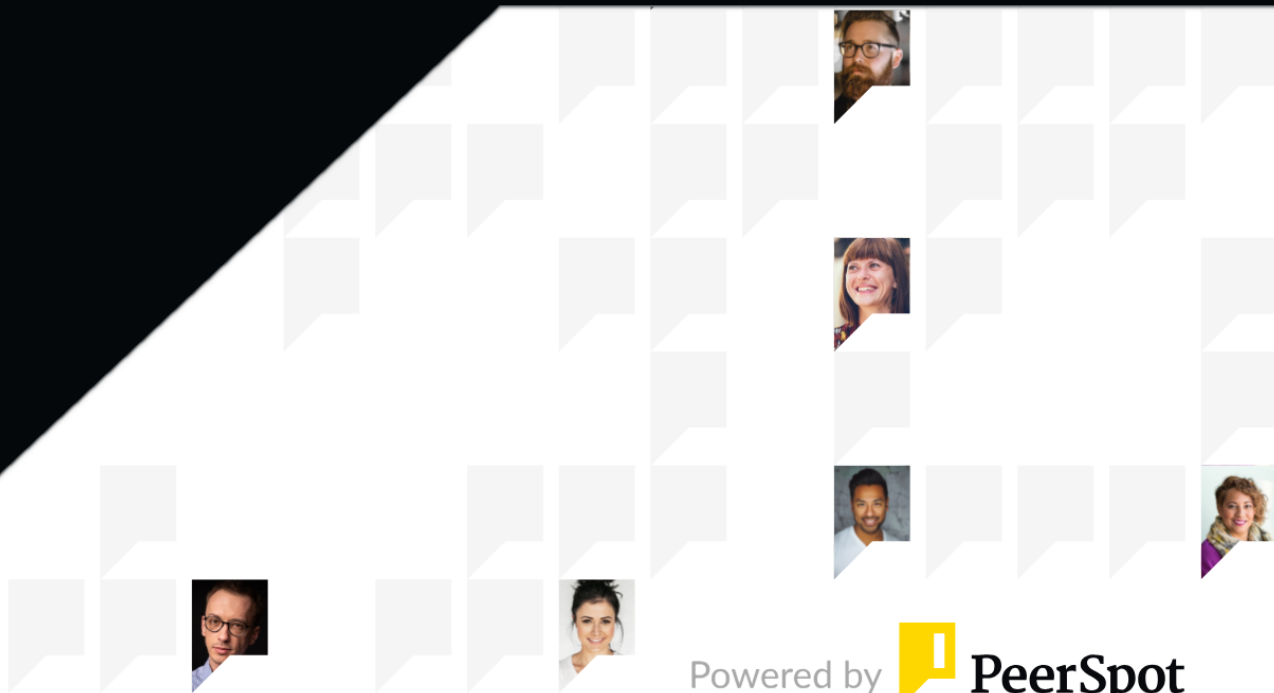


aws marketplace

Pipefy

Reviews, tips, and advice from real users



Powered by  PeerSpot

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Product Recap

pipefy

Pipefy

Pipefy Recap

Pipefy is a powerful workflow management tool that streamlines and automates processes. It effectively manages tasks, projects, and approvals, while offering flexibility and customization options.

With its user-friendly interface, customizable workflows, and automation capabilities, Pipefy saves time and improves collaboration. Integration options with other tools further enhance data management and collaboration.

Valuable Features

Excerpts from real customer reviews on PeerSpot:



“Pipefy is a great ally in this process.”



Tamires dos Santos Andrade

PMO Manager at a financial services firm with 10,001+ employees



“Since using Pipefy, I estimate that we have saved 50% in time and costs.”



Patel Dhulva

Software Firmware Engineer at Kohler Company



“Overall, Pipefy helped create more predictable, organized, and scalable operational processes.”



Andre Soares

Sre at Atlas Technologies



“Pipefy really improved my routine and reduced some errors.”



Isabela Bezerra

Field Office Coordinator at a manufacturing company with 10,001+ employees



“The way Pipefy has had a positive impact on my organization is that the major positive impact was being able to visualize the project as a whole, not only at the micro level, but also at the macro level.”



Matheus-Santana

Head de Operações



“Pipefy had a positive impact mainly on the ease of documentation, the ease of automations, communication, and reduction of manual work.”



Heloisamuniz Muniz De Souza

Analista de Negócios at a outsourcing company with 1,001-5,000 employees



“Pipefy has had a positive impact on my organization and it made day-to-day work much easier.”



Validated user

Analista de Compras Junior at a tech vendor with 10,001+ employees

What users had to say about valuable features:

The best features that Pipefy offers are that everything is automated. Within that automation, specific features that made my day-to-day work easier are the integration with other systems, the use of artificial intelligence that makes things easier, and the creation of reports. The use of artificial intelligence made things easier and helped me improve my use of technology. It is a very good program with a lot of quality and an educational value.

Silvanir Silvani

Analisa Financeira

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“The best features Pipefy offers include having the phases defined and being able to customize these phases according to the company I work for, being able to send automatic emails, and keeping the customer's history; all of this helps me a lot to have more time in my daily routine to manage the onboarding process..”

Validated user

Especialista em Onboarding de Clientes at a non-tech company with 11-50 employees

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“In my opinion, the best features Pipefy offers include the overview of the leads and the situation, where we can go, and where we should stop while considering the future.

“The overview of the lead situation is valuable for me because of my time constraints. When I see that a customer is cold, I should leave that and move forward with someone else. Pipefy has positively impacted my organization by helping me manage my time better. I can share that I think I can save my time by half. For example, if I needed to evaluate a customer without Pipefy, I would use significantly more time..”

Validated user

Executive assistant

[Read full review](#) 

“The best feature that Pipefy offers me is the ease of using the tool. This ease of use impacts my daily work because in the cards themselves we can identify the tickets as soon as we open the tool.

“Pipefy has had a positive impact on my organization because it brought me more visibility to map the bottlenecks we were having within the operation so we could work on them.

“I monitor the visibility that Pipefy has brought by its integration with our emails and the Slack tool, which gives me visibility of all the cases that other departments are reporting to me, and this ends up not impacting the ticket volume significantly..”

Validated user

Analista Financeira Pleno at a real estate/law firm with 1,001-5,000 employees

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“The best features that Pipefy offers are the ability to create something from scratch according to my needs. That is the main convenience it offers me.

I use a bit of everything for creating these solutions from scratch in my day-to-day work. I use custom forms, a series of automations, and the whole approval and document validation part within Pipefy. In addition to that, it can give me an overview and several reports about how my management is going and how my portfolio is doing.

Not only for me, but as a project manager of a large company, I see how each area uses Pipefy differently. We have everything from forms that will give the service team more clarity in requests to accounts payable and accounts receivable Pipefys that help from receiving invoices to automation and integration with other systems to post entries and reduce the workload. Pipefy adapts to your needs. .”

Tamires dos Santos Andrade

PMO Manager at a financial services firm with 10,001+ employees

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“The best features Pipefy offers are the visualization. Nowadays, people have a lot of difficulty with many things, so a clearer, cleaner, more objective visual is great because then we don't need to spend much time training anyone new. I really appreciate objective things, and I think this is great because then we don't need to spend much time training anyone new. It's all kind of intuitive, and as I mentioned before, this kanban visual is very practical, with colors highlighting what each thing should be. I believe that from the most basic position up to management, everyone can use Pipefy perfectly because of these characteristics.

“The visualizations in Pipefy are very good. From the most basic position to the most advanced, everyone can understand what is being done and what can be done. We don't waste much time teaching anything to anyone new because it's very clear, direct, and objective. I appreciate things that are clear, direct, and objective, so the visualization in Pipefy, because it uses this kanban model, is very practical..”

Validated user

[Read full review](#) 

Unknown at a tech vendor with 11-50 employees

Other Solutions Considered

Before choosing Pipefy, I evaluated other options such as Omie and Linux, but Pipefy was chosen because it offered the best artificial intelligence technology.

Silvanir Silvani

Analisa Financeira

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“The process of training and user adoption for using Pipefy involved the area that designed the methodology and the sales funnel processes training the employees in the commercial area to use it, as they used another system called HubSpot before..”

Cayo Silva

Executivo de Vendas at a retailer with 51-200 employees

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“Before Pipefy, there was no system. We used to write emails, and we would receive a lot of emails, and sometimes it was a mess and difficult to organize. When we found Pipefy, it was an excellent solution for the organization..”

Isabela Bezerra

Field Office Coordinator at a manufacturing company with 10,001+ employees

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“I did not evaluate other options because the first Pipefy purchase was not made by me. It was done by a previous management, so I cannot tell you which options were considered..”

Tamires dos Santos Andrade

PMO Manager at a financial services firm with 10,001+ employees

[Read full review](#) 

“I did not use a specific solution before choosing Pipefy. Most things were done by email, by Excel, or by other tools that did not have this functionality. The implementation was aimed at organizing workflows, providing visibility, centralizing processes, and in a way it is also a document repository, providing more clarity and SLA for all processes..”

Tamires dos Santos Andrade

PMO Manager at a financial services firm with 10,001+ employees

[Read full review](#) 

“Before choosing Pipefy, I evaluated other options such as Gestor.

“The evaluation process of other tools before choosing Pipefy is something I cannot provide more detail about, as that information is handled by the procurement team..”

Validated user

Analista Financeira Pleno at a real estate/law firm with 1,001-5,000 employees

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ROI

Real user quotes about their ROI:

I have already obtained a return on investment with Pipefy, as it made it possible to need fewer employees, automated the programs, saved money, and enabled fewer errors.

Silvanir Silvani

Analisa Financeira

[Read full review](#) 

“I can say that with the time, Pipefy is a very good tool because we can take other team members to make things that are more useful and evaluate if that is necessary or not based on Pipefy's insights..”

Validated user

Executive assistant

[Read full review](#) 

“I rate the cost-benefit of Pipefy in relation to what it delivers as very good because it is not software that has a very high cost and it delivers a lot of functionality and a lot of efficiency in the commercial area..”

Cayo Silva

Executivo de Vendas at a retailer with 51-200 employees

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“I have already mentioned a bit about time reduction, SLA reduction, and FTE reduction. It depends on the usage and each area had its expected return. Some areas, mainly speaking here of reduction of rework, information centralization, and automations, see a series of gains here within Edenred..”

Tamires dos Santos Andrade

PMO Manager at a financial services firm with 10,001+ employees

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“I have obtained return on investment with Pipefy, mainly in terms of time spent on analyses. There has been optimization of work, workflow, and probably manpower as well because things that would take longer in terms of manual work were greatly reduced due to the platform's comprehensive automation. In this scenario, there was a reduction in both time and manpower..”

ItaloGomes

Desenvolvedor at a financial services firm with 1-10 employees

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“We have already gotten a return on investment with Pipefy, and our savings came from the number of employees. Sometimes we needed to hire more employees because we did not have a standard workflow. With the entire service being constantly evaluated and with us having a trace of all this operational side, we are able to measure the quality of the service, how much each of the employees worked, and sometimes even replace an employee instead of hiring more people for the team, making some specific changes in the team so the service could keep evolving quickly..”

Matheus-Santana

Head de Operações

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Use Case

My main use case for Pipefy is bank reconciliation, entering orders, and entering purchases. A specific example of how I used Pipefy for bank reconciliation and order entry is clearing payments and reconciling the incoming orders in the bank with what came into the bank and what went out of the bank. In these financial routines, everything that was done related to purchases involved sending a request to have the purchase made and the request to clear it in the banks.

Silvanir Silvani

Analisa Financeira

[Read full review](#) 

“I use Pipefy to control leads and sort out customer evaluations for new customers. When a new customer comes in, Pipefy helps me manage that process by assisting with the timeline, including the first contact, what they communicated, whether the lead is hot or cold, and if we should continue with the negotiation. I also sometimes use Pipefy to write down proposals for customers..”

Validated user

Executive assistant

[Read full review](#) 

“My main use case for Pipefy is to receive tickets from other departments. I use Pipefy as my main tool to receive tickets from other departments, respond to them, and track the response SLA.

“Besides using Pipefy for tickets with interaction with other departments, I also use it to issue some types of reports..”

Validated user

[Read full review](#) 

Analista Financeira Pleno at a real estate/law firm with 1,001-5,000 employees

“My main use case for Pipefy is that we used it for everything; all the areas of BIP Saúde used Pipefy: the data area, HR area, supplies area, logistics area, operations area, finance area, so all the areas were connected and interconnected through Pipefy.

“I won't be able to give you a specific example of how we use Pipefy in finance because I wasn't in the finance department, but I used it, for example, in operations, and whenever a ticket was opened to let us know that a car was late in our operation, we would receive this ticket, check it, respond, and then move it through the appropriate stages, through its boxes on the kanban. This is something very good about Pipefy because it uses kanban, which is an easy way to visualize things and it doesn't get confusing or difficult for anyone. Additionally, we created several automations which we used a lot in other departments to create forms and create processes within Pipefy that improved our day-to-day work..”

Validated user

[Read full review](#) 

Unknown at a tech vendor with 11-50 employees

“My main use case for Pipefy is managing my project portfolio, and I have also used it for other functionalities, mainly in the treasury area for receiving invoices and for tracking requests. I have had a really good experience with Pipefy.

Pipefy now controls the entire lifecycle of my project portfolio management, from the opening of the request, where I can receive from the requesters what they need and the impact of each of their projects, to setting a prioritization and assigning a specific PMO for that type of project. It helps me manage the entire lifecycle from the request to requirements gathering, to the development phases, and the testing phases. In each of these stages I can upload evidence, and it asks me the right questions to ensure governance. Pipefy is a great ally in this process.

What I like most about using Pipefy in portfolio management or in other processes is that I can truly adapt it to my needs. I have some different tracks of projects, whether for internal projects, external projects, or structuring projects, and Pipefy allows me to make this adaptation and navigate in a very clear, easy, and transparent way across each of these tracks. .”

Tamires dos Santos Andrade

PMO Manager at a financial services firm with 10,001+ employees

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“My main use case for Pipefy is during the implementation process, specifically for customer onboarding.

“Pipefy has a function very similar to an agile methodology called Kanban, which is very necessary for the implementation process, so I use it to track all the steps and all the phases of the implementation process for each customer.

“With Pipefy, I can have a broad view of each customer in each phase, so every day, I can go into Pipefy and understand the phases the customer is in, whether they are late or not, and whether I need to take action that day or not.

“Pipefy gives me information about the phases the customer is in, allowing me to take action that day if necessary, especially if I identify some delay or lack of some data or information.

“For some time, I have been working on the implementation of enterprise customers, where I need to work with several areas at the same time, and Pipefy gives me a view of which phase the customer is in, if they are behind schedule, if they are following the checklist, and all those involved as well; so it gives me autonomy, freedom, and security in the implementation process.

“Pipefy gives me the autonomy to keep the flow going, ensuring I have the customer's history about everything that is happening so that I don't miss any phase of the schedule or any part of the checklist, which provides me more security that the project will run well until go-live..”

Validated user

[Read full review](#) 

Especialista em Onboarding de Clientes at a non-tech company with 11-50 employees

Setup

The setup process involves configuring and preparing the product or service for use, which may include tasks such as installation, account creation, initial configuration, and troubleshooting any issues that may arise. Below you can find real user quotes about the setup process.

“The process of implementing Pipefy in my company was carried out entirely by IT and designed together with the business area.

“The integration of Pipefy with other tools that we use internally was a simple integration that we used with Google tools through APIs..”

Cayo Silva

Executivo de Vendas at a retailer with 51-200 employees

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Customer Service and Support

“I needed to contact Pipefy's customer support only once, but they were very helpful and answered my question quickly. I would rate customer support a 10..”

Validated user

Analista Financeira Pleno at a real estate/law firm with 1,001-5,000 employees

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“Support is an area of Pipefy that I see has some room for improvement because there is a delay in support responses, and I find the support system somewhat bureaucratic..”

Cayo Silva

Executivo de Vendas at a retailer with 51-200 employees

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“I personally never needed to contact Pipefy support. When it was necessary in very specific cases, the contracting department and finance department took that action and made contact, but practically all cases were resolved in a very short time..”

Validated user

Analista Administrativo at a consultancy with 51-200 employees

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“Pipefy's customer support works very well. The few times we contacted them or asked for help with something, it worked very well. Perhaps there could be an easier contact option via WhatsApp, which could even be a bot, but via WhatsApp sometimes it would work very well..”

ItaloGomes

[Read full review](#) 

Desenvolvedor at a financial services firm with 1-10 employees

“Pipefy's customer support is good. You get in touch with them, and they send you an email afterwards. I think it is good.

“I would rate customer support on a scale from one to ten as ten..”

Matheus-Santana

[Read full review](#) 

Head de Operações

“We have direct contact with Pipefy's customer support, so there are always one or two consultants who are dedicated to the company, and the support is excellent. Whenever I needed support, and there were many times I needed it, they were extremely attentive and quick in their service. Besides that, when you need any support in building any workflow or improving some process, they are always available. This is also included in our annual contract..”

Tamires dos Santos Andrade

[Read full review](#) 

PMO Manager at a financial services firm with 10,001+ employees

Other Advice

“I believe that Pipefy is secure because it is a highly reliable tool, and I believe that it doesn't have data leaks or all these security problems that we have. I would rate my overall experience with Pipefy as a ten..”

Validated user

Unknown at a tech vendor with 11-50 employees

[Read full review](#) 

“I believe Pipefy is the best tool today for monitoring customers in the onboarding process, especially enterprise customers who require more critical care because we work with several areas, different people, and the schedule and the checklist need to be very well updated, which is something that Pipefy provides us..”

Validated user

Especialista em Onboarding de Clientes at a non-tech company with 11-50 employees

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“My advice to others looking into using Pipefy is to first assess your business because Pipefy is full of features and you may not need to use everything that Pipefy can offer. Pipefy is good for a business that is growing and needing more customers. I rate my overall experience with Pipefy as an 8..”

Validated user

Executive assistant

[Read full review](#) 

My advice to other people who are thinking about using Pipefy is that it is very good. It offers a lot of artificial intelligence systems, automation, and it is an extremely reliable and secure system. Pipefy is a complete system which offers visual systems, is educational, and I highly recommend it. I would consider indicating it to other companies because it is a system that enables the facilitation of purchase orders and reconciliation. I would only improve the human contact with the customer for support. I gave this review a rating of 10.

Silvanir Silvani

Analisa Financeira

[Read full review](#) 

“My advice to other people who are thinking about using Pipefy is that it is a great tool to use in daily work, giving visibility of all the necessary information needed. You can extract reports to cross data.

“I would rate this product a 9..”

Validated user

Analista Financeira Pleno at a real estate/law firm with 1,001-5,000 employees

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“On a scale from one to ten, I rate Pipefy a nine.

I think it is a very complete tool and very easy to use, which is why I give it a nine rather than a ten. It does not require great instruction, so you can quickly learn how the tool works and make very effective builds. I only did not give it a ten yet because of the points I mentioned. They are improving every day. Since I started using it until now, the conditionals have become much clearer, the automations too, and the layouts have evolved and that is clear. However, there are still things to evolve, and that is why not a ten. I did not give a lower score because it is effectively functional. I think it is a very complete tool that can help many companies organize themselves better in various areas of any company.

I advise others thinking about using Pipefy to do a trial and not be limited to just one area. You can practically run Pipefy across the entire company, simplifying workflows, giving you more governance, standardizing processes, standardizing approvals, and automating several tasks that today are quite operational. Pipefy already has several ready-made layouts that you can adapt, or you can also build your layout from scratch. Do not be limited to just one need. .”

Tamires dos Santos Andrade

PMO Manager at a financial services firm with 10,001+ employees

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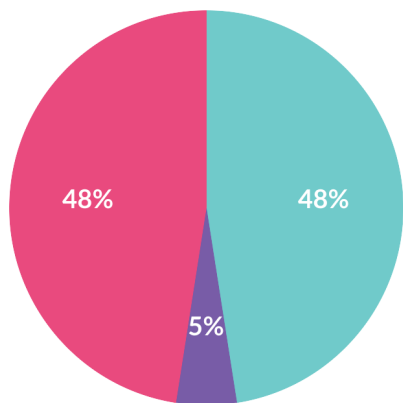
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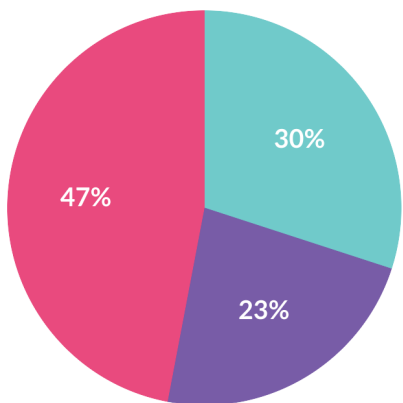


Company Size

by reviewers



by visitors reading reviews



Large Enterprise Midsize Enterprise Small Business

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