



INSIGHTLY CRM

EXTENDED PROFILE



OVERVIEW

Insightly CRM caters towards small businesses who wish to bring all aspects of the sales and project management process under a single platform.

Geared specifically towards small business, Insightly CRM is available in five different plans, ranging from their free service - for two users - to their comprehensive enterprise service. As a result of this Insightly CRM is positioned to provide the correct service level for businesses at different levels and stages of growth, with the ability for low-cost early adoption, this can be upgraded as the business and its needs expand.

With a strong focus on integrating sales and project management, Insightly CRM has been built to make tracking and organizing all aspects of the customer relationship process an easy to manage and visualize through a fully customizable interface. While higher price plans have a variety of extra features such as email scheduling and advanced permissions, all packages include full third party integration and management processes from lead to post-sale, along with military grade encryption to ensure data is protected for both the customer and company.

Insightly CRM is entirely web-based, with both iOS and Android optimization and mobile apps accessible at all user levels.

FEATURE OVERVIEW



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Insightly CRM
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✓
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗

QUOTATION HANDLING	✗
TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✗
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✗
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✗
OTHER FEATURES	
MULTIPLE LOCATIONS	✗
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✗

HOSTING METHOD	
CLOUD	✓
ON-PREMISE	✗
FURTHER INFORMATION	
PRICING	Free up to 2 users. \$15/user/month.



SOFTWARE SCREENSHOTS

The screenshot displays the 'insightly' software interface. At the top left is the 'insightly' logo. A search bar contains the text 'Search all data...'. To the right of the search bar are icons for a calendar, a bell, and a user profile. Below the search bar is a navigation bar with icons for home, checkmark, and a list view. The main content area is titled 'Haresh Sharma' with a star icon and 'Manage Tags'. Below the title are buttons for back, edit, and 'Actions', and a 'Follow' button next to a profile picture of Haresh Sharma. A horizontal menu below the title includes 'About', 'History', 'Emails', 'Notes', 'Files', 'Tasks', and 'Events'. The 'About' tab is selected. The 'CONTACT DETAILS' section includes an 'Add Detail' link and the following information: Contact Name: Haresh Sharma; WORK Address: 145A Moulmein Road Singapore, 308106 Singapore map; Background: NUS-Shell Short Play Competition in 1988. The 'LINKS' section includes an 'Add New Link' button and the following information: Contacts: Anton Pavlovich Chekhov is a colleague of Haresh Sharma; Organisations: Epigram Books Playwright; Projects: Set up office - Singapore - Spring 2014. On the right side, there is a 'TWITTER FEED' section showing three tweets from the account '@IFollowPWs' (1333 followers). The tweets are: 1. RT @JohnMc_Lpool: @IFollowPWs @P2S_Festival Page to Stage festival call fro scripts http://t.co/wFid3Aee5R (7 days ago); 2. @InstaGrets We are on the East Coast ourselves. Break legs! (35 days ago); 3. RT @replej: @IFollowPWs @PBS & Emerson College hosting Film + Live Chat on Playwriting tonight 10p ET http://t.co/OliOO2TXHH Join us? A vertical sidebar on the right contains social media icons for LinkedIn and Twitter.

64 days ago

instightly UPGRADE NOW Search all data...

Reports

Opportunities By Organization Report

Report Filters: This Month | Last Month | Last Quarter | Last Year | All Time

Start Date: [] End Date: []

By Organization: []

By Custom Field: []

Print Report

Opportunities By Organization Report

Opportunities by Organization

Organization	Value
Epitome	\$16,517,000 (5.2%)
Opys Music	\$14,317,000 (4.5%)
Junika Music	\$10,000,000 (3.1%)
Flashlight's Report	\$75,000,000 (23.6%)

instightly UPGRADE NOW Search all data...

Mr. Bobby Van Camp Manage Page

Xero

Vanelec Customer

Primary: Bobby Van Camp
Email: []
Phone: USA (501) 223 4567
Direct: []

Group: []
Physical Address: 100 First Street Westbridge, L.A 54321
Billing Address: 100 First Street Westbridge, L.A 54321
Sales Taxes: N/A
Bill Terms: N/A
Billing: []
Website: []

Actions: **\$0.00** OVERDUE INVOICES **\$100.00** OUTSTANDING INVOICES
\$0.00 OVERDUE BILLS **\$0.00** OUTSTANDING BILLS
\$100.00 LIFETIME VALUE **\$100.00** 12 MONTH VALUE

DATE	TYPE	REF.	DUE DATE	OVERDUE	CURRENCY	TOTAL	PAID	DUE	STATUS
01-Apr-2015	AR	INV-0004	31-Aug-2015	0 Days Overdue	USD	\$100.00	\$0.00	\$100.00	Authorized

instightly UPGRADE NOW Search all data...

Reports

Completed Tasks And Events Report

Report Filters: This Month | Last Month | Last Quarter | Last Year | All Time

Start Date: [] End Date: []

By Organization: []

By Custom Field: []

Print Report

Completed Tasks And Events Report

Activity Tracking

Activity Tracking Chart

instightly UPGRADE NOW Search all data...

System Settings

Categories > Opportunity States > Relationships > Pipelines > **Activity Sets** > Custom Fields > Web To Contact > Record ID > Instightly URL > Users > Teams > Item Visibility > Data Export >

Activities

New Soft Load

Type	Due / Event	Activity Name		
Task	Start + 1d	Find and add organization	[]	[]
Task	Start + 1d	Research and log lead's social accounts	[]	[]
Task	Start + 1d	Follow, Circle, Friend, etc. in Social	[]	[]
Task	Start + 3d	Send 1st email follow-up	[]	[]
Task	Start + 6d	Apply Next Activity Set	[]	[]

Add New Activity Choose Activity Type