



# Insightly CRM Pricing Plans Comparison Chart

# Insightly CRM Pricing Plans

BEST VALUE		
Plus	Professional	Enterprise
<div>\$29</div> <div>USD per user/month <i>(billed annually)</i></div> <div>\$35/user/month <i>(billed monthly)</i></div> <div><p>Keep in touch and never drop the ball. Get all the right tools to optimize your message.</p><ul style="list-style-type: none"><li>• Scheduled emails</li><li>• 100 custom email templates</li><li>• Higher record limits</li><li>• MailChimp auto-import</li></ul><p>Now you're talking!</p></div>	<div>\$49</div> <div>USD per user/month <i>(billed annually)</i></div> <div>\$59/user/month <i>(billed monthly)</i></div> <div><p>Leap forward in productivity and security. Protect your data and automate processes.</p><ul style="list-style-type: none"><li>• Role-based permissions</li><li>• Workflow automation</li><li>• Lead assignment roles</li><li>• Priority email support</li></ul><p>Productivity at the professional level.</p></div>	<div>\$99</div> <div>USD per user/month <i>(billed annually)</i></div> <div>\$129/user/month <i>(billed monthly)</i></div> <div><p>Contact us and ask how Insightly can give you the best deal for the features and limits you need.</p><ul style="list-style-type: none"><li>• Unlimited records</li><li>• Unlimited storage</li><li>• Dedicated specialist</li></ul><p>We can help you grow your business to new heights.</p></div>

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

	Plus	Professional	Enterprise
<b>Find and manage leads</b>			
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	●	●	●
<b>Build stronger customer relationships</b>			
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	●	●	●
Attach files from cloud storage Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account	●	●	●

	Plus	Professional	Enterprise
<b>Sell more productively</b>			
<b>Opportunity management</b> Manage and track all the details of every deal with stages, pipelines, and custom fields	●	●	●
<b>Customizable sales processes</b> Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account	●	●	●
<b>Integrated phone dialer and call logging</b> Place and receive phone calls with click to call, and log and record every call automatically	—	\$	\$
<b>Automatic call analysis and reporting</b> Track phone call frequency and length, and filter and report on call logs	—	\$	\$
<b>Apply task and event activity sets</b> Assign a templated sequence of tasks and events to leads, opportunities, projects, or organizations	●	●	●
<b>Assign sales teams</b> View which sales team members worked on every deal	●	●	●
<b>Batch update records with ease</b> Filter, select, and update the details of any number of records in Insightly from any list view	●	●	●
<b>Work from any device</b>			
<b>Native Android and iOS mobile apps</b> Utilize the power of Insightly from anywhere with our award-winning mobile applications	●	●	●
<b>Real-time mobile data synchronization</b> The Insightly mobile apps are always up to date and in sync	●	●	●
<b>Mobile business card scanning</b> Take photos of business cards from your phone and automatically convert them to contacts or leads	15	25	50
<b>Mobile contact and calendar integration</b> Automatically sync with the contacts and calendar apps on your phone	●	●	●
<b>Mobile voice notes</b> Record audio notes into Insightly from the microphone on your phone	●	●	●
<b>Deliver projects</b>			
<b>Integrated project management</b> Track projects, milestones, and all correspondence and project activities in Insightly	●	●	●
<b>Milestones and associated task tracking</b> Track milestones and schedule and assign associated tasks	●	●	●

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

	Plus	Professional	Enterprise
<b>Model and automate business processes</b>			
<b>Complete workflow automation</b> Automate and orchestrate workflow tasks, sending emails, updating records, executing custom code, firing webhooks, and much more	—	●	●
<b>Custom object creation</b> Store any type of data inside Insightly and relate it to contacts, organizations, sales, or projects with granular permissions	—	●	●
<b>Products, Price Books, and Quotes</b> Select products, pricing, and deliver quotes from within Insightly CRM to accelerate sales processes, drive efficiency, and improve your customer's experience	—	—	●
<b>Custom validation rules</b> Author validation checks to suit your business and it's processes	—	—	●
<b>Calculated fields on any object</b> Powerful formula engine can execute and store complex calculations in any object	—	—	●
<b>Roles and permissions</b> Set granular roles and permissions for objects and data access for different users	2	UNLIMITED	UNLIMITED
<b>Configurable profiles and page layouts</b> Control read/write permissions for fields in any object for different users	2	UNLIMITED	UNLIMITED
<b>Deploy custom apps on any platform</b> Build sophisticated custom apps and deploy them across web and mobile in minutes	—	—	●
<b>Lambda function authoring and execution</b> Create and execute custom code within Insightly in any one of five languages when records are created or updated	—	—	●
<b>Configurable webhooks</b> Send HTTP notifications to any endpoint when records are added or changed	—	●	●
<b>Dynamic page layout rules</b> Tailor business processes, field visibility, and required fields on the fly from user input	—	—	●
<b>Connect to any application</b>			
<b>Over 250 integrations to business apps</b> Insightly integrates with a large range of business applications right out of the box	●	●	●
<b>Published web services API</b> Access our comprehensive REST API at no additional cost	●	●	●
<b>Configurable outbound webhooks</b> Send HTTP notifications to any endpoint when records are added or changed	—	●	●

	Plus	Professional	Enterprise
<b>Connect to any application</b> <i>continued</i>			
<b>Schedule serverless lambda functions</b> <small>Create and execute custom code within Insightly in any one of five languages when records are created or updated</small>	—	—	●
<b>Calendar sync</b> <small>Sync events with Google or Microsoft Office calendars</small>	●	●	●
<b>Contact sync</b> <small>Sync contact details with Google Contacts</small>	●	●	●
<b>Gmail integration</b> <small>Access Insightly information and save records from within Gmail</small>	●	●	●
<b>Outlook integration</b> <small>Access Insightly information and save records right from within Outlook</small>	●	●	●
<b>Cloud file storage integration</b> <small>Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account</small>	●	●	●
<b>Get the most out of Insightly</b>			
<b>Standard support plan</b> <small>Access email-based support, Insightly's comprehensive Help Center, and Community Forums</small>	●	●	●
<b>Customized Support &amp; Service Plans</b> <small>Not sure what help you'll need? Call us and we'll configure a Support &amp; Service Plan just for you.</small>	—	\$	\$
<b>Professional services</b> <small>Not sure how CRM can help you reach your business goals? We have professional experts to help you. Call us for a tailored proposal: <b>1-888-999-4039</b></small>	—	\$	\$
<b>Developer API support</b> <small>Connect Insightly to any app or system with the help of our Developer support plans</small>	—	\$	\$
<b>Core CRM</b>			
Record limit	100,000	250,000	UNLIMITED
File storage	10GB	100GB	UNLIMITED
Records per import	25,000	50,000	50,000
Mass email (emails per day)	2,500	5,000	10,000