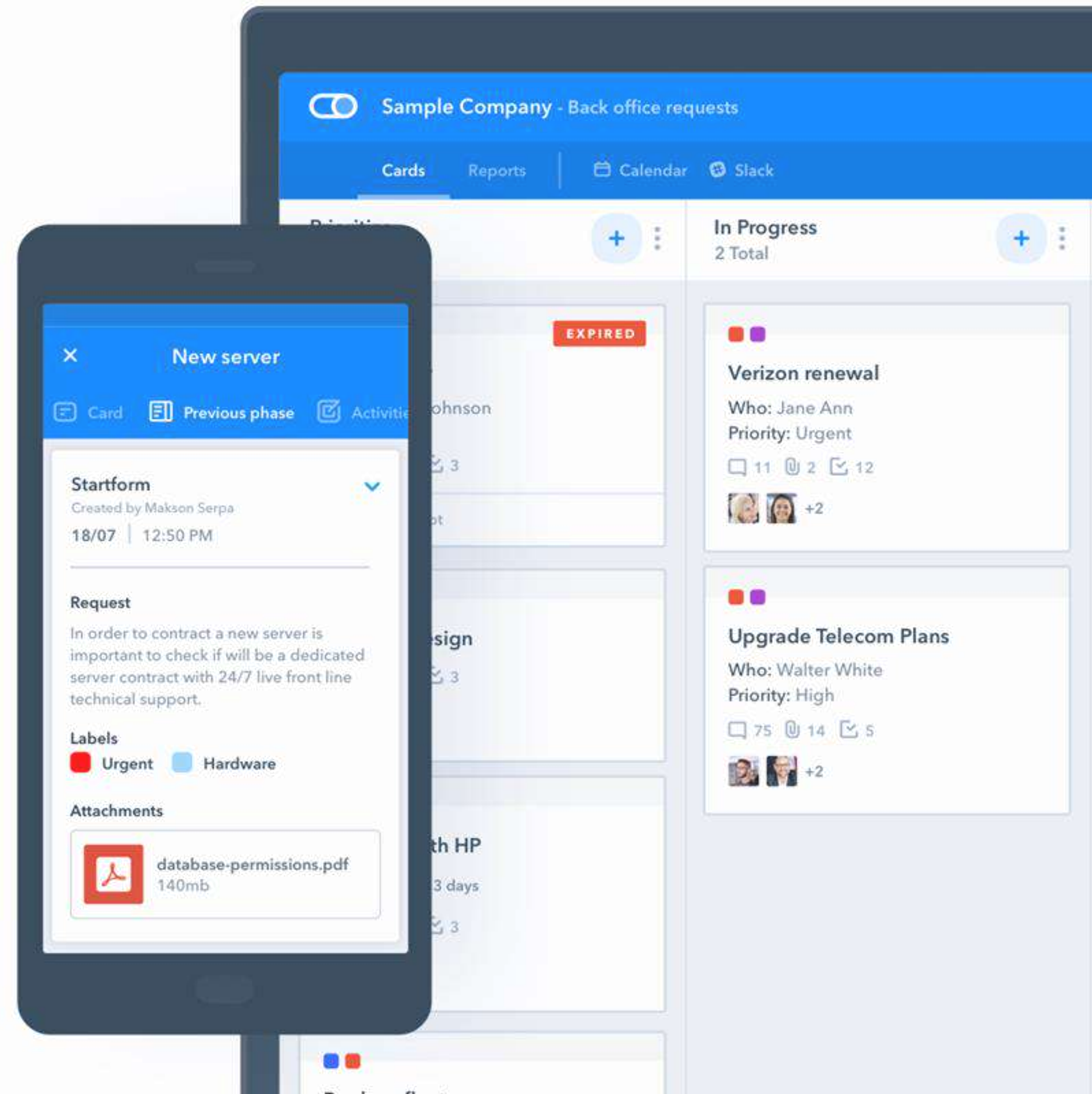


The process excellence platform

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





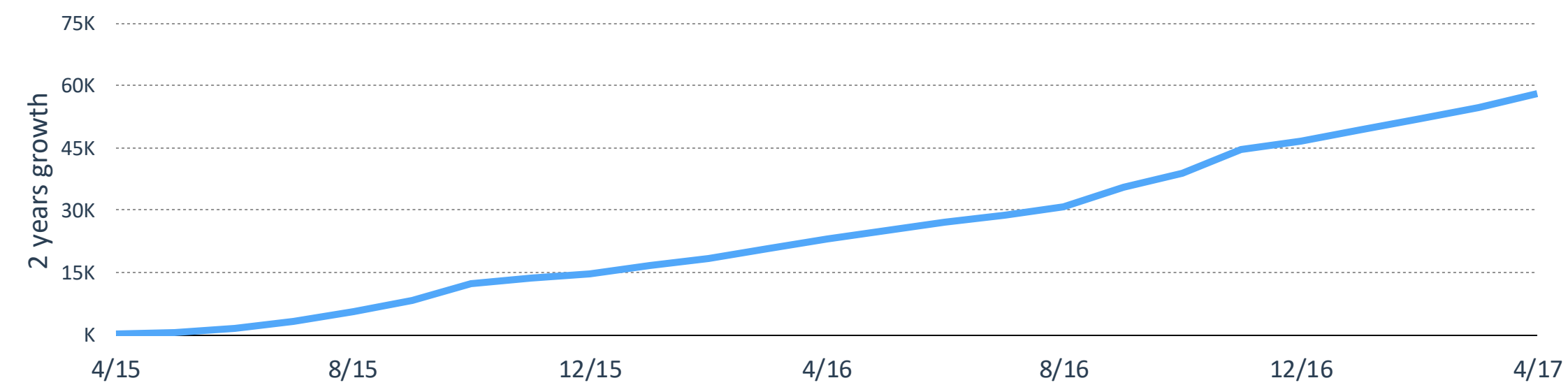
Trusted by managers
from 15K+ companies
in 150 countries



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**

VALOR
CAPITAL GROUP, LLC

 **TRINITY**
VENTURES

 **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..

The screenshot displays the Pipefy Sales Pipeline interface for 'My company'. The interface is organized into four columns representing different stages of the sales process: Prospect, Discovery, Proposal, and Negotiation. Each column contains a list of cards representing individual deals or prospects. The cards include contact information, status indicators (like 'LATE' or 'EXPIRED'), and progress bars. The top navigation bar includes options for 'Cards', 'Reports', and 'Calendar', along with a '+ Invite members' button. The bottom of each column has a brief description of the stage's purpose.

My company - Sales pipeline

Prospect (4 Total)

- Example Customer's Company
Alex Lee
mylena.ito@gmail.com
37d 37d 37d
- ABL Ltda
Chiara Tonin
Chiara@ABLgroup.com
28,000.00
37d 37d 37d
- LI Ltda
Lilian Duff
lilian@licompany.com
37d 37d 37d
- ABLSX
Mylena Carter
purchase@ablsx.com
54,200.00
37d 37d 37d

Discovery (4 Total)

- Travelers
Taylor Moore
37d 37d 37d
- Apple
Chris Patel
Jun, 8 a day ago
37d 37d 0min
- AJXS
Alicia Taylor
Jun, 8 a day ago
37d 37d 0min
- Uber
Peter J
37d 37d 37d

Proposal (2 Total)

- HYF
Amanda Jones
37d 37d 37d
- Google
Philip Thompson
4
37d 37d 37d

Negotiation (1 Total)

- ABLS
Louise Martin
louise.martin@abls.com
64,000.00
1 4
37d 37d 37d

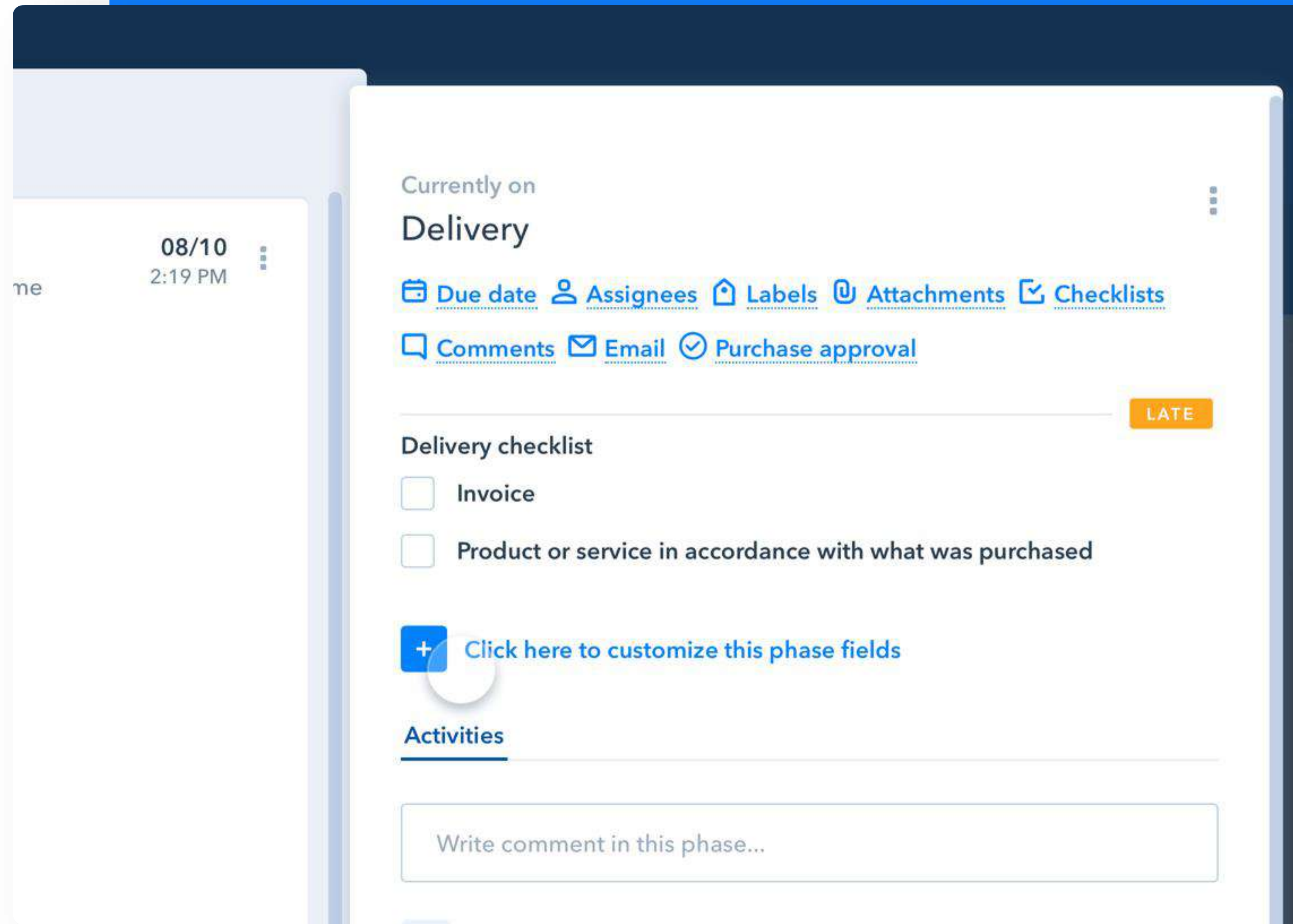
Answer questions, overcome objections and negotiate until you close the deal!

Specify what you offered and when you expect to follow-up.

Discover the customer's needs and

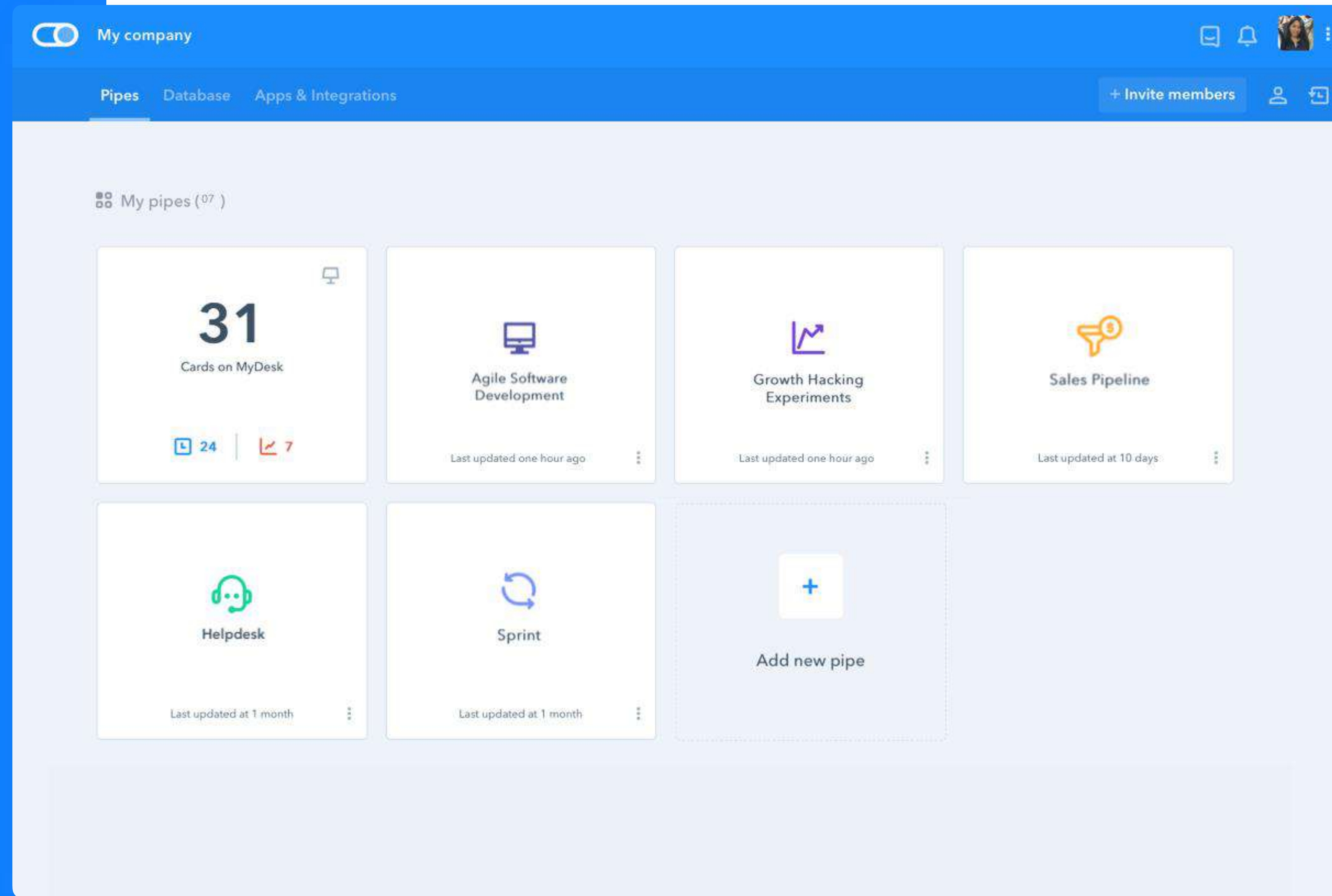
100% Customizable

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.

My company - Sales pipeline

Cards Reports Calendar + Invite members

Prospect
4 Total 4 4

Example Customer's Company
Alex Lee
mylena.ito@gmail.com
37d 37d 37d LATE EXPIRED

ABL Ltda
Chiara Tonin
Chiara@ABLgroup.com
28,000.00
37d 37d 37d LATE EXPIRED

LI Ltda
Lilian Duff
lilian@licompany.com
37d 37d 37d LATE EXPIRED

ABLSX
Mylena Carter
purchase@ablsx.com
54,200.00
37d 37d 37d LATE EXPIRED

Discovery
4 Total 4 4

Travelers
Taylor Moore
37d 37d 37d LATE EXPIRED

Apple
Chris Patel
Jun, 8 a day ago
37d 37d 0min LATE EXPIRED

AJXS
Alicia Taylor
Jun, 8 a day ago
37d 37d 0min LATE EXPIRED

Uber
Peter J
37d 37d 37d LATE EXPIRED

Discover the customer's needs and

Proposal
2 Total 2

HYF
Amanda Jones
37d 37d 37d EXPIRED

Google
Philip Thompson
4
37d 37d 37d

Specify what you offered and when you expect to follow-up.

Negotiation
1 Total 1 1

ABLS
Louise Martin
louise.martin@abls.com
64,000.00
1 4
37d 37d 37d LATE EXPIRED

Answer questions, overcome objections and negotiate until you close the deal!

This is a phase.

Each pipe is divided into phases.

Phases are the steps of the process
of the execution.

My company - Sales pipeline

Cards Reports Calendar + Invite members

Prospect
4 Total 4 4

Example Customer's Company
Alex Lee
mylena.ito@gmail.com
37d 37d 37d

ABL Ltda
Chiara Tonin
Chiara@ABLgroup.com
28,000.00
37d 37d 37d

LI Ltda
Lilian Duff
lilian@licompany.com
37d 37d 37d

ABLSX
Mylena Carter
purchase@ablsx.com
54,200.00
37d 37d 37d

Discovery
4 Total 4 4

Travelers
Taylor Moore
37d 37d 37d

Apple
Chris Patel
Jun, 8 a day ago
37d 37d 0min

AJXS
Alicia Taylor
Jun, 8 a day ago
37d 37d 0min

Uber
Peter J
37d 37d 37d

Discover the customer's needs and

Proposal
2 Total 2

HYF
Amanda Jones
37d 37d 37d

Google
Philip Thompson
4
37d 37d 37d

Specify what you offered and when you expect to follow-up.

Negotiation
1 Total 1 1

ABLS
Louise Martin
louise.martin@abls.com
64,000.00
1 4
37d 37d 37d

Answer questions, overcome objections and negotiate until you close the deal!

This is a card.

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

My company - Sales pipeline

Cards Reports Calendar + Invite members

Prospect
4 Total 4 4

Example Customer's Company
Alex Lee
mylena.ito@gmail.com
37d 37d 37d

ABL Ltda
Chiara Tonin
Chiara@ABLgroup.com
28,000.00
37d 37d 37d

LI Ltda
Lilian Duff
lilian@licompany.com
37d 37d 37d

ABLSX
Mylena Carter
purchase@ablsx.com
54,200.00
37d 37d 37d

Discovery
4 Total 4 4

Travelers
Taylor Moore
37d 37d 37d

Apple
Chris Patel
Jun, 8 a day ago
37d 37d 0min

AJXS
Alicia Taylor
Jun, 8 a day ago
37d 37d 0min

Uber
Peter J
37d 37d 37d

Discover the customer's needs and

Proposal
2 Total 2

HYF
Amanda Jones
37d 37d 37d

Google
Philip Thompson
4
37d 37d 37d

Specify what you offered and when you expect to follow-up.

Negotiation
1 Total 1 1

ABLS
Louise Martin
louise.martin@abls.com
64,000.00
1 4
37d 37d 37d


Answer questions, overcome objections and negotiate until you close the deal!

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.

Macbook pro 15'

Assignees



+

Due date

Sep, 25

a day ago

Labels

Critical

Top urgency

+

✓

Purchase approval 1

+

⋮

Approval (1)

✓

Macbook pro 15'

Created on Aug, 15

On Approval

Start form

Created by Isabelle Wuilleumier Salemme

07/27

11:08 AM

⋮

Name

Isabelle W. Salemme

Department

sales

What needs to be purchased?

Macbook pro 15'retina

Email

isabelle@pipefy.com

Urgency

Critical

Top urgency

Additional details

i

Currently on

Approval

⋮

Due date

Assignees

Labels

Attachments 3

Checklists

Comments

Email templates

Email 6

✓

Purchase approval 1

Do you approve the purchase?

☐ Yes

☐ No

Approval request

✓

Create new card

Expected delivery date

99/99/9999

📅

+

Click here to customize this phase fields

Activities

Write comment in this phase...

🚨

Overdue on Approval

now

Move to

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

Macbook pro 15'

Assignees

+

Sep, 25

a day ago

Labels

Critical

Top urgency

+

✓

Purchase approval

1

+

Approval (1)

✓

Macbook pro 15'

Created on Aug, 15

On Approval

Start form

Created by Isabelle Wuilleumier Salemme

07/27

11:08 AM

Name

Isabelle W. Salemme

Department

sales

What needs to be purchased?

Macbook pro 15'retina

Email

isabelle@pipefy.com

Urgency

Critical

Top urgency

Additional details

Currently on

Approval

Due date

Assignees

Labels

Attachments

3

Checklists

Comments

Email templates

Email

6

✓

Purchase approval

1

Do you approve the purchase?

Yes

No

Approval request

✓

Create new card

Expected delivery date

99/99/9999

+

Click here to customize this phase fields

Activities

Write comment in this phase...

Overdue on Approval


now

Move to

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

Macbook pro 15'

Assignees



+

Due date

Sep, 25

a day ago

Labels

Critical

Top urgency

+

✓

Purchase approval 1

+

⋮

Approval (1)

✓

Macbook pro 15'

Created on Aug, 15

On Approval

Start form

Created by Isabelle Wuilleumier Salemme

07/27 11:08 AM

⋮

Name

Isabelle W. Salemme

Department

•

sales

What needs to be purchased?

Macbook pro 15'retina

Email

isabelle@pipefy.com

Urgency

Critical

Top urgency

Additional details

i

Currently on

Approval

⋮

Due date

Assignees

Labels

Attachments 3

Checklists

Comments

Email templates

Email 6

✓

Purchase approval 1

Do you approve the purchase?

☐ Yes

☐ No

Approval request

✓

Create new card

Expected delivery date

99/99/9999

📅

+

Click here to customize this phase fields

Activities

Write comment in this phase...

⚠

Overdue on Approval

now

Move to

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

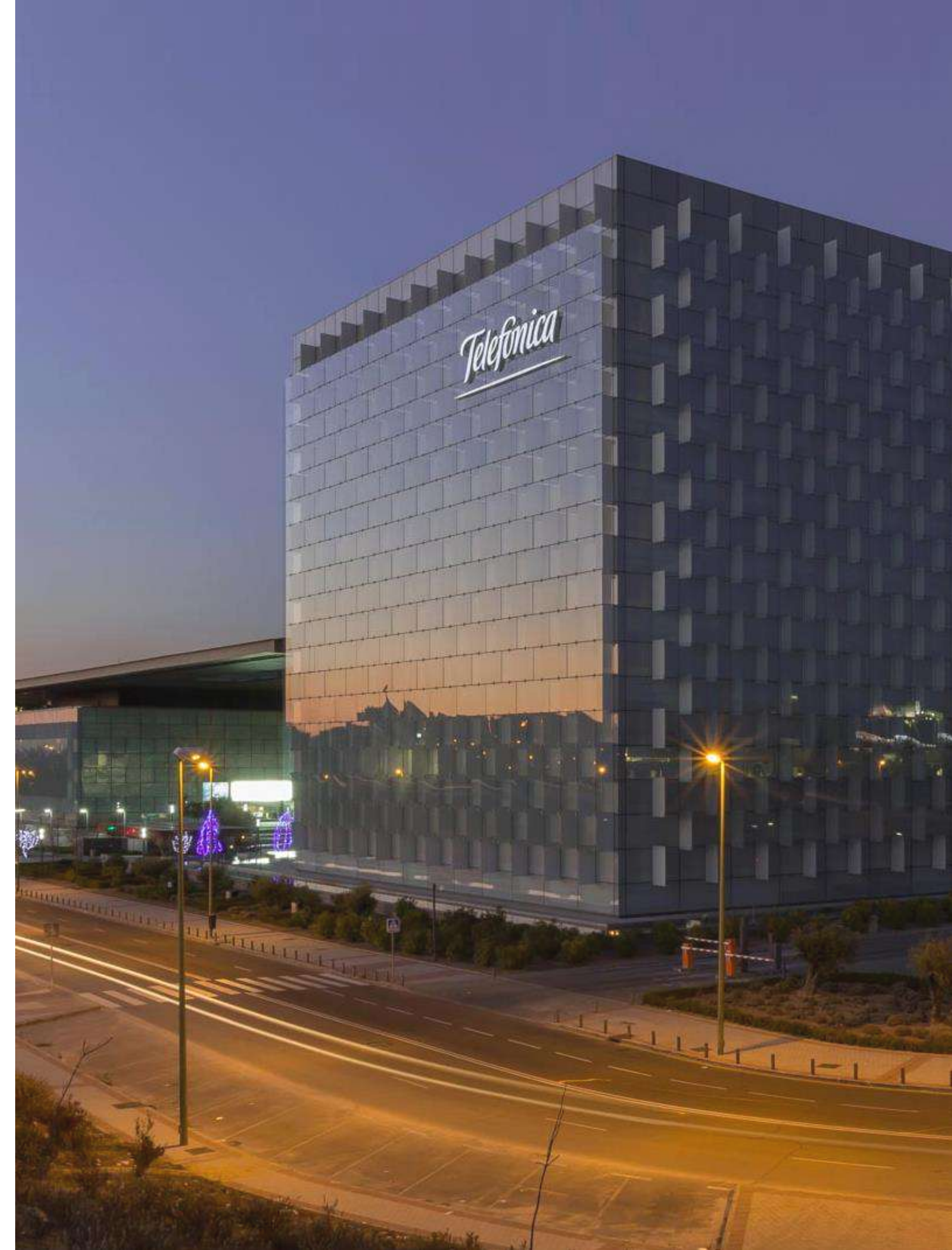
Reduce operational risks by centralizing all process workflows and information in Pipefy's secure database.

Customer Case

Telefonica

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!”

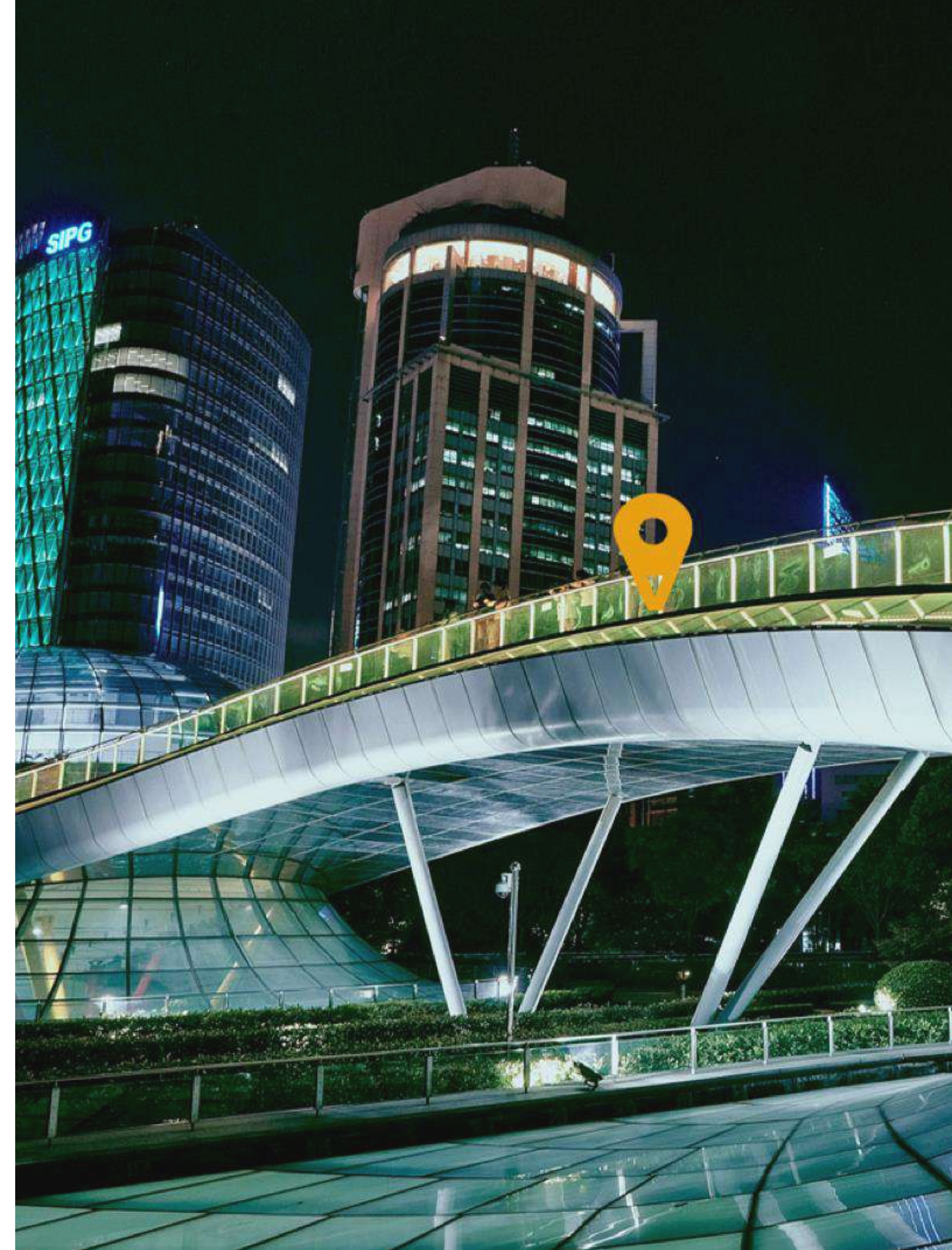


Customer Case Accenture



“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](#)

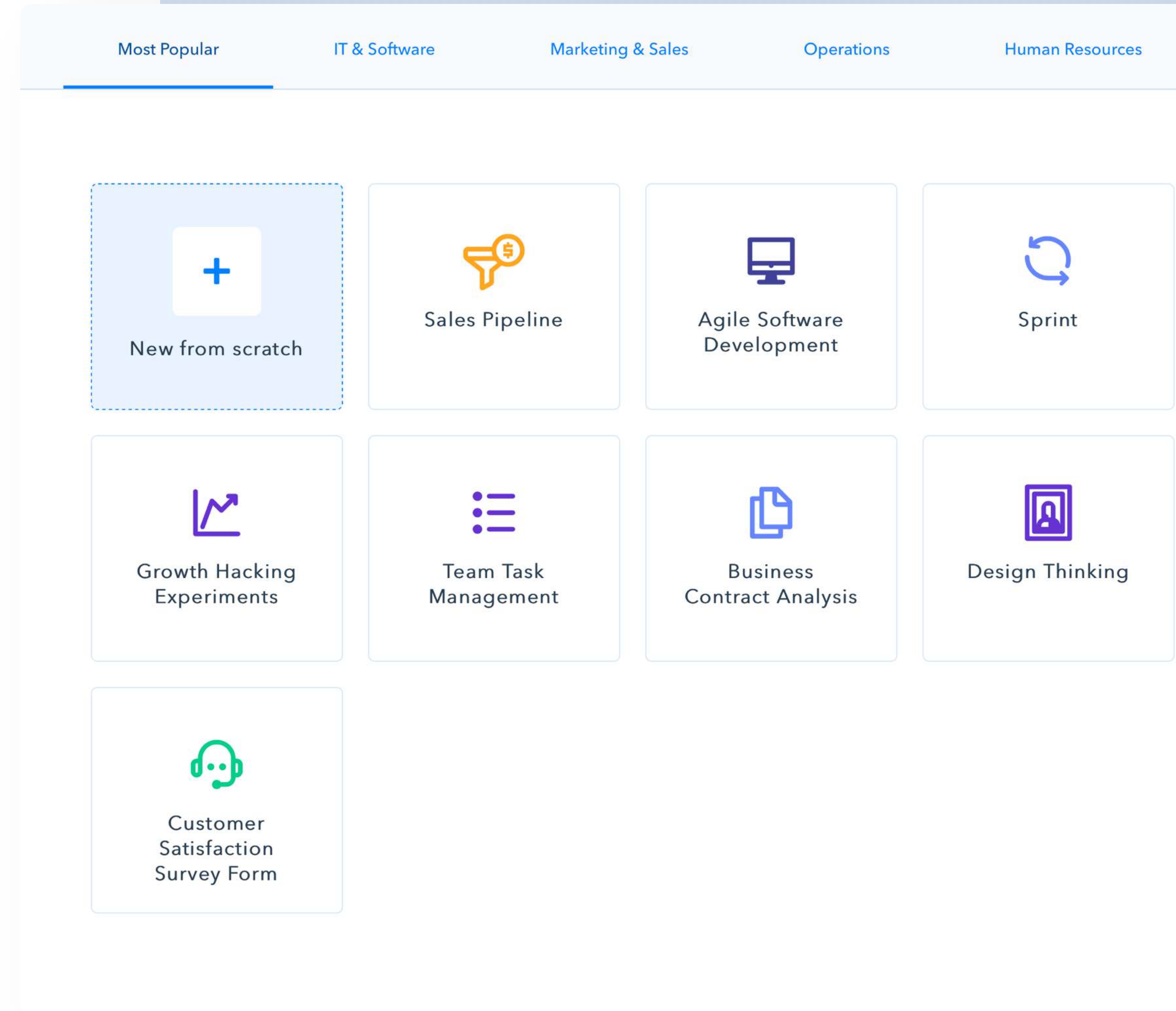
Features

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



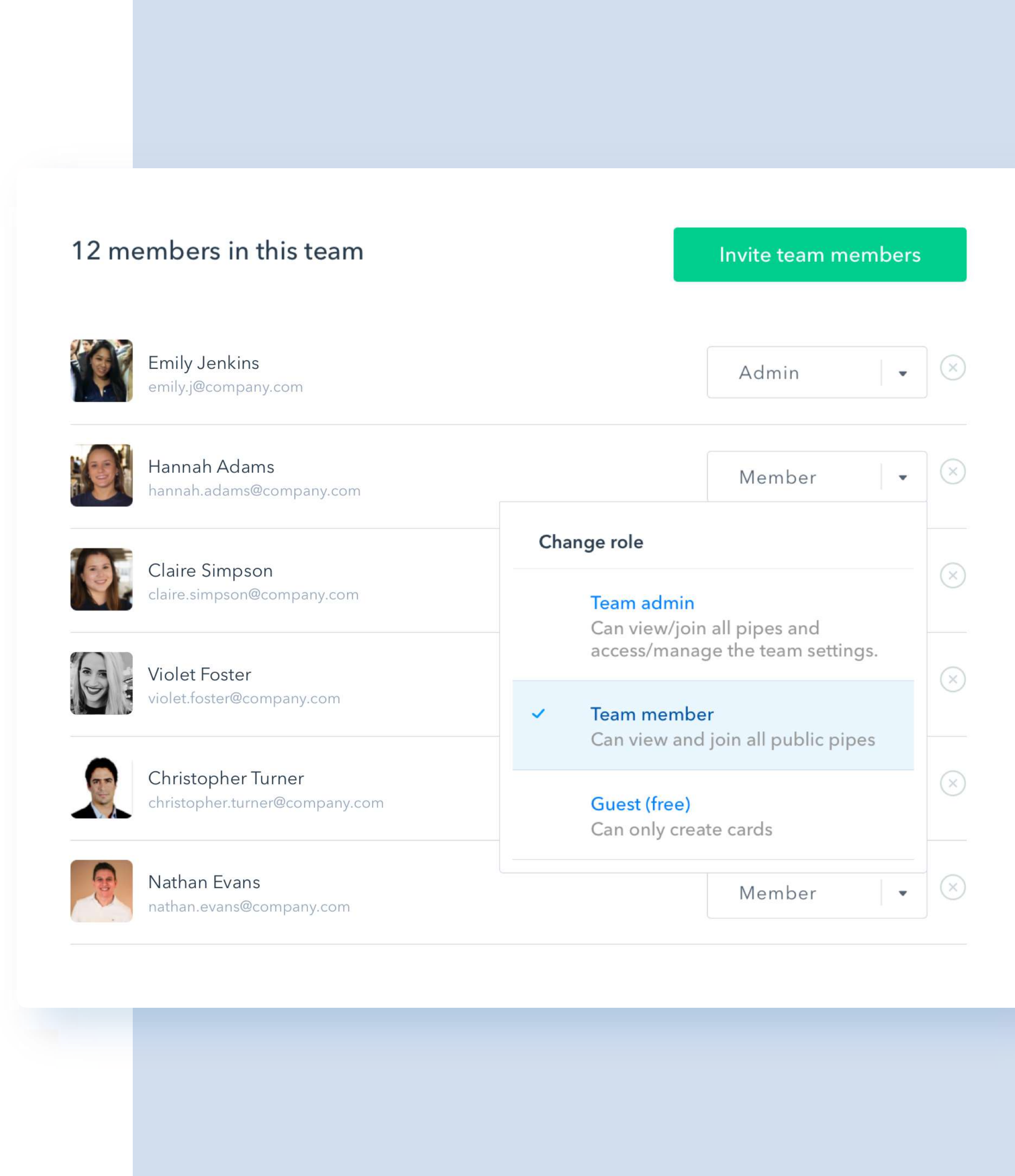
Template Store

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.

Proposal

2 Total

2

2

HYF

Amanda Jones

34d

34d

34d

LATE

EXPIRED

Google

Philip Thompson

34d

34d

33d

LATE

EXPIRED

Specify what you offered and when you expect to follow-up.

Negotiation

1 Total

1

1

ABLS

Louise Martin

louise.martin@abls.com

64,000.00

1

4

34d

34d

33d

LATE

EXPIRED

Answer questions, overcome objections and negotiate until you close the deal!

Won

1 Total

✓

Lost

1 Total

✓

Sales Pipeline (copy 1)

Form

Share

Due date

Assignees

Labels

Attachments

Company name

Contact name

Contact email

Contact phone

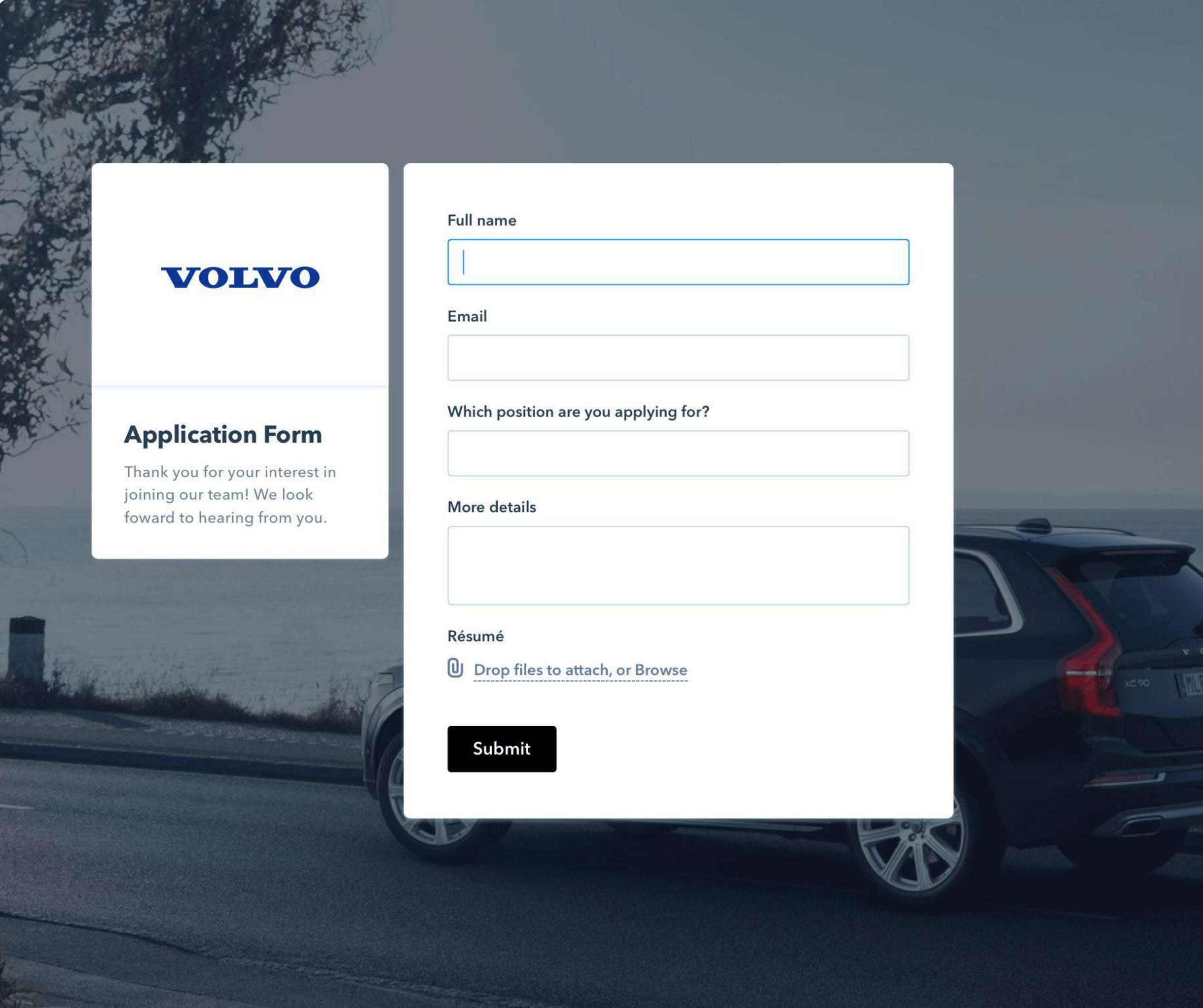
Deal value

+ Click here to customize this form

Create new opportunity - or press ctrl + enter

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.

A screenshot of a Volvo application form overlaid on a background image of a Volvo SUV parked by a body of water. The form is divided into two main sections. The left section features the Volvo logo at the top, followed by the title 'Application Form' and a thank-you message. The right section contains several input fields for personal and application information, followed by a file upload section for a resume and a submit button.

VOLVO

Application Form

Thank you for your interest in joining our team! We look forward to hearing from you.


Full name

Email

Which position are you applying for?

More details

Résumé


 Drop files to attach, or Browse

Submit

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:

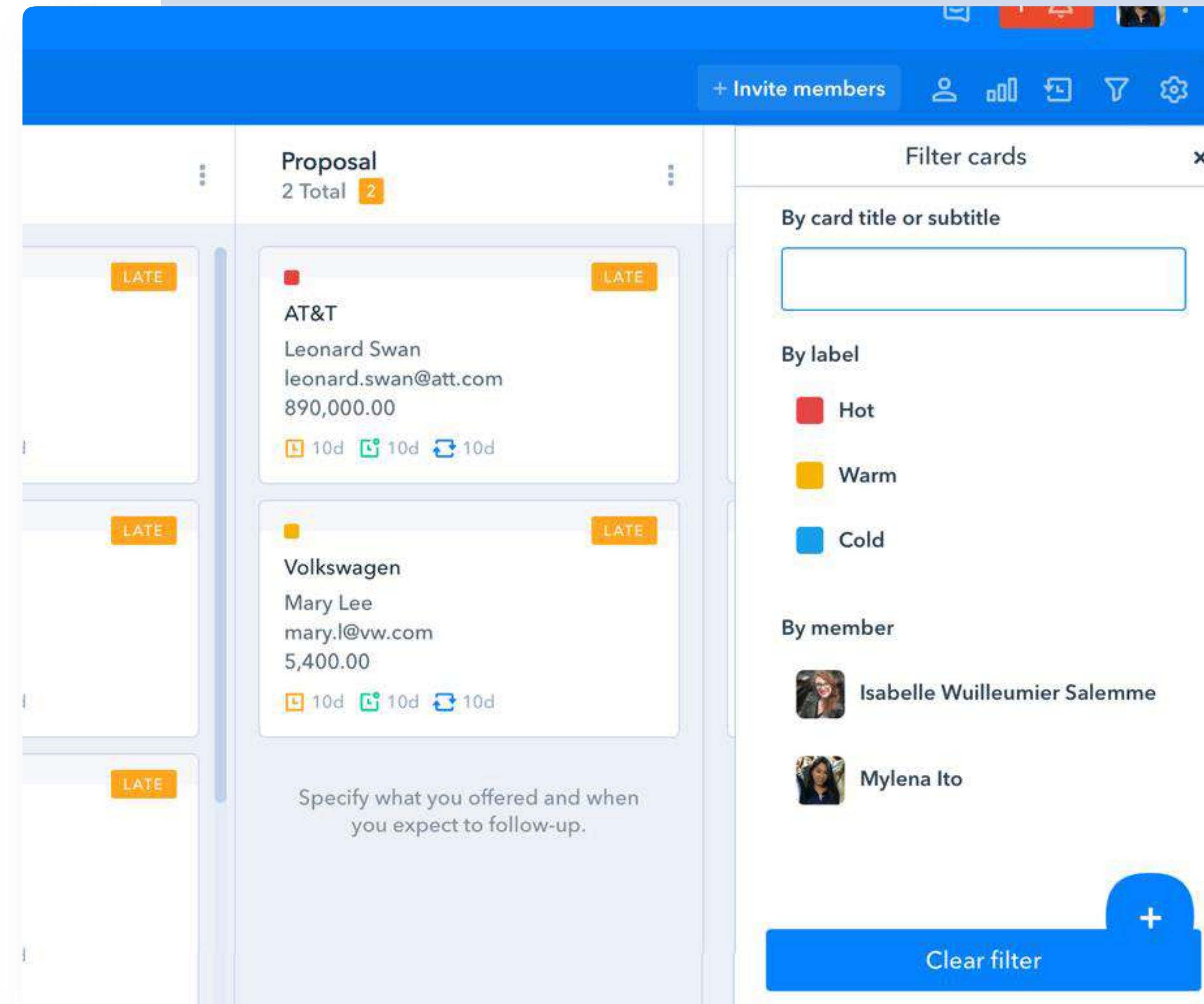
- Overdue;
- Late alert;
- Expired alert;

	Purchase 0 Total	Delivery 0 Total
ests pending oval.	<div><div><div><div><div></div><div>LATE</div></div><div>Computer</div><div>David H. Mitchell</div><div>David.mitchell@company.com</div><div>Aug, 1 in 5 days</div><div><div>0/3</div></div><div><div><div>1d</div><div>3h</div><div>0min</div></div><div></div></div></div></div><div>Product/service awaiting to be purchased.</div></div>	Verify items/hire

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.



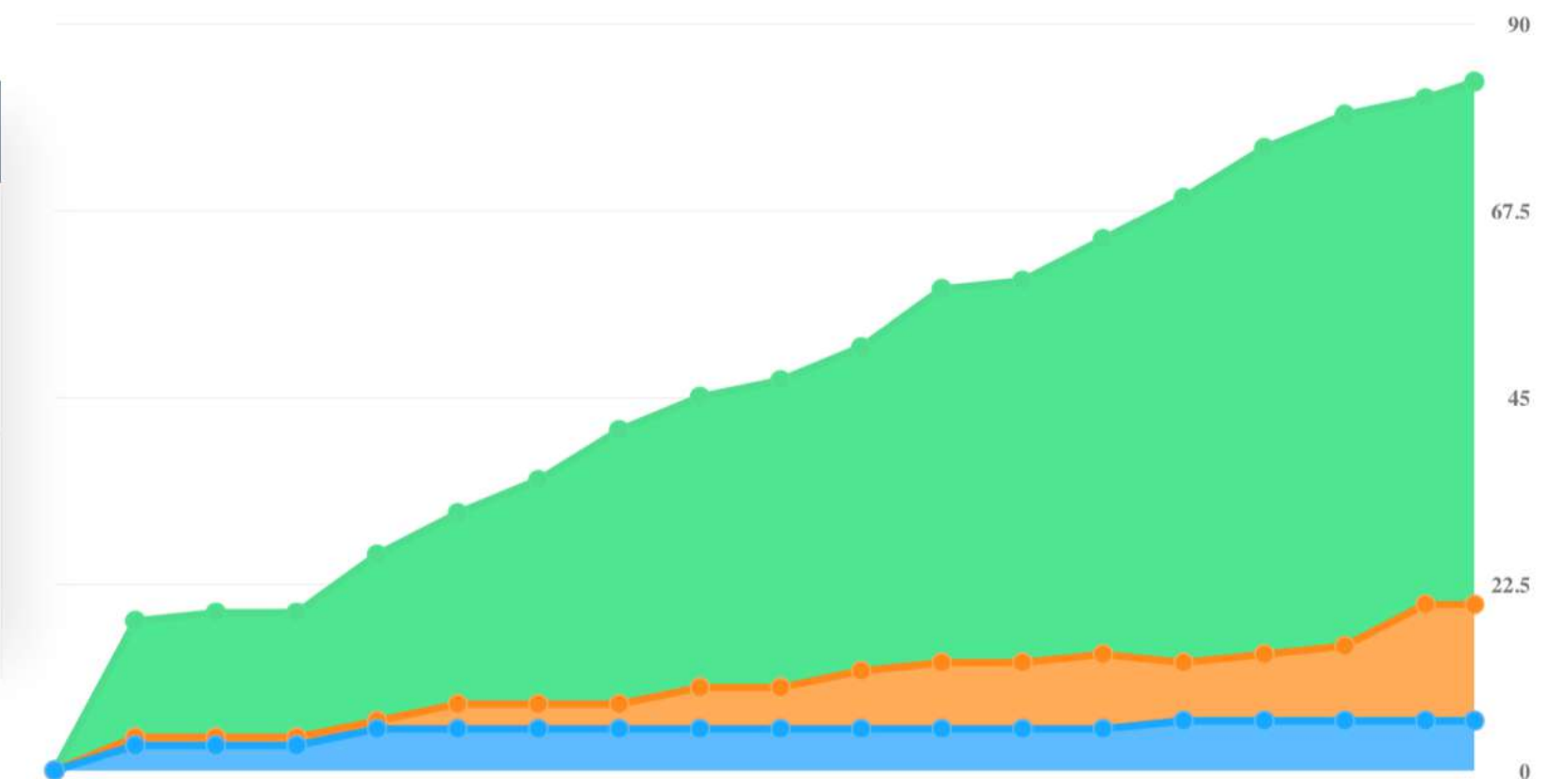
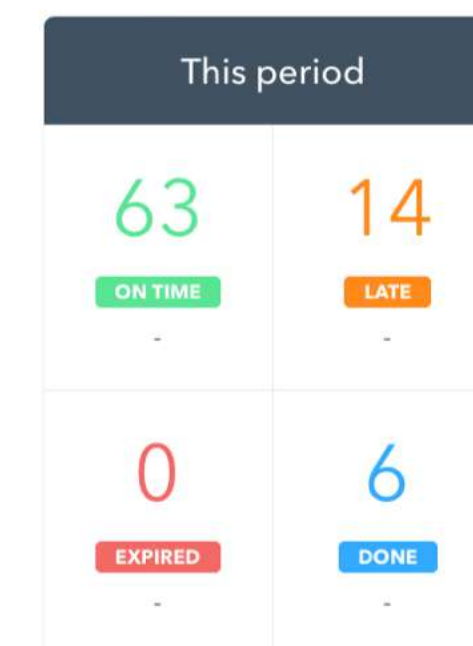
Metrics

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

Happening now



Productivity report



Advanced Reports

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

Pipefy - Demo Org - Sales Pipeline

Cards

Reports

Calendar

+ Invite members

GENERAL

☐ ID

☐ Title

☒ Current phase

☒ is

Prospect

☐ is not

Add filter

☐ Labels

☐ Due date

Save report

New report

10 results match

Deal value

Sum.

1,125,840.00

TITLE	CURRENT PHASE
General Electrics	Discovery
Walmart	Negotiation
Volkswagen	Proposal
Toyota Motor	Discovery
Apple	Discovery
Samsung Electronics	Negotiation

MyDesk

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

Pipefy - Demo Org

Pipes

Database

Apps & Integrations

MyDesk

Deborah S. Hill

Total on MyDesk

29 cards

Most recent

24 cards

Nearing due date

5 cards

Most recent (24)

Valentina Hill

valentina@pipefy.com

Hiring Process (copy 1) / Onboarding

+1

Facebook Live Drops

from \$800 to \$9000

Growth Hacking Experiments / Brainstorm

3

1

0/4

Verify Internet Signal - 3rd floor

alicia@pipefy.com

IT Service Desk / Solving

format computer

marinas@pipefy.com

IT Service Desk / Solvino

Nearing due date (5)

Escolher stock photos

May 27 10 days ago

Design / Inbox

2

1

Identidade para webinars + Landing page

Jun 02 4 days ago

Design / Inbox

1

Diagramar ebook "the ultimate bug tracking checklist"

Jun 09 3 days

Design / Inbox

May ebook - The Ultimate Bug Tracking Process

Notifications

Marina Tonin Agranionih left a comment on the card "Identidade para webinars + Landing page"

05/11/2017 02:11 PM

The card "AJXS" just became late

05/10/2017 10:30 AM

The card "Apple" just became late

05/10/2017 10:30 AM

The card "Lisa Carter" just became late

05/10/2017 10:30 AM

The card "Dulce Morris" just became late

05/10/2017 10:19 AM

The card "Valentina Hill" just became late

05/10/2017 10:17 AM

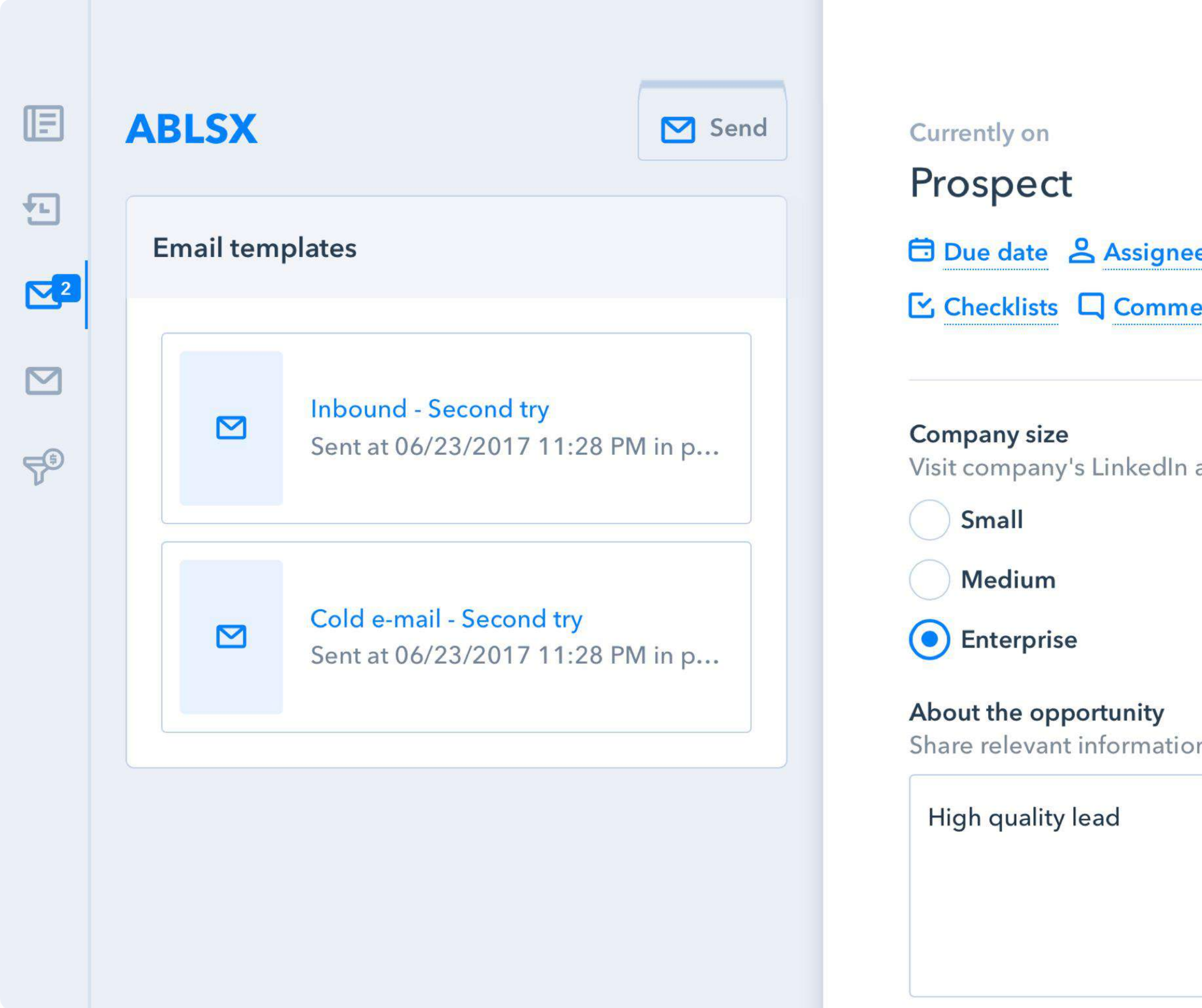
Isabelle Wulleumier Salemmie added you to "Ebook - Customer Service Mistakes"

05/09/2017 10:24 AM

The card "LP customers" just became

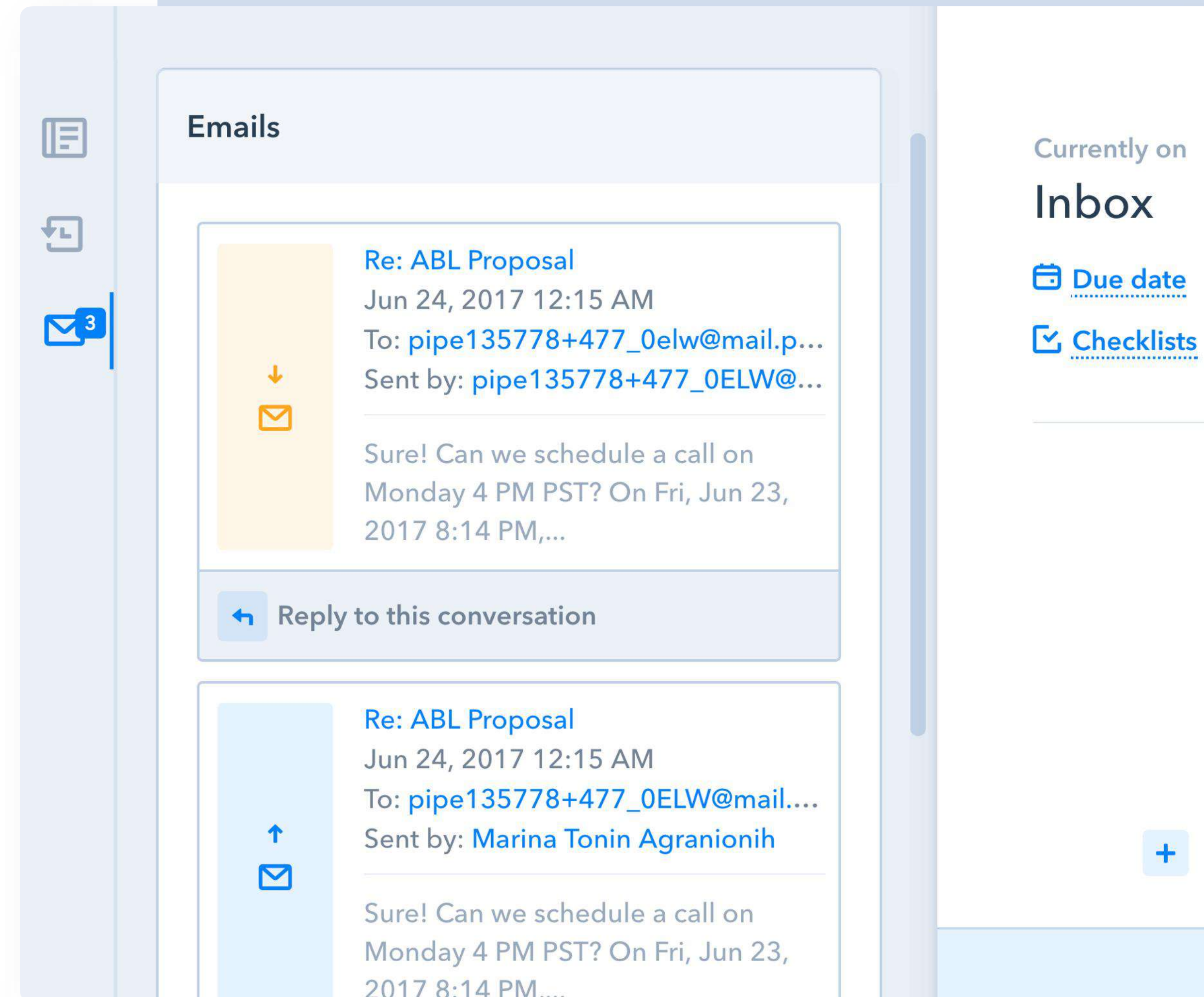
Email Templates

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



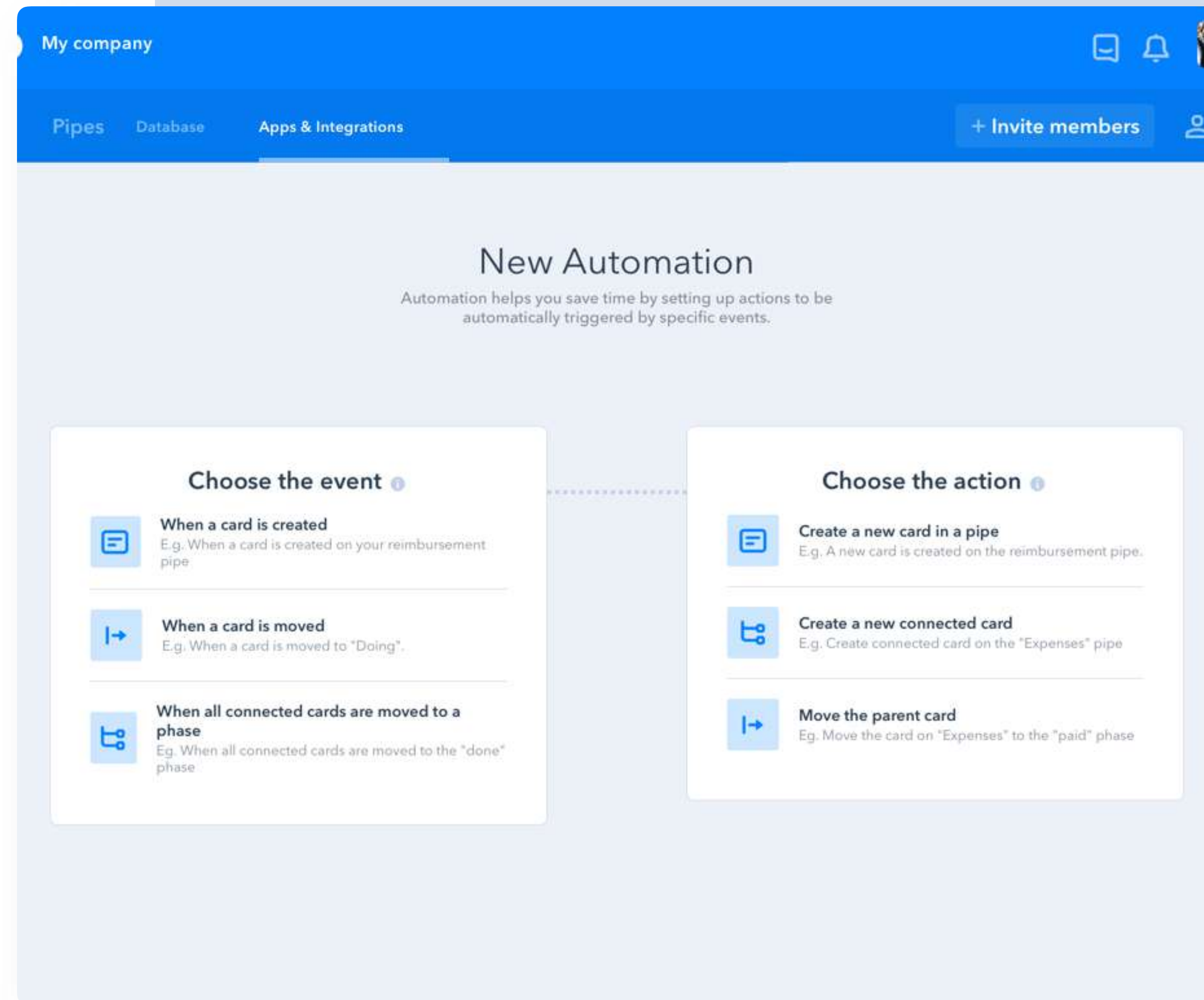
Email Messaging

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.



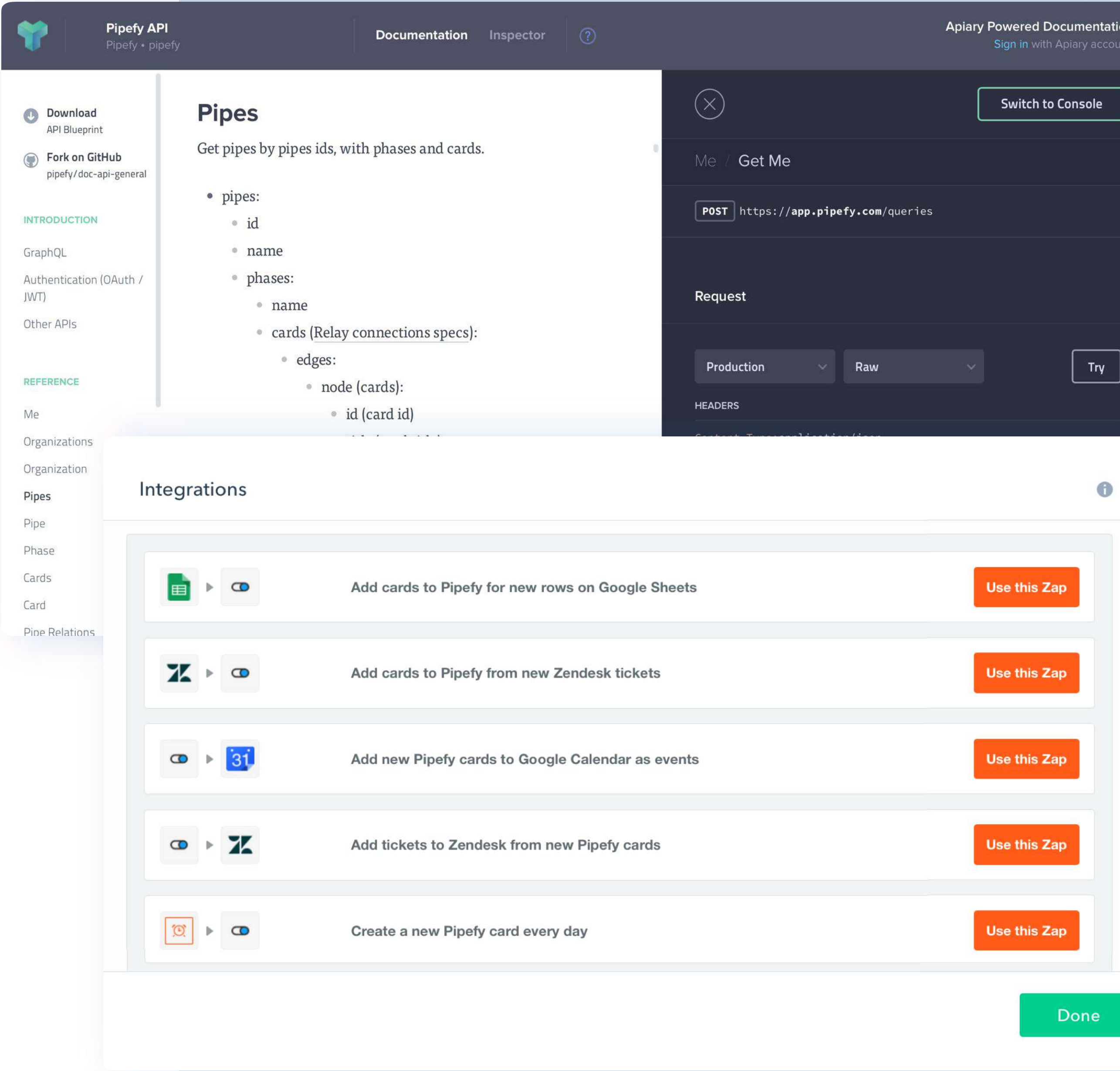
Automation

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



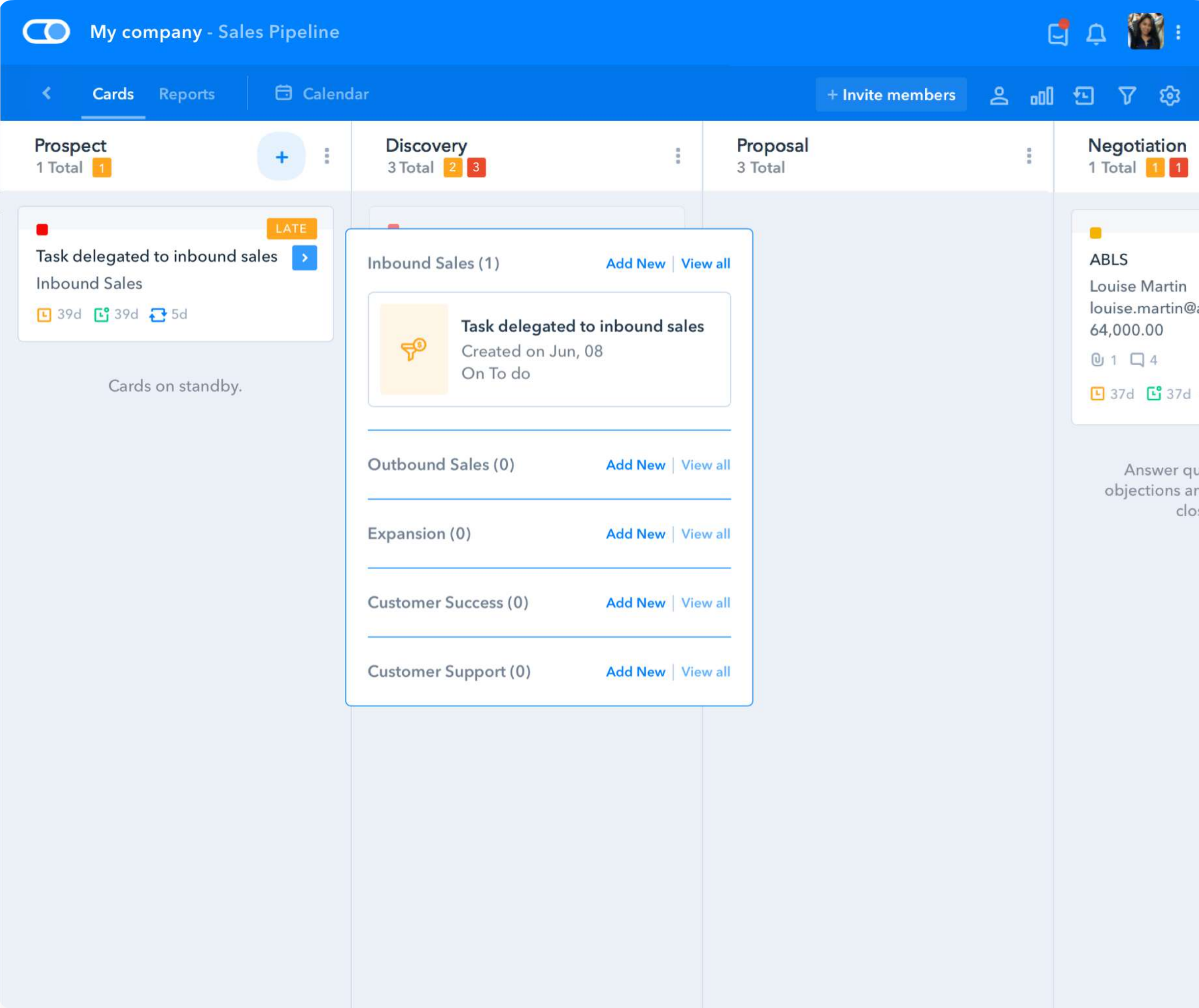
Integrations

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.

My company

<

Pipes

Database

Apps & Integrations

+ Invite members

Equipment

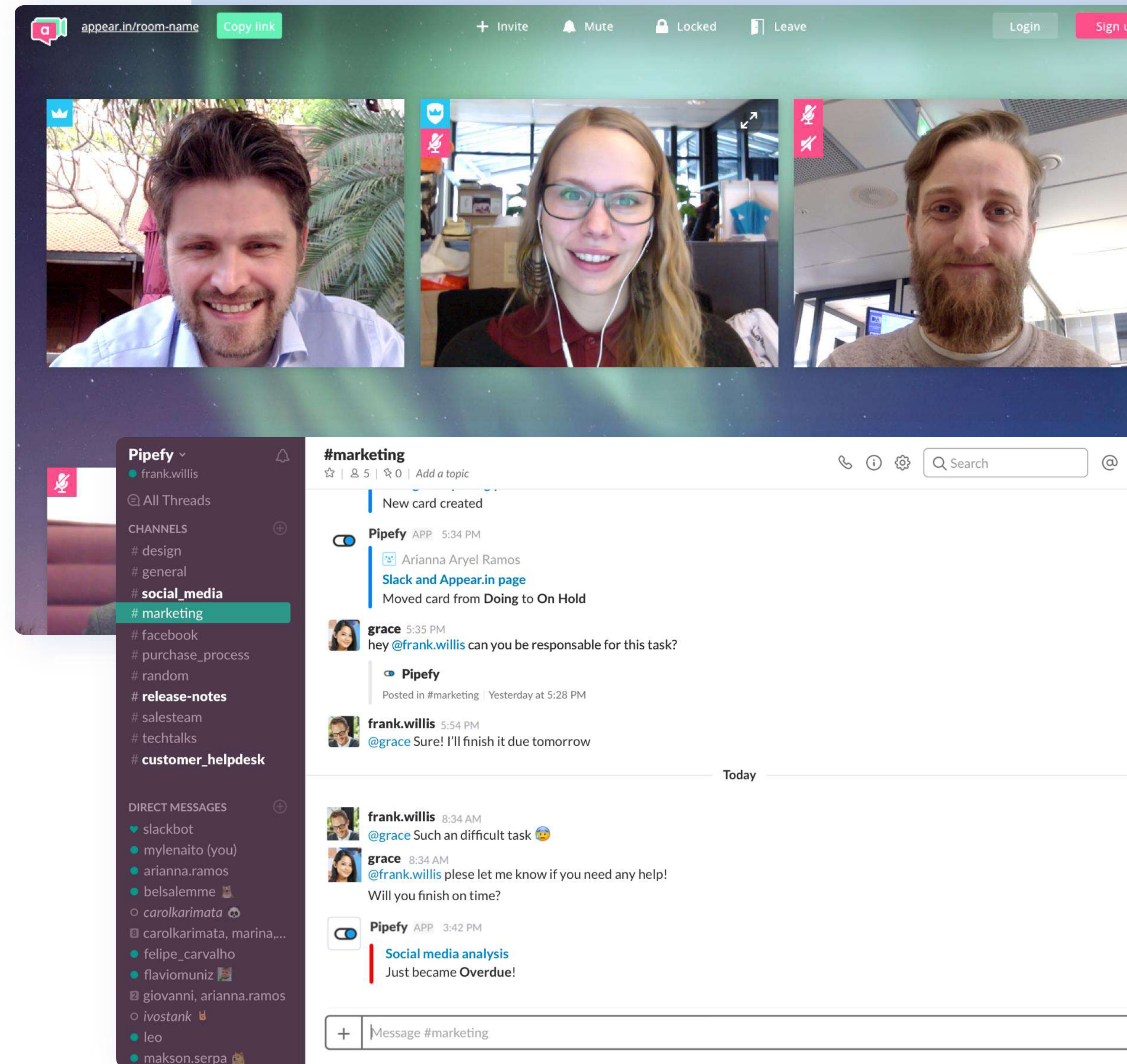
15 results match

Create record

LABEL	TYPE	BRAND	MODEL	STATUS
021	Mouse	Logitech	M170	In use
022	Monitor	LG	23MP55HA	In use
023	Notebook	Dell	D1TPHJ2	In use
024	Notebook	Dell	D1TPHJ2	In use
025	Monitor	LG	23MP55HA	In use
026	Keyboard	Multilaser	TC081	In use
027	HDMI cable	LG	M1762	In use
028	Mouse	Multilaser	M0222	In use
029	Monitor	Dell	Rev A03	In use
030	Mouse	Logitech	M170	In use
031	Keyboard	Multilaser	TC081	In use
032	HDMI cable	LG	M1762	In use

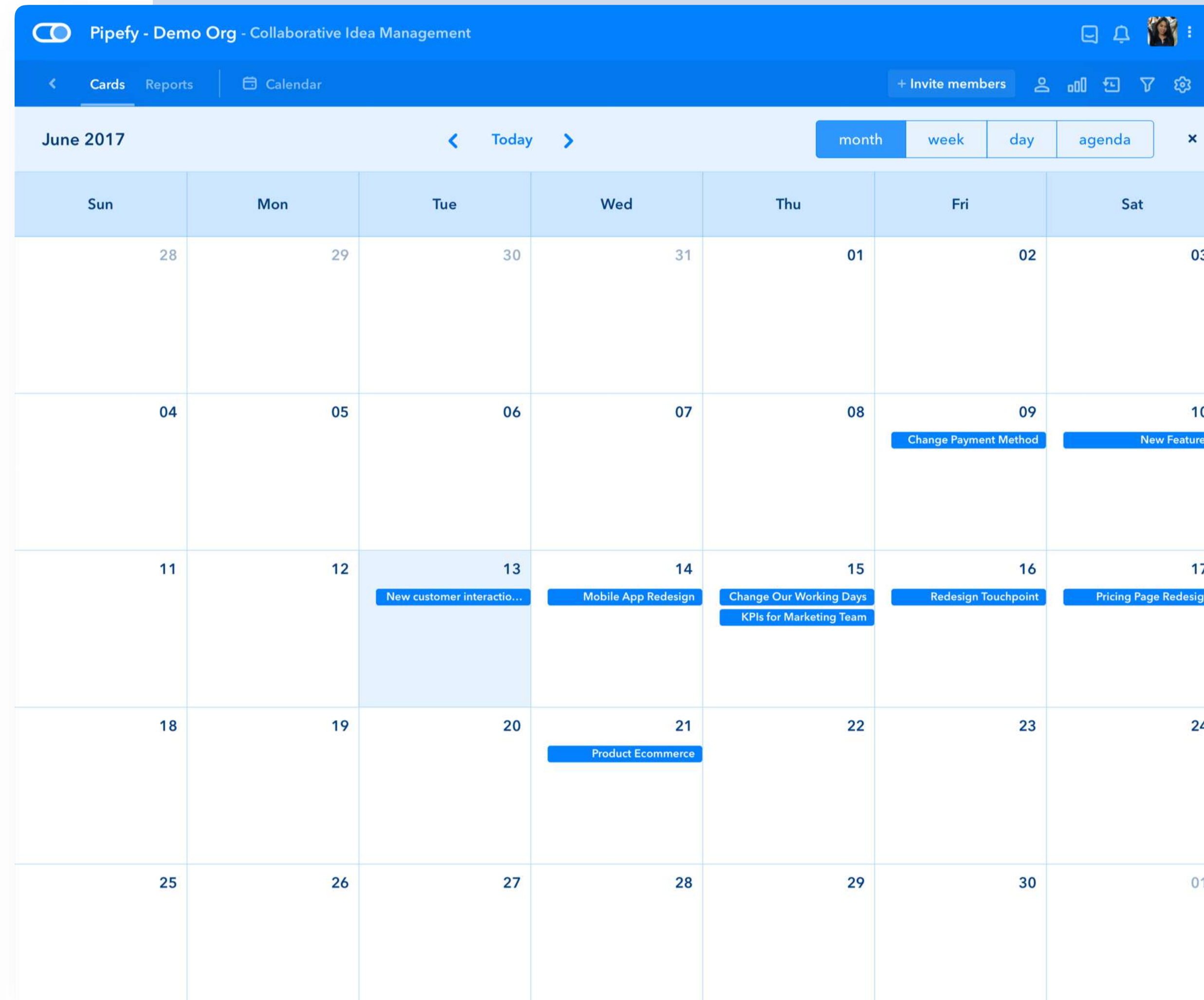
Apps

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.

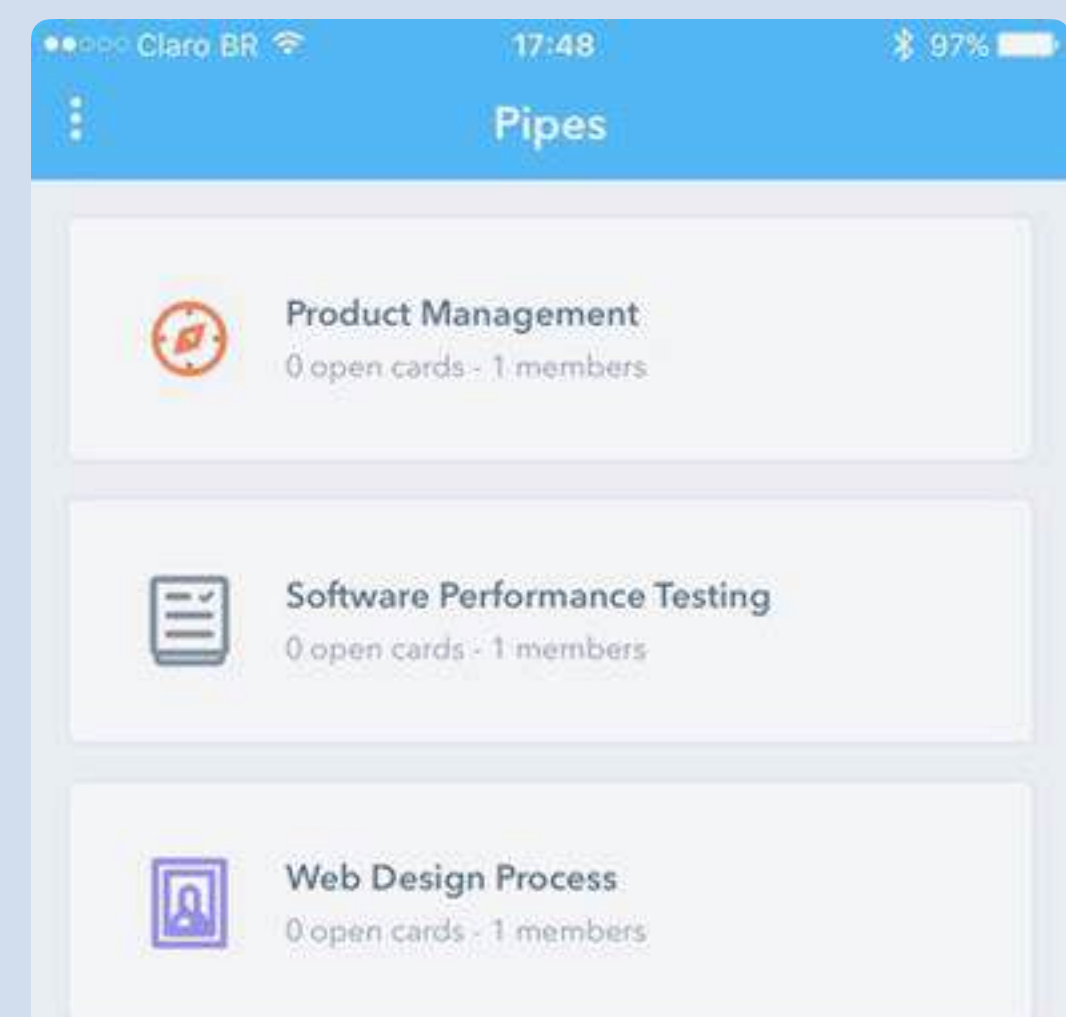
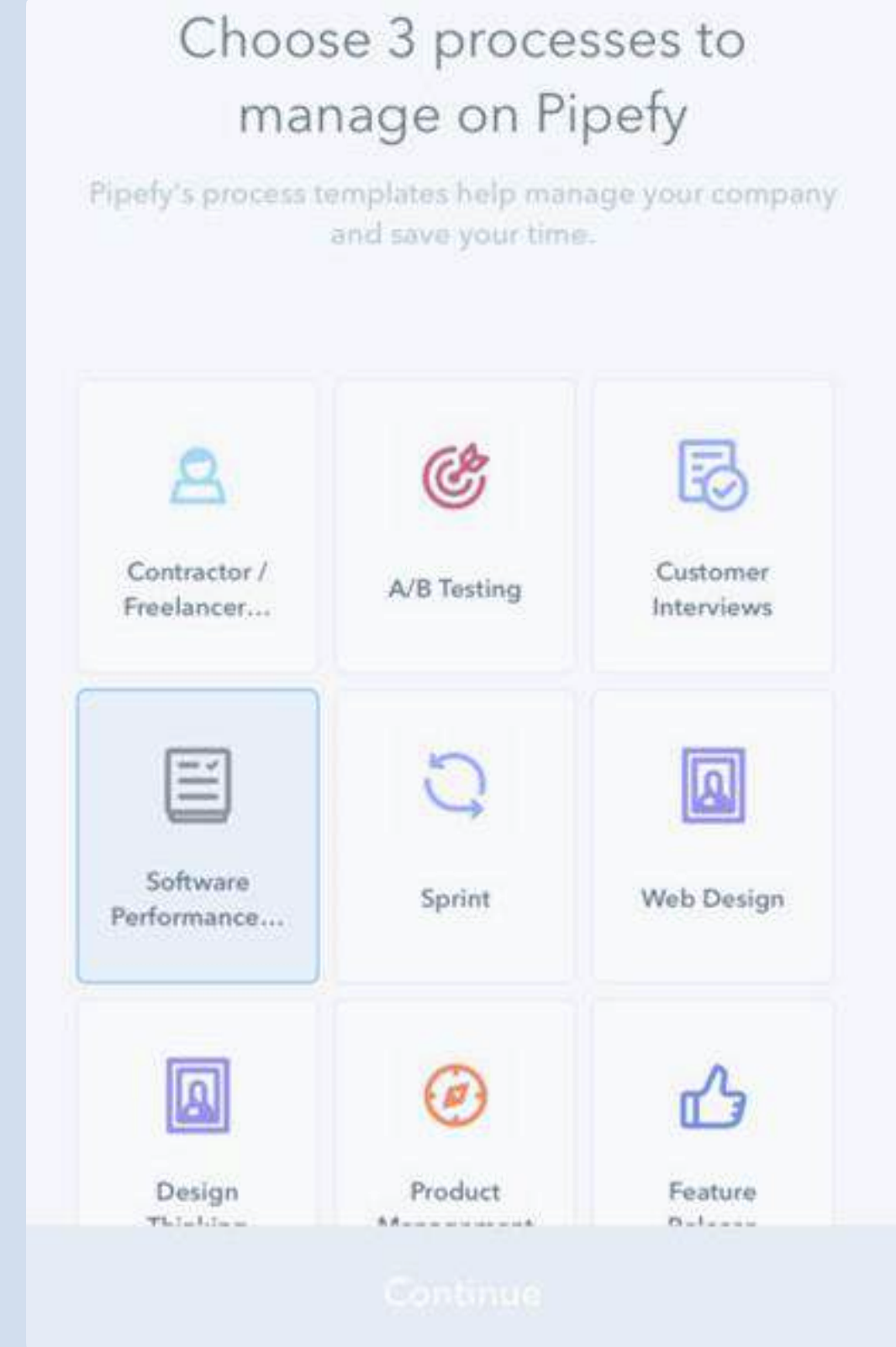
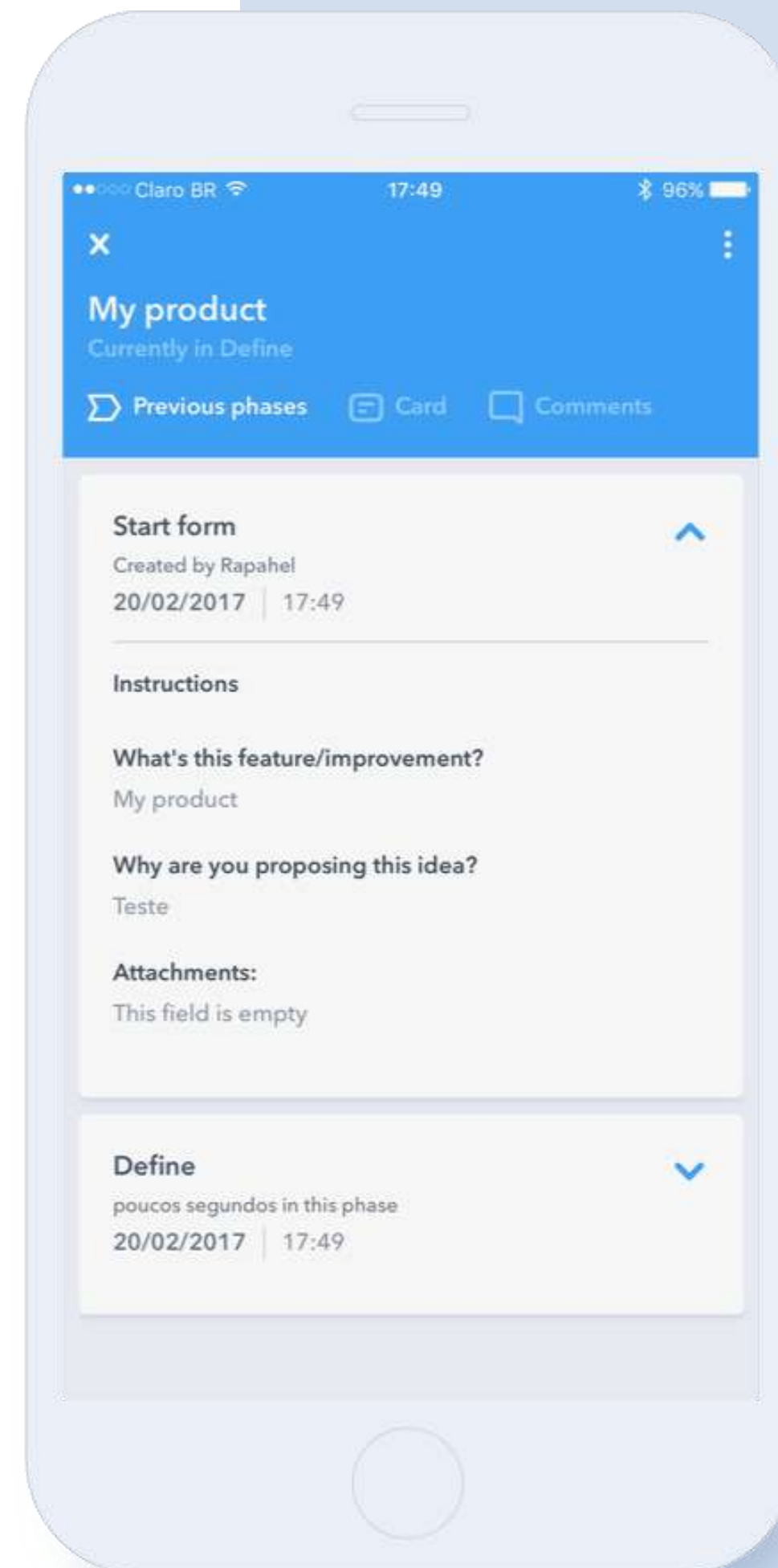


Mobile App

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

