

Everything FiggyCRM does. It's a short list. **That's the point.**

Most CRM manuals run 90 pages, because most CRMs have 90 pages of things to configure. We don't, so this is about a five-minute read. We timed it.

● The latest version always lives at app.figgycrm.com/guide.

01 Getting started

Create your account at app.figgycrm.com/signup. You get your own private workspace and 14 free days. No credit card, no sales call, no “quick 30-minute onboarding Zoom.” Confirm your email and you’re in.

Do one thing on day one: add the two or three people you keep meaning to get back to, and put a follow-up date on each. Congratulations, you now understand the entire philosophy of this product.

02 Home

Home is the “what should I do today?” screen:

- **Next up:** your open tasks, most urgent first.
- **Recently active:** the people you’ve worked with lately.
- **Going quiet:** people with no activity in over 30 days. It only appears when someone qualifies, and yes, it works a bit like your conscience. Click a name and make it go away the honest way.

Numbers for open deals, wins this month, follow-ups, and contacts. We could call it an “analytics dashboard,” but it’s four numbers.

03 Contacts

A contact is a person: company, phone numbers, email, notes, and their whole history in one place. Click one and see everything you know about them, which beats scrolling your inbox and squinting.

- **Categories:** one per contact, like Prospect or Customer. They come in colors, because everything is a little better in colors.
- **Tags:** freeform labels. Add as many as you like. We won't judge your system.
- **Follow-ups:** set a next follow-up date and it shows up on Home and in your calendar feed.

Bringing contacts from your old CRM

Go to Contacts → Import CSV and choose the export file from the system you're leaving. (We won't ask why you're leaving. Okay, we'd love to know. Email us.) Files from Google Contacts, Outlook, HubSpot, and most other CRMs work as-is: no reformatting, no column matching, duplicates skipped automatically, up to 2,000 contacts per file.

Cleaning up in bulk

Tick the checkbox beside a few contacts, or the one at the top to select everything showing, and an Archive button appears. One click sends them all to the Archive, which lives in Settings under Data & backups. They wait there in case you change your mind. Nothing gets truly deleted by one dramatic click.

If a contact still has open deals or projects, FiggyCRM skips it and tells you, because archiving someone mid-deal is usually an accident.

04 Deals

The Deals board tracks the work you might win as cards you drag between stages. Rename, reorder, and recolor the stages in Settings until the board matches how you actually sell, not how a sales textbook thinks you should.

When you move a deal to a winning stage, FiggyCRM quietly creates a project for it, carrying over the customer, notes, and history. Winning the work and doing the work live next door to each other.

05 Projects

Projects are for after the win. Each one links to a contact and moves through its own stages, separate from the deals board. Attach tasks and notes to keep delivery on track. That's the whole section. We told you this guide was short.

06 Tasks and reminders

A task is anything you don't want to forget. Give it a due date and a priority if you like, attach it to a contact, deal, or project, or let it float free. Check tasks off anywhere they appear.

Email reminders: turn them on in Settings and FiggyCRM sends one summary email, on the days and time you pick, listing what's overdue or due today. If nothing's due, we send nothing. Radical, we know.

07 Your follow-ups, in your calendar

In Settings you'll find a private calendar link. Paste it into your calendar app once, and every task or follow-up with a date appears in the calendar you already use, updating on its own.

- **Google Calendar:** click the + beside "Other calendars", then pick "From URL".
- **Apple Calendar:** open the File menu and pick "New Calendar Subscription".
- **Outlook:** click "Add calendar", then "Subscribe from web".

That's the entire integration. No connecting accounts, no permission screen asking to read your email. Keep the link private. Anyone who has it can see your task titles.

08 Search

Q Search contacts, companies, deals...

The search box at the top finds contacts, companies, deals, projects, and tasks in one go. Type, pick, done. This is the shortest section because search didn't need a manual.

09 Working as a team

Invite teammates from Settings → Workspace. Everyone gets their own sign-in to the same shared workspace. Invitations expire after 7 days of being ignored, which is also useful information about your colleague.

- **Owner:** full control, including billing and handing the whole thing to someone else.
- **Admin:** manages settings, stages, labels, and members.
- **Member:** does the actual work.

Billing is per person: \$30 per user per month.

10 Your data

It's yours. All of it. Behave accordingly:

- **Backups:** download a complete copy of your workspace anytime from Settings. We also make our own daily backups automatically, because trust is nice and backups are nicer.
- **Restore:** load a downloaded backup back in from Settings; nothing gets duplicated.
- **Archive:** "deleting" a contact, deal, project, or task moves it to the archive first, because everyone has deleted the wrong thing at least once. Restore it from Settings and pretend it never happened.

11 Billing

14 free days, no card. After that it's \$30 per user per month if you like it. No contracts, cancel anytime, monthly only. There's no annual plan to be talked into on a call, because there are no calls.

If your trial runs out before you decide, your workspace pauses. Nothing is deleted. It just waits for you, like a gym membership, except this one you might actually use.

12 Your account

- Change your name and photo in Settings → Account.
- Forgot your password? The sign-in page has the link. No shame, that's what it's for.
- Want to leave? Delete your account and every scrap of your data from Settings, no support ticket required. We'll email you a confirmation receipt and be sad about it quietly.

13 Need help?

Use Settings → Help & feedback inside the app, or email hello@figgycrm.com. Every message is read by an actual person. There's no chatbot to get past. You email, a human answers.