

# Account Insight Plug-in Overview

Account Insight is a Chrome plug-in that surfaces actionable ABM and account insights to your sales teams, allowing them to engage accounts more effectively.



## Availability

Account Insight is included for all customers who have both ABM and Marketo Sales Insight. For customers who only have ABM, Account Insight is available as a purchased add-on. Each customer is limited to 250 Account Insight seats. Please contact your sales rep for details. It is not available to customers who do not have ABM.



## Caution

The Account Insight plug-in will not work in subscriptions that have [SSO-only](#) (single sign-on) enabled.

CRM context works for Salesforce when launching the plug-in from an Account, Lead or Contact. CRM context will not work for Dynamics when launching the plug-in from an Account, Lead or Contact. For Dynamics users, we recommend using the Account Insight plug-in.

## What's in this article?

[Named Accounts](#)

[Activity Feed](#)

## Named Accounts

See named accounts in order of their rank among each other. This list is available to account owners only. Account team support is coming soon.



## MY ACCOUNTS ?

100<sup>th</sup>  
percentile [United Oil & Gas, Singapore](#)

98<sup>th</sup>  
percentile [Farmers](#)

97<sup>th</sup>  
percentile [Progressive](#)

95<sup>th</sup>  
percentile [Dickenson plc](#)

95<sup>th</sup>  
percentile [Mazda](#)

92<sup>nd</sup>  
percentile [Fidelity](#)

92<sup>nd</sup>  
percentile [Tata](#)

92<sup>nd</sup>  
percentile [Nissan](#)

92<sup>nd</sup>  
percentile [Ford Motors](#)

92<sup>nd</sup>  
percentile [Chevron](#)

To see details for a named account, click its name...



ACTIVITY FEED

NAMED ACCOUNTS

## MY ACCOUNTS ?

100<sup>th</sup>  
percentile United Oil & Gas, Singapore

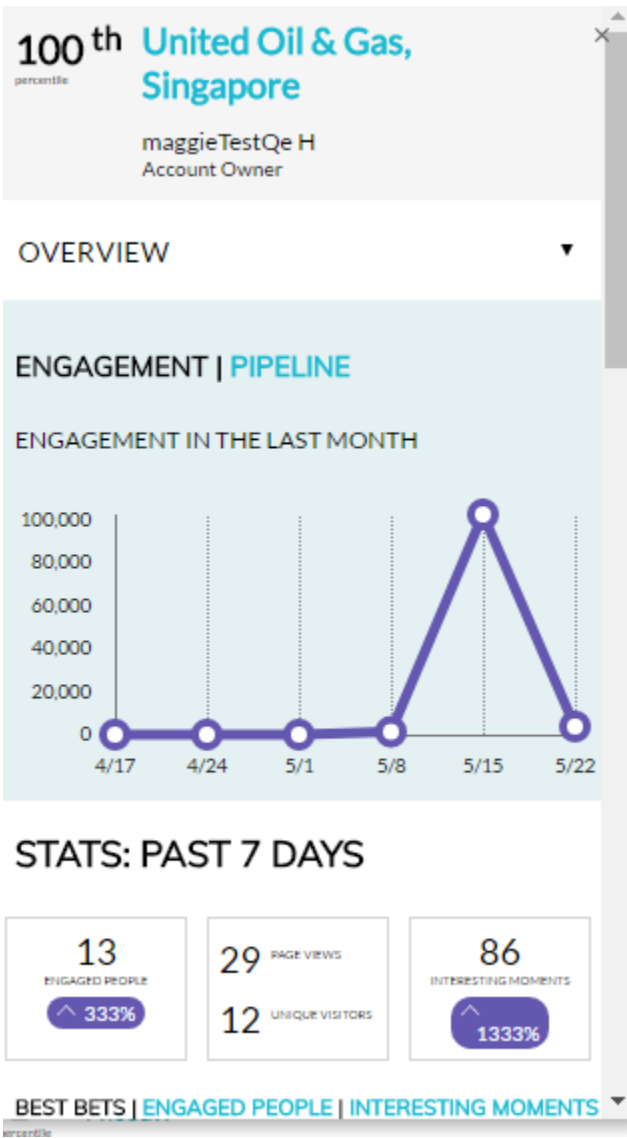
98<sup>th</sup>  
percentile Farmers

97<sup>th</sup>  
percentile Progressive

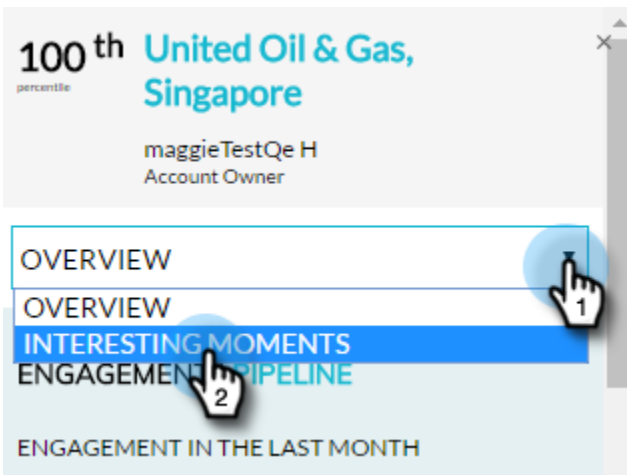
95<sup>th</sup>  
percentile Dickenson plc

95<sup>th</sup>  
percentile Mazda

...and the overview appears.



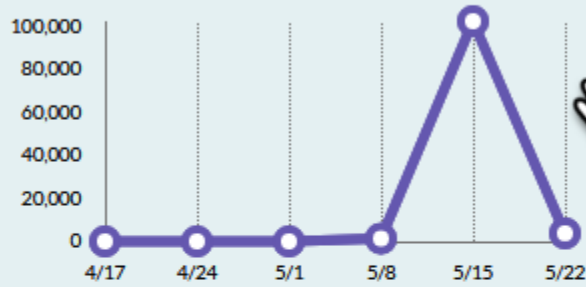
See interesting moments by using the drop-down.



Scroll down to see best bets. Interesting moments is here too, along with engaged people.

## ENGAGEMENT | PIPELINE

### ENGAGEMENT IN THE LAST MONTH



### STATS: PAST 7 DAYS



### BEST BETS | ENGAGED PEOPLE | INTERESTING MOMENTS

testuser.cp1


testuser.cp1@uog.com



Click a person's name...

## STATS: PAST 7 DAYS




BEST BETS | [ENGAGED PEOPLE](#) | [INTERESTING MOMENTS](#)





**testuser cp1**   


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[testuser.cp1@uog.com](mailto:testuser.cp1@uog.com)



**Tom Ripley**   
Regional General Manager 

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[triple@uog.com](mailto:triple@uog.com)

...and see their activity.

**100<sup>th</sup>** **United Oil & Gas, Singapore** ×  
percentile


maggieTestQe H  
Account Owner

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←  **Tom Ripley**  
Regional General Manager   


View in CRM [triple@uog.com](mailto:triple@uog.com)


### TOM'S ACTIVITY

-  Milestone Interesting moment generated by Interesting moment for UOGS


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-  Milestone Interesting moment generated by Interesting moment for UOGS


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-  Milestone Interesting moment generated by Interesting moment for UOGS


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-  Milestone Interesting moment generated by Interesting moment for UOGS

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-  Milestone Interesting moment generated by Interesting moment for UOGS

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-  Milestone Interesting moment generated by Interesting moment for UOGS

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You can also switch the view from Engagement to Pipeline.


**100<sup>th</sup>** **United Oil & Gas, Singapore**  
percentile

maggieTestQe H  
Account Owner

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OVERVIEW ▼

ENGAGEMENT | **PIPELINE**



ENGAGEMENT IN THE LAST MONTH

To exit out of the named account, click the X on the upper-right.

maggieTestQe H  
Account Owner

OVERVIEW

ENGAGEMENT | PIPELINE

## Activity Feed

The activity feed shows recent activity, going back seven days.

ACTIVITY FEED NAMED ACCOUNTS

### RECENT ACTIVITY

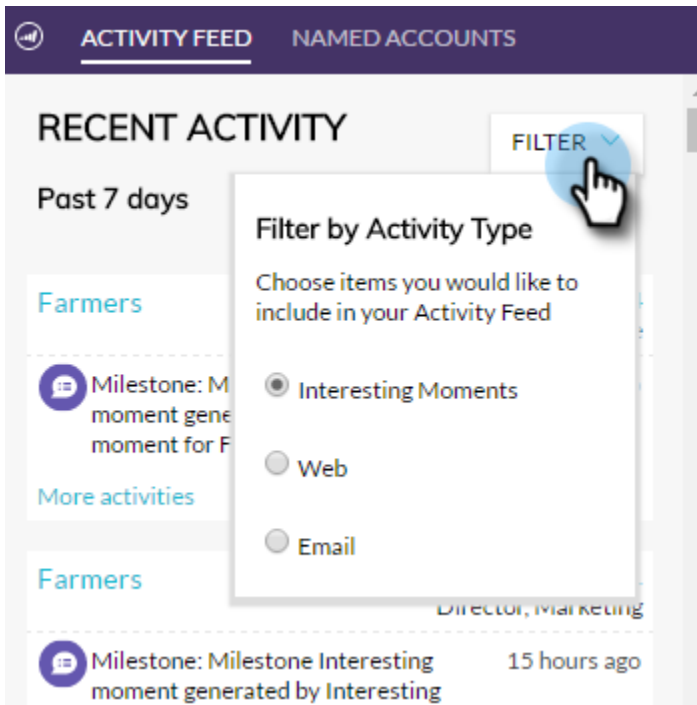
Past 7 days

FILTER

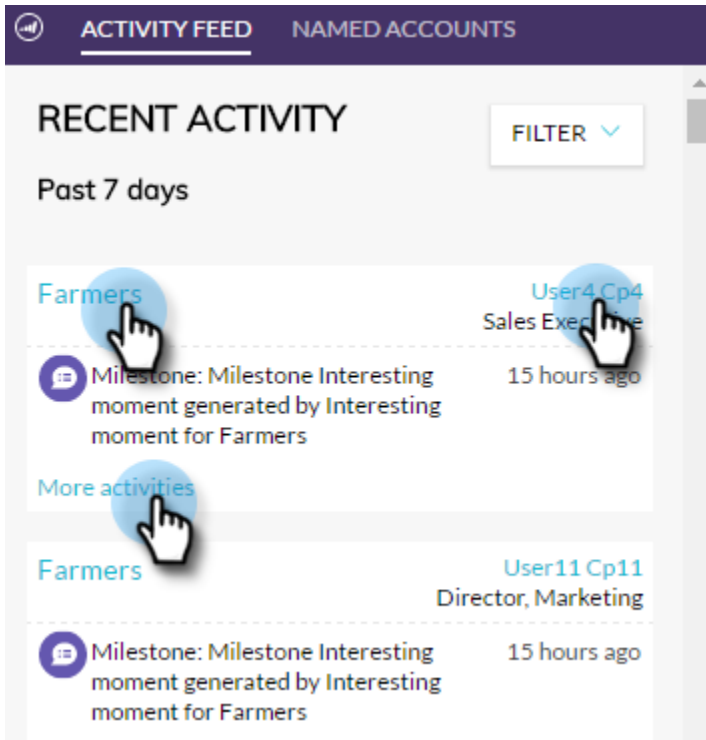
Farmers	User4 Cp4 Sales Executive
Milestone: Milestone Interesting moment generated by Interesting moment for Farmers	15 hours ago
More activities	
Farmers	User11 Cp11 Director, Marketing
Milestone: Milestone Interesting moment generated by Interesting moment for Farmers	15 hours ago
More activities	
Farmers	User1 Cp1 VP, Facilities
Milestone: Milestone Interesting moment generated by Interesting moment for Farmers	15 hours ago
More activities	

Click the **Filter** drop-down to filter by different activity types.

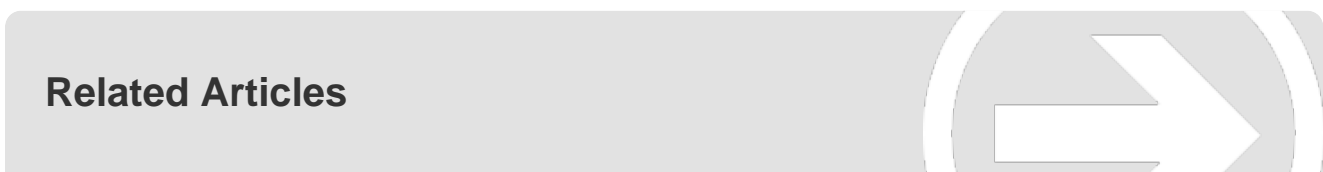




Several items are clickable. Click the named account to see its details. Click the name of the user to see their activity. Click More Activities to see, well, more activities.



Pretty cool stuff!



- [Set up Account Insight](#)