



Pricing Plans Comparison Chart

Insightly Pricing Plans

BEST VALUE		
Plus	Professional	Enterprise
\$29 USD per user/month <i>(billed annually)</i> \$35/user/month <i>(billed monthly)</i> 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!	\$49 USD per user/month <i>(billed annually)</i> \$59/user/month <i>(billed monthly)</i> Leap forward in productivity and security. Protect your data and automate processes. • Role-based permissions • Workflow automation • Lead assignment roles • Priority email support Productivity at the professional level.	\$99 USD per user/month <i>(billed annually)</i> \$129/user/month <i>(billed monthly)</i> 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.

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

	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

	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	●	●	●

	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	●	●	●

	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

	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: 1-888-999-4039	—	\$	\$
Core CRM			
Record limit	100,000	250,000	UNLIMITED
File storage	10GB	100GB	UNLIMITED
Records per import	25,000	50,000	50,000