Features	TALYGEN	Insightly
CRM		
Contact Management		
Contacts & Task Management	✔	✔
Email Integration	✔	✔
Import Data	✔	✔
Customer Portal/Account	✔	✔
Customer Interactions	✔	✔
Case Management	✔	✖
Contact Timelines	✔	✔
Workflow Automation	✔	✔
File Sharing	✔	✔
Document Management	✔	✔
Sales		
Accounts Management	✔	✔
Opportunity Management	✔	✔
Activity Streams	✔	✖
Personalized Dashlets & Homepage	✔	✔
Activity Tracking & History	✔	✔
Product Catalog & Tracking	✔	✔
Quote Management	✔	✔
Sales Opportunity Forecasting	✔	✔
Sales Team Management	✔	✔
Sales Email Campaigns	✔	✔
Sales Automation	✔	✔
Contacts	✔	✔
Feeds	✔	✔
Product Customization	✔	✔
Unlimited Records	✔	✔
Custom Modules	✔	✔
Time-Based Actions	✔	✔
Custom Related Lists	✔	✔
Sales Force Automation	✔	✖
Sales Tracking	✔	✔
Customer Service Management	✔	✔
Task And Event Tracking	✔	✔
Quotation	✔	✔
Invoice	✔	✔
Purchase Order	✔	✔
Sales Order	✔	✔
Deal Stages	✔	✖
Create Custom Reports	✔	✔
Marketing		
Drip Campaigns	✔	✔
Email Marketing	✔	✔
Newsletter Management	✔	✔
Marketing Management	✔	✔
Lead Generation	✔	✔

Marketing Campaigns	✔	✔
Service		
Case/Ticket Management	✔	✔
Manage Prospect, Leads And Opportunities	✔	✔
Convert Prospect, Lead, Opportunity To Project	✔	✔
Advanced Case Escalation	✔	✖
Bug Management	✔	✔
Knowledge Base	✔	✔
Access To 100+ Admin Services	✔	✔
Ease Of Use		
Custom Fields	✔	✔
Customize The Communication Type	✔	✖
Campaign Wizard	✔	✖
Multiple Currencies	✔	✖
File Sharing	✔	✔
Document Management	✔	✔
Collaboration		
Client Management/ Client Login	✔	✔
Link Contacts With Tasks/Projects	✔	✔
Project Request By The Client	✔	✔
Time Tracking		
Time Track		
Automatic Time-Tracking	✔	✔
Billable And Non Billable Time Tracking	✔	✔
Add Manual Time Entry	✔	✔
Bulk Time Entry	✔	✔
Timesheet	✔	✔
Offline Mode	✔	✔
Overtime Tracking	✔	✔
Meal Break Support	✔	✖
Time Off Request Management	✔	✖
Fast And Simple Employee Time Entry	✔	✖
Time Tracking With Screenshot	✔	✔
Audit		
Screenshots	✔	✔
Work Diary	✔	✔
Mouse Click	✔	✔
Keyboard Click	✔	✔
Multi Screen Management	✔	✔
Approval Rule	✔	✖
Activity Log	✔	✖
Website Tracking	✔	✔
Application Tracking	✖	✖
Screen Recording	✔	✖
Webcam Image Capturing	✖	✖
Activity Flagging	✔	✖
Silent Monitoring	✔	✖
Ease Of Use		
Billable And Non Billable Time Tracking	✔	✔
Upgrade Anytime, Keep Data	✔	✔

Task-Level Time Tracking	✔	✔
View Time Entry In Calendar And Listing View	✔	✘
Collaboration		
Client Management/ Client Login	✔	✘
Link Contacts With Tasks/Projects	✔	✘
Project Request By The Client	✔	✘
Client Can Review Screenshots	✔	✘
Client Can Review Work Diary	✔	✘

Expense Tracking

Data		
Data Control	✔	✔
Multi Branch Management	✔	✘
User Roles & Permissions	✔	✘
Payments		
Receipt Photos	✔	✘
Receipts	✔	✘
Project Managers, Team Timesheets, Team Expense Reporting	✔	✘
Daily Allowances	✔	✔
Customize The Category And Trip Name	✔	✘
Setup Expense Approval Rule As Per Project	✔	✘
Efficient Approval & Control On Expense Level	✔	✘
Custom Expense Policy Rules	✔	✔
Travel Allowances	✔	✘
Invoice		
Invoicing & Bill Processing	✔	✘
Define Tax Formulas	✔	✘
Allocation		
Project Allocation	✔	✔
Reporting		
Export Timesheets	✔	✔
E-Mail Reports	✔	✔
Reporting	✔	✘
Exporting Reports To Excel (XLS)	✔	✘
Rounding And Decimals In Reports	✔	✘
Your Company Logo In Reports	✔	✘
Visual Reporting	✔	✔
Detailed Reports	✔	✘
Uninvoiced Report	✔	✘
Generate Expense Reports	✔	✘
Support For Various Timesheet Formats	✔	✘
Configurable Reports	✔	✔
Location Based Reporting	✔	✘
Timesheets Approval	✔	✘
Manage Time With Timesheets	✔	✘
Time Tracking		
Manual Entry (Within App (Not Time Sheets))	✔	✔
Automate (Stop Watch/Timer)	✔	✘
Workflows		
Multi-Stage Approval Workflow	✔	✘
Custom Business Logic	✔	✘

Security & Backup Procdures	✔	✔
Card Integration	✔	✘
Ease Of Use		
Receipt Uploads	✔	✘
Detection Of Duplicate Expenses	✔	✘
Upload Files, Images With Expense	✔	✘
Bulk Upload Of Expense	✔	✘
Project Management		
Basic PM Tools		
Time Tracking / Timesheets	✔	✔
Project Milestones	✔	✔
Setup Milestones And Convert Them To Invoices Directly	✔	✘
Setup Expense Limit	✔	✘
Tasks Management	✔	✔
Tasks (Sub-Projects)	✔	✘
Global Tasks	✔	✘
Project Planning	✔	✔
Project Forecasting	✔	✔
Break Projects Down With Tasks	✔	✘
Project Level Permissions	✔	✘
Gantt Chart	✔	✘
Project Roadmap	✔	✘
Workflow System	✔	✘
Configurable Approval Workflows	✔	✘
Flexible Workflow And Approvals	✔	✘
Portfolio Management	✔	✘
Issue Tracking	✔	✔
Practice Management	✔	✔
Resource Management		
Resource Management	✔	✔
Skills Management	✔	✘
Project And Resource Forecasting	✔	✔
Program Management/ Event	✔	✔
Allocation-Based Estimates	✔	✘
Scheduling	✔	✔
Asset Management	✔	✔
Project Request	✔	✘
24/7 Monitoring To Ensure Availability	✔	✘
Unlimited Team Size	✔	✘
Document Management		
Document Editing	✔	✔
Document Sharing And Storage	✔	✔
Project Integration	✔	✔
Access Rights Management	✔	✘
Document Versioning	✔	✘
Import From External Resources (Excel, GoogleDocs, Etc)	✔	✘
View Company Knowledgebase	✔	✘
Communication		
Project Message Board	✔	✘
Socialize Feature For Inter User (Chat Within A Company)	✔	✘

Group Chat (Chat Within A Company)	✔	✘
Client Login (Login Available For Client)	✔	✘
Forum	✔	✔
Blogs	✔	✔
Integration With Third Parties Services		
Import Basecamp Data	✔	✘
Google Apps Integration	✔	✘
Freshbooks Integration	✔	✘
Salesforce Integration	✔	✘
QuickBooks Integration	✔	✘
Outlook Integration	✔	✔
MS Project Integration	✔	✔
Collaboration		
Client Management/ Client Login	✔	✘
Link Contacts With Tasks/Projects	✔	✘
Project Request By The Client	✔	✘
Ease Of Use		
Project Templates	✔	✘
Copy/ Clone Projects	✔	✘
Customizable Dashboards	✔	✔
Cloud Based Storage	✔	✘
View Project Detail	✔	✘
Backups	✔	✘
Mobile Apps	✔	✔
Drag And Drop Functions	✔	✔
Resource Import Tools	✔	✘
Integrated Help	✔	✘
Continuous Enhancements Included	✔	✘
Time Zone Conversions	✔	✘
Reporting		
Report Generation	✔	✔
File Dashboard	✔	✘
Can Manage Company Storage Into Screenshots, Project Storage And Doc Storage	✔	✘
Useful Reporting For Projects	✔	✘
Assignments	✔	✔
Reports For Dashboard	✔	✘
Exportable Reports	✔	✘
Billing		
Billing Management	✔	✔
Flexible Billing Rate Management	✔	✘
Flexible Workflow And Approvals	✔	✘
Balance And Accrual Calculations	✔	✘
Track And Manage Expenses By Project	✔	✘
Milestone Alerts	✔	✔
Time And Expense Based Billing		✘
Project Quotes	✔	✘
Invoices		
Invoicing		
Multi-Currency Online Invoicing	✔	✔
Invoice Integration	✔	✔

Personalized Invoices	✔	✘
Invoice Generation	✔	✘
Recurring Invoices	✔	✘
Batch Invoices	✔	✘
Import Time/Expense	✔	✘
Customized Rules For Automated Invoicing	✔	✘
Calculate The Discounts As Sequential Or Stack	✔	✘
Utility Billing	✔	✘
Billing Rule	✔	✘
Invoice Import	✔	✘
Flag Automation	✔	✘
Rate Schedule	✔	✘
Billing Services	✔	✘
Dynamic Reporting	✔	✘
Specify The Period(In Months) The Received/Due Amount Displayed	✔	✘
Payment		
Full Budget Management	✔	✘
Manage Budgets	✔	✘
Online Payment	✔	✔
Multi-Currency Support	✔	✘
Time And Expense Entry For Billing	✔	✘
Payment Reminders	✔	✘
Credit Notes	✔	✘
Easy-To-Use Expense Reports	✔	✘
Tax Formulas Automate Tax Calculations	✔	✘
Setup Default Tax And Discount Rates	✔	✘
Calculate The Discounts As Sequential Or Stack	✔	✘
Receipts		
Attach Receipts	✔	✘
Remittance Slip	✔	✘
Upload Of Digital Receipts	✔	✘
Emails		
Email Reports To Managers	✔	✔
Email Integration	✔	✔
Emails Overdue Statements	✔	✔
Ease Of Use		
Automated Notifications	✔	✔
View Invoice	✔	✘
Manage Different Status Of The Invoices	✔	✘
Automatic Send Invoice As Email	✔	✘
Automate The Invoice Number	✔	✘
Rounding Rules	✔	✘
Collaboration		
Client Management/ Client Login	✔	✘
Link Contacts With Tasks/Projects	✔	✘
View Invoices And Pay	✔	✔

HR Management

Users & Roles		
Job Descriptions	✔	✘
Employee Logins	✔	✘
Employee Profiles	✔	✘
Administrators	✔	✘
Employee Management		
Dashboard	✔	✔
Timesheet	✔	✔
Dynamic Report Generator	✔	✔
Biometric Attendance	✔	✘
Leave Tracker	✔	✘
Attendance Policy	✔	✘
Leave Policy	✔	✘
Resignation Management	✔	✘
Approval Rule	✔	✘
Leave Slots	✔	✘
Dispute Management	✔	✘
Attendance	✔	✘
Assets	✔	✘
Organizational Chart	✔	✘
Leave Management		
Balance And Accrual Calculations Of Time Off	✔	✘
Flexible Time Off Approval Workflows	✔	✘
Support Of Custom Time Off Types	✔	✔
Calendar View Time Off Scheduling	✔	✘
Submit Time Off Requests	✔	✘
Recruitment		
Create Vacancies & Publish	✔	✘
Manage The Company Recruitments	✔	✘
Have External Job Layout, Manage The Layout For Same	✔	✘
Managers Can Send Requisition To HR For Hiring	✔	✘
Manage The Applicants Applying For The Job	✔	✘
Convert The Applicant To User Once Hired	✔	✘
On-Boarding For New Hires Individually Or In Batches	✔	✘
Human Capital Management	✔	✘
Resume Parsing	✔	✘
Hiring Policies	✔	✘
Interview Schedule	✔	✘
Job Requisition	✔	✘
Talent Pool	✔	✘
Offer Management	✔	✘
Candidate Rating	✔	✘
Candidate Reference Program	✔	✔
Assessment	✔	✔
Recruitment Store Front	✔	✔
Talent Management	✔	✘
Performance		
Performance Management	✔	✔
Automated Employee Performance Appraisals	✔	✘

Competency Management	✔	✘
Employee Feedback And Recognition	✔	✘
Team Reviewers	✔	✘
Review Managers	✔	✘
Benefits Administration		
Employee Self-Service	✔	✘
Employee Time-Off Tracking	✔	✘
Succession Planning	✔	✘
Goal Management	✔	✘
Customize Work Flows	✔	✔
Active Directory / LDAP Plugin	✔	✘
Setup Accrual	✔	✘
Setup Working Week Shift Wise	✔	✘
Convert NOn Working Day As Working For Specific Users	✔	✘
Manage And Track Attendance With In And Out Time	✔	✘
Approval Rule	✔	✘
Setup Bonus Leave	✔	✘
Ease Of Use		
Employee/Corporate Directory	✔	✘
Setup Company Holiday Location Wise	✔	✘
Customize Leave Type	✔	✘
Knowledge Base	✔	✘
Dashboard	✔	✔
File Sharing	✔	✔
Document Management	✔	✔
Appointment Calendar		
Calendar Management	✔	✘
Group Scheduling	✔	✘
Meeting Room Booking	✔	✘
Online Scheduling	✔	✘
Payment Processing	✔	✘
Recurring Appointments	✔	✘
Reminders	✔	✘
Reservations	✔	✘
Customization/Branding	✔	✘
Reporting And Analytics	✔	✘
Website Integration	✔	✘
Google Calendar Linking	✔	✘
Email Marketing	✔	✘
Compatiblity		
IPhone App	✔	✔
Android App	✔	✔
Windows Phone App	✔	✔
Blackberry App	✔	✔
Windows Desktop App	✔	✔
Linux Desktop App	✔	✔
Mac Desktop App	✔	✔
Help & Support		
Email	✔	✔
FAQs	✔	✔
Live Chat	✔	✔

Telephone	✔	✔
Tutorials	✔	✔
Forum	✔	✔
Webinar	✔	✔
User Guide	✔	✔
Blogs	✔	✔
Other Key Features		
Multi-Lingual/Localization	✔	✔
Multi-Currency	✔	✖
SSL Secure	✔	✔
DEVELOPER API	✔	✔
On-Premise Installation	✔	✖
Add-Ons And Other Integration		
Google Calendar	✔	✔
Microsoft Exchange	✔	✔
INTUIT QUICKBOOKS	✔	✔
Freshbooks Integration	✔	✔
FSM/Ticketing		
FSM/Ticketing	✔	✖
Work Order Management	✔	✖
Scheduling And Dispatching	✔	✖
Mobile App	✔	✔
Invoicing And Time Tracking Integration	✔	✔
Capture Video On-Site	✔	✔
Zone Management	✔	✖
Heat Map	✔	✖
Live Locator Tracking	✔	✔
Ticket Activity Tracking	✔	✔
Digital Workflows	✔	✖
Merge	✔	✔
811 Call Center Integration	✔	✔
Centralized Customer Portal	✔	✔
Reporting And Analytics	✔	✔
Route Planning And GPS Integration	✔	✖
Service Level Agreement	✔	✔
Form Builder	✔	✔
Crew Allocation	✔	✔
Rule Engine	✔	✖
Asset Management	✔	✔
Knowledge Base	✔	✔
Locator Helpdesk	✔	✔
Non-Locator Helpdesk	✔	✔
Social Media Integration	✔	✖
Communication	✔	✔
Time Tracking	✔	✔
Feedback	✔	✖
Map Integration	✔	✖
Event Management		
Event Management	✔	✔
Event Planning	✔	✔

Registration	✔	✔
Venue Management	✔	✘
Speaker Management	✔	✘
Marketing	✔	✔
Communication	✔	✔
Reporting And Analytics	✔	✔
Payment Processing	✔	✔
Ticketing	✔	✔
Google Calendar Integration	✔	✔
Budget Management	✔	✔
Recurring Events Setup	✔	✔
Store Front	✔	✘
Attendees Management	✔	✔
Social Media Integration	✔	✘
Availability Management	✔	✘
Project Tracker	✔	✘
Virtual/Physical Events	✔	✘
Ticket Sale	✔	✘
Discount And Coupon	✔	✘
Policy	✔	✔
FAQs Management	✔	✔
Donation	✔	✔
Event Wishlist	✔	✔
Resource Management	✔	✔
Custom Dashboard	✔	✔
Asset Management		
Asset Management	✔	✔
Barcode/QR Code Scanning	✔	✘
Asset Requisition	✔	✔
Assets Life Cycle Management	✔	✔
Requisition Checkout Time	✔	✔
Calibration, Audit And Image Capturing	✔	✔
Mobile Scanning	✔	✘
Self-Checkout	✔	✘
Depreciation Management	✔	✘
GPS Tracking	✔	✘
Asset Deployment	✔	✘
Integration With RFID	✔	✔
Asset Tracking	✔	✘
Inventory Management	✔	✔
Asset Disposal	✔	✘
Push Notifications	✔	✔
Mobile App	✔	✔
Custom Asset Categories	✔	✔
Asset History	✔	✘
Asset Reservations	✔	✘
User Permissions	✔	✔
Dashboard And Analytics	✔	✘
Alerts And Notifications	✔	✘

Asset Documentation	✔	✔
UCAS		
UCAS	✔	✘
Messaging	✔	✔
Voice Calls	✔	✘
Video Call	✔	✘
File Sharing	✔	✔
Team Collaboration	✔	✔
Contact Management	✔	✔
Integration With CRM	✔	✘
Sangoma And Ticketing Integration	✔	✔
Group Chats	✔	✘
Messaging By Project	✔	✔
Communication History And Logs	✔	✔
Personalized Communication	✔	✔
Unified Messaging	✔	✔
Call Routing & Forwarding	✔	✔
Virtual Meetings & Conferencing	✔	✘
Calendar Integration	✔	✔
Training		
Training	✔	✔
Online Training	✔	✔
Physcial Training	✔	✘
Venue Management	✔	✘
Trainer Allocation	✔	✔
Attendees Management	✔	✔
Recurring Trainings	✔	✘
Document Sharing	✔	✔
Questionaire Setup	✔	✘
Attendance	✔	✔
Training Feedback	✔	✘
Star Rating	✔	✘
Reports And Analytics	✔	✔
Document Storage		
Document Storage	✔	✔
Smart, Secure Files Sharing	✔	✔
Third-Party Storage Systems	✔	✘
Access To Unlimited Folders	✔	✔
Drag And Drop To Upload Files/Folders	✔	✔
Manage Cloud-Based Storage	✔	✔
Personalized Storage Space For Team Members	✔	✔
Grant Guest Access To Files	✔	✔
Assign Storage Space To Clients	✔	✔
Preview Of Folders And Files	✔	✔
Flexible Configuration	✔	✘
Restore Files From Recycle Bin	✔	✘
Setup External Access With Expiration Date	✔	✔

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