



The Best Plan for Your Business

Insightly CRM has features to meet your needs and flexible subscription plans to fit your budget.

Manage and monitor sales, projects, teams, and communications at any level. With online access through the web and mobile apps, you'll always be connected and never miss the latest update. Upgrade to higher limits and advanced features as your business grows.

Our easy-to-use software makes it simple to get started on your own, and our Customer Success team will offer guidance and training when you need it. Contact our sales team if you have questions, they'll be happy to help you find the right plan for your business.

	MOST POPULAR		
Free	Plus	Professional	Enterprise
Discover the benefits of CRM for a 1 or 2 person company	Segment, communicate, and monitor outreach efforts	Add workflow automation and team security	Scale your CRM with us to fit all of your business needs
\$0	\$29	\$49	\$99
Up to 2 users	USD per user/month (billed annually) \$35/user/month (billed monthly)	USD per user/month (billed annually) \$59/user/month (billed monthly)	USD per user/month (billed annually) \$129/user/month (billed monthly)
Start organizing your business. Manage sales and projects more effectively. <ul style="list-style-type: none">• 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. <ul style="list-style-type: none">• 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. <ul style="list-style-type: none">• 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. <ul style="list-style-type: none">• Unlimited records• Unlimited storage• Dedicated specialist We can help you grow your business to new heights.



The Right Features for Your Needs

Insightly is the all-in-one CRM for businesses of all shapes and sizes. Sales managers track goals, project managers monitor progress, and individual contributors manage their tasks more effectively—everyone increases productivity with Insightly.

Customize Insightly to capture the information you need and pull together actionable reports. Communicate with prospects and customers through your own email account. Reclaim valuable time by automating repetitive tasks. Every business finds features they love at a price they can afford.

		MOST POPULAR		
	Free	Plus	Professional	Enterprise
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
Task Management	✓	✓	✓	✓
Lead Management	✓	✓	✓	✓
Sales Opportunities	✓	✓	✓	✓
Project Management	✓	✓	✓	✓
Relationship Tracking	✓	✓	✓	✓
Recycle Bin	✓	✓	✓	✓
API Access	✓	✓	✓	✓
Customer Success Services				
Email Support		Email	Priority Email	Priority Email
Phone Support		Email sales@insightly.com for details		
Onboarding Sessions & Training		Email sales@insightly.com for details		
Reports & Dashboards				
Standard Dashboards	✓	✓	✓	✓
Custom Dashboards			✓	✓
Shareable Insight Cards			100	Unlimited
Custom Reports		Unlimited	Unlimited	Unlimited
Scheduled Reports & Smart Alerts	10	25	100	250
Report Charts	✓	✓	✓	✓
Connect to Power BI	✓	✓	✓	✓



The Right Features for Your Needs *cont.*

			MOST POPULAR	
	Free	Plus	Professional	Enterprise
Email				
Custom Email Templates	5	100	Unlimited	Unlimited
Mass Email (emails per day)	10	2,500	5,000	10,000
Email Scheduling	✓	✓	✓	✓
Mobile Features				
iOS and Android Apps	✓	✓	✓	✓
Voice Notes	✓	✓	✓	✓
Card-to-Lead & Card-to-Contact (per user, per month)		15	25	50
Automation				
Pipelines & Activity Sets	✓	✓	✓	✓
Web-to-Contact Forms	✓	✓	✓	✓
Web-to-Lead Forms	✓	✓	✓	✓
Google Contacts Sync		✓	✓	✓
Calendar Sync		✓	✓	✓
Workflow Automation			✓	✓
Lead Assignment Rules			✓	✓
Security & Sharing				
Create Teams	✓	✓	✓	✓
Role-Based Permissions			✓	✓
Profile-Based Permissions			✓	✓
Customization				
Custom Branding		✓	✓	✓
Custom Fields (per record type)	2	50	100	200



Powerful Integrations for Your Teams

Connect your world of business apps to your CRM. Not only are there Insightly-built integrations for popular business applications, other companies have also connected to our open API so your team can share data through Insightly. No need to jump from application to application.

Bring it all together in one place and gain greater visibility into all the moving parts.

		MOST POPULAR	
	Free	Plus	Professional Enterprise
G Suite & Google	Gmail Sidebar in your inbox. Google Drive files where you need them. One-click SSO login from G Suite.		
	Sync Google Contacts and Calendar to keep everything up-to-date.		
Microsoft	Outlook add-in for your inbox. Connect to OneDrive files, Power BI reports, & Power Flow automation.		
	Outlook Calendar Sync lets you view all your meetings, wherever you are.		
Mailchimp	Connect to MailChimp's email marketing platform. Never enter a contact twice.		
	Scheduled auto-imports bring in new MailChimp subscribers.		
Files & Notes	Linked files and notes from Box, Dropbox, and Evernote. Create and link PandaDoc quotes and proposals.		
Accounting	Best-in-class integrations with Xero and QBO (Quickbooks Online) to monitor bills and payments.		
Collaborations	Slack communication with the Insightly Assistant uses our bot framework to help you find records and get more done through natural language interactions.		
Third-Party Integrations	And many integrations created by our partners through Insightly's open API, including: PieSync, Data2CRM, Boomerang, Proposable, Wishpond, Flow XO.		

Mobile

Take Insightly with you on our iOS and Android apps. Update records online and view them offline. Get push notifications, so you don't miss a thing.

Security

Protect your business information with SOC 2 compliance, EU-U.S. Privacy Shield certification, and SSL encryption. See our [Privacy Policy](#) and [Terms of Service](#).

API

Our REST-based API enables developers to integrate CRM and sync data with virtually any application. With client SDKs for nearly all major programming languages, the power of connected data is in your hands.

Service Plans

Our Customer Success team offers consultations with our advanced subscription plans. With professional onboarding and training, we'll help you set up a customized CRM as you learn best practices.