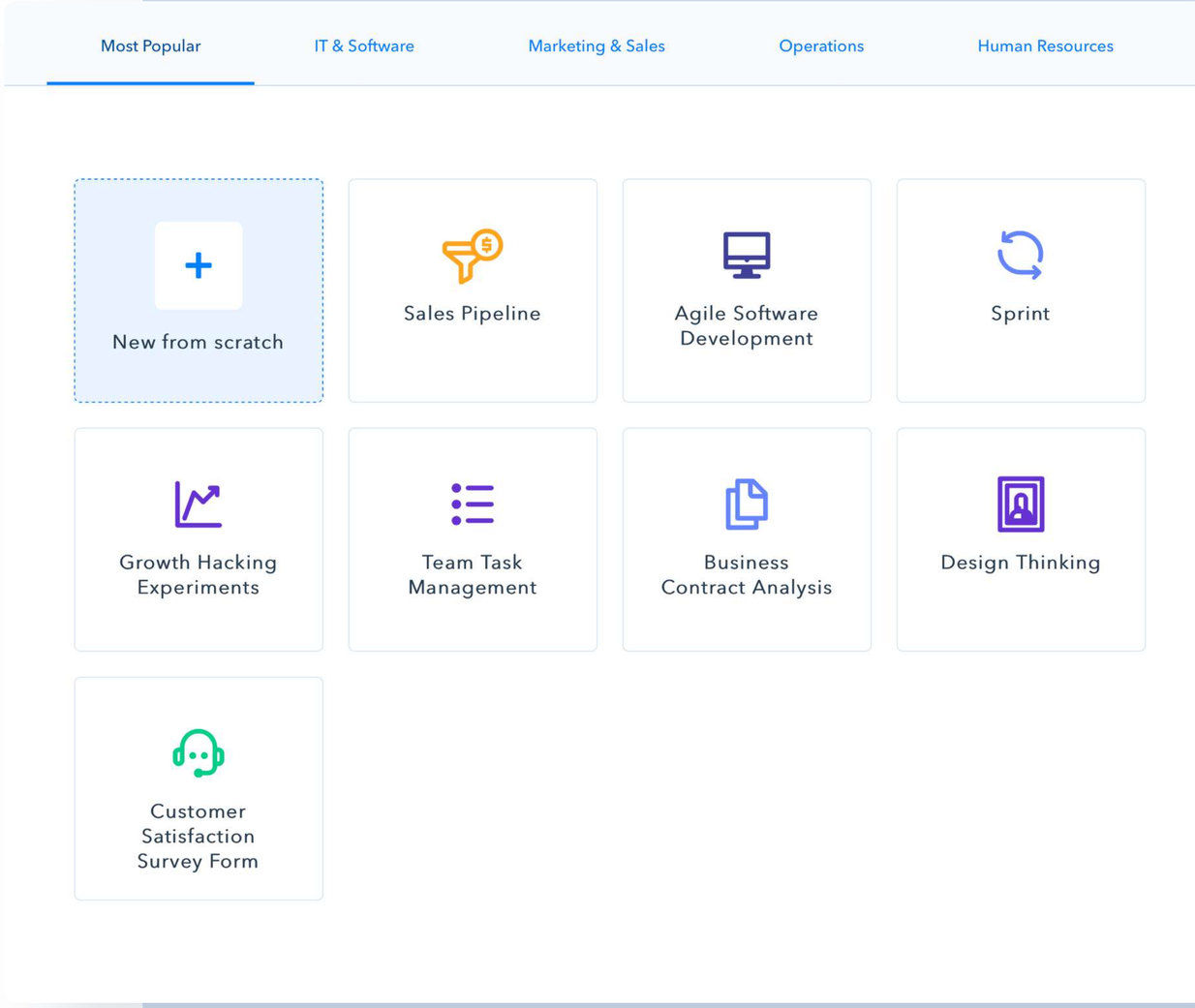
Security documentation

# Features

Pipefy offers many advanced features to power your processes and to further boost your team’s productivity:

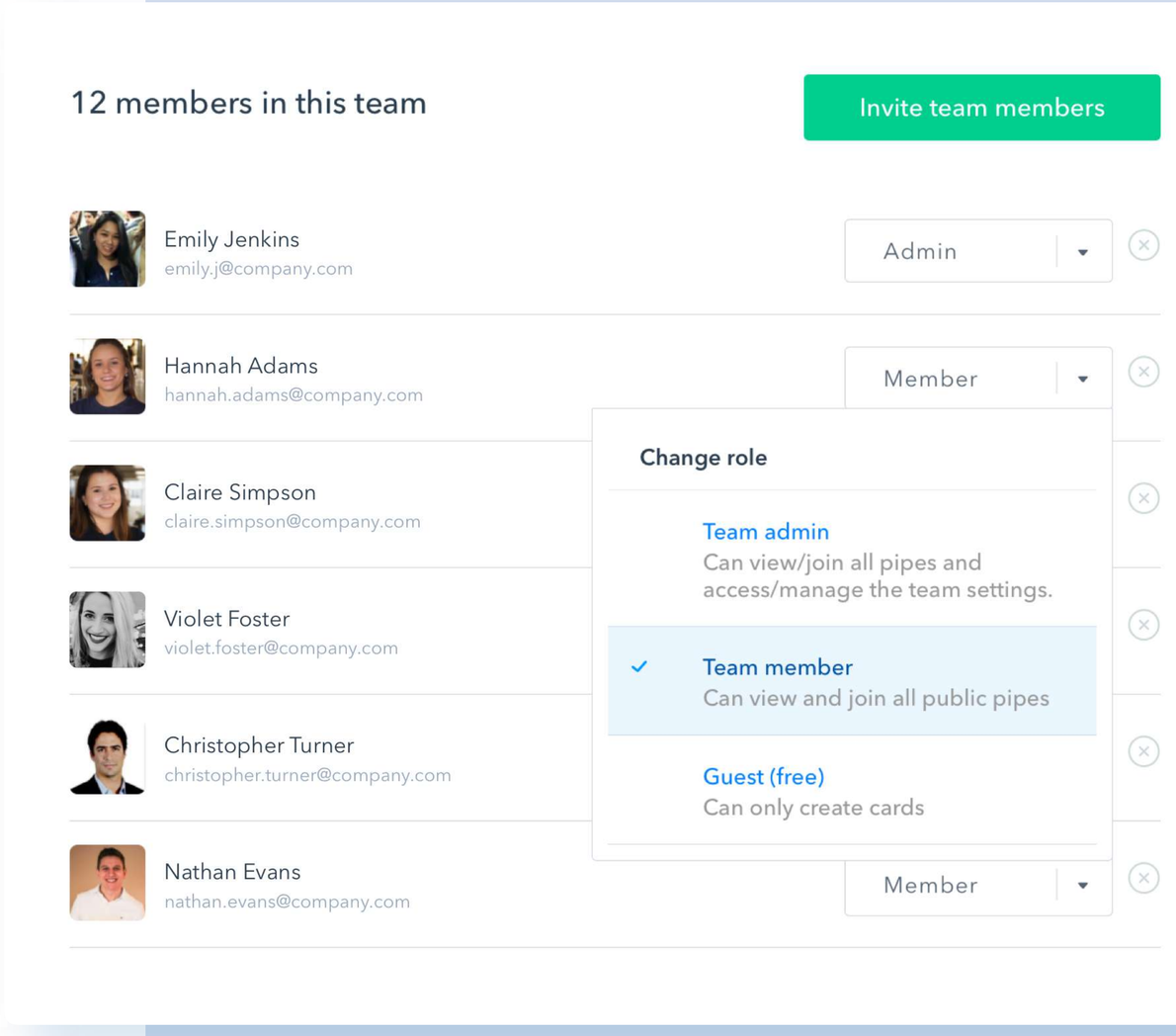
# Template Store

Pipefy offers a series of pre-developed process templates made by our team. You can choose one (or more) from the templates available and edit them according to your needs and create a new process from scratch



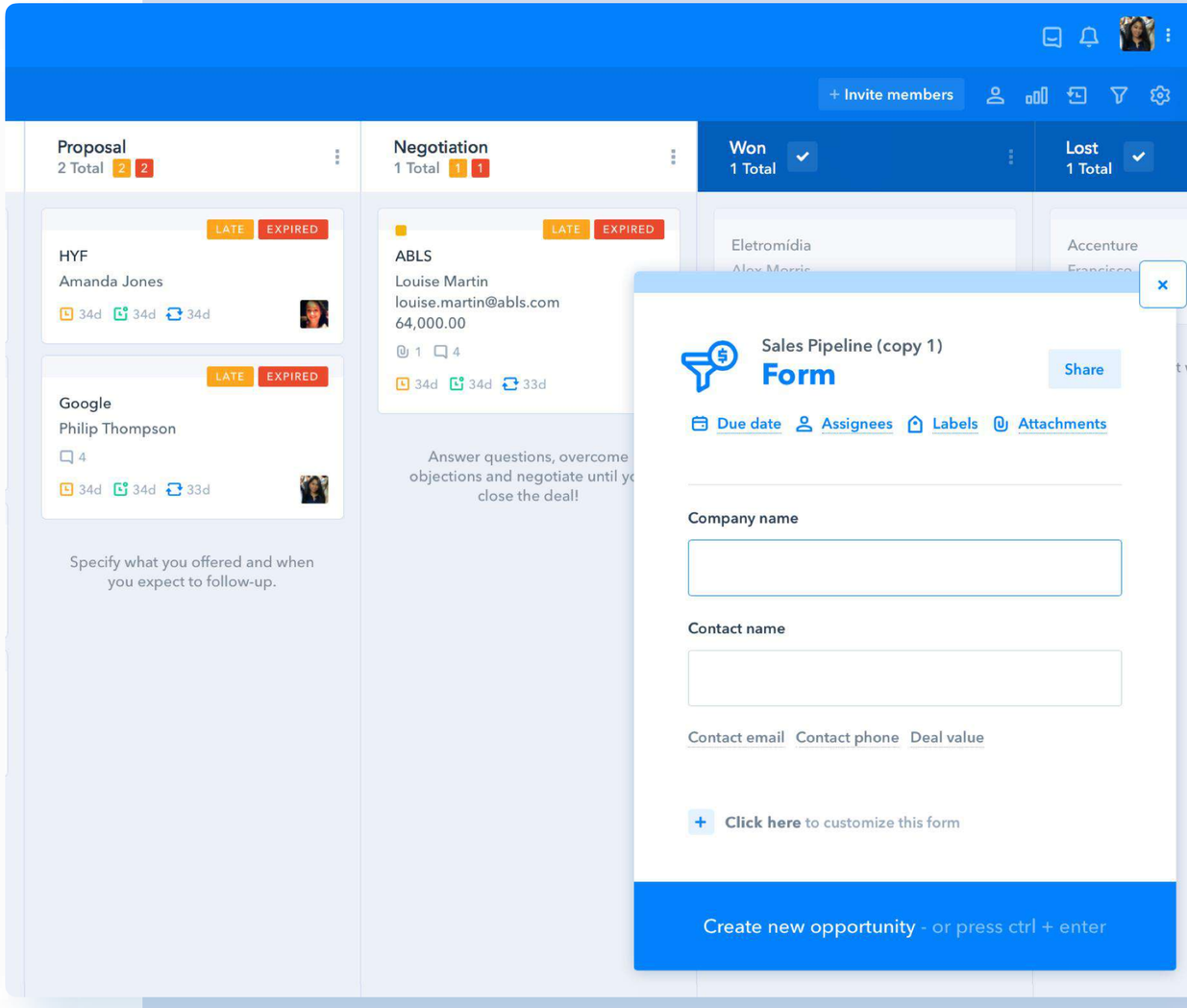
# Members and Permissions

Attribute permission levels to the team members and each pipe (administrator, member, guest or restricted view user).



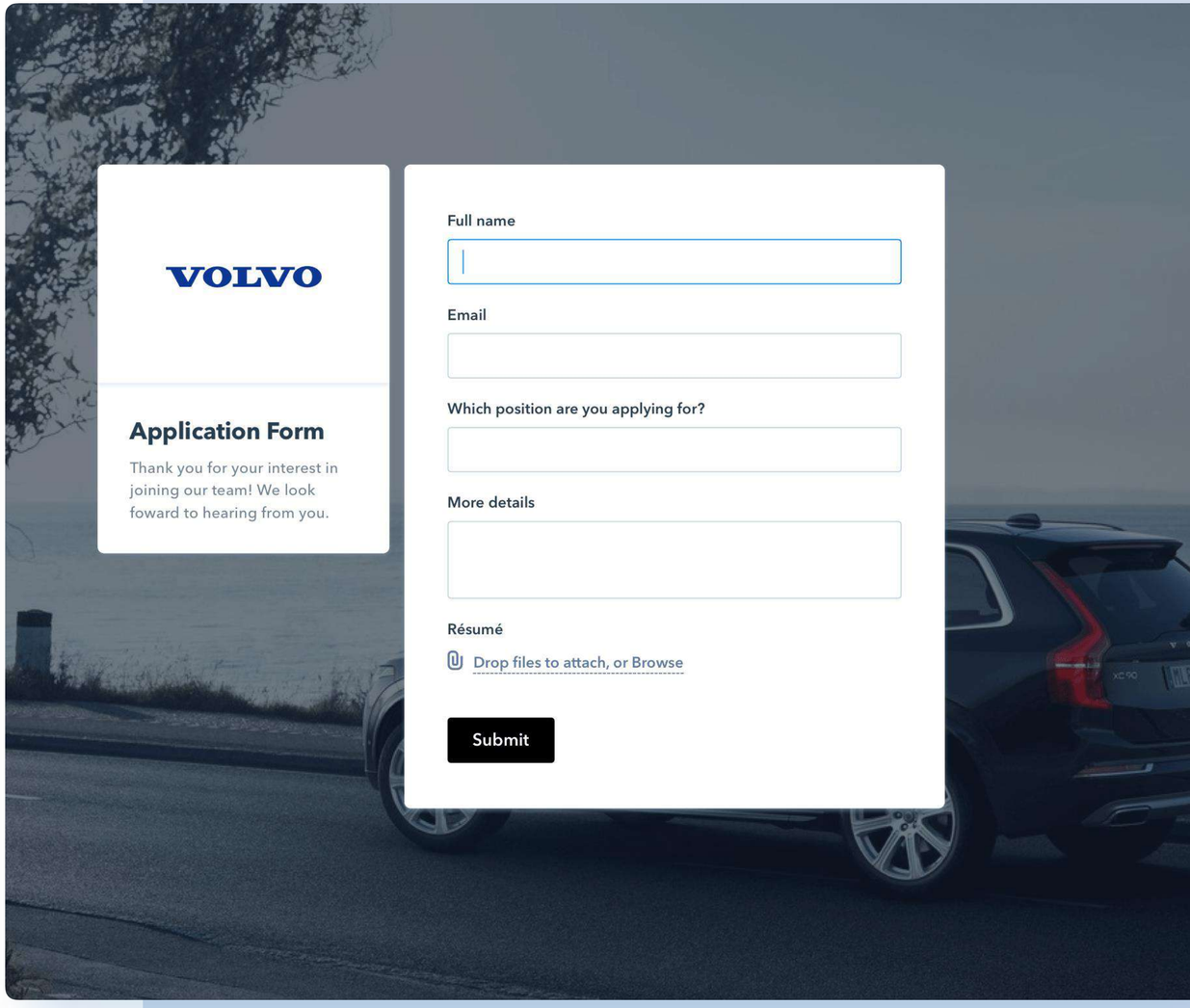
# Start Form

This form is used to create new demands (cards) within the process. It requires all the necessary info to ensure the process flow.



# Public Forms

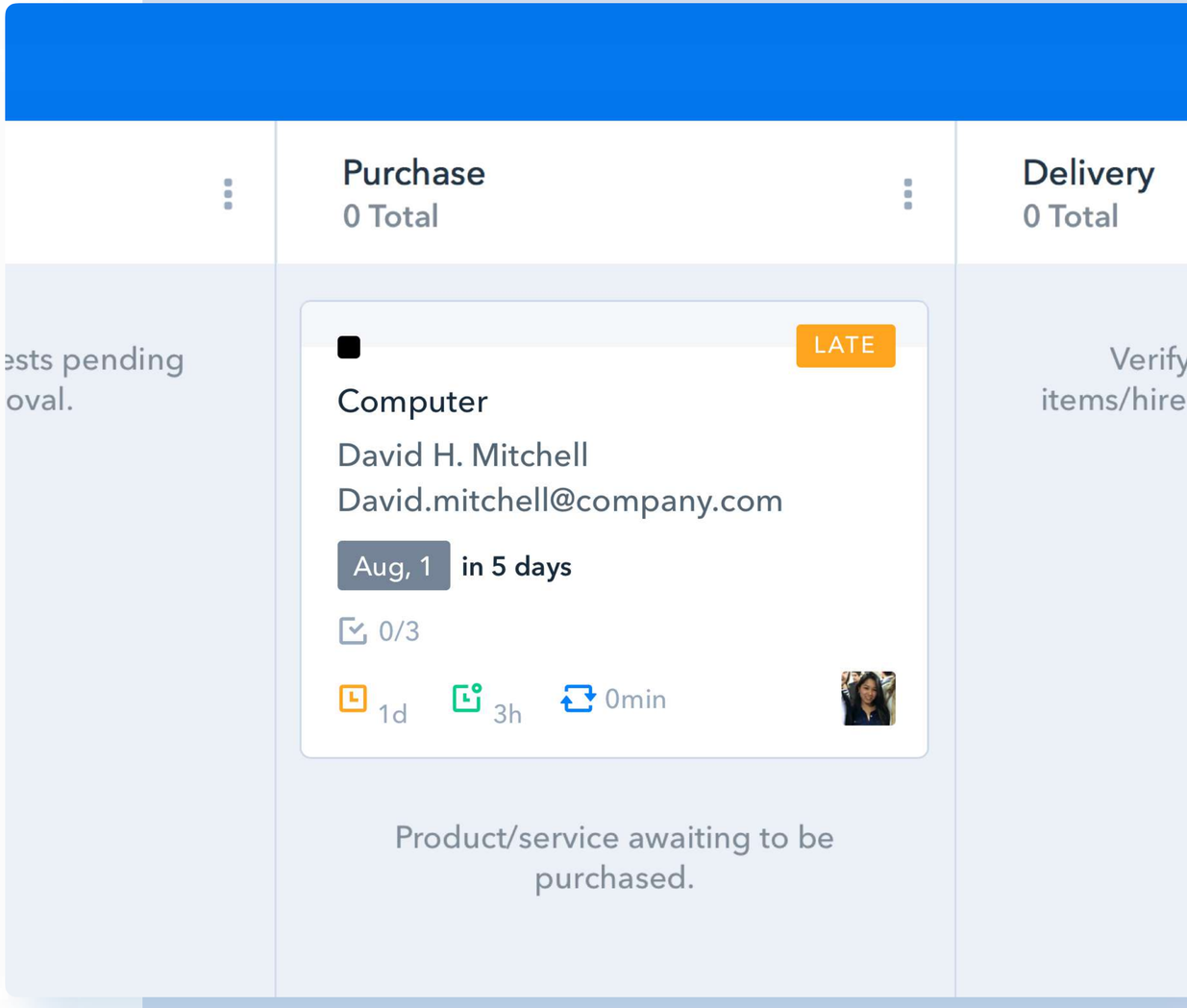
Public forms complement workflow processes in which a business operation needs information from a third party. Tailor your public forms to match your company’s design and brand.



# SLAs

Automated alerts to help you keep track of your processes standard level agreements. You can control how much time a card can stay in one phase or go through the entire process. Pipefy offers three types of alerts:

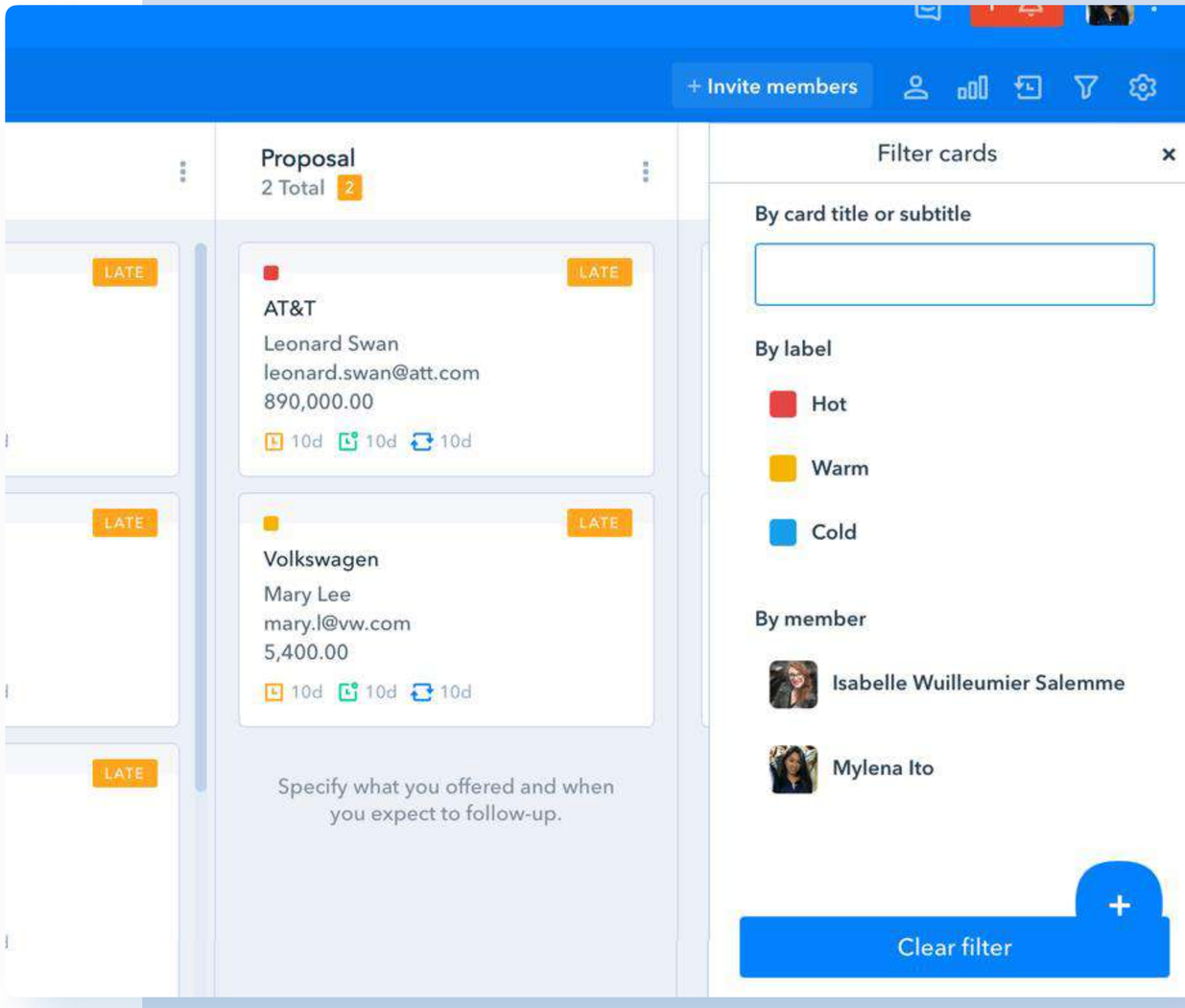
- Overdue;
- Late alert;
- Expired alert;



# Labels and Filters

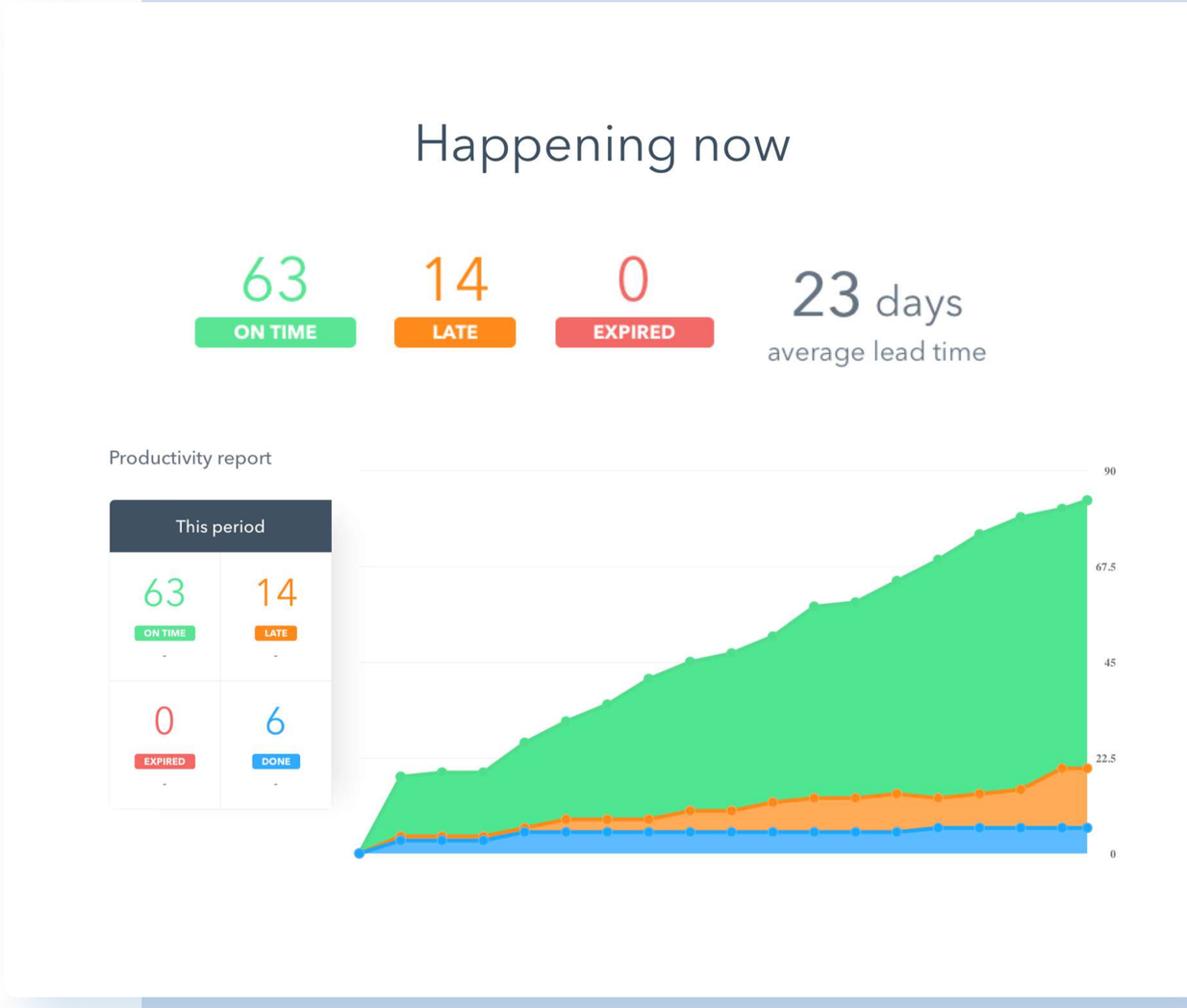
Create your own personalized labels and add them to the cards to simplify the visualization of specific types of cards.

It’s also possible to filter cards by words or persons responsible.



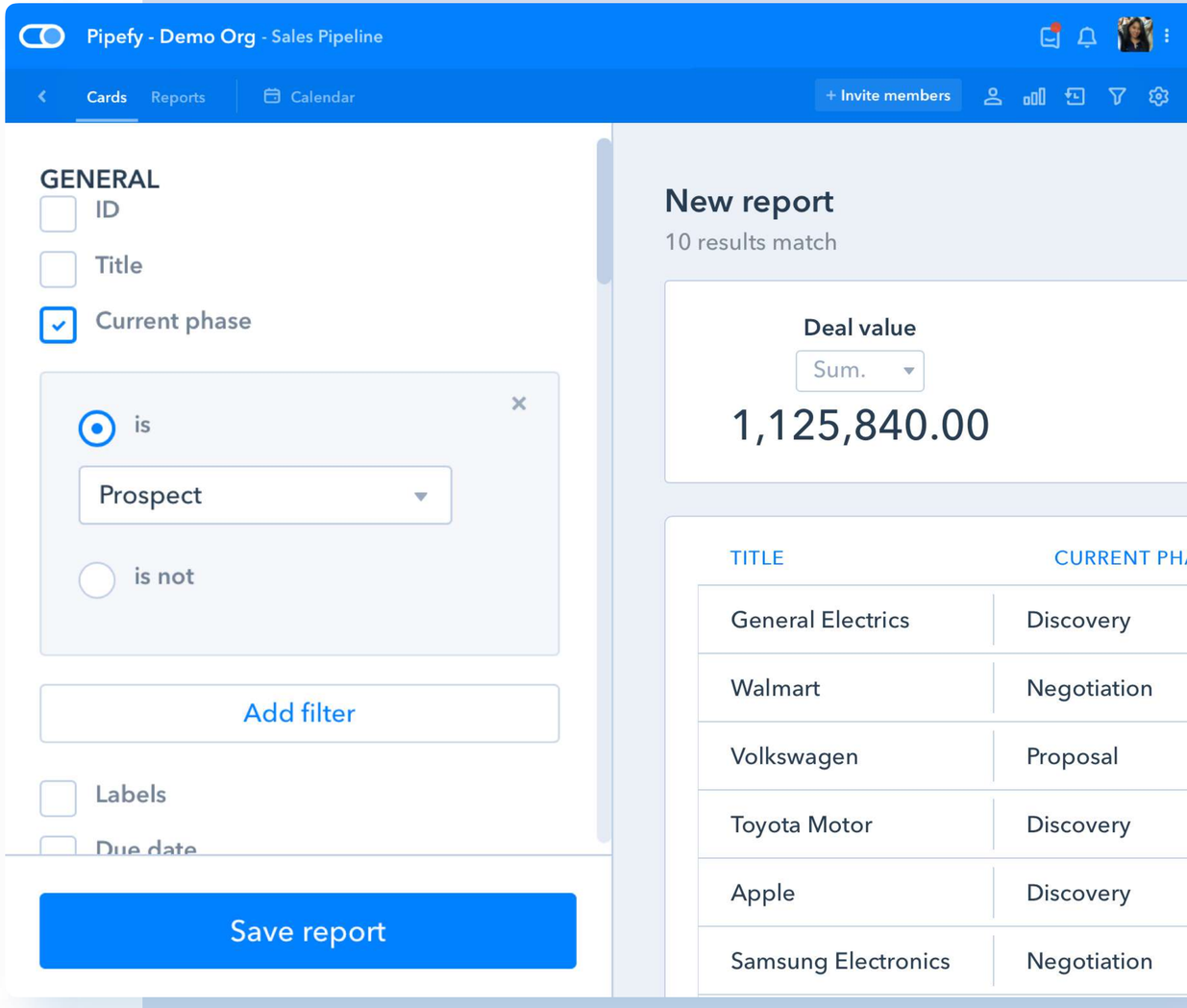
# Metrics

Ready-made charts in cumulative flow formats help management analyze process productivity and identify possible bottlenecks.



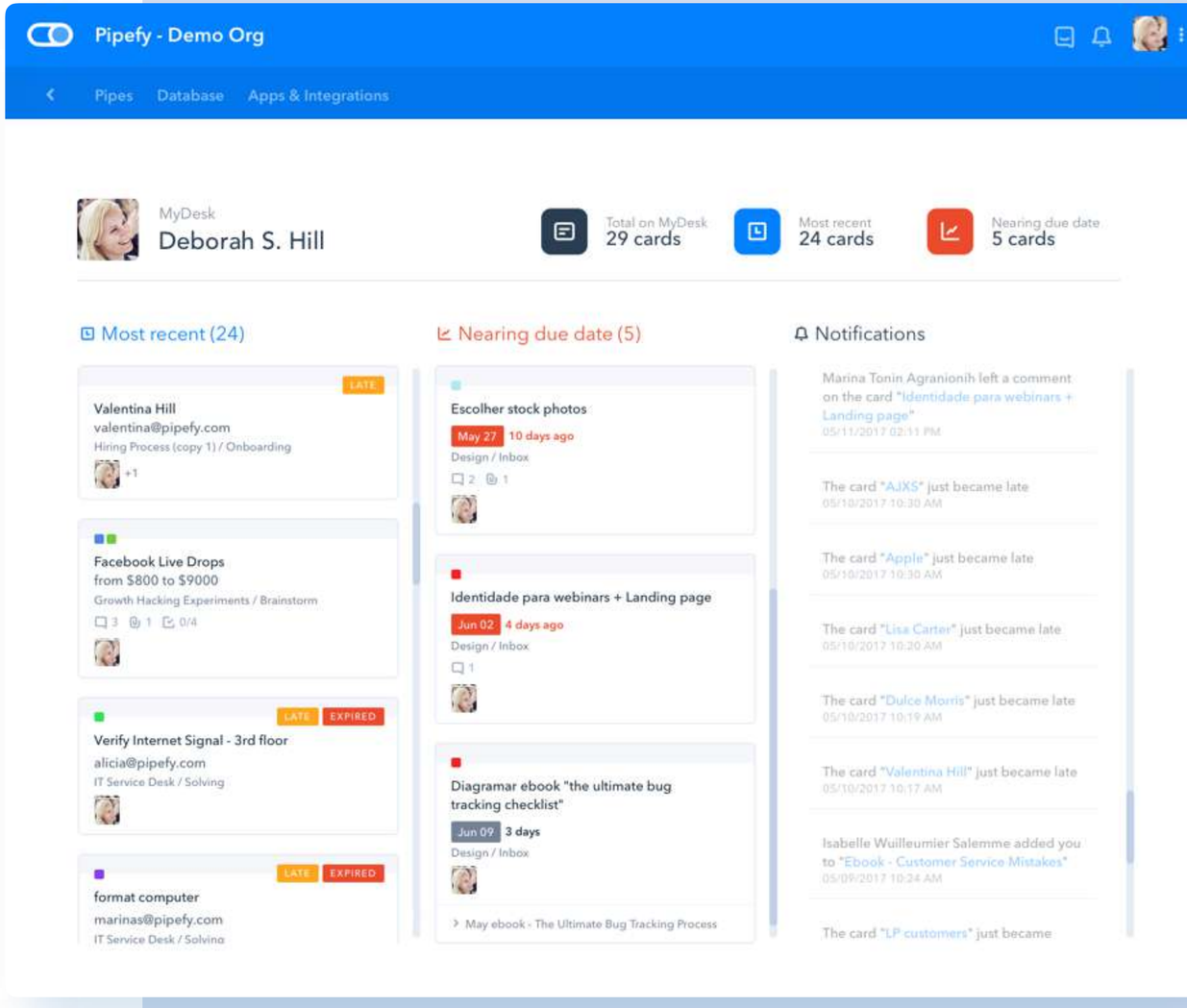
# Advanced Reports

These allow filtering and data extracting from your workflows. It’s possible to integrate Pipefy to BI software and build customized dashboards.



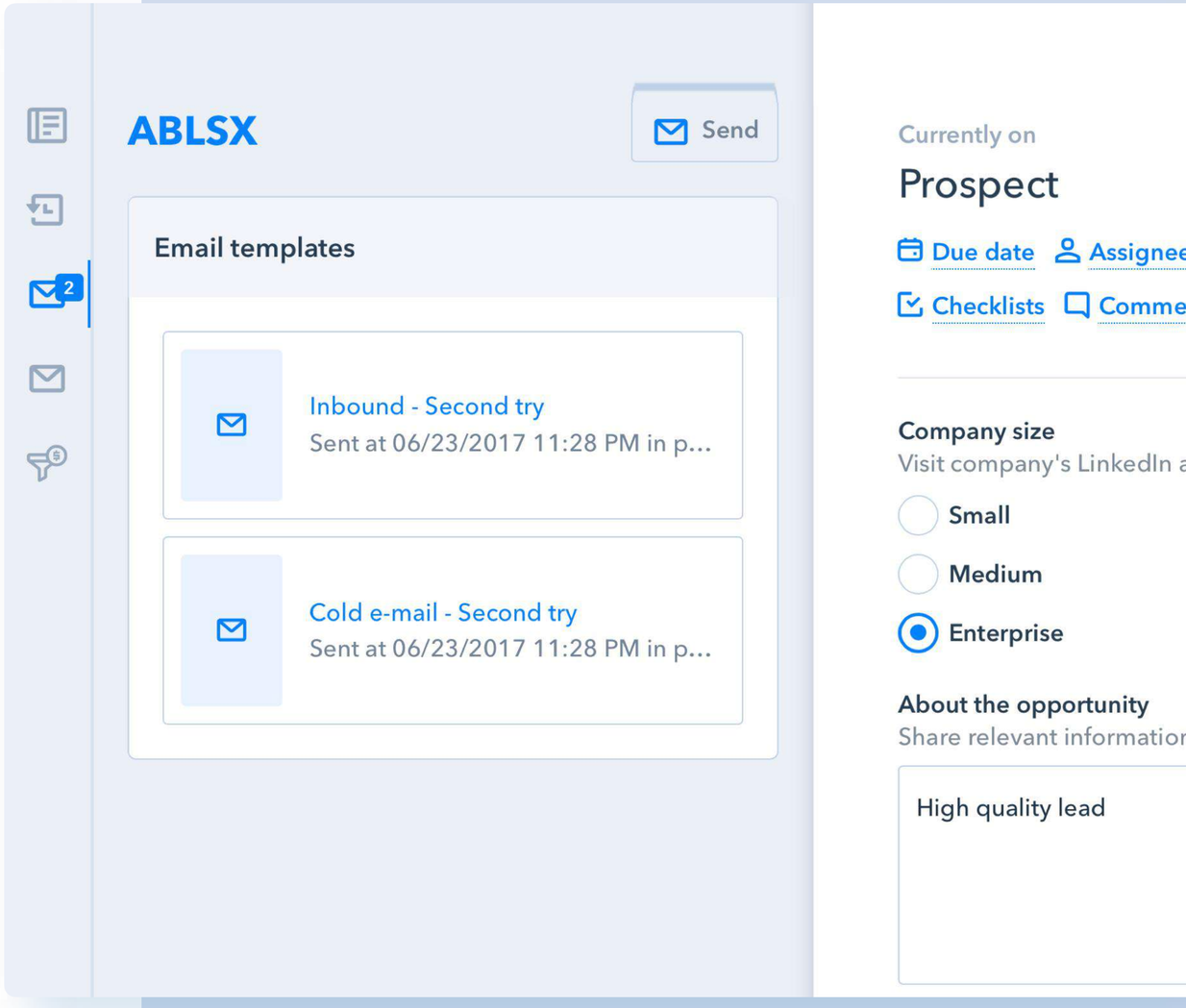
# MyDesk

See all the cards which you are responsible for through the MyDesk panel.



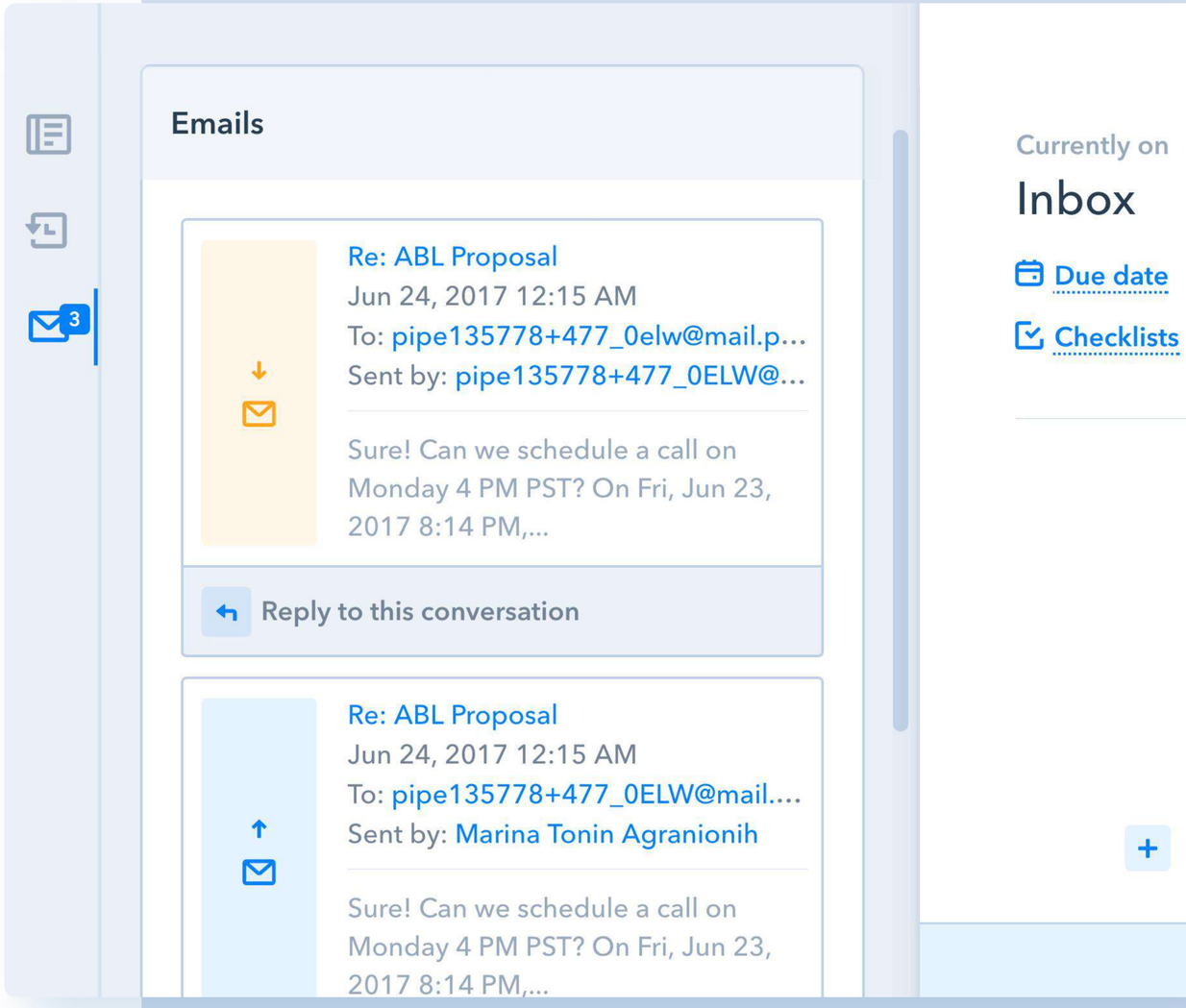
# Email Templates

Create your own template modals containing personalized content to be sent automatically saving time.



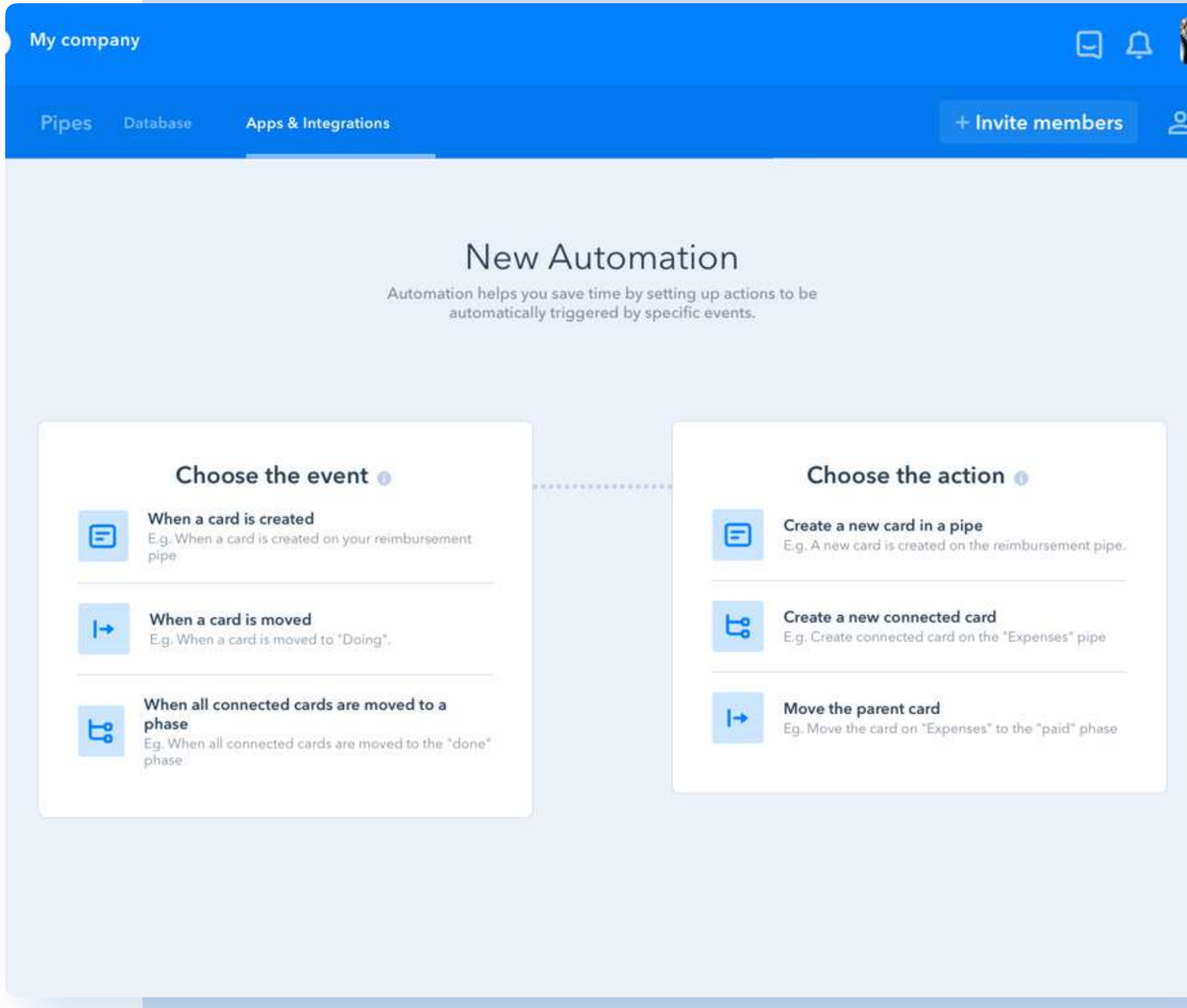
# Email Messaging

With email messaging it is possible to send and received emails from a card in a easy way. It is so practical and you don’t need to open your email inbox to send your clients and colleagues emails.



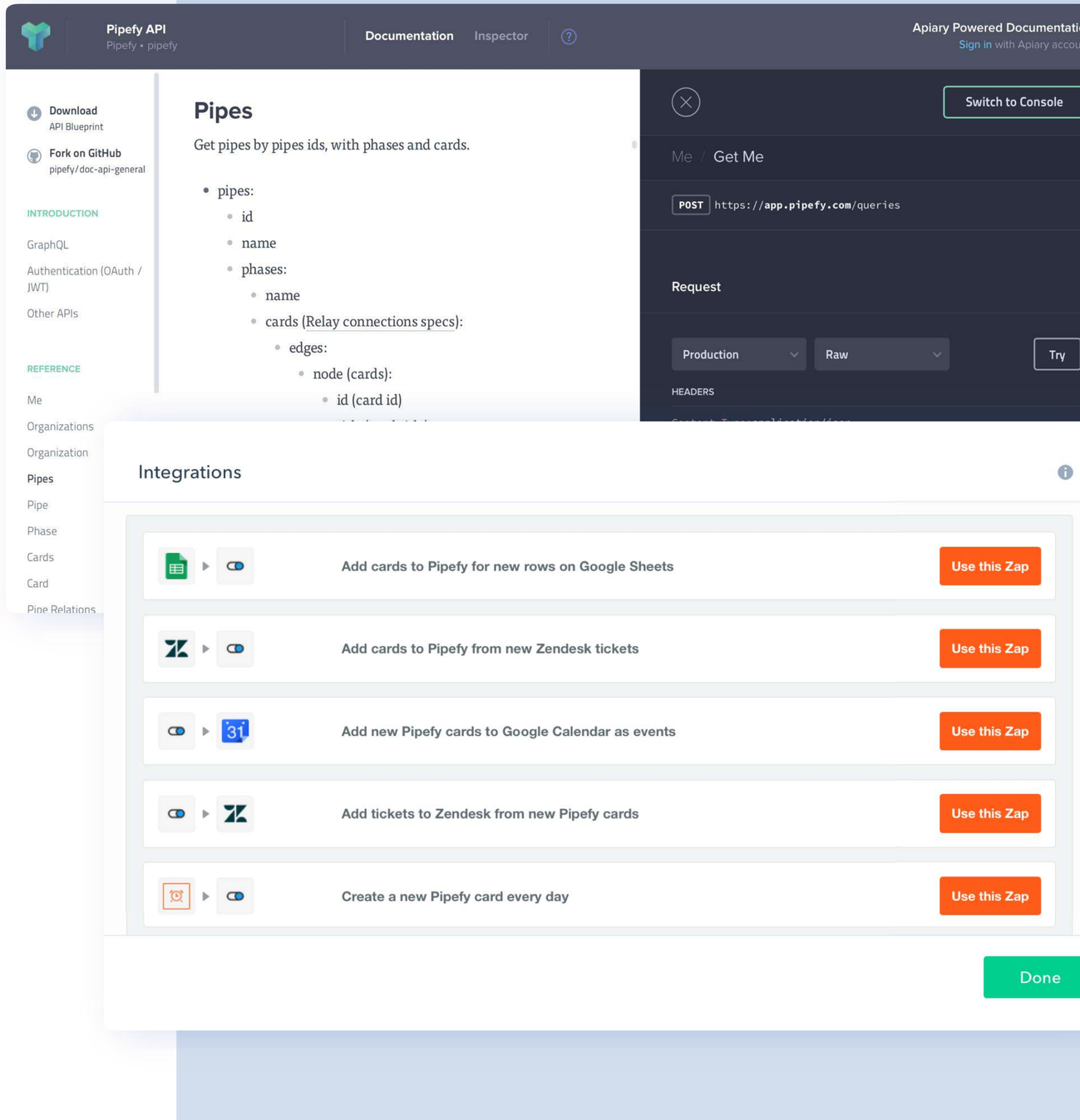
# Automation

Save time automating your process.  Set up actions to be automatically triggered by specific events.



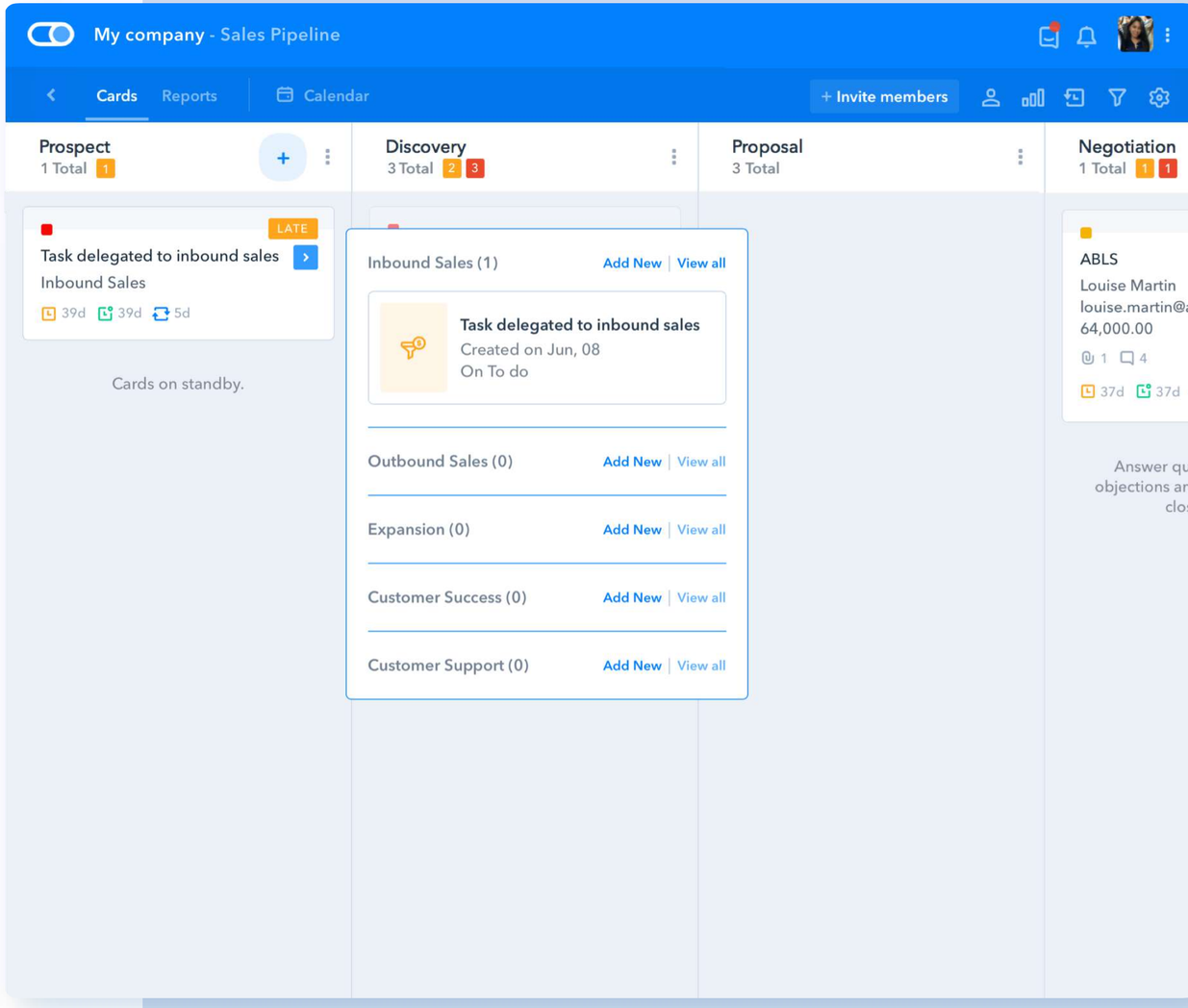
# Integrations

Centralize you operation and even further increase your team’s efficiency integrating Pipefy to more than 700 apps through Zapier or our own API.



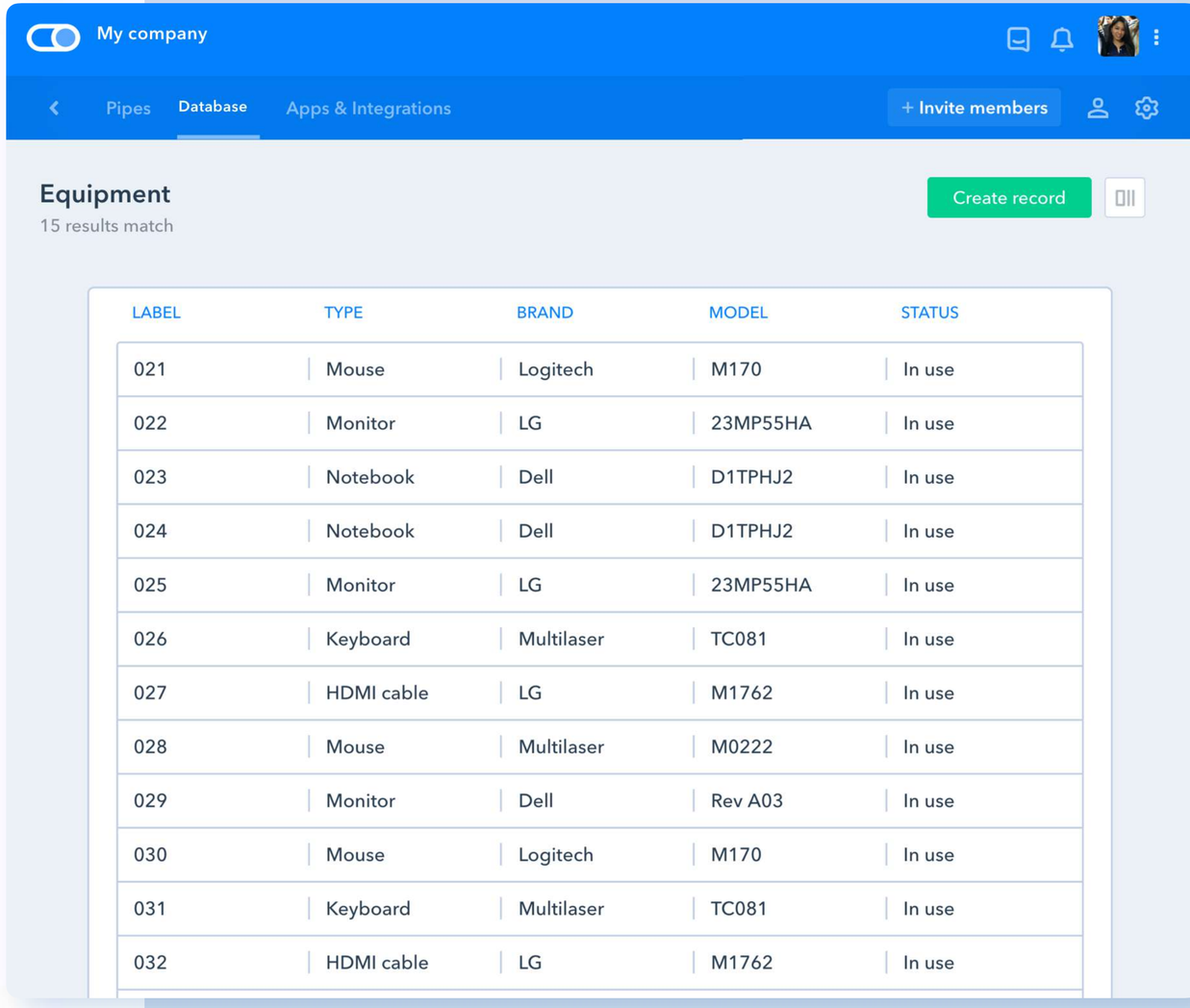
# Connections

The fact that the cards will be connected makes for easy information sharing among teams. It ensures the same information on the card that originated others will be shared, which saves a lot of time and help prevent mistakes from manually transferring information.



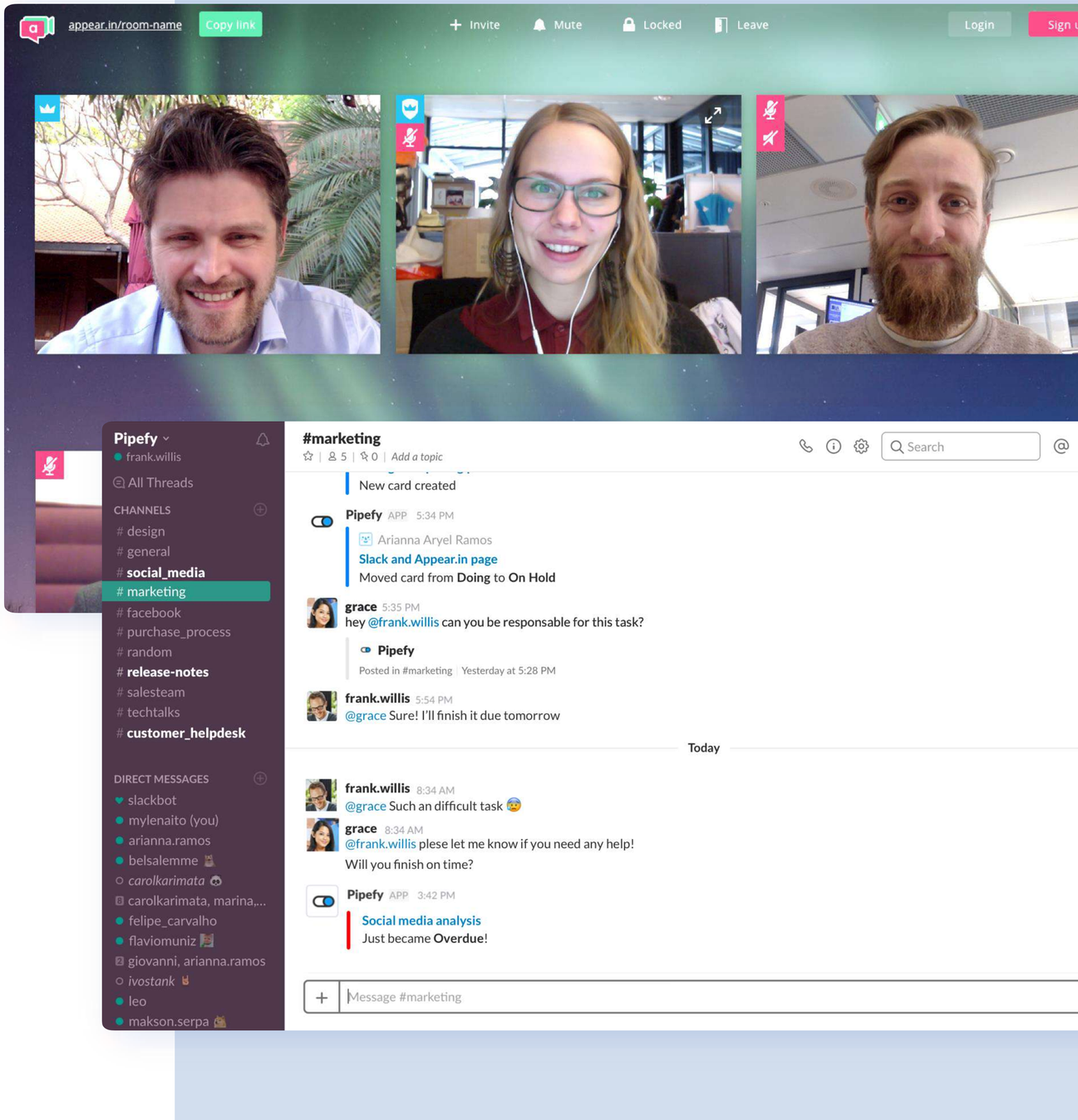
# Database

Create database tables and centralize your process information. The database is Pipefy's storage system where you can store and retrieve important information for your company's processes, such as customer, supplier and product registration, for example.



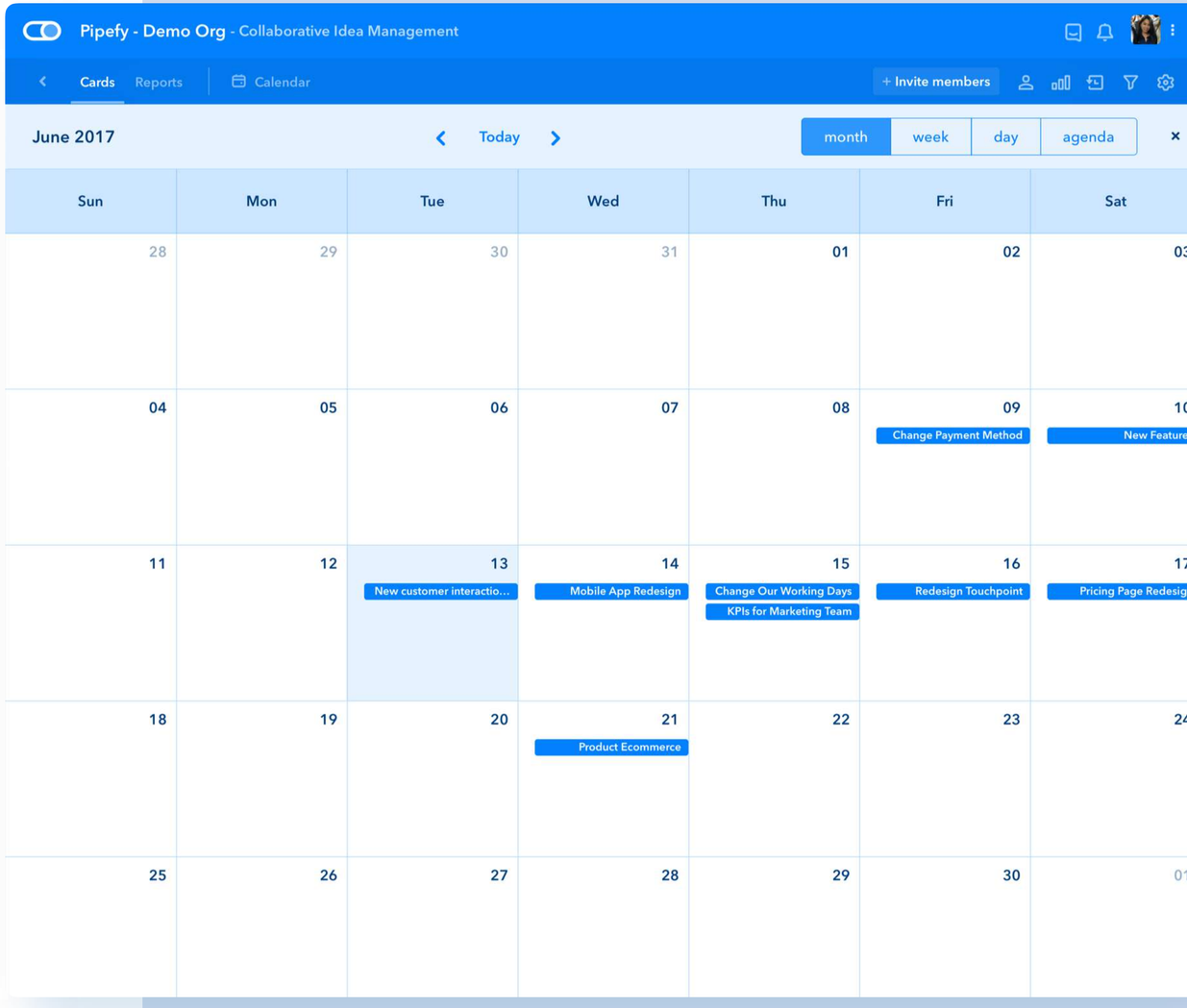
# Apps

Improve the performance of your workflows through native integrations with some of your favorite apps (such as Slack, Google Hangouts and Github), in-app extensions and advanced features.



# Calendar View

Offer management a clear overview of the deadlines of each process task. It’s possible to visualize dates by day, week and month besides the schedule (list) format.

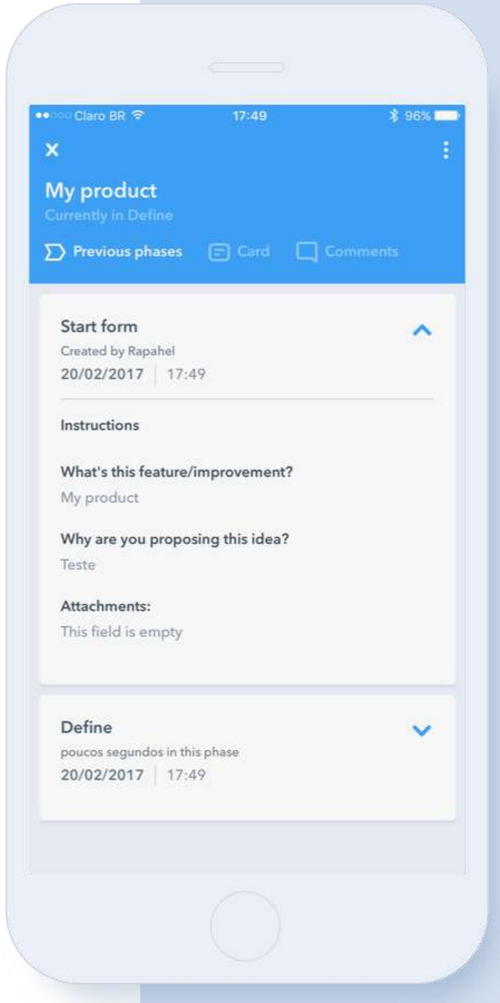


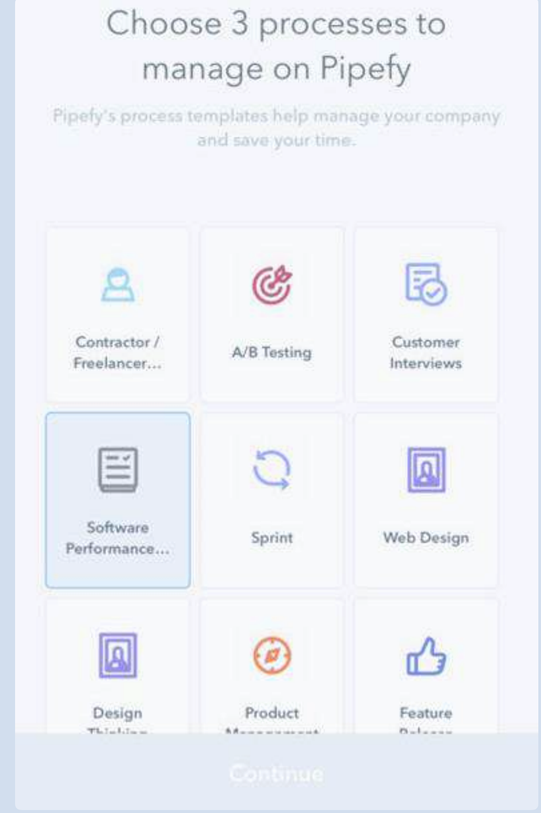
# Mobile App

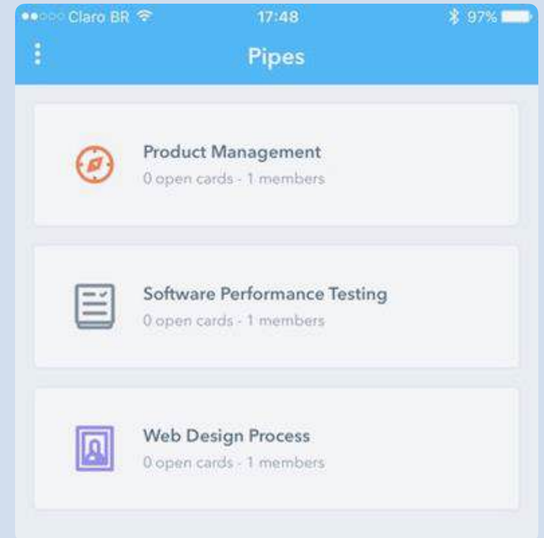
The Pipefy app allows you to follow up on the progress of your activities wherever you are. Available for iOS(AppStore) and Android (Google Play).

App Store

Google Play



# Thank you,

Have a business operations challenge you’re looking to solve?

Get started

pipefy