



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 for a contact profile. At the top, the Insightly logo is on the left, and a search bar with the text "Search all data..." is in the center. To the right of the search bar are icons for a calendar, a bell, and a user profile. Below the search bar, the contact name "Haresh Sharma" is displayed with a star icon and a "Manage Tags" link. To the right of the name is a "Follow" button and a profile picture of Haresh Sharma. Below the name are navigation tabs: "About" (selected), "History", "Emails", "Notes", "Files", "Tasks", and "Events".

The main content area is divided into two columns. The left column is titled "CONTACT DETAILS" and includes an "Add Detail" link. It lists 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 right column is titled "TWITTER FEED" and shows the account information: "Account: IFollowPWs Followers: 1333". It displays three tweets:

- RT @JohnMc_Lpool: @IFollowPWs @P2S_Festival Page to Stage festival call fro scripts <http://t.co/wFid3Aee5R> 7 days ago
- @InstaGrets We are on the East Coast ourselves. Break legs! 35 days ago
- RT @replej: @IFollowPWs @PBS & Emerson College hosting Film + Live Chat on Playwriting tonight 10p ET <http://t.co/OliOO2TXHH> Join us?

At the bottom of the contact details, there is a "LINKS" section with an "Add New Link" button and a list of links:

- Contacts: [Anton Pavlovich Chekhov](#) is a colleague of Haresh Sharma
- Organisations: [Epigram Books](#) Playwright
- Projects: [Set up office - Singapore - Spring 2014](#)

64 days ago

instightly UPGRADE NOW Search all data...

Reports

Opportunities By Organization Report 1

Category Breakdown
Reasons For Losing
Pipeline Stage
Funnel Analysis
By Responsible User 3
By Organization
By Custom Field
Total Incoming
Value Of Opportunities
Tasks And Events

Opportunities By Organization Report 2

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%)
Flahugh's Repair	\$75,000,000 (23.8%)

instightly UPGRADE NOW Search all data...

Mr. Bobby Van Camp Message 1 of 2 Follow

Xero

Vanelec Customer

Primary: Bobby Van Camp
Email:
Phone: USA (501) 223-4567
Direct:
Tax ID:
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 3

Category Breakdown
Reasons For Losing
Pipeline Stage
Funnel Analysis
By Responsible User
By Organization
By Custom Field
Total Incoming
Value Of Opportunities
Tasks And Events

Completed Tasks And Events Report

Activity Tracking

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