

Pricing Plans Comparison Chart

Insightly Pricing Plans

BEST VALUE			
Free	Plus	Professional	Enterprise
\$0	\$29	\$49	\$99
Up to 2 users	USD per user/month <i>(billed annually)</i> \$35/user/month <i>(billed monthly)</i>	USD per user/month <i>(billed annually)</i> \$59/user/month <i>(billed monthly)</i>	USD per user/month <i>(billed annually)</i> \$129/user/month <i>(billed monthly)</i>
Start organizing your business, and manage sales and projects more effectively. • Webforms • Gmail Sidebar • Outlook add-on • Quickbooks integration • Xero integration	Keep in touch and never drop the ball. Get all the right tools to optimize your message. • Scheduled emails • 100 custom email templates • Higher record limits • MailChimp auto-import Now you're talking!	Leap forward in productivity and security. Automate processes and protect your data. • Role-based permissions • Workflow automation • Lead assignment roles • Priority email support Productivity at the professional level.	Contact us and ask how Insightly can give you the best deal for the features and limits you need. • Unlimited records • Unlimited storage • Dedicated specialist We can help you grow your business to new heights.
TRY FOR FREE	TRY FOR FREE	TRY FOR FREE	CONTACT SALES

To speak with a human being, call: **1-888-999-4039**

● ALL FEATURES \$ ADDITIONAL COST

	Free	Plus	Professional	Enterprise
Find and manage leads				
Lead management Manage and track leads and qualify prospects	●	●	●	●
Lead assignment and routing Automatically route incoming leads to the right reps based on your criteria	—	—	●	●
Automatic duplicate detection Improve data quality by ensuring leads are not duplicated	—	●	●	●
Mass emailing Send custom, templated, and tracked emails to targeted lists of leads or customers	—	●	●	●
Email templates Improve productivity with templated emails and track open and reply rates	—	●	●	●
Schedule outbound emails Send emails to prospects and customers at exactly the right time, automatically	—	—	●	●
Visualize leads with kanban Drag and drop leads to move deals along visually in kanban view	—	●	●	●
Web to lead capture Capture new leads on any web page and filter out spam automatically so you never lose a hot prospect	●	●	●	●
Automatic social profile enrichment Social network profiles are automatically appended to records so you have the full picture of every contact and lead	●	●	●	●
Build stronger customer relationships				
Contact and organization management View a complete picture of every contact and organization including history, communications, activities, and linked items	●	●	●	●
Task and event management Sync calendar events and track assigned tasks so nothing falls through the cracks	●	●	●	●
Relationship linking Map and better understand complex customer relationships through flexible record linking	●	●	●	●
Intelligent scoring of relationship strength AI algorithms measure and score the health of every customer relationship so you can maintain engaged contacts	—	—	—	COMING SOON
Visually map contact relationships Explore the map of relationships between contacts and employees, and discover new paths to prospects	—	—	—	COMING SOON

● ALL FEATURES \$ ADDITIONAL COST

	Free	Plus	Professional	Enterprise
Build stronger relationships <i>continued</i>				
Discover undocumented relationships Uncover hidden relationships between contacts and employees and determine the strength score of those relationships	—	—	—	COMING SOON
Attach files from cloud storage Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account	●	●	●	●
Sell more productively				
Opportunity management Manage and track all the details of every deal with stages, pipelines, and custom fields	●	●	●	●
Customizable sales processes Customize multiple sales pipelines for each sales process, and assign activity templates to each stage	●	●	●	●
Integrated phone dialer and call logging Place and receive phone calls with click to call, and log and record every call automatically	—	—	\$	\$
Automatic call analysis and reporting Track phone call frequency and length, and filter and report on call logs	—	—	\$	\$
Apply task and event activity sets Assign a templated sequence of tasks and events to leads, opportunities, projects, or organizations	●	●	●	●
Assign sales teams View which sales team members worked on every deal	●	●	●	●
Batch update records with ease Filter, select, and update the details of any number of records in Insightly from any list view	●	●	●	●
Work from any device				
Native Android and iOS mobile apps Utilize the power of Insightly from anywhere with our award-winning mobile applications	●	●	●	●
Real-time mobile data synchronization The Insightly mobile apps are always up to date and in sync	●	●	●	●
Mobile business card scanning Take photos of business cards from your phone and automatically convert them to contacts or leads	—	15	25	50
Mobile contact and calendar integration Automatically sync with the contacts and calendar apps on your phone	●	●	●	●
Mobile voice notes Record audio notes into Insightly from the microphone on your phone.	●	●	●	●

	Free	Plus	Professional	Enterprise
Deliver projects				
Integrated project management Track projects, milestones, and all correspondence and project activities in Insightly	●	●	●	●
Milestones and associated task tracking Track milestones and schedule and assign associated tasks	●	●	●	●
Calendar synchronization Sync tasks and events to your work calendar	●	●	●	●
Configurable project processes Build templates of tasks and event sets, and apply them to projects in one click	●	●	●	●
Convert won opportunities to projects Move all the way from leads into opportunities and then to projects in Insightly, and preserve all data at every step	●	●	●	●
Business intelligence platform				
Built-in business intelligence dashboards Build beautiful dashboards with over 40 different chart types and drag-and-drop configurable layouts	—	●	●	●
Customizable real-time insight cards Create sophisticated charts and graphs, and share them with co-workers on any dashboards	—	—	100	UNLIMITED
Build and share customized BI dashboards Share complete dashboards or individual charts and graphs with co-workers	—	—	●	●
Configurable reports Flexible reports with groupings, totals, summaries, and drag-and-drop field selection	—	●	●	●
Customized report scheduling and emailing Schedule reports to run at any time and have the results emailed to the right people, automatically	—	—	●	●
Collaborate across the company				
Integration with Google G-Suite Login, Calendar, and Docs The most popular CRM to integrate with the full suite of Google G-Suite productivity tools	●	●	●	●
Integration with Microsoft Office 365 Login, Calendar, and OneDrive Utilize Insightly from Outlook on your phone or computer, link to OneDrive files, and login to insightly with your Office credentials	●	●	●	●
Slack integration with AI bot Add the Insightly Slack AI bot and get CRM data within Slack	●	●	●	●

	Free	Plus	Professional	Enterprise
Collaborate across the company <i>continued</i>				
Insightly Outlook add-on Get the power of Insightly and all your customer and sales data right inside Outlook	●	●	●	●
Insightly Gmail add-on Use our complete CRM integration inside Google Gmail with our add-on	●	●	●	●
Model and automate business processes				
Complete workflow automation Automate and orchestrate workflow tasks, sending emails, updating records, executing custom code, firing webhooks, and much more	—	—	●	●
Custom object creation Store any type of data inside Insightly and relate it to contacts, organizations, sales, or projects with granular permissions	—	—	●	●
Custom validation rules Author validation checks to suit your business and it's processes	—	—	—	●
Calculated fields on any object Powerful formula engine can execute and store complex calculations in any object	—	—	—	●
Roles and permissions Set granular roles and permissions for objects and data access for different users	—	2	UNLIMITED	UNLIMITED
Configurable profiles and page layouts Control read/write permissions for fields in any object for different users	—	2	UNLIMITED	UNLIMITED
Deploy custom apps on any platform Control read/write permissions for fields in any object for different users	—	—	—	●
Lambda function authoring and execution Control read/write permissions for fields in any object for different users	—	—	—	●
Configurable webhooks Send HTTP notifications to any endpoint when records are added or changed	—	—	—	●
Dynamic page layout rules Send HTTP notifications to any endpoint when records are added or changed	—	—	—	●
Connect to any application				
Over 250 integrations to business apps Insightly integrates with a large range of business applications right out of the box	●	●	●	●

● ALL FEATURES \$ ADDITIONAL COST

	Free	Plus	Professional	Enterprise
Connect to any application <i>continued</i>				
Published web services API Access our comprehensive REST API at no additional cost	—	●	●	●
Configurable outbound webhooks Send HTTP notifications to any endpoint when records are added or changed	—	—	●	●
Schedule serverless lambda functions Send HTTP notifications to any endpoint when records are added or changed	—	—	—	●
Calendar sync Sync events with Google or Microsoft Office calendars	●	●	●	●
Contact sync Sync events with Google or Microsoft Office calendars	●	●	●	●
Gmail integration Access Insightly information and save records from within Gmail	●	●	●	●
Outlook integration Access Insightly information and save records right from within Outlook	●	●	●	●
Cloud file storage integration Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account	●	●	●	●
Get the most out of Insightly				
Standard support plan Access email-based support, Insightly's comprehensive Help Center, and Community Forums	—	●	●	●
Customized success plan Access email-based support, Insightly's comprehensive Help Center, and Community Forums.	—	—	\$	\$
Professional services Not sure how CRM can help you reach your business goals? We have professional experts to help you. Call us for a tailored proposal.	—	—	\$	\$
Developer API support Not sure how CRM can help you reach your business goals? We have professional experts to help you. Call us for a tailored proposal	—	—	\$	\$
Core CRM				
Record limit	2,500	100,000	250,000	UNLIMITED
File storage	200MB	10GB	100GB	UNLIMITED
Records per import	500	25,000	50,000	50,000