

Insightly for Google Apps Concept Guide



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Preface

Insightly is a web based tool designed to organize your data and get things done more efficiently. From a single user to a busy and growing company, Insightly can be easily tailored to your situation or way of doing business, while boosting your productivity along the way.

Insightly is very easy to use and this guide will help you to understand some of the concepts and ideas behind the software, allowing you to gain maximum benefit from its use. Insightly can be configured to meet your needs rather than making you conform to the software's way of working - and it has lots of shortcuts to help you better manage your day to day workflows and maximize productivity. Working with Insightly is easy and fun and only takes a few minutes to set up, and because it's web based - you can use it from anywhere. And because it's designed especially for Google Apps and Gmail, the two work together seamlessly.



Overview

This document gives you a general understanding of the features within Insightly, and how they work together to make your life easier. We'll cover tips on how to customize Insightly to the way you work throughout the document.

Insightly organizes the daily flow of information in your life (like emails, tasks, notes, phone calls etc) into two areas - opportunities and projects. Projects can be created for anything you plan to do with a goal in mind, like a holiday to Paris, the design ideas for a new house, or authoring the final engineering report for construction of a bridge.

Opportunities on the other hand are slightly different - they are a place for managing potential new business that you might win in the future. A good distinction is that projects are for things you're working on right now, and opportunities are for potential work that you might win in the future and potentially profit from. If you do win the work, you can easily convert an opportunity to a project and keep all the pre-sale history from the opportunity conveniently linked up to the new project.

The concept of linking is what Insightly is all about. It allows you to associate relevant pieces of information (like tasks, notes, emails, files, contacts, and organizations) together and attach them to the relevant opportunities and projects, providing clearer context and better organization around that information.

And because that relevant information is right there in your project or opportunity, you can see at a glance things like who else is working on the project, when the last communication was, what the status of that project is and what happens next on that project or opportunity.

Let's use an example to better illustrate how it all works. Say you're working for a legal firm on a big court case. You can use Insightly to create a new project for the upcoming case, and then link the relevant contacts to the case and describe the role each one plays in the overall picture (like an expert witness, or a testifying police officer, or a co-defendant). Any emails that are sent or received related to the case can be linked up with just one click, and any notes or tasks related to the case can also be quickly associated too.

Insightly keeps everything related to that big case together in one page. You can share it with everyone that needs to know about the case using appropriate security permissions, and everyone can see exactly what the court case status is, and what needs to be done next to progress it along. And because all the information is on the internet, those involved can be on the other side of the country or even the world, and still remain right up to speed. It also helps that everything is gathered together in one place, you don't need to switch between multiple software applications to get the big picture - allowing you to work smarter and faster.

The other main organizational tool in Insightly is Opportunities. They're brilliant for tracking exactly where a prospect (contact that is not yet a client) is in the process of becoming a client and winning work. Like projects, all the pieces of relevant information can be linked directly to that opportunity. If you have someone in sales working for your company, or even if you perform that role yourself, Insightly is great for tracking potential job opportunities. If you need to perform a follow-up phone call to a prospect to inform them of your current special offers, you can quickly check that opportunity in Insightly and get a summary of what was said in past conversations and previous



emails, and where the prospect sits in your sales process - so you can go into that follow-up call with confidence. If you have lots of sales people in your organization, or if you work within a hierarchal sales team, managers and other sales staff can also see each opportunity through the appropriate use of security permissions and groups.

So whether you're aiming to finally accomplish a few of your big objectives in life, or if you want to take control of the hundreds of things floating around in your head, Insightly is the right tool for the job. With all the important information linked up and tucked safely away in Insightly's database, you can stop worrying and start focusing on getting things done productively and proactively.



The Insightly web application

When you setup Insightly you're given a private website that Insightly will associate with you or your organization. Everyone within your Google Apps domain can access your Insightly website. Each user has their own login, but all users share the same website. This is the same as the other Google properties like Google sites or Google Docs. Insightly has very easy to configure permissions for things like notes, emails, and files, so you can share important data with other team members.

Because Insightly is web based, you don't need to download, setup or install any software. You just go to your Insightly website from any computer with an Internet connection. It works out simpler, safer and a lot smarter than software that you install on your own computer.

Behind the scenes the team at Insightly takes care of everything - including securing your data, daily backups with multiple copies, upgrades, and keeping everything humming along - so you can concentrate on the things that are important to you, rather than sorting out IT related headaches.

Items in Insightly


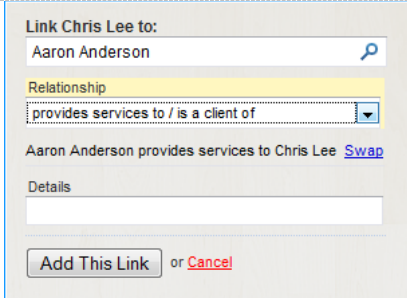
Contacts

A contact in Insightly is just our word for a person. You can keep everything you know about a person in Insightly, including their birthday, any phone numbers or email addresses, who they work for etc. You can quickly create a new note about anyone in Insightly with just one click too, so anything you want to jot down about the contact is kept right there with their record. Insightly also stores files for contacts, so you can save things like documents, resumes or photos along with the contact.

One of the most powerful features of Insightly is its ability to link contacts. You can link a contact to almost anything else - including the organizations they work for, the projects or opportunities they are involved with, or to other contacts.

When you link a contact to an opportunity, project, or organization in Insightly, you have the option to define a role for that relationship link. So the role for a contact linked to an organization might be "employee", "sales manager" or "director", it just gives an indication of how they are associated with that organization. A link between a contact and a project might have a role defined as "project manager" or "quality inspector". So it reads like "Joe is the quality inspector for project 4".

Linking a contact to another contact within Insightly is slightly different. Here you have to choose the relationship type, which can be something like a colleague, customer, friend, parent relative, spouse etc. New relationship types can be added to Insightly under the settings menu. You can learn more about managing relationships in Insightly under the 'Customizing Insightly for your business' heading in this document.

 <p>Link Chris Lee to:</p> <p>Role</p> <p>Details</p> <p>Add This Link or Cancel</p>	 <p>Link Chris Lee to:</p> <p>Aaron Anderson</p> <p>Relationship</p> <p>provides services to / is a client of</p> <p>Aaron Anderson provides services to Chris Lee Swap</p> <p>Details</p> <p>Add This Link or Cancel</p>
Creation of a link with a role.	Creation of a link with relationship specified.

Contacts in Insightly can be tagged too, as can Organizations, Opportunities and Projects. Tagging is a really simple means of loosely grouping items together. So if you have a few clients you would like to send a little corporate gift to at Christmas, you might tag all those contacts with the tag of "Christmas Gift". At the end of the year you can quickly bring up all those contacts with that "Christmas Gift" tag and send them a little something special for their support during the past year.

Organizations

Organizations within Insightly are companies, associations, non-profits, government agencies, and just about any sort of legal entity that's not a person. You can record information like website addresses, phone numbers, postal address, important dates and background history for the organization.

Files, notes, emails, and tasks can also be associated with an organization in just a couple of clicks. Insightly also pulls down related news headlines from the Internet and displays them right next to an organization in the news tab too.

You can tag organizations to group them together - so you might create a tag named "competitor" and add that tag to all the organizations in your Insightly that you compete against, or create a tag named "Europe" and add that tag to all your customers located within the European Union.

You can of course link contacts to organizations, and specify a role for that link, and employees, associates, or sub-contractors can be linked up to an organization in this way. Organization links work the same way for projects and opportunities too. It's dead easy to add an organization to a project and specify the role (supplier, partner, competitor etc).

Links between two organizations are defined by a relationship type, similar to links between two contacts. Relationship examples between organizations include customer/supplier, parent company/subsidiary, or 'provides services to'/'is a client of'. Just pick the relationship type and choose the direction (e.g. : which of the two is the supplier and which is the customer) and you're done. Of course you can define additional relationships that might be specific to your type of work under the Settings menu.

Projects

Projects are for those things that take longer than a few minutes to complete, and that you might want to plan ahead for and keep track of in Insightly. Projects allow for you to keep all the relevant information grouped together and give you a place to see the current status, what's already been done, and what the next step in the process is to move the project forward.

Projects have only a few fields to keep them simple and quick to create. You can describe the details of a project, choose a category for the project (like website design, or product brochure), and choose an Insightly user that's responsible for the project. You can also set who can see the project within the system - everyone, just you, a team, or pick individual people.

Projects have a color coded status so you can see at a glance what their current status is (not started, in progress, completed, deferred, cancelled or abandoned).

One of the most powerful features of projects is the ability to set tasks and milestones. You can create milestones for each step in the project and specify a target completion date for each milestone. Tasks can be created and associated with each milestone within the project, so you have more granular control of what needs to be done, by whom, and when.

Projects like everything else in Insightly can be linked to contacts, organizations, or opportunities. Emails, notes and files can also be linked to projects so you can keep important correspondence, files, and email attachments right there with the project.

Opportunities

Opportunities are created for people or businesses that might be interested in buying your products and services or for contributing to your revenue. For a manufacturing organization using Insightly, this might be potential clients wanting to buy the products you make, or for a non-profit organization it might be people who want to donate to your cause or foundation. Opportunities are setup so you can keep track of and manage potential business, and to help in progressing that opportunity towards becoming a reality through winning the work and realizing the income.

When you create an opportunity you can define its potential worth either as a fixed bid or lump sum, per hour, per week or per month for a certain time period. This allows you to quantify how much upcoming work you think you might have in the future, and allows you to plan for that eventuality. You can set a probability of winning the opportunity out of 100, and a forecast close date for the deal to happen. You can also choose a category to put the opportunity into (eg: product sale, maintenance contract, or commercial large sum donation) and set permissions on who can see the opportunity and who's responsible for it.

Opportunities can be linked to contacts involved, and you can define roles for those individuals within the opportunity, like decision maker, customer advocate, naysayer. Tasks and milestones can also be assigned to an opportunity so you can plan how to progress it along with deadlines and accountability. Attach files like proposals, emails, and customer correspondence to opportunities so you have a great history of what was negotiated.

Tags

Tags are for grouping like items together in Insightly. You can add tags to opportunities, projects, contacts, organizations, and emails. The best way to describe how to use tags is with an example. If you decide that you want to arbitrarily categorize all your projects into 'Big', 'Small' and 'Tiny', you would first create the three project tags with those names. You can then go through each project and add either the 'big', 'small', or 'tiny' tag to each one. To then see all the 'Small' projects, you can either click on that tag in one of the projects to display the list containing all projects with that tag, or click on the 'Small' tag under the Tags tab to get that same list.

Tagging is a very simple concept that's easy to understand and use, and great for categorizing your items.

Tasks

A task is an item of work. You can use tasks to create a list of things that need to be done, and assign timeframes to those things so you know what needs to be done and by when. You can also set reminders on tasks to get a handy notification emails.

Tasks can be linked to contacts, opportunities, projects, organizations, and emails. You can assign a due date, or just put it down for some time in the future. Tasks can also be created against milestones in projects, so you can really get specific in defining what needs to be done for each milestone. When you complete a task, just check off the checkbox next to its name.

You can get a handy email reminder when a task is due, and you can assign or delegate tasks to others for completion. This is an effective way of managing and dividing up work by those responsible in a multi-user scenario.



Notes

Notes are for writing down a brief summary of things you learned, need to remember, or just important pieces of information. They're kind of like post-it notes in the real world. They're super easy to create in just one click, and you can even add file attachments to notes too. Insightly will store the date that the note was created, and others or yourself can leave comments on a note, maybe even sparking off a discussion. This can be handy if you have users that do not share the same office as you but want to add their input.

Notes are ideal for those little things you would like to record, but that don't really fit in a pre-defined space. Just jot down a quick note and Insightly will remember it forever.

Notes can be added to contacts, opportunities, organizations, and projects. You can also set permissions on notes so only you can see them, or share them with everyone, a group of users, or a specific list of users of your choice. Just click on the Notes sub-tab when viewing the individual details of one of the items listed above to start.

Emails

Insightly has great email integration, and can automatically import emails from services like Gmail or any other email program, and allow you to search through your email with 'as you type' searching. Just forward, CC or BCC an email to your Insightly dropbox to have it appear under the email tab within Insightly.

Insightly analyses each email upon import, and links each one up to the relevant contacts and organizations the email relates to automatically. If an email you receive is related to a project or opportunity, you can easily link it up yourself to the relevant one in just a couple of clicks. Any file attachments embedded with the email will be linked up to, so you never lose important files sent to you as attachments.

Imported emails are visible to everyone by default. You can change this by altering the permissions at the top of the email when viewing it under the Emails tab. If you choose to link an email to a project or opportunity, you have the option of making that email public so others involved with the opportunity or project can see that correspondence.

Insightly cleverly uses advanced email analytics to discover the hidden associations between contacts in email by analysing the From, To, and CC fields to build up a knowledge of who knows who. Insightly will add an association link between two contacts in your database if they regularly send email to each other, so when you view either of those contacts you can see those discovered contact relationships.

Links

Linking is one of the main tenets of Insightly, and it's deceptively simple yet very powerful. Linking in Insightly creates ties that join related items together, and provides relevant context to items in the database. It's a natural fit for a web based system, because Insightly uses hyperlinks to show relationships so you can jump between items in your database, just as you might jump between articles in Wikipedia or posts in a blog.

A great benefit of linking is that you don't have to enter information more than once. If you have a prospect involved in negotiations on three different opportunities - you don't have to enter that prospects details three times for each of the three opportunities. Just create three links - one for each opportunity back to the prospect, and in just a few seconds you're finished.

The links sidebar is on the right hand side of the screen when viewing individual Contacts, Organizations, Opportunities or Projects. You can start adding links and relating items together by clicking on the 'Add Link' hyperlink in the top right of screen.

Google Docs

Because Insightly is made specifically for use with Google Apps, we have tight integration with Google Docs – Google's office suite for creating documents, spreadsheets, presentations and drawings online. You can add links to documents saved to your Google Docs repository from within Contacts, Organizations, Projects and Opportunities in Insightly.

So if you have created a great presentation on the progress made so far this year in one of your big projects, you can add a link directly to that presentation from within that projects page in Insightly. This helps keep together the list of all the Google Docs relating to that project right on the project page, which is where you want them.

You can browse, search and add Google Docs to Contacts, Organizations, Opportunities and Projects in Insightly by clicking on the 'Docs' sub-tab when viewing one of these item.

Activity Sets

An Activity Set in Insightly is a template for a series of tasks, which can then all be applied to a Contact, Organization, Opportunity or Project at once. It's a great way to automate processes within your organization.

If you often repeat the same set of tasks for a given process within your business, you may find it faster to create an activity set for these tasks. Within your activity set create a new activity for each task. You can space the due dates for each task into the future too, so they will fall due in the correct order for your workflow. The entire activity set can then be added to your project, opportunity, contact or organization from within the Actions menu, resulting in all the tasks in the Activity set being created automatically - rather than having to manually creating each task individually every time. You can setup Activity Sets and add activities under the Settings page.

Pipelines

A pipeline is a linear series of steps (stages) that can be defined for both projects and for opportunities. Insightly shows a pipeline as a visual aid to indicate progress along a path. If you repeat the same series of steps for different projects or opportunities, you can define a pipeline for those steps so you can visually track progress and see exactly what stage you're up to in a process, and how far you have to go.

A Pipeline stage can also have an activity set associated with it, and when you start that stage the activity set is applied to the project or opportunity, and the tasks are automatically created. Activity Sets combined with Pipelines are a powerful way to manage workflow. You can define pipelines and stages under the Settings page.

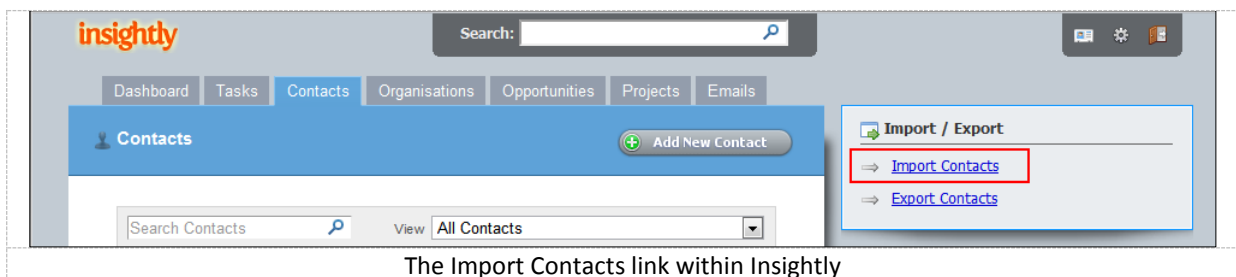
Settings up Insightly

Adding Contacts and Organizations

Insightly starts off with no contacts or organizations in your database. You have two options in importing contacts, either from a file import or from your Gmail contact list. You can, of course, add contacts and organizations yourself manually.

Importing Contacts from your Gmail Address Book

Importing contacts from your Gmail address book is very easy. Click on the "Import Contacts" link under the Contacts tab, outlined below in red, choose "Import you contacts from Gmail". Finally, tick the contacts you would like to import, and click the "Import Selected Contacts" button and you're done.



The Import Contacts link within Insightly

Importing Contacts from a file

You can import contacts from a CSV (comma separated values) file right into Insightly. Many contact management programs allow you to export to a CSV file, as does Microsoft Excel. Once you have the CSV file, importing is a two-step process.

Under the Contacts tab, click on the "Import Contacts" hyperlink (as shown above). Then choose the CSV file from your computer, and click on the "Import Contacts" button.

The final step is to match the Insightly contact fields up to the fields for contacts in your file. The screen (shown below) shows you the contents of the file you imported next to the possible contact fields from Insightly. Insightly automatically guesses the best field matches from your file, and you can make changes by selecting the correct fields from the drop-down menu.

Insightly can accept multiple records for fields. So for example, an individual contact can have two home phone numbers or three work phone numbers. Selecting the same drop down value for multiple fields in your file will achieve this.

Dashboard | **Contacts** | Organisations | Opportunities | Projects | Tags | Messages

Import File Mapping

Map Fields to Insightly

We're about to import 34 of your contacts.

The final step is to map the fields from your file with the corresponding correct fields in Insightly.

In the table below, the Insightly field on the left needs to be matched up with the correct column from your file. The fields highlighted in yellow are the ones you will have to do manually.

Insightly field	Column Name	Your Data
NO MATCH, you choose...	Contact Id	6.6389E+16
NO MATCH, you choose...	Opportunity Source	
First name	First Name	Brenda
Last name	Last Name	Hogg
Company name	Client Company's Name	Commercial Law Solutions
NO MATCH, you choose...	Client Company's Id	6.6389E+16
NO MATCH, you choose...	Vendor Name	
NO MATCH, you choose...	Vendor Id	

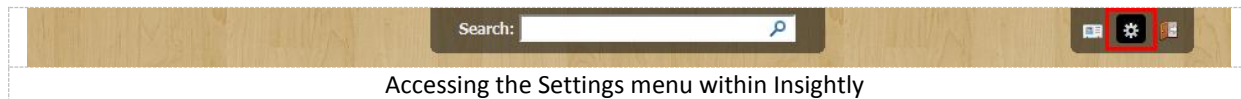
If Insightly can't find a match for a field in your file, you can choose the corresponding matching field yourself. Those fields that Insightly can't find a match for will have a yellow background highlight. You can then go ahead and choose the appropriate field yourself from the drop down.

Click on "Import these Contacts" and Insightly will start importing the records. If any contacts or organizations are already in the database, Insightly will skip those records so duplicates are not created. It may take several minutes depending upon the number of contacts in your file, but Insightly will send you an email when it's all done.

If you are not happy with the import, you can undo it by clicking the Undo Import link in the email.

Customizing Insightly for your business

You can customize Insightly to the way you or your business works. Settings for customization are available under the Settings menu, accessible by clicking on the small gear icon in the upper right hand side of the screen when logged in as an administrator. If you signed up for Insightly, then you are an administrator.



Relationships

Relationships are defined within Insightly when linking contacts with other contacts, and when linking organizations with other organizations. It's important to know that relationships are directional - they have both a forward and a reverse part.

For instance, one of the relationships already defined within Insightly for both contacts and organizations is the customer/supplier relationship. So for example General Electric might be a supplier to Boeing (for jet engines), and that would therefore make Boeing a customer of General Electric too. It's one relationship but it can be expressed two ways.

When creating a link between two contacts, or two organizations, you just choose the relationship from the list, and then choose the direction. Insightly shows you a sentence when creating the link so you can make sure you got it right.

Relationships can be used to track friendships, affiliations, family ties, or even sports partners. Relationships are important in real life, and Insightly keeps track of those relationships so you don't have to remember, for instance, if two contacts that work at the same firm are husband and wife or just colleagues.

Categories

Categories are just one way within Insightly to classify things (tags are a great option too). Insightly has categories for opportunities, projects, files and tasks. Categories differ from tags because you can put each item in only one category, but you can assign multiple tags.

Categories for tasks include things like meetings, phone calls, follow-ups, or to-dos. Categories for files might be things like documents, pictures or sounds. Usually you only need a few categories for each item type, and remember that categories are shared across all users in your system.

Opportunity State Change Reasons

Opportunities within Insightly can be in one of five states - open, won, lost, abandoned or suspended. Insightly color codes each state so you can see at a glance when viewing an opportunity what state it's in.



When changing states for an opportunity (like from open to lost), the user changing the state has the option of choosing a reason for transitioning to the new state. This is useful in capturing information you will want to analyze further down the road, and an example in the case of changing an opportunity from open to lost: why did we lose the opportunity?

It might be because a competitor undercut your bid price, or because the client withdrew the tender, or even because you didn't get back to the client in time with a quote. Whatever the reason, you have the advantage of being able to capture that valuable data so you can go back later and analyze the number of times a certain scenario played out. If you are losing too many opportunities because you are being undercut by competitors, you might consider lowering your prices or trying to better communicate the added value in your product or service.

You can customize the different reasons for changing each opportunity state that your business encounters under the settings menu.

Teams

Teams within Insightly are made up of a group of users, and are used primarily for security permissions. You might have a team called 'Executive Committee' defined with only those users that are part of the executive. Within Insightly you can then set the security permissions on an item like an email or a note to the 'Executive Committee' team. It's a convenient way of locking down permissions for an item to a defined group of users without having to explicitly add each user individually for each item you wish to secure. If another staff member is promoted to the executive, you just have to add them once to that team, rather than the much bigger task of adding them individually to the permissions of every email and note applicable.

Note: If the owner of an item changes security permissions on that item to a team which does not include themselves, they are still able to access that item. So for instance, if you write a note, then set the permissions on that note to the 'Executive Committee' team of which you are not a member, you can still access the item because you wrote it. Insightly will not lock you out of an item of which you are the owner/author - in case you made a mistake in setting that permission.



Help and Support resources

You can visit the Insightly product blog to be kept up to date in new developments, features, and tips on how to use Insightly. The web address is:

<http://blog.insight.ly>

If you're on Twitter you can follow Insightly at:

<http://twitter.com/insightlyapp>

You can also get technical support and lodge support requests from the Insightly support website below, or just email support@insight.ly. The support website address is:

<http://support.insight.ly>