

aws marketplace

Pipefy

Reviews, tips, and advice from real users



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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:

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



Andre Soares

Sre at Atlas Technologies

- ✓ “In terms of money and time saved, Pipefy is a great time saver overall, reflecting in analysts handling additional projects beyond ticket management.”



Verified user

Finance Analyst at a media company with 5,001-10,000 employees

- ✓ “Pipefy has impacted my organization positively as we have not reduced our headcount, but we could if we wanted to because the number of people managing those processes before Pipefy was a lot.”



Mmazzuco Mazukuloli

Consultant, Lean 6 Sigma consultant at a energy/utilities company with 201-500 employees

- ✔ “Pipefy has had a positive impact on my organization by helping the collections team convert invoices that were overdue into paid invoices and, consequently, cash for the company.”



Gustavo Pilar

Software Developer at a legal firm with 1-10 employees

What users had to say about valuable features:

“Reporting is a main tool I use in Pipefy, following through the tickets especially when connecting with outsourced companies to manage them. Pipefy speeds up my process significantly. Previously, managing emails was cumbersome with around 200 to 500 tickets daily. Pipefy categorizes and moves cards into various phases easily, a stark contrast to following progress in Outlook.

Pipefy's scalability is noteworthy too. It increases awareness through auto replies and emails, smooth ticket category automation, and helps different departments with additional pipes..”

Verified user

Finance Analyst at a media company with 5,001-10,000 employees

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“Kanban view really helps us to have a panoramic view of what's happening in the company, how much we have coming in there, and how much can come in within a certain period.

In my opinion, the best features that Pipefy offers are the separation of forms by phase and the tag section for assignment of owners. The separation of forms by phase and the assignment of owners make my day-to-day easier by allowing me to determine small actions at each phase for a specific person, where the form will only be available in that phase. A specific form will only be available in that phase, then from the moment the phase changes, I can switch it to another person and also change the form. The updated form will be available to another person, but it is a totally different form.

Pipefy has had a positive impact on my organization by helping the collections team convert invoices that were overdue into paid invoices and, consequently, cash for the company. .”

Gustavo Pilar

Software Developer at a legal firm with 1-10 employees

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“The best features Pipefy offers include the possibility of managing the process in a Kanban style, the fields and making fields obligatory, together with the possibility of making automations, such as notifying someone if a card is in a phase of that process for a long time, then someone gets a notification. When this activity or this phase is completed, someone gets a notification. All these kinds of automations within the transition of phases is the main function that we use in Pipefy.

“The automations and required fields help my team day-to-day by ensuring that we have our database always fully completed. For example, there are no blank spaces. We always have the information standardized because the way people fill the fields is standardized because of Pipefy. We have the possibility to analyze this data easily because of this standardization.

“Pipefy has impacted my organization positively as we have not reduced our headcount, but we could if we wanted to because the number of people managing those processes before Pipefy was a lot. We have reduced this, and these people now have more time to focus on more strategic and tactical activities and not only on operational activities. We have more standardized data to analyze and now we have dashboards because we have a digital process and not just an analytical process. We do not have paper forms anymore, but we used to have paper forms. All of this has helped us a lot.

“A specific outcome since using Pipefy is that we have reduced lead time significantly..”

Mmazzuco Mazukuloli

[Read full review](#) 

Consultant, Lean 6 Sigma consultant at a energy/utilities company with 201-500 employees

“In my opinion, some of the best features Pipefy offers are workflow customizations with low-code configuration, automation of repetitive tasks and approvals, an easy-to-use and intuitive interface, visibility and tracking across teams and processes, integration capabilities with other tools, centralized process management, notifications, and SLA tracking. One feature I particularly appreciated was the ability to standardize processes while still keeping workflows flexible enough to adapt to different team needs. Teams interact with Pipefy mainly through structured workflows for operation requests, approvals, and task tracking. Instead of relying on scattered communication through chats and emails, they use Pipefy as a centralized platform to submit requests, follow progress, assign responsibilities, or monitor deadlines. It improved collaboration between technical and non-technical teams because everyone had better visibility into the status of tasks and processes.

The flexibility of Pipefy helps my teams because our workflows often change depending on team priorities and operational needs. For example, we initially created a simpler approval workflow for infrastructure requests. Later, as the process evolved, we needed to add new validation stages, automatic notifications, SLA controls, and different approval paths depending on the request type. With Pipefy, we were able to adapt the workflow without needing major redevelopment or complex technical changes. That made it easy for teams to continuously improve processes as requirements changed. Another positive aspect was how quickly non-technical teams could understand and interact with the workflow. The visual organization and automation features helped reduce confusion and improve collaboration across departments.

I also appreciated the reporting and tracking visibility because managers and the team could easily monitor bottlenecks, pending tasks, and process performance in a centralized way..”

Andre Soares

Sre at Atlas Technologies

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Other Solutions Considered

“I did previously use ServiceNow in my past work, but in this current employer, it was not Pipefy; it was just Outlook email, which was the best solution for the Outlook migration..”

Verified user

Finance Analyst at a media company with 5,001-10,000 employees

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“I think it is important to determine first what you need for the solutions because there are also other alternatives, Kanban solutions, or ticketing solutions that you might need; what matters most here is the usability of the interface..”

Verified user

Finance Analyst at a media company with 5,001-10,000 employees

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ROI

Real user quotes about their ROI:

“In terms of money and time saved, Pipefy is a great time saver overall, reflecting in analysts handling additional projects beyond ticket management. This has reduced the need for more employees, as I alone can manage the growth using my admin access..”

Verified user

Finance Analyst at a media company with 5,001-10,000 employees

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Use Case

“Pipefy is used to handle tickets, ticketing, inquiries, and help desk pipes. I currently manage two pipes for ticket handling, and there are upcoming pipes that align with different use cases..”

Verified user

Finance Analyst at a media company with 5,001-10,000 employees

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“My main use case for Pipefy involves creating accounts receivable pipes, splitting tasks among the operations team, and managing projects. I duplicate the information from the financial system for accounts receivable, and from this information inside Pipefy, in a Kanban separated by time stages, I start creating tasks for the finance team..”

Gustavo Pilar

Software Developer at a legal firm with 1-10 employees

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“My main use case for Pipefy is to manage processes and to follow processes with Kanban style management and for some automations such as when an activity is completed then someone gets an email asking them to complete a field or to submit another document. However, it is mainly for process reasons.

“A quick specific example of a process I manage with Pipefy is that we used to first receive the suggestion of projects and then the suggestion of participants to conduct this project. Pipefy uses an automation to approve the participation of these candidates in the project with their managers and also to approve the project with the direction of the company. It is all fully automated within Pipefy..”

Mmazzuco Mazukuloli

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Consultant, Lean 6 Sigma consultant at a energy/utilities company with 201-500 employees

“I use Pipefy mainly for workflow automation, internal process management, and organization operations requests between teams. We used it to start tasks, approvals, and record information activities for two years.

My main use case for Pipefy is workflow automation, internal process management, and organizing operational requests between teams. We use it to standardize tasks, approvals, and recording operational activities.

One of the workflows I automated with Pipefy is the flexibility of creating customized workflows and automation without requiring heavy development effort. The interface is user-friendly and helped improve visibility across processes and teams. It has improved process organization, task tracking, visibility, and reduces manual follow-ups between teams. It has also rapidly centralized the operational requests in one place.

For example, when managing internal operation requests between infrastructure and development teams, before Pipefy, many requests were handled manually through chat messages, emails, and spreadsheets, which made tracking difficult and sometimes caused delays or duplicated work. With Pipefy, we created a structured workflow where requests automatically move through stages such as triage, approval, execution, validation, and completion. Each stage had assigned responsibilities, deadlines, and automated notifications. This helped centralize communication, improve visibility, and reduce the amount of manual follow-up needed between teams. We also used automation for approvals and status updates, which reduced repetitive tasks and made the process more organized and predictable. Overall, it improved workflow transparency and helped teams collaborate more efficiently..”

Andre Soares

Sre at Atlas Technologies

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Customer Service and Support

“My concern is that I am connected to an outsourcing company, so any request to Pipefy goes through this third party. This is cumbersome, and I find direct customer service with Pipefy to be lacking..”

Verified user

Finance Analyst at a media company with 5,001-10,000 employees

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Other Advice

“My advice for others looking into using Pipefy is to first describe the process and the improvements in the process before developing the system and the Kanban style. Before you develop Pipefy, I suggest drawing and describing the responsibilities and describing all the process information and the instructions before the tool. I give this product a rating of 8..”

Mmazucco Mazukuloli

Consultant, Lean 6 Sigma consultant at a energy/utilities company with 201-500 employees

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“My advice for others thinking about using Pipefy is to have defined processes, so that the migration is easier before migrating. I think Pipefy is a good tool for those who already know what they want and need to speed up processes, but in general, it is more important for you to know which data is important for you and which processes you need to define than for you to simply hire a tool. I would rate this experience a seven out of ten..”

Gustavo Pilar

Software Developer at a legal firm with 1-10 employees

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“Pipefy is easy to navigate, resembling a more straightforward and user-friendly Kanban board. It could have been better with more integration features in development. It is not Pipefy's fault about some support issues but rather third-party complications. For usability, Pipefy is favorable given its diverse team adaptability. However, lacking innovative features compared to other existing systems is a downside. I rated this review an 8 out of 10..”

Verified user

Finance Analyst at a media company with 5,001-10,000 employees

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“While I do not have exact official metrics available, based on our internal experiences, I would estimate that Pipefy helped reduce manual follow-up and coordination work by around thirty to forty percent. Processes that previously required constant status checks through chat messages and emails became much more centralized and automated. We also noticed faster response times for operational requests because responsibilities, approvals, and deadlines became clearer inside the workflow. From a productivity perspective, automation for notifications, approvals, and task movements probably saved several hours per week for the teams involved, especially for recurring operational processes. Another important improvement was reducing communication gaps and duplicated work. Since everyone had visibility into the workflow status, teams spent less time searching for updates or clarifying ownership. Overall, the biggest gains were in process visibility, operational organization, and reduction of repetitive manual coordination tasks.

One additional improvement that could make Pipefy even better would be stronger AI-assisted workflow recommendations and automation suggestions. For example, intelligent suggestions for process optimization, bottleneck detection, or automation opportunities could help teams continuously improve workflows more proactively. I believe enhanced observability and traceability for complex

workflows would be valuable in enterprise environments, especially for teams managing many operational processes simultaneously. Another area could be improving the experience for highly technical teams by offering more advanced API integrations and infrastructure-oriented capabilities while still keeping the platform simple for non-technical users. Overall, I think Pipefy already delivered strong value for workflow and process management, especially because of its flexibility and the ease of adoption across different departments.

My advice would be to start with simple and well-defined workflows first. Then gradually expand automation and process complexity as teams become more familiar with the platform. Pipefy works especially well when organizations take time to standardize processes and clearly define responsibilities, approvals, and workflow stages before building automations. I would also recommend involving both technical and non-technical teams early in the implementation process because one of Pipefy's strengths is improving collaboration and visibility across departments. Another important point is to establish governance and workflow organization standards from the beginning, especially in larger environments. As the number of workflows and automations grows, maintaining consistency becomes very important. For organizations looking to improve operational organization, process tracking, approvals, and workflow automation without heavy deployment effort, I think Pipefy can deliver strong value and a relatively fast adoption.

Overall, I think Pipefy is a strong and flexible workflow management platform that can bring significant value to organizations looking to improve operational processes, collaboration, and automations. What I appreciated most was the balance between usability and flexibility. It allowed both technical and non-technical teams to collaborate more effectively while maintaining process visibility and organization. I also think Pipefy is especially valuable for companies that are transitioning from manual process management and want a more structured and scalable operational model without requiring large development efforts. At the same time, continuing to evolve in enterprise scalability, analytics, integrations, and intelligent automation features could make the platform even stronger for larger and more complex environments. Overall, my experience with

the platform was positive, and I believe it can be a very effective solution for workflow and business process management. I would rate this review an eight out of ten..”

Andre Soares

Sre at Atlas Technologies

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