



# Jotform Workflows

A powerful, no-code workflow automation tool with a drag-and-drop builder for streamlining approvals, tasks, e-signatures, and payments.

<https://www.jotform.com>

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## Overview

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Jotform Workflows is a comprehensive, no-code automation platform developed by Jotform, designed to streamline and systemize business processes across various industries, including healthcare and biotech. It expands upon the functionality of the former Jotform Approvals, enabling users to create complex, multi-step workflows using an intuitive drag-and-drop builder.

### Key Features and Capabilities:

**Workflow Builder:** A visual, drag-and-drop interface that allows users to design custom workflows without any coding knowledge.

**Logic & Flow Control:** Includes conditional logic, parallel processing, conditional branches, and merging branches to create smart, dynamic workflows.

**Actions:** Automate tasks such as assigning tasks, collecting approvals, requesting e-signatures, sending automated emails, and collecting payments via integrated payment forms.

**Data Management:** Centralized submission storage, real-time tracking, and customizable reports/dashboards to monitor workflow progress and gain insights.

**Templates:** Access to hundreds of pre-built workflow templates for common use cases like employee onboarding, recruitment, and expense approvals.

**Mobile Access:** Allows users to complete approvals and manage tasks on the go via a mobile app.

**Target Users and Use Cases:** Jotform Workflows is suitable for businesses of all sizes, from startups using the free tier to large enterprises requiring custom solutions. It is particularly useful for digitizing and automating processes that start with a form submission, such as:

**Healthcare/Biotech:** HIPAA-compliant patient intake, consent forms, and internal document approvals (available on Gold/Enterprise plans).

**Human Resources:** New hire onboarding, leave requests, and recruitment application reviews.

**Finance:** Expense report approvals, purchase order approvals, and payment collection.

**General Business:** Lead generation, customer support ticketing, and document lifecycle management.

## Key Features

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- Drag-and-drop workflow builder
- Conditional logic and parallel processing
- Automated approvals and task assignment
- E-signatures and document generation
- Payment collection integration
- Real-time flow tracking and reporting
- 200+ workflow templates

## Pricing

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**Model:** freemium

Offers a perpetually free 'Starter' plan with limited features. Paid subscription plans (Bronze, Silver, Gold) are available, starting at \$34/month (billed annually) for the Bronze plan. Enterprise plans offer custom pricing, enhanced security, SSO, and HIPAA compliance features.

**Starting at:** USD \$34

**Target Company Size:** startup, small, medium, enterprise

## Integrations

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Google Drive, Slack, Dropbox, Airtable, Salesforce, HubSpot, monday.com, Zoom, PayPal, Stripe, Asana, Microsoft Teams

## Compliance & Certifications

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HIPAA

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