Insightly CRM
Pricing Plans Comparison Chart

Insightly CRM Pricing Plans

Plus	BEST VALUE Professional	Enterprise
$29 USD per user/month *(billed annually)* $35/user/month *(billed monthly)*	**$49** USD per user/month *(billed annually)* $59/user/month *(billed monthly)*	**$99** USD per user/month *(billed annually)* $129/user/month *(billed monthly)*
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. Protect your data and automate processes. • Role-based permissions • Workflow automation • Lead assignment rules • 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.

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	●	●	●
Attach files from cloud storage Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account	●	●	●

	Plus	Professional	Enterprise
Sell more productively			
Opportunity management	●	●	●
Manage and track all the details of every deal with stages, pipelines, and custom fields			
Customizable sales processes	●	●	●
Attach and link files from any Dropbox, OneDrive, Google Drive, and Box account			
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			
Click-to-call			
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			
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	**15**	**25**	**50**
Take photos of business cards from your phone and automatically convert them to contacts or leads			
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			
Deliver projects			
Integrated project management	●	●	●
Track projects, milestones, and all correspondence and project activities in Insightly			

	Plus	Professional	Enterprise
Deliver projects *continued*			
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 dashboard	–	**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	●	●	●
Insightly Outlook add-on Get the power of Insightly and all your customer and sales data right inside Outlook	●	●	●

	Plus	Professional	Enterprise
Collaborate across the company *continued*			
Insightly Gmail add-on Send HTTP notifications to any endpoint when records are added or changed	●	●	●
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	–	●	●
Products, Price Books, and Quotes Select products, pricing, and deliver quotes from within Insightly CRM to accelerate sales processes, drive efficiency, and improve your customer's experience	–	–	●
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 Build sophisticated custom apps and deploy them across web and mobile in minutes	–	–	●
Lambda function authoring and execution Create and execute custom code within Insightly in any one of five languages when records are created or updated	–	–	●
Configurable webhooks Send HTTP notifications to any endpoint when records are added or changed	–	●	●
Dynamic page layout rules Tailor business processes, field visibility, and required fields on the fly from user input	–	–	●
Connect to any application			
Over 250 integrations to business apps Insightly integrates with a large range of business applications right out of the box	●	●	●

	Plus	Professional	Enterprise
Connect to any application *continued*			
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 Create and execute custom code within Insightly in any one of five languages when records are created or updated	–	–	●
Calendar sync Sync events with Google or Microsoft Office calendars	●	●	●
Contact sync Sync contact details with Google Contacts	●	●	●
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 Support & Service Plans Not sure what help you'll need? Call us and we'll configure a Support & Service Plan just for you.	–	$	$
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: **1-888-999-4039**	–	$	$
Developer API support Connect Insightly to any app or system with the help of our Developer support plans	–	$	$
Core CRM			
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