CONTRACT MANAGER

User Manual
Release 25.1.0
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WHAT IS «CONTRACT MANAGER» ?

With "Contract Manager," you can manage all your contracts (insurance, rental agreements, leases, etc.).

Features:

- Unlimited number of contracts

- Distinction between income and expenses

- Unlimited number of freely definable categories

- Management of contract partners, agents, and contact persons (phone, email, website, etc.) via macOS contacts

- Sort by name, category, contract partner, and contract person

- Termination date can be entered as an appointment in the macOS calendar

- Display termination date in the calendar

- Contract can be marked as inactive

- Contract can be filtered by contract person

- Contract person is visible in the list of contracts

- Send email to the contract partner

- Send contract changes to the contract partner via email

- Send contract termination to the contract partner via email

- Evaluation with list of all contracts and all contract fields (with export and print function)

- Automatic saving of all changes

- An unlimited number of documents can be added to each contract

- Drag and drop emails from the email application

- Drag and drop photos from the photo application

- Management of terms and notice periods

- Evaluation of contracts (costs per month, quarter, year)

- Graphical overview of the evaluation with export function in pixel or vector format

- Print all contracts as a list

- Print visible contracts as a list (with filter active)

- Print all contracts with details

- Print visible contracts with details (with filter active)

- Print selected contract with details

- Copy all data to the clipboard (for further processing in Excel®, Pages®, or LibreOffice, etc.)

- Export all data as an Excel® XLSX file

- Export all data as CSV file (for further processing in Excel®, Pages®, LibreOffice, etc.)

- Data import via CSV file

- Price increases for individual contracts can be recorded

- Graphical overview of price increases with export function in pixel or vector format

- Data backup (including CSV file) to internal hard drive, network drive, or external medium (USB stick, etc.)

APPLICATION START

After starting "Contract Manager," you can immediately begin entering your contracts. The database and all attachments for "Contract Manager" are stored in the directory "$HOME/Library/Containers/ de.pps4me.ContractManager/Data/Library/Application Support/ContractManager."
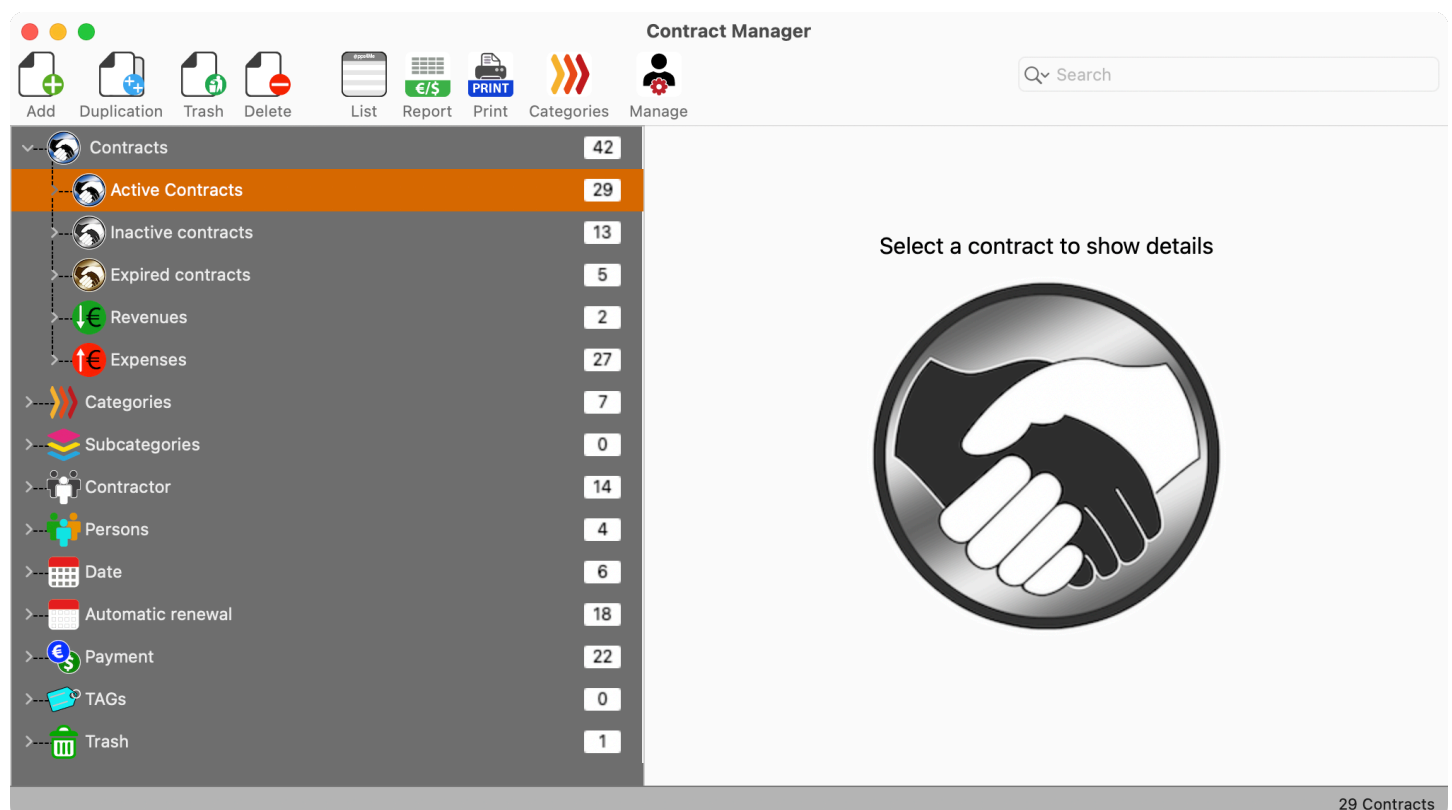
The application is divided into the following areas:

Top:

Toolbar menu

Left:

Selection structure with number of entries

Right:

Details of the selected contract divided into the following sections:

• General

• Contract term / Termination

• Attachments

• Premium

• Payment information

• Portal login

• TAGs

The values displayed in the tree structure have the following meaning:

	Contracts	Count of all contracts
	Active contracts	Count of active contracts
	Inactive contracts	Count of inactive contracts
	Expired contracts	Count of expired contracts
	Revenue	Count of contracts for revenue
	Expenses	Count of contracts for expenses
	Categories	Count of categories
	Any category	Count of contracts per category
	Subcategories	Count of subcategories
	Any subcategories	Count of contracts per subcategory
	Contractors	Count of contractors
	Any contractor	Count of contracts per contractor
	People	Count of people
	Any persons	Count of contracts per person
	Date	Count of subcategories
	Each subcategory in date	Count of contracts per category/subcategory
	Automatic renewal	Count contracts with automatic renewal
	Without renewal	Count contracts without automatic renewal
	With renewal	Count contracts with automatic renewal

	Sequence	Count of subcategories
	Without sequence	Count of contracts without a sequence
D	Daily	Count of contracts with an daily sequence
W	Weekly	Count of contracts with an weekly sequence
M	Monthly	Count of contracts with an monthly sequence
1/2	Half-yearly	Count of contracts with a half-yearly sequence
Y	Yearly	Count of contracts with an yearly sequence
	Own sequences	Count of own sequences
	Each own sequence	Count of contracts in the respective sequence
	Payment method	Count of contracts with a payment method
	Any payment method	Count of contracts per payment method
	TAGs	Count of different TAGs
	Trash	Count of contracts in trash

ACCESS TO CALENDAR, REMINDERS, AND ADDRESS BOOK

With "Contract Manager," you can manage the terms of your contracts and the cancellation deadlines for your contracts via the macOS calendar. Contract Manager creates an entry in the calendar for each contract you want. This means you will be notified in good time of the end of the contract or the cancellation deadline by a calendar reminder. To use this feature, Contract Manager requires access to the calendar. If you do not want to allow this access, you can still use Contract Manager to its full extent, except for this feature.
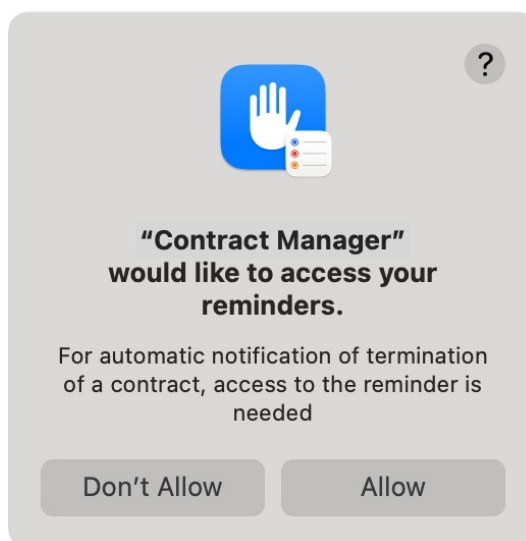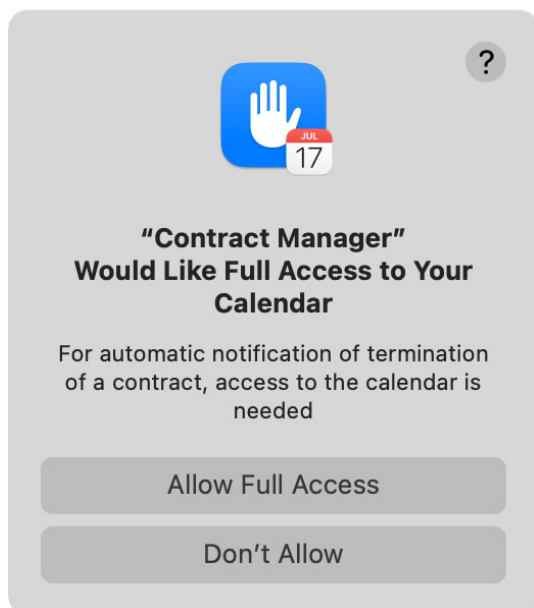
With «Contract Manager» you can take over the contact details of your contracts (insurance provider and/or contact person with all the data such as address, e-mail, phone, etc), automatically from the macOS address book. This get you the benefit, that you have only one place which you must manage your contact data. If you change the details of a contact person in the macOS address book, «Contract Manager» has also this changed contacts data automatically. Furthermore, you can directly send an e-mail (contract termination or address change) to the contact person. This is the reason why «Contract
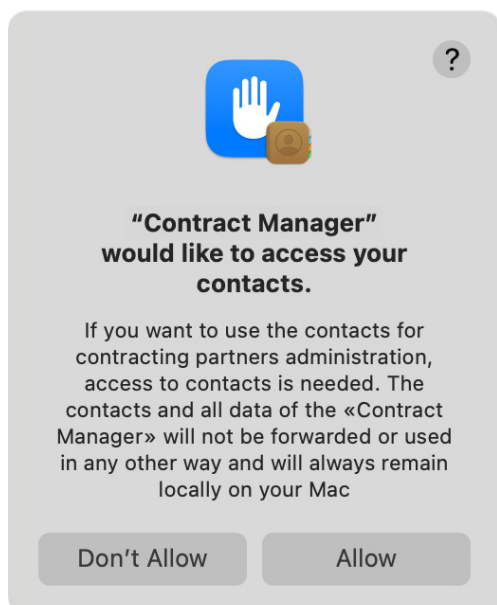
Manager» needs access to your macOS contact data. If you do not want to allow this access, you can use «Contract Manager» with full functions except this feature.

If you allow or not allow any access to your personal data, «Contract Manager» will not use this data outside the application. All data will be saved to your local calendar store and your local macOS contact data, except you have activate iCloud for your calendar and your contact data. Then your data are stored in the iCloud. All other data of «Contract Manager» are stored on your local device in your personal library folder. «Contract Manager» doesn't use your data outside the application and it doesn't share your data with anyone or any system in the internet. You can use «Contract Manager» without a network connection.

If you would use these features, you must activate it in the settings.
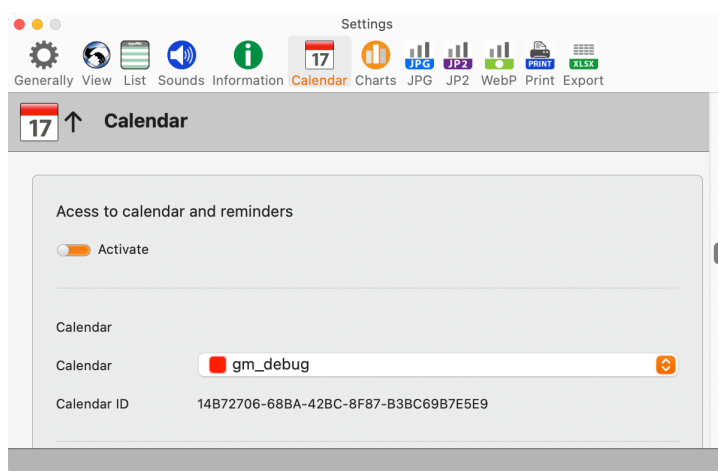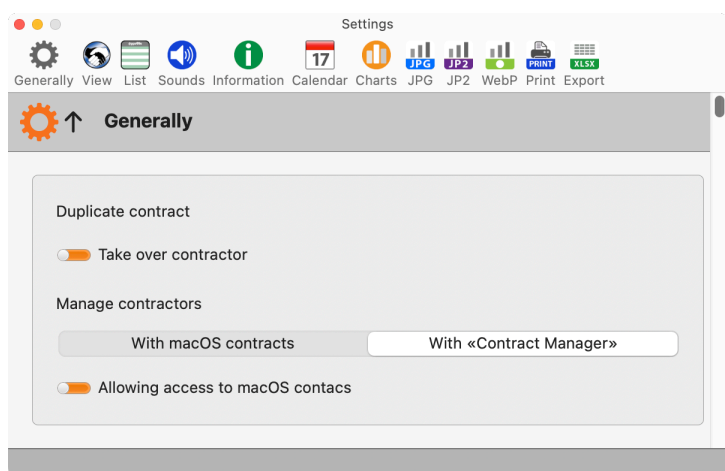
If the contacts of macOS are used, the menu for "Manage contractors" is deactivated.
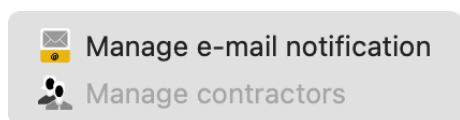
The function will then no longer be available in the toolbar menu either.
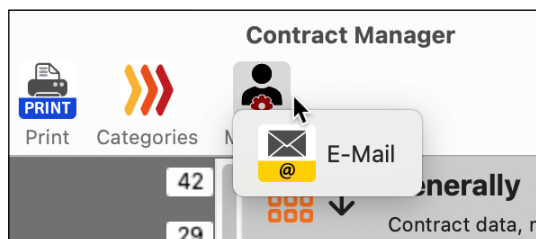
In the Touch Bar, the icon for managing contacts is hidden

EXPAND OR COLLAPSE SECTIONS IN DETAILS

In the details, the sections can be expanded or reduced as follows:

By clicking on the icon in the header
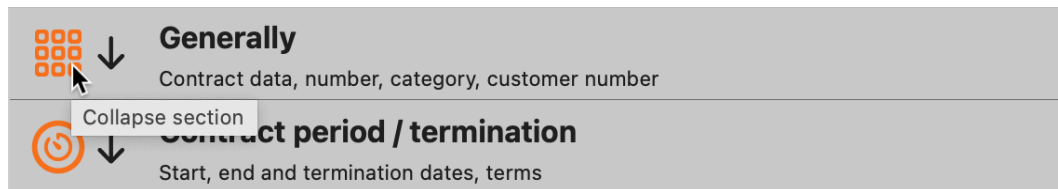
Double-click on the header
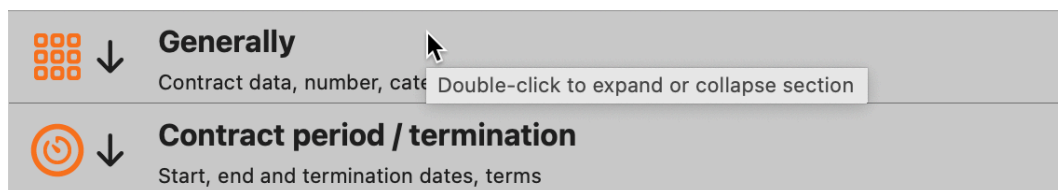
With the context menu
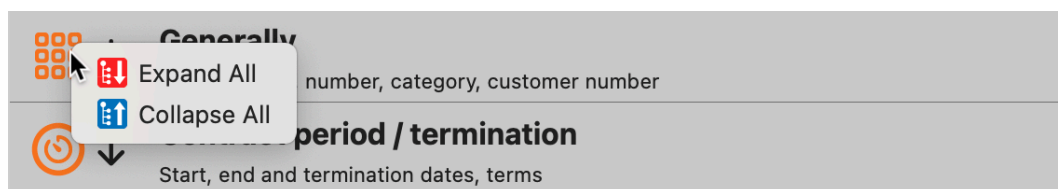
The status of the individual sections (expanded or reduced) is saved automatically. After restarting the application, the sections are displayed exactly as they were when you left the application.

TOOLBAR MENU

The following functions are available in the toolbar menu.
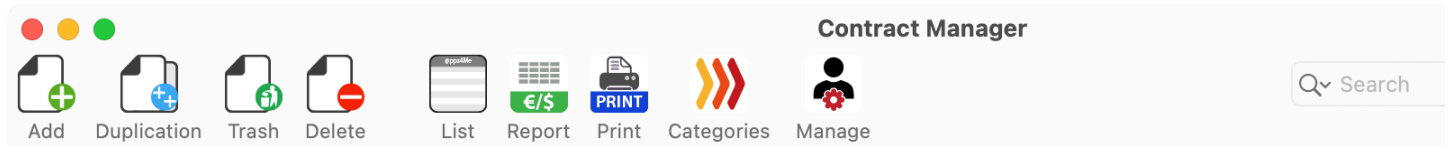
- Add contract
- Duplicate contract
- Move contract to trash,
- Delete contract
- List of all contracts
- Evaluation
  - Evaluation
  - Price history
- Print
  - List
    - All contracts
    - Active contracts
    - Inactive contracts
    - Expired contracts
    - Revenues
    - Expenses
  - Details (one contract per page)
    - All contracts
    - Active contracts
    - Inactive contracts
    - Expired contracts
    - Revenues
    - Expenses
- Manage categories
  - Categories
  - Subcategories
- Manage
  - Email
  - Contract partners
- Search

SELECTION MENU

The following areas are available in the selection menu:

- Contracts
  - Active contracts
  - Inactive contracts
  - Expired contracts
  - Revenue
  - Expenses
- Categories
- Subcategories
- Contract partners
- Persons
- Date
  - Order date
  - Start date
  - End of contract
  - Termination date
  - Terminated on
- Automatic renewal
  - Without renewal
  - With renewal
  - Sequence
    - Without sequence
    - Daily
    - Weekly
    - Every two weeks
    - Monthly
    - Yearly
    - Every two years
    - Every three years
    - Every view years
    - Every five years
    - Own sequences

- Payment method
  - Year
  - Half-year
  - Quarter
  - Every 2 months
  - Month
  - Week
  - Day
  - None
- TAGs
- Trash
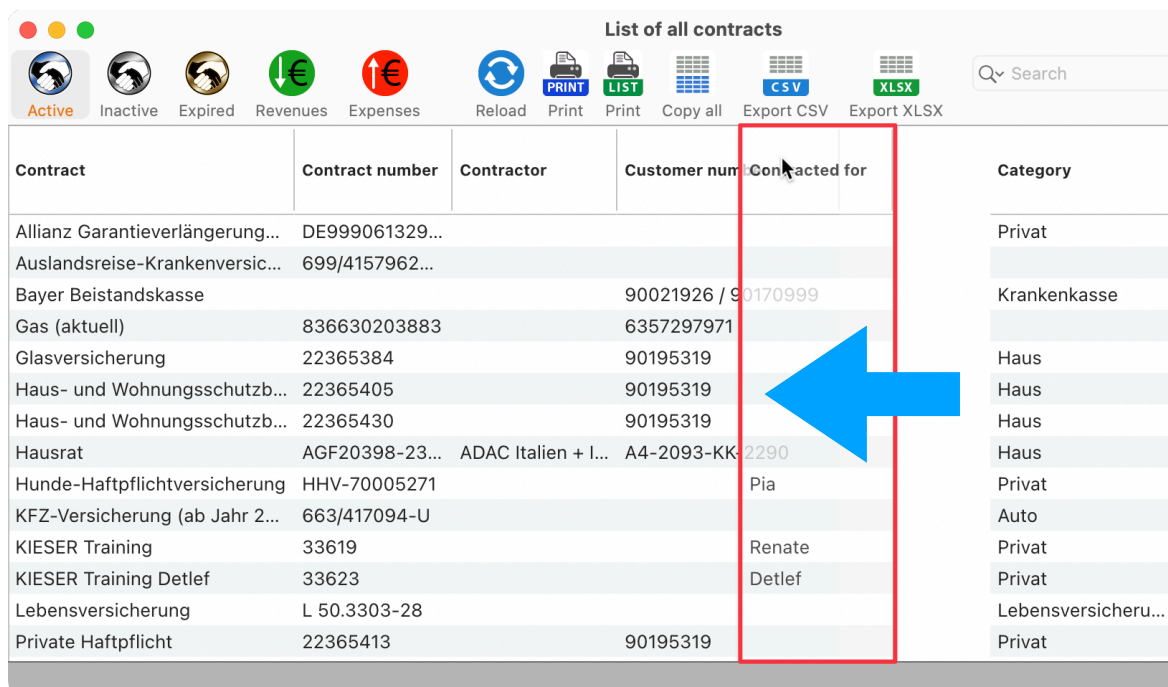
Contracts	42
Active Contracts	29
Inactive contracts	13
Expired contracts	13
Revenues	2
Expenses	27
Categories	7
Subcategories	1
Contractor	4
Persons	4
Date	18
Order date	6
Start Date	29
End of contract	20
Termination Date	9
Terminated on	1
Automatic renewal	18
Without renewal	11
With renewal	18
Sequence	7
Payment	22
Year	15
Half-year	0
Quarter	1
Month	6
Week	0
Day	0
None	7
TAGs	0
Trash	1

CUSTOMIZE LIST

- The list of contracts can be freely configured. All settings are saved and will be reassigned to the list after restarting the application.

- Set zoom factor

- Set column widths

- Arrange columns

- Show or hide columns

- Reset lists to default values

Arrange columns

Simply move the desired column to the new position.

Show or hide columns

The current column can be hidden using the context menu.
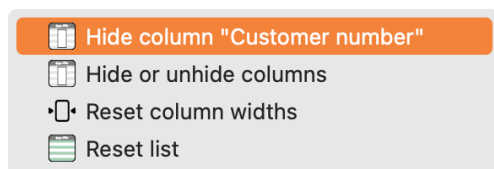
Mehrere Spalten können einfach über ein Options-Fester ein- oder ausgeblendet werden. Verwende dazu "Spalten ein- oder ausblenden" aus dem Kontext-Menü.
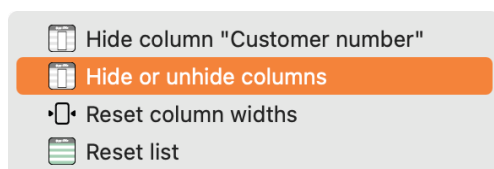
The columns that are shown and hidden are listed in their original order in the Options window.

Hide or unhide columns

- ☐ Hidden: Contract
- ☐ Hidden: Contract number
- ☑ Hidden: Contracted for
- ☐ Hidden: Customer number
- ☐ Hidden: Contractor
- ☐ Hidden: Category
- ☐ Hidden: Subcategory

| Hide all | Unhide all |

Close
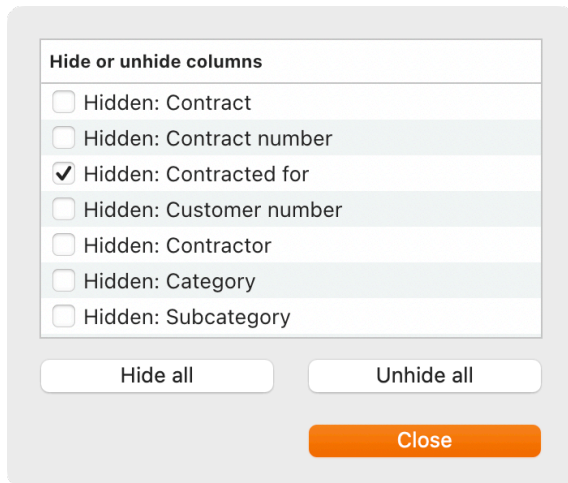
Adjust the size of the list

The lists can be quickly enlarged using the context menu. In the settings, the zoom factor for the lists can be set from 50% to 400%.

- Hide column "Customer number"
- Hide or unhide columns
- Reset column widths
- Reset list
- Zoom ▸
  - ✓ Zoom 100%
  - Zoom 125%
  - Zoom 150%
  - Zoom 175%
  - Zoom 200%
- ✓ With Headline
- Copy cell to clipboard
- Copy row to clipboard
- Column copied to clipboard
- Copy all data to clipboard
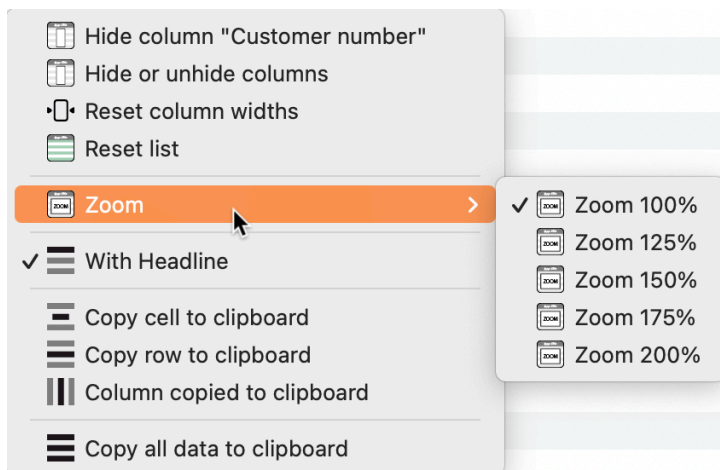
Spaltenbreiten zurücksetzen

The column width of all columns can be set to the default values. Use the context menu to do this.

- Hide column "Customer number"
- Hide or unhide columns
- Reset column widths
- Reset list
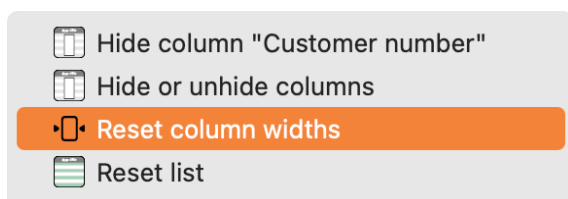
Reset list

The list can also be reset to the default values. Use the context menu to do this.

- Hide column "Customer number"
- Hide or unhide columns
- Reset column widths
- Reset list
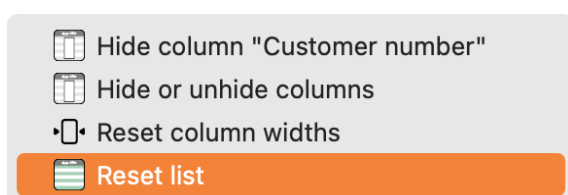
TOUCH BAR

If you have a Mac with a Touch Bar, you can use it to access the following functions:

Main window

- Add contract
- Copy contract
- Move contract to trash
- Delete contract
- List of all contracts
- Evaluation of contracts
- Price history
- Manage categories
- Manage email notifications
- Manage contract partners
- Scroll down or up to view details

List

- Show all contracts
- Show income
- Show expenses
- Update data
- Print
- Copy everything to clipboard
- Export as CSV file
- Export as Excel® XLSX file

Evaluation

- Export as CSV file

- Export as Excel® XLSX file

- Copy everything to clipboard

- Print

- Display graphical evaluation

Graphical evaluation
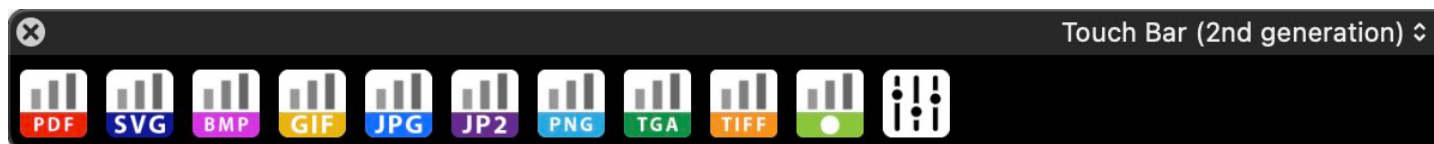
- Save as PDF

- Save as SVG

- Save as BMP

- Save as GIF

- Save as JPG

- Save as JPEG2000

- Save as PNG

- Save as TGA

- Save as TIFF

- Save as WebP

- Show options

Price history

- Load nine data

- Copy everything to the clipboard

- Export as CSV file

- Export as Excel® XLSX file

Price history graphical evaluation

- Line graph
- Curve graph
- Bar graph
- Save as PDF
- Save as SVG
- Save as BMP
- Save as GIF
- Save as JPG
- Save as JPEG2000
- Save as PNG
- Save as TGA
- Save as TIFF
- Save as WebP
- Show options

Print

- Go to first page
- Go to previous page
- Go to next page
- Go to last page
- Load data nine
- Save as PDF
- Save as HTML
- Print
- Show options
- Set variable zoom

Manage contract partners

- Add contract partner
- Duplicate contract partner
- Delete contract partner
- Sort contract partners in ascending order
- Sort contract partners in descending order
- Import contract partners via a vCard file
- Export contract partners as a vCard file
- Export all contract partners as an Excel® XLSX file
- Scroll details

Manage categories

- Add category
- Delete category
- Edit category

Manage subcategories

- Add subcategory
- Delete subcategory
- Edit subcategory

ADD NEW CONTRACT

To enter a new contract, click on the "Add" icon in the top left corner.
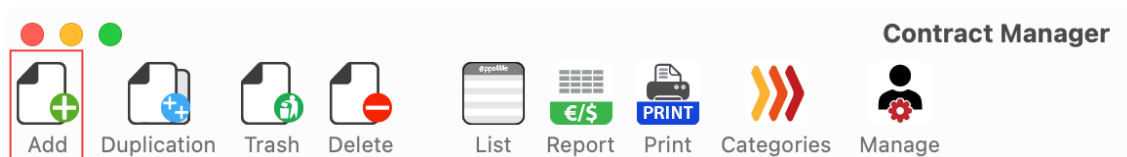
This can also be done via the "File" menu.
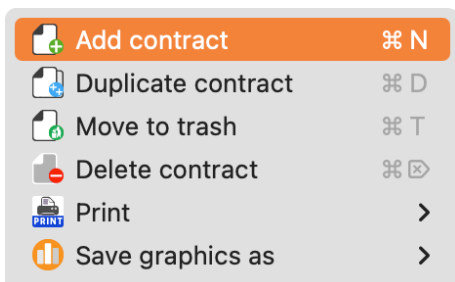
You can also use the Touch Bar to add a new contract.
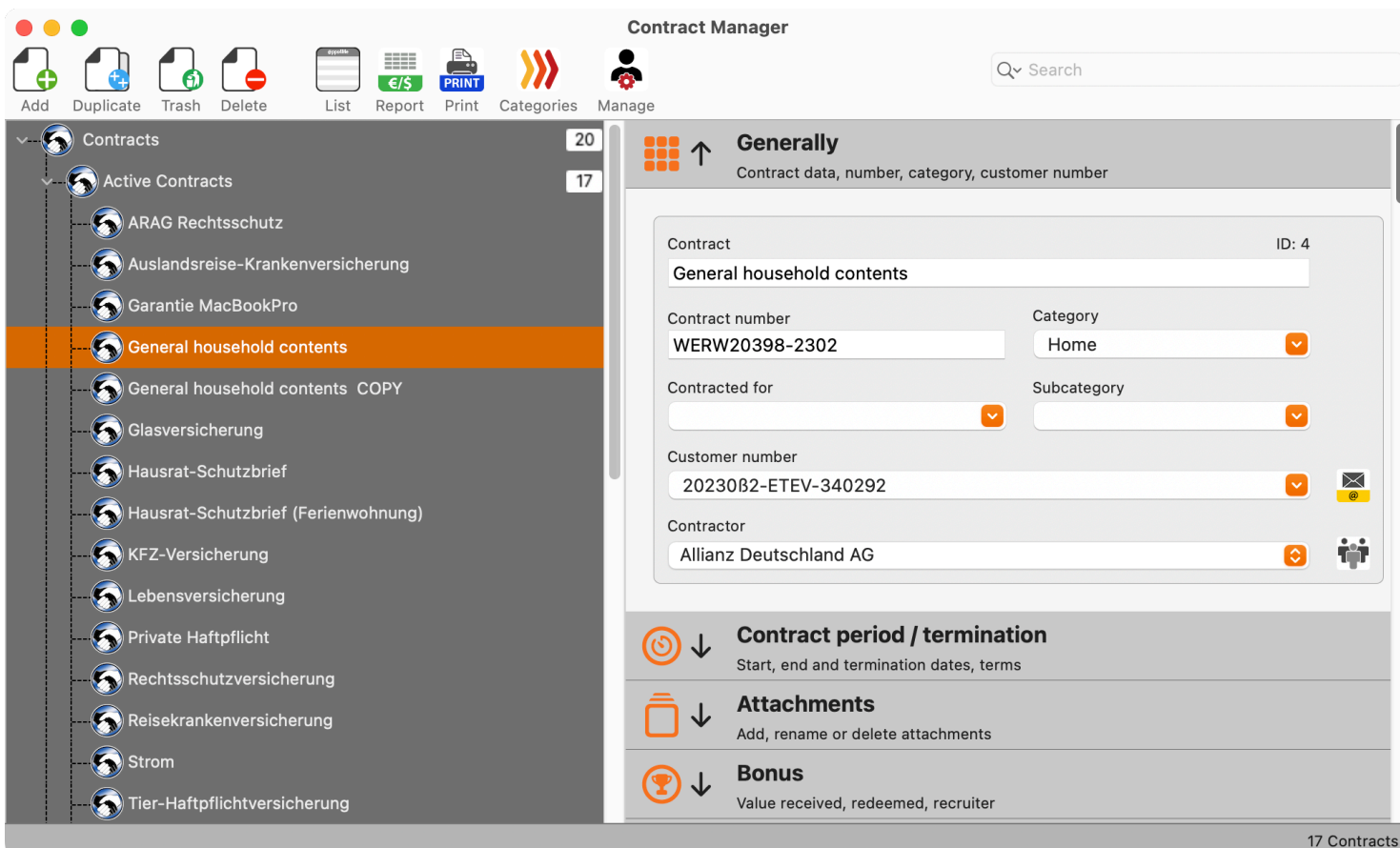
Then enter the necessary data in the corresponding fields of the individual sections. All changes are automatically saved when you leave the individual fields. In the "Category" field, you can select an existing category or enter a new one. In the "Contract partner" field, you can select an existing contract partner from the address book and transfer it. For more information, see Manage contract partners.

For date fields, the date can also be selected using a calendar. To do this, click on the corresponding calendar icon to the right of the date field.

If you want to delete a date, deactivate the date field on the left-hand side.

As soon as you leave a field, the changes are saved automatically. The information bar indicates that the contract has been saved.

In the settings, you can specify that successful messages should be displayed. For all date fields, the current date can be selected via the context menu.

ADD AND CHANGE TERMINATION DATE IN CALENDAR

In order to use this feature, Contract Manager requires access to your calendar and reminders. For more information, please refer to the chapter "Access to the calendar, reminders, and address book".

In the "Contract Details" section, you can create an appointment for the cancellation in your calendar. Before you can use this feature, you must select a calendar for the appointments in the settings. First, select a date in the "Cancel on" field. Then enter a date or select a date from the calendar selection. To do this, click on the small calendar icon to the right of the corresponding field.

To add the appointment to the macOS calendar, right-click on the calendar icon (as shown in the picture below) and select "Add Event."
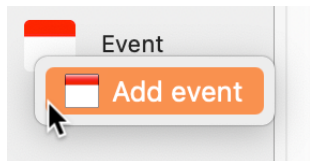
The calendar icon now contains the number of the selected day.
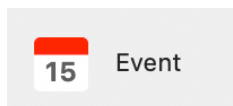
A reminder for this appointment is always sent 14 days in advance. This value can be changed in the settings.

Automatic renewal

The following sequences are available for automatic renewal. Automatic renewal is not entered in the calendar.
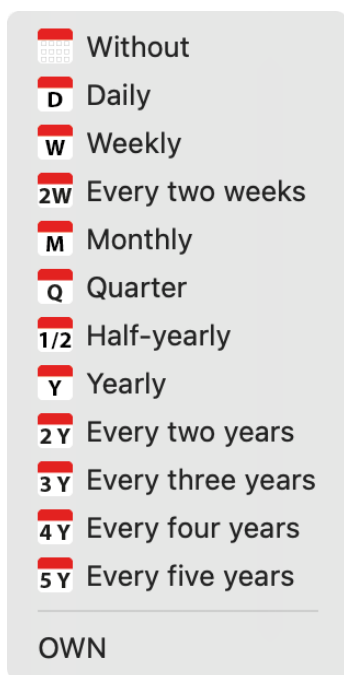
DELETE TERMINATION DATE

In the "Contract Details" section, you can delete an existing appointment from the calendar. If an appointment is in the calendar, the calendar icon will show the number of the selected day. To delete an appointment, just uncheck the box to the left of the appointment.
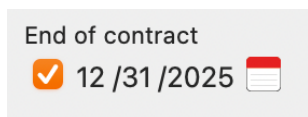
The date is now deleted and an existing appointment is removed from the calendar.

EXPORT TERMINATION DATE

The termination date can be exported as an "iCalendar" file (.ics). Select "Export as .ics" from the context menu.
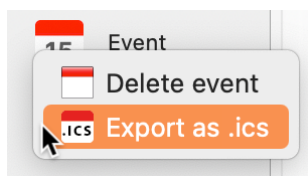
UPDATE DATES

The "Update dates" function can be used to automatically update the contract end date and the "Cancel on" date. To do this, select "Manage => Update dates" from the toolbar menu. This function is also available via the "Manage" menu.
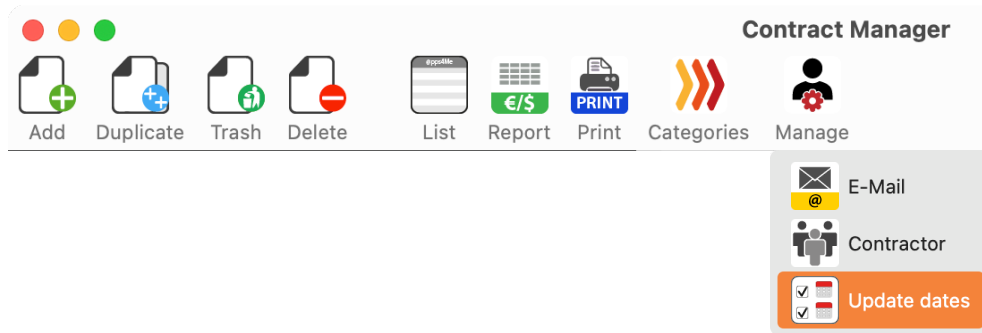
The following window lists the contracts that meet the following conditions:

- A date must be entered for the contract start date
- The contract end date must be either blank or later than the current date
- The "Automatic renewal" switch must be activated
    - No custom sequences may be entered
    - Only standard sequences are supported
- An interval must be selected and a value must be entered for "Notice period"

Example

The contracts that meet the above conditions are listed in the following window.

Select all or the desired entries and click on "Continue" to display the new dates. The new contract end date and the new cancellation date are displayed in red.

If a termination date has already been reached or passed, it will not be recalculated during the update. Only when the contract end date has been passed and recalculated will the termination date be recalculated.

Now click on "Update dates" to apply all changes.

ATTENTION!

This action cannot be undone.

EDIT CONTRACT

To modify an existing contract, select a contract from the list. Enter the desired changes in the respective sections.

Add TAGs

To enter a TAG, simply enter the term and press the "Enter," "Return," or "TAB" key on your keyboard.

TAGs
Rental

Edit TAGs

To edit a TAG, simply double-click on the term and edit it. To save the change, press the "Enter," "Return," or "TAB" key on your keyboard.

TAGs
Rental

Remove TAGs

To remove a TAG, simply select the term with a click and press the "Backspace" or "Delete" key on your keyboard.

TAGs
Rental   Bahamas

TAGs
Rental

As soon as you leave a changed field, the changes are automatically saved.

ADD, RENAME OR DELETE ATTACHMENTS

To add attachments to a contract, select a contract. Under "Attachments," you can add, rename, and delete attachments. Here, you can add files of any type using drag and drop. All attachments are displayed in this list without a folder structure.
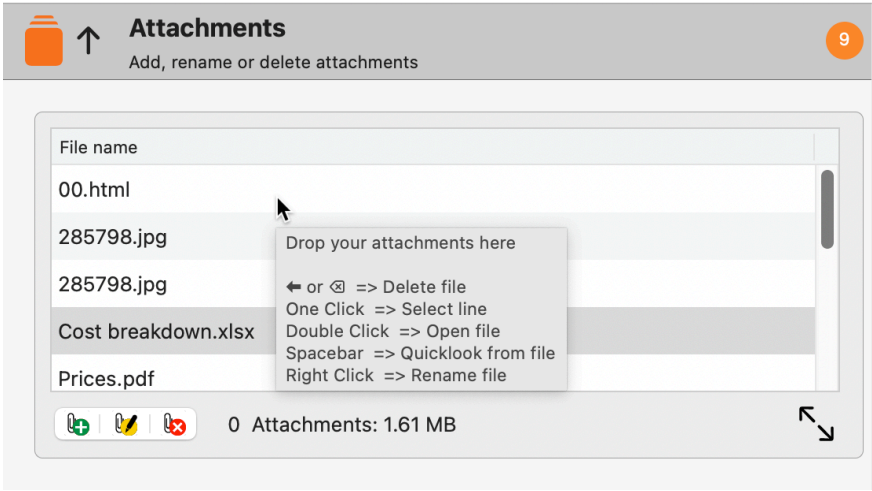
The number of attachments is displayed at the top right. The number and size of all attachments are displayed at the bottom. If you add a file as an attachment that already exists, a corresponding message is displayed.

One or more attachment can be selected from the list of attachments. The following functions are then available:

Function	Impact
← or ⌫	Delete attachment
Double click	Open attachment
Space bar	Preview selected attachments
Right click	Rename attachment
🔗➕ 🔗❌ 🔗✏️	Add, delete, and rename attachments

To rename a facility, select a facility from the list and click on the "Edit" icon.

You can also access the "Rename" function via the context menu.

Anlagen

Dateiname
Vertrag.pdf
AGBs.pdf
VertragsManagerAnlagen.mp4
Hinweise.txt

📎✏️ Ausgewählte Anlage umbenennen

4 Anlagen

Example: Preview

The attachments can also be opened in a separate window.

This window offers the following options for managing attachments:

- Create new folder
- Add attachments
- Rename attachments/folders
- Delete attachments/folders
- Move attachments/folders
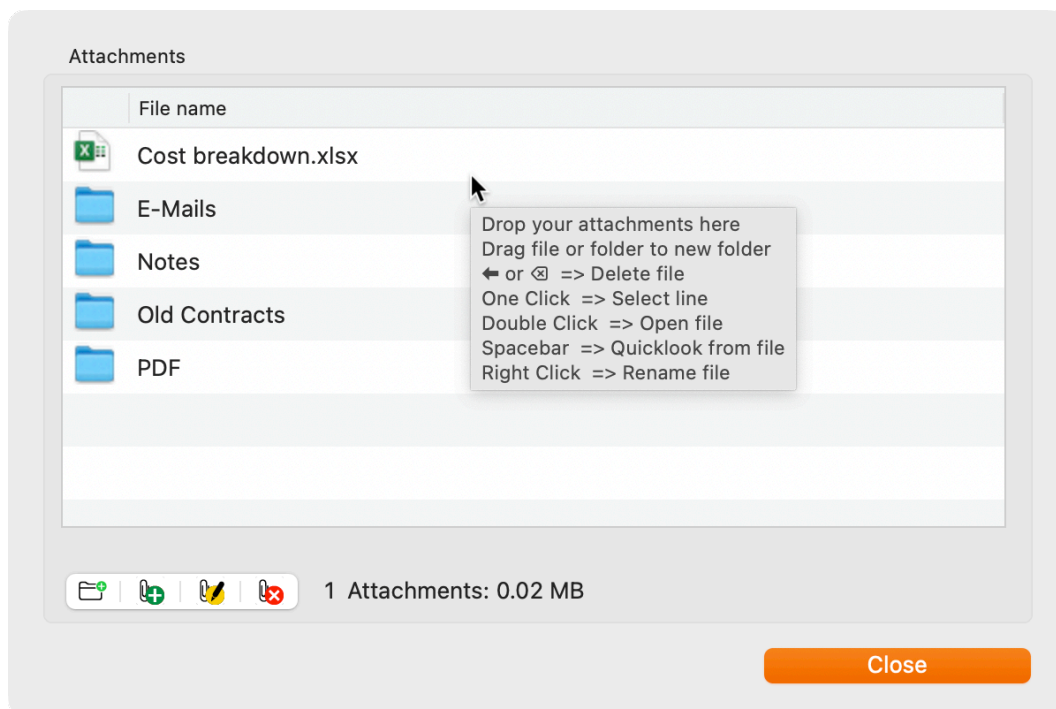
The window can be closed using the "ESC" key or the "Close" button at the bottom right.

To move an attachment or folder to another folder, select the corresponding object from the list and drag it to the new folder.

DEACTIVATE CONTRACT

To mark an existing contract as inactive, select a contract from the list. Activate the "Deactivate contract" field in the "Contract term / Termination" section.

Once this field has been activated, the contract is assigned to the "Inactive contracts" category. It will not appear in any lists or when printing. If you want to reactivate an inactive contract, select "Inactive contracts" in the structure tree and select the relevant contract. Then deactivate the "Deactivate contract" switch.

Both functions are also available via the context menu.
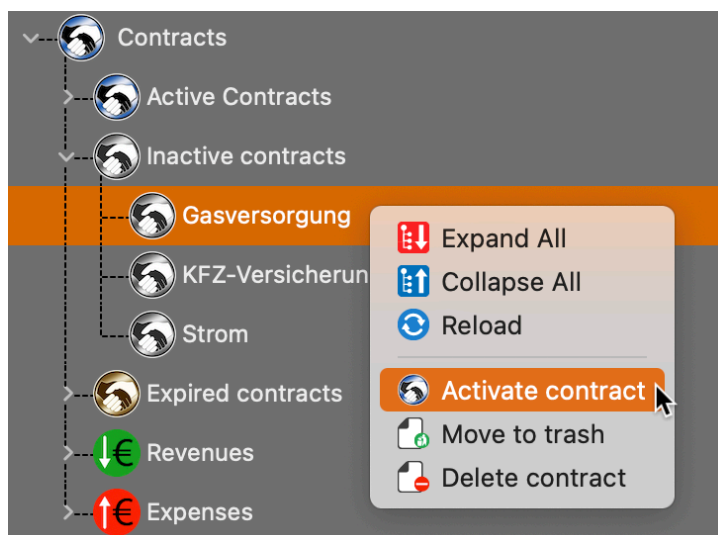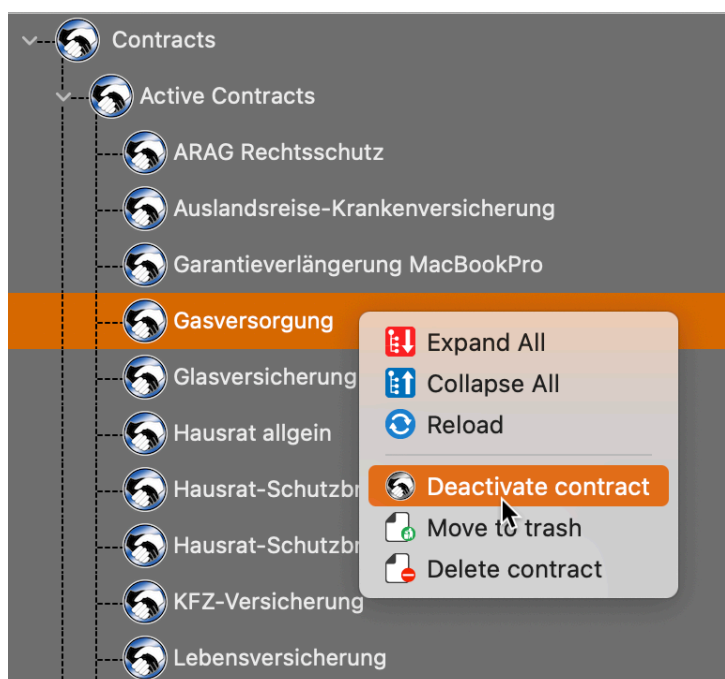
DUPLICATE CONTRACT

To duplicate an existing contract, select a contract from the list. Click on "Duplicate" in the toolbar menu.
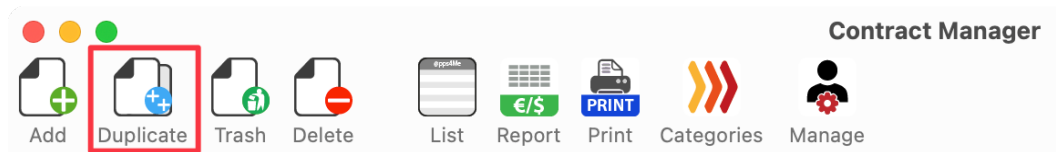
A copy of the selected contract is created. The name of the contract with the extension "Copy" is used as the contract name.
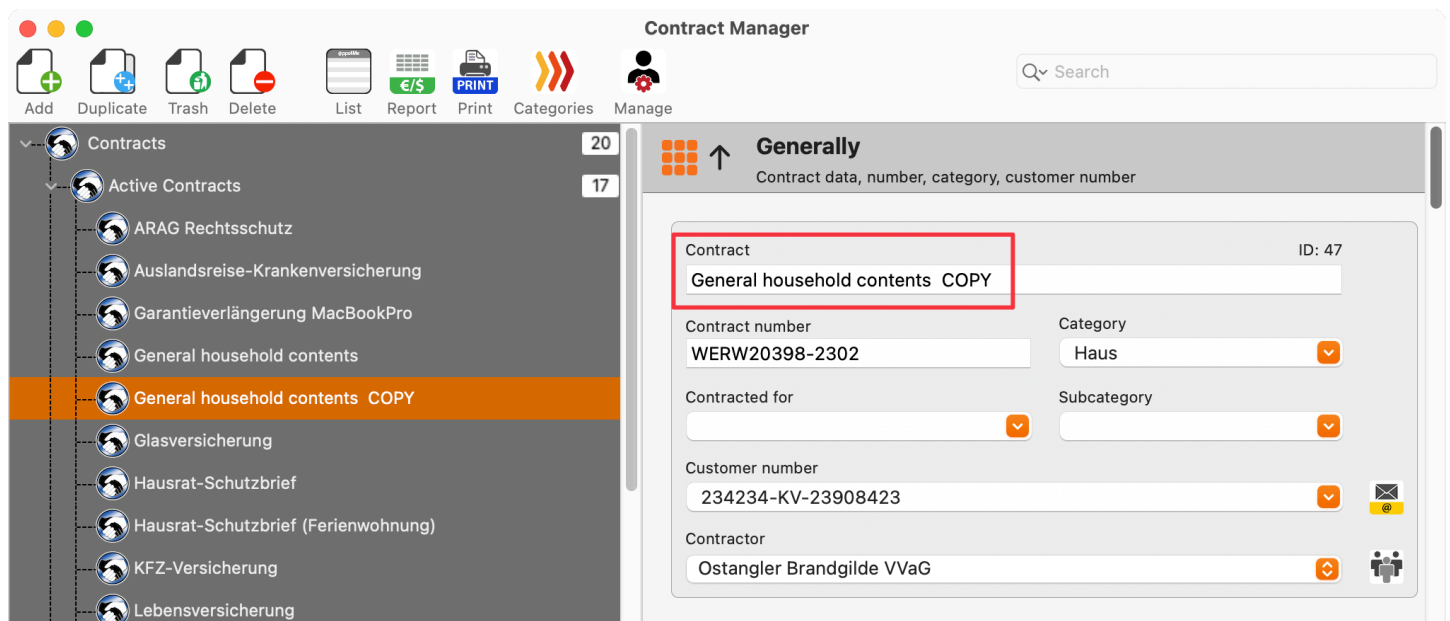
Any attachments to the selected contract will not be duplicated. In the settings, you can specify whether the contract partner should also be copied.

MOVE CONTRACT TO TRASH

This function allows you to move contracts to the trash before permanently deleting them. The contracts contained therein can then be deleted individually at a later date. The "Empty trash" function can also be used to delete all contracts in the trash at once.

Deleting individual contracts and emptying the trash cannot be undone!

Put the contract in the trash

To move a contract to the trash, select a contract from the list and click on "Trash" in the toolbar menu.
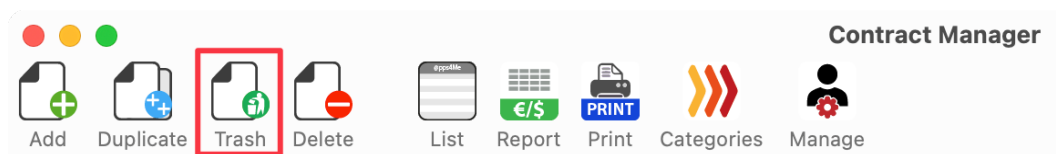
You can also move a contract to the trash using the Touch Bar or the context menu.
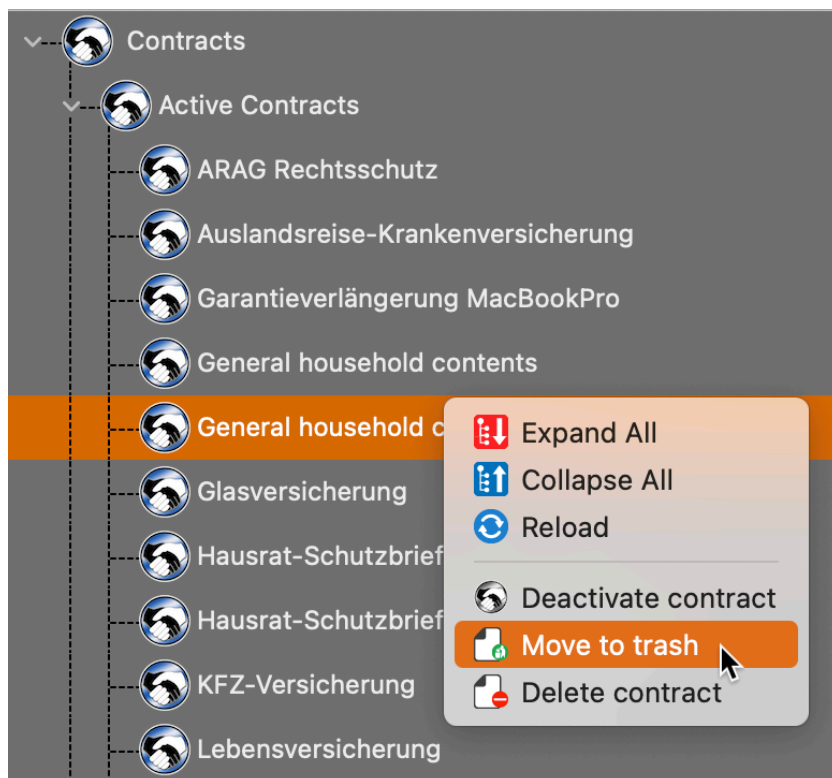
Restore contract from trash

To retrieve a contract from the trash, select a contract and then select "Restore from trash" from the context menu.
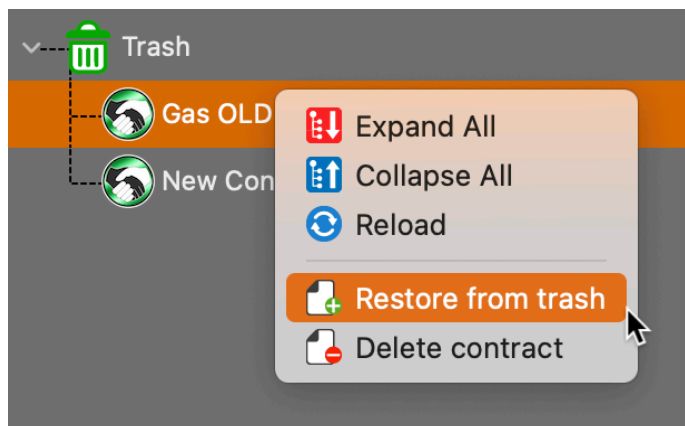
If the restored contract was marked as "inactive," it will be moved to the "Inactive Contracts" section. If this is not the case, it will be moved to the "Active Contracts" section.

Delete contract from trash

To delete a contract from the trash, select a contract and then select "Delete" from the context menu.
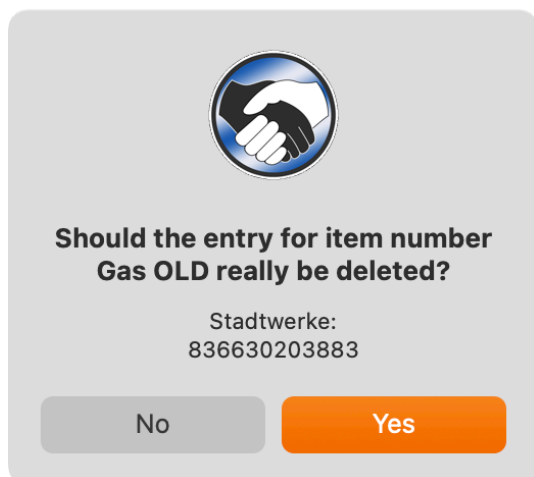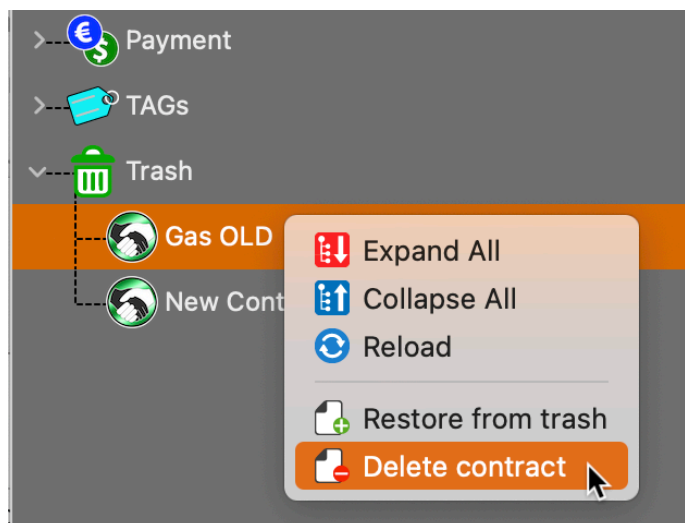
Empty trash

Select "Empty trash" from the context menu to completely empty the trash and delete all contracts it contains.
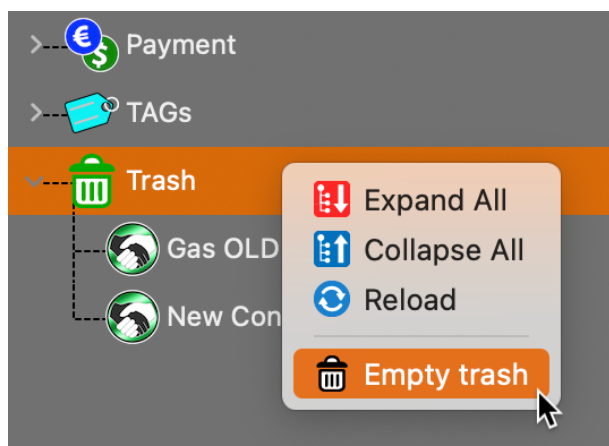
Deleting individual contracts and emptying the trash cannot be undone!

DELETE CONTRACT

To delete a contract, select a contract from the list and click "Delete" in the toolbar menu.

Or use the menu "File => Delete contract".
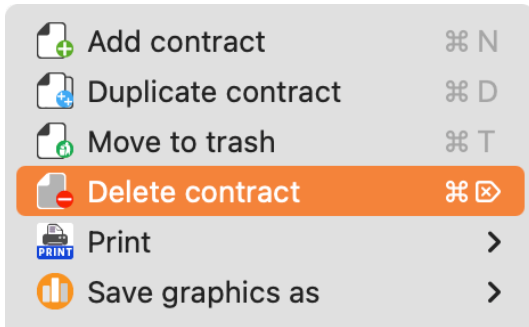
You can also use the Touch Bar or context menu to delete a contract.
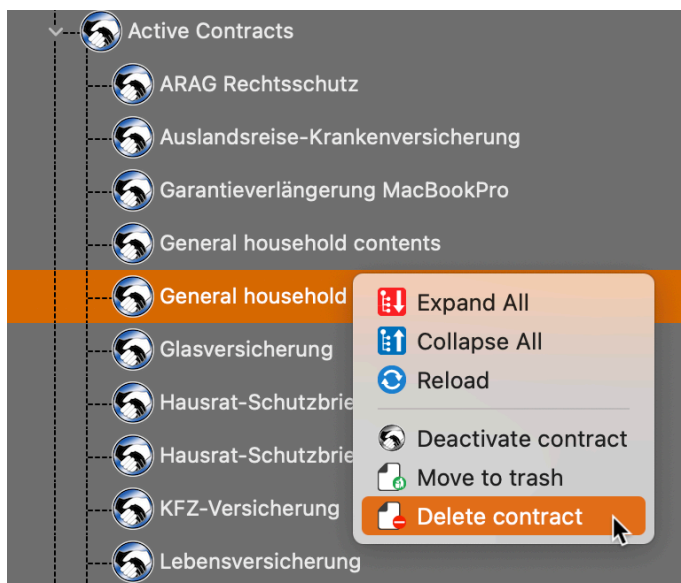
Deleting a contract cannot be undone!

SEARCH CONTRACT

To do this, enter the term you are looking for in the search field at the top right.

| Q˅ general   ⊗ |

The default search is always "Begin with." If you want to search for contracts that contain a specific text, enter a % sign before the search term.

| Q˅ %house   ⊗ |

The following fields are included in the search:

- Description
- Contract concluded for
- Contract number
- TAG

You can also search in the list of all contracts. In the settings, you can specify whether the additional fields "Contract concluded for," "Contract number," and "TAGs" are used for the search.

MANAGE CONTRACT PARTNERS

Contract partners and agents can be managed via macOS Contacts. This means you don't need to enter address details twice. You also have the option of managing contract partners directly using the "Contract Manager."

In the settings, you can specify how contract partners should be managed.
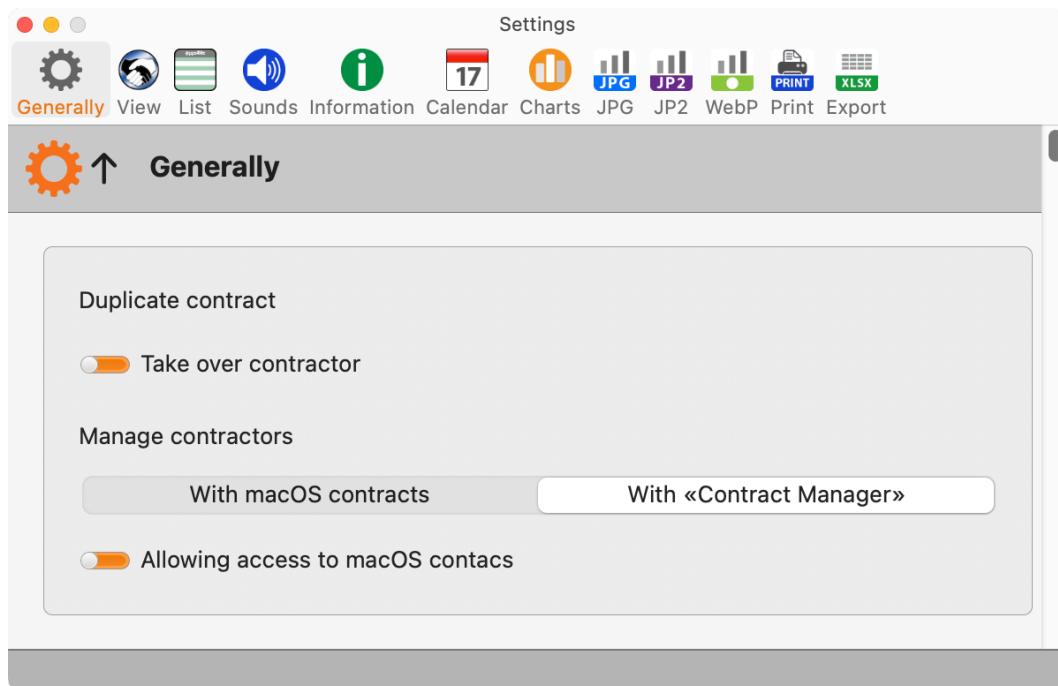
For more information on managing contract partners and agents via macOS contacts, see the chapter "Use contract partners from macOS contacts"

For more information on managing contract partners directly with "Contract Manager," see the chapter "Manage contract partners with «Contract Manager»"

USE CONTRACT PARTNERS FROM MACOS CONTACTS

Contract partners and agents are managed via the macOS address book. This means you don't need to enter address data twice.

In order to use this feature, Contract Manager requires access to your address book. Furthermore, access to macOS contacts must be enabled in the settings. For more information, please refer to the chapters "Access to the calendar, reminders, and address book", "Manage contract partners" and "Settings."

Simply select an entry from the address book. To do this, click on the contacts icon to the right of the "Contract partners" field.
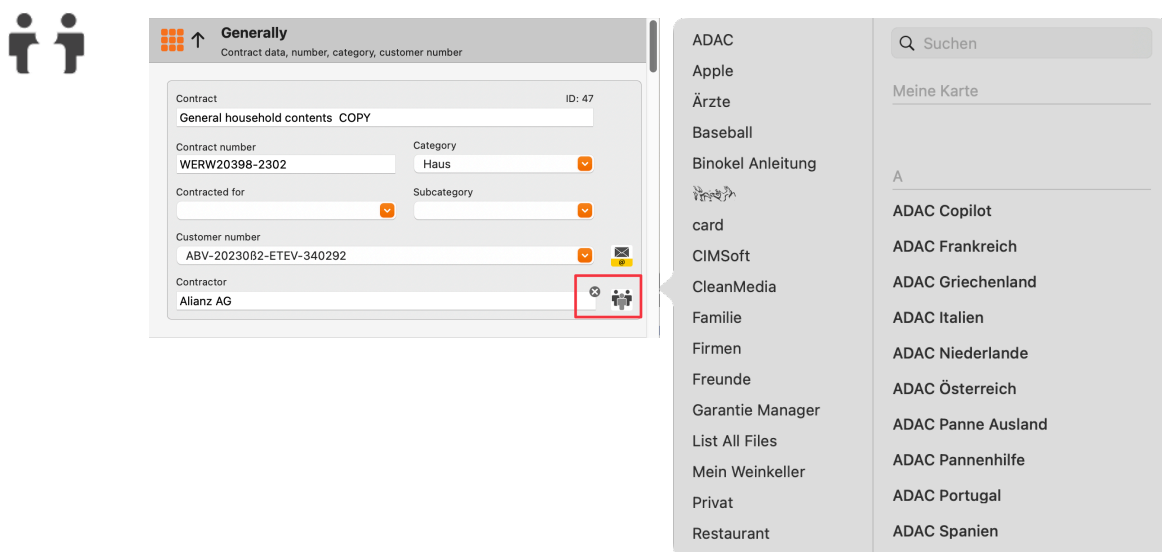
The window with all macOS contacts will then open. Select an entry.

The first name and last name of the contact will be entered in the "Contract partner" field. If the contact is marked as a company, then "Company • First name Last name" will be entered. If no first name and last name are entered for this company contact, then only the company name will be used.
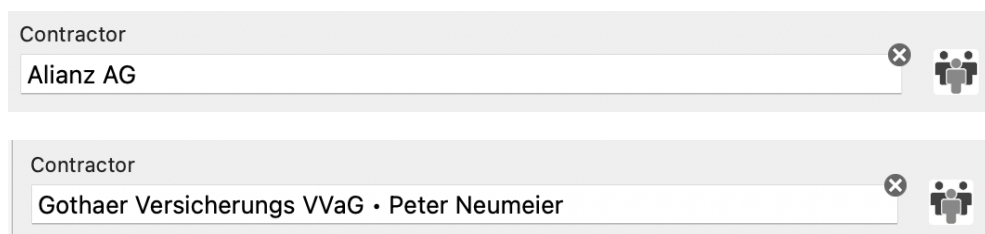
Here's how to create a contact in the macOS Address Book for use with Contract Manager.

Activate the "Company" switch. Enter the name of the insurance company or contractual partner as the company name. Enter the company's address, telephone number, fax number, URL, and email address as the work or head office details. Enter the agent's details under first name, last name, and the other fields as "Private" or "Other."

MANAGE CONTRACT PARTNERS WITH «CONTRACT MANAGER»

Contract partners can be managed directly using the "Contract Manager." To use this feature, "Manage contacts" must be enabled in the "Contract Manager" settings. See "Manage contract partners" for more information.

Simply select an entry from the pop-up menu.

To manage the contacts in the "Contract Manager," click on the "Contract Partners" icon in the toolbar menu.

Or click on the Contact icon to the right of the "Contract partner" field.

Or use the menu "Manage => Manage contract partners".

✉ Manage e-mail notification
👥 Manage contractors
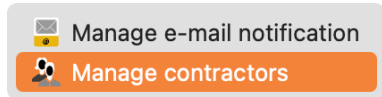
The "Contract partners" window then opens with all contacts in the "Contract Manager." The number after each contract partner indicates the number of contracts assigned (including "inactive contracts" and contracts in the trash).
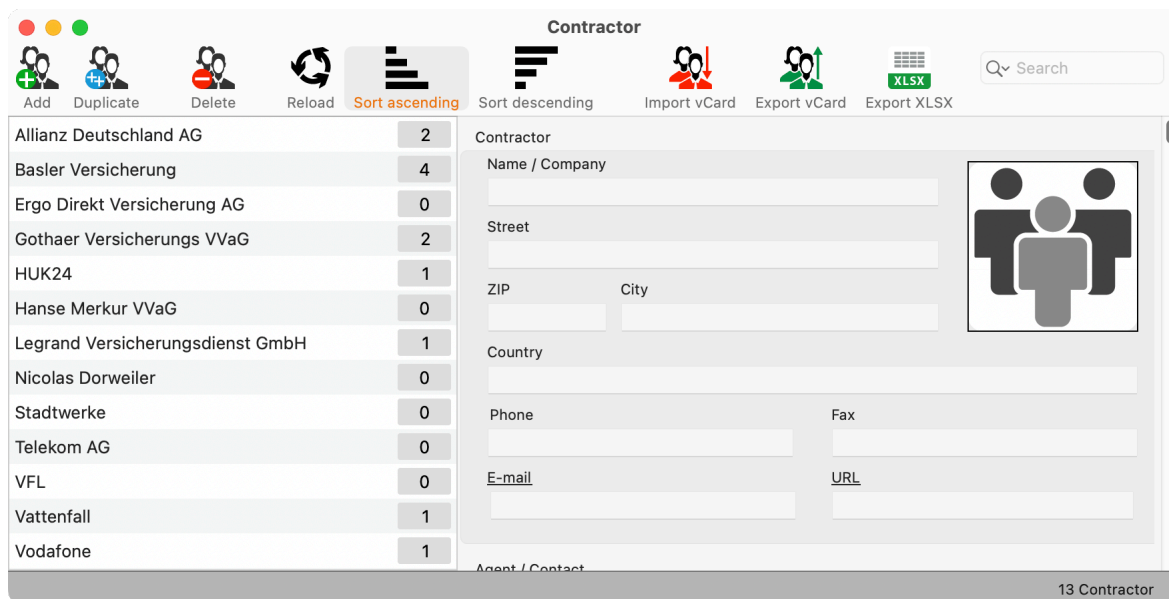
Here, contractual partners can be added, modified, and deleted, as well as imported and exported.
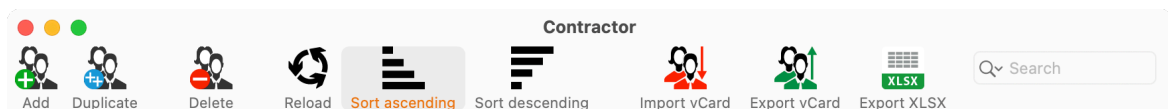
Search for contract partners

To search for a contract partner, enter the name you are looking for or part of it in the search field.

The default search is always "Starts with".
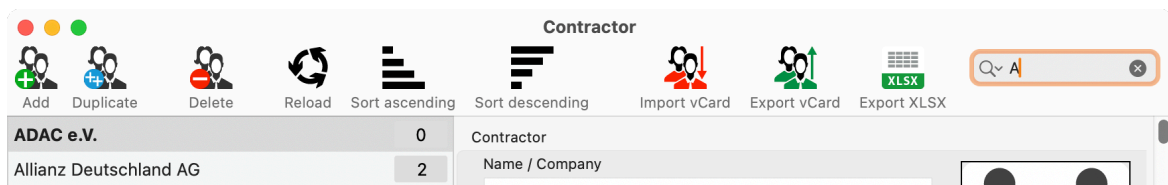
If you want to search for a contract partner that contains a specific text, enter a % sign before the search text.

Add contract partner

Click on the "Add contract partner" icon and enter the necessary values in the corresponding fields. All changes are saved automatically.

Duplicate contract partner

Select a contract partner from the list and click on the "Duplicate contract partner" icon. Change the necessary values in the corresponding fields. All changes are saved automatically.

Delete contract partner

Select a contract partner from the list and click on the "Delete contract partner" icon. You will be asked again whether you really want to delete the contract partner.

If a contract is still assigned to this contract partner, the contract partner cannot be deleted.

Reload all contract partners

To do this, click on the "Reload" icon in the toolbar menu.

Sort contract partners in ascending order

To do this, click on the "Sort Ascending" icon in the toolbar menu.

Sort contract partners in descending order

To do this, click on the "Sort Descending" icon in the toolbar menu.

Import contract partners via a vCard file

To do this, click on the "Import vCard" icon in the toolbar menu.

Select a vCard file (with the extension .vcf) and choose one of these three options:

• Automatically (recommended option)

• Interactive

• Individual

Option: Automatically

Select a vCard file (with the extension .vcf).

Now you can see the vCard preview.

Click on "Import". The selected contact will be entered as a new contract partner.

Option interactive

You got the vCard preview with more values available in the pop-up menus.

Option individual

You got the vCard preview with more values available in the pop-up menus to assign the values to the available fields. It is also possible to change the assigned fields before importing.

Import contract partners via drag and drop

To do this, drag a vCard file or a vCard from the macOS address book into the contract partner list.

If the vCard file contains multiple contacts, all contacts in the file will be imported.

If the company name or the first name and last name of the contact person already exist as a contract partner, this entry will not be imported.

All functions are also available via the context menu.

EXPORT CONTRACT PARTNERS AS VCARD FILES

Select a contract partner from the list and click on the "Export vCard" icon in the toolbar menu.

Select a location to save the vCard file.

You can also export as a vCard file using drag and drop. To do this, drag a contract partner from the list of contract partners to the desktop or any folder in Finder.

EXPORT ALL CONTRACT PARTNERS AS AN EXCEL® XLSX FILE

To do this, click on the "Export XLSX" icon in the toolbar menu.

Select a location to save the Excel file.

All available fields for the contract partner are exported. If a contact has a photo, this is also exported.

All fields for email and URL are exported with a hyperlink (mailto:, https://).

All features are also available via the context menu.
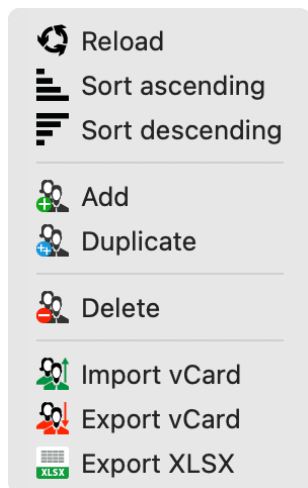
REMOVE CONTRACT PARTNER FROM CONTRACT

To remove a contractual partner from the contract, click on the "Delete" icon at the end of the contractual partner field.

Clicking on the "Delete" icon removes the contractual partner from the contract.

Contract partners are managed via the "Contract Manager."

Select "None" from the pop-up menu.

SEND E-MAIL NOTIFICATION TO CONTRACT PARTNER

In order to use this feature, Contract Manager requires access to your address book and reminders. For more information, please refer to the section "Access to the calendar, reminders, and address book".

To send an e-mail notification to the contract partner, click on the e-mail icon.

The following options are available:

1. Normal e-mail with the contract name and contract number in the subject line

2. E-mail for a contract change (new address) with the contract name and contract number in the subject line

3. E-mail for contract termination with the contract name and contract number in the subject line

A new email is created with the message text you specified earlier.

If you want to change the predefined text, select "Manage => Manage e-mail notifications" from the menu.
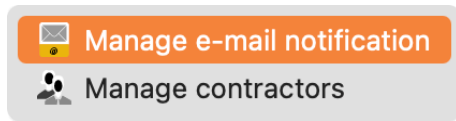
Or click on the "Email" icon in the toolbar menu.
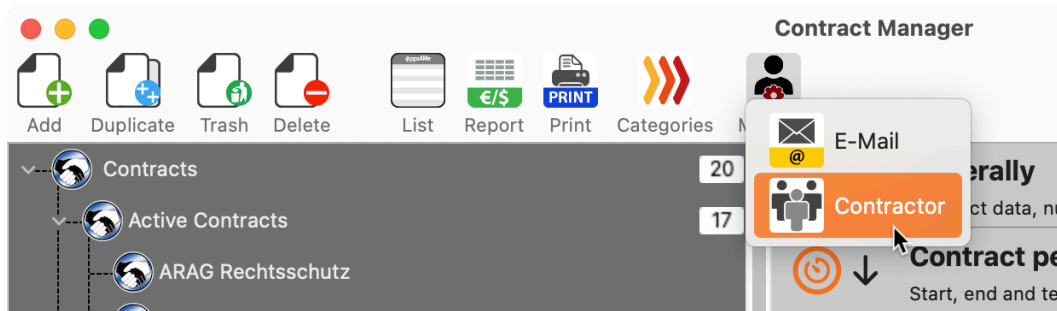
You can customize the text in the following window.

Contract change   Contract termination

The values in square brackets (e.g., [VNR]) should not be changed, as these are variables that are replaced by the values of the selected contract when the email is generated. You can insert the variables at the current position in the text using the fields in the "Available fields to insert" area. All changes you make in this window are automatically saved and will be available again after restarting the application.

MANAGE CATEGORIES

To edit the categories, select the "Categories" icon in the toolbar menu or in the Touch Bar.
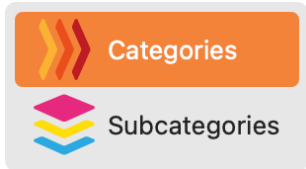
Or select "Categories => Manage categories" from the menu.

This opens the "Categories" window. Here you can add, edit, or delete categories. To add a category,

click on the "Add" icon in the toolbar menu. To delete, click on the "Delete" icon, and to rename, click on the "Edit" icon. A category can also be renamed by double-clicking on it. The number behind each category indicates the number of contracts assigned to it (including "inactive contracts" and contracts that are in the trash)..

Manage categories	
Auto	1
Gesundheit	2
Haus	2
Haus 2	2
Home	1
Kommunikation	1
Krankenkasse	0
Lebensversicherung	1
Privat	4
Rechtsschutz	1
Versicherung	1

MANAGE SUBCATEGORIES

To edit the subcategories, select the "Subcategories" icon in the toolbar menu or in the Touch Bar.
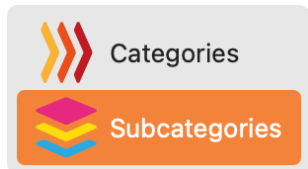
Or select "Categories => Manage subcategories" from the menu.
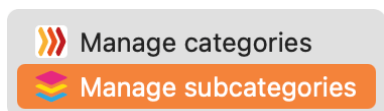
This opens the "Subcategories" window. Here you can add, edit, or delete subcategories. To add a subcategory, click on the "Add" icon in the toolbar menu. To delete, click on the "Delete" icon, and to rename, click on the "Edit" icon. A subcategory can also be renamed by double-clicking on it. The number after each subcategory indicates the number of contracts assigned to it (including "inactive contracts" and contracts that are in the trash).
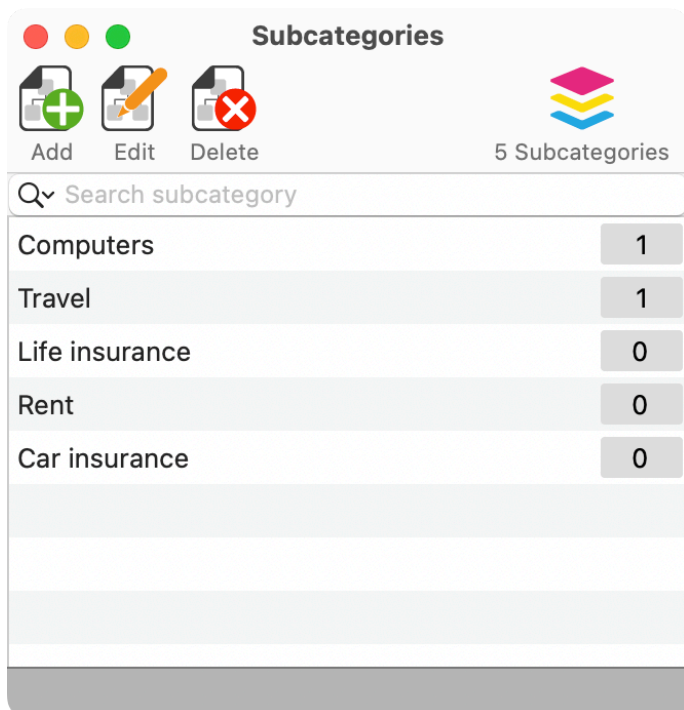
ADD PRICE INCREASES TO HISTORY

You can record price increases for your contracts in the history. First, select the relevant contract. Right-click on the "Contribution" field and select "Add to price history" from the context menu. The current price is entered in the history with the current date (not the date in the contract). This date can be changed later if necessary. Repeat this process for each price increase.
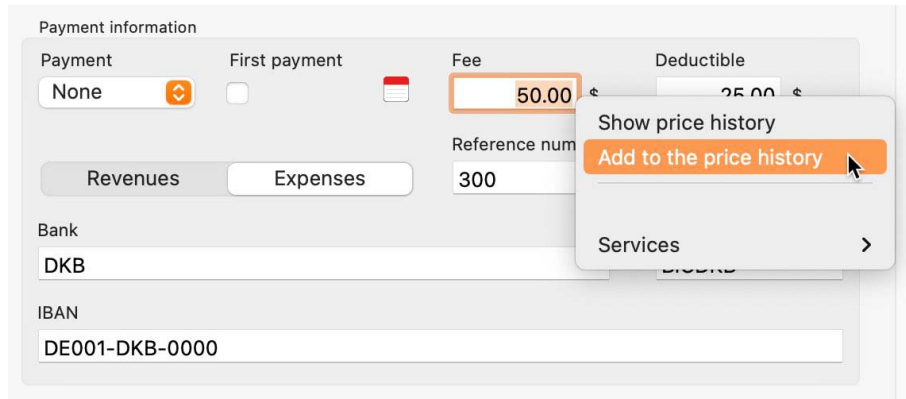
To view the price history, select the context menu "Show price history".
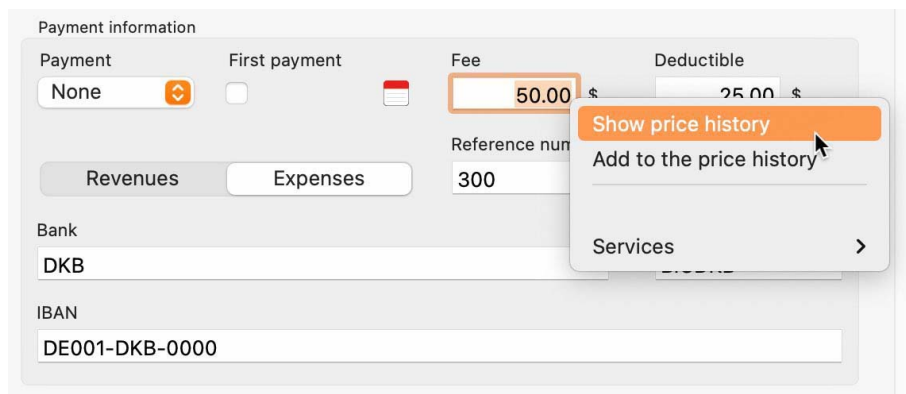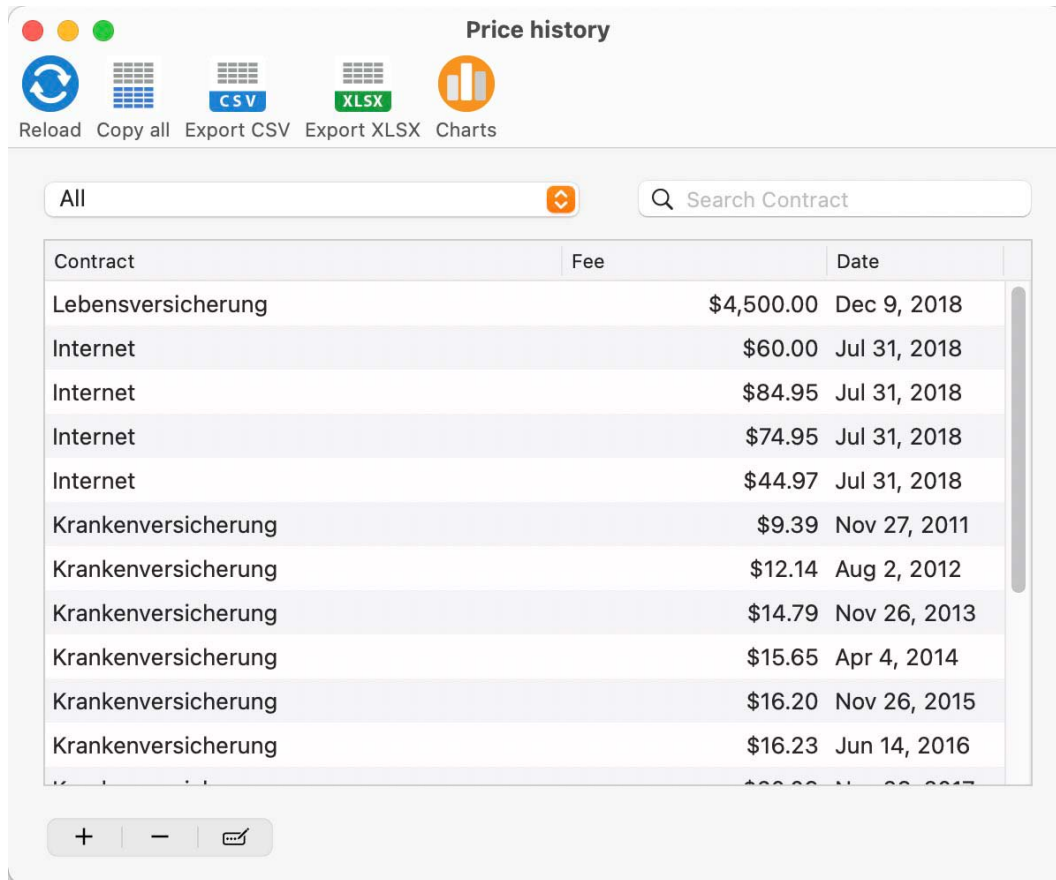
This opens the "Price history" window. This window can also be opened via the menu "Evaluation => Show price history".
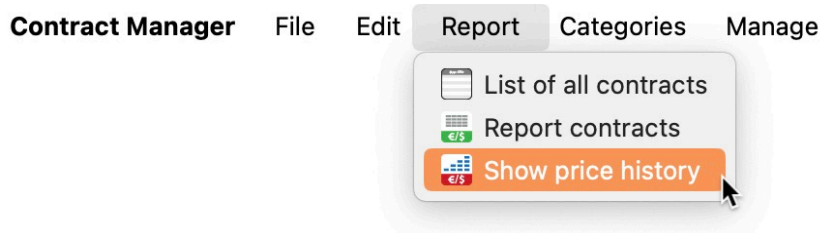
Or use the "Evaluation => Price history" icon in the toolbar menu.
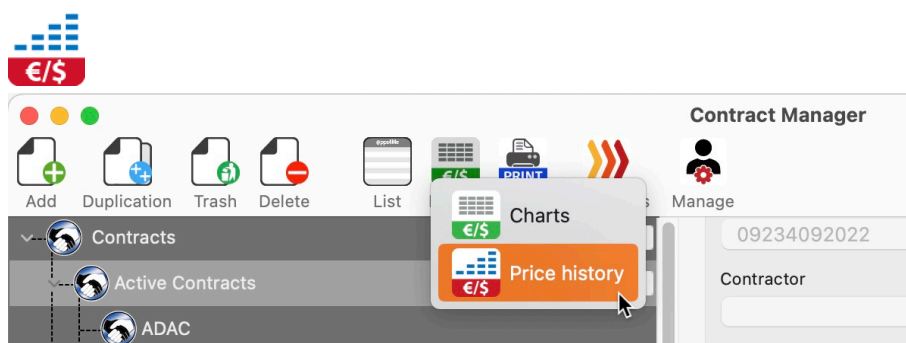
Here you can see all registered contracts with the date and price of the last or current price increase.

You can filter the list as desired using the "Search contract" field.
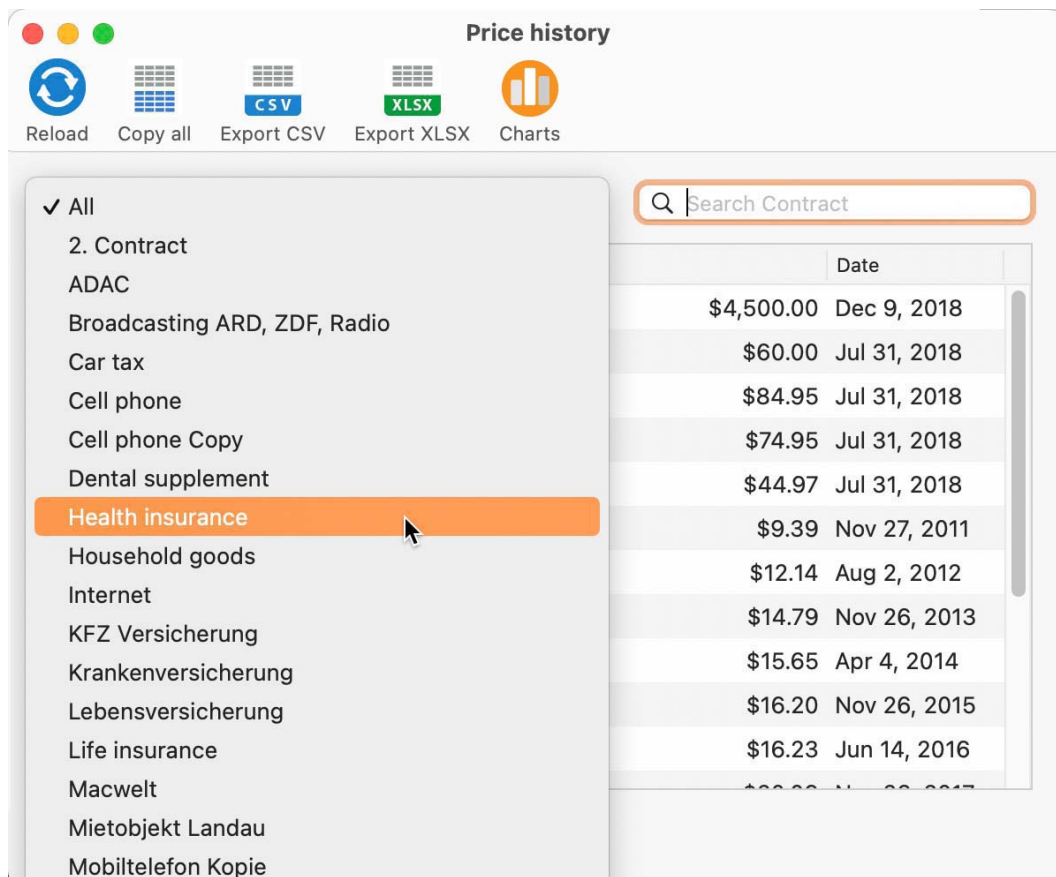
You can also select the relevant contract directly from the selection menu.

GET GRAPHICAL OVERVIEW OF PRICE INCREASE

You can also view the price increases for your contracts in a graph. To do this, double-click on an entry in the "Price history" window.

All data sets are displayed by default.
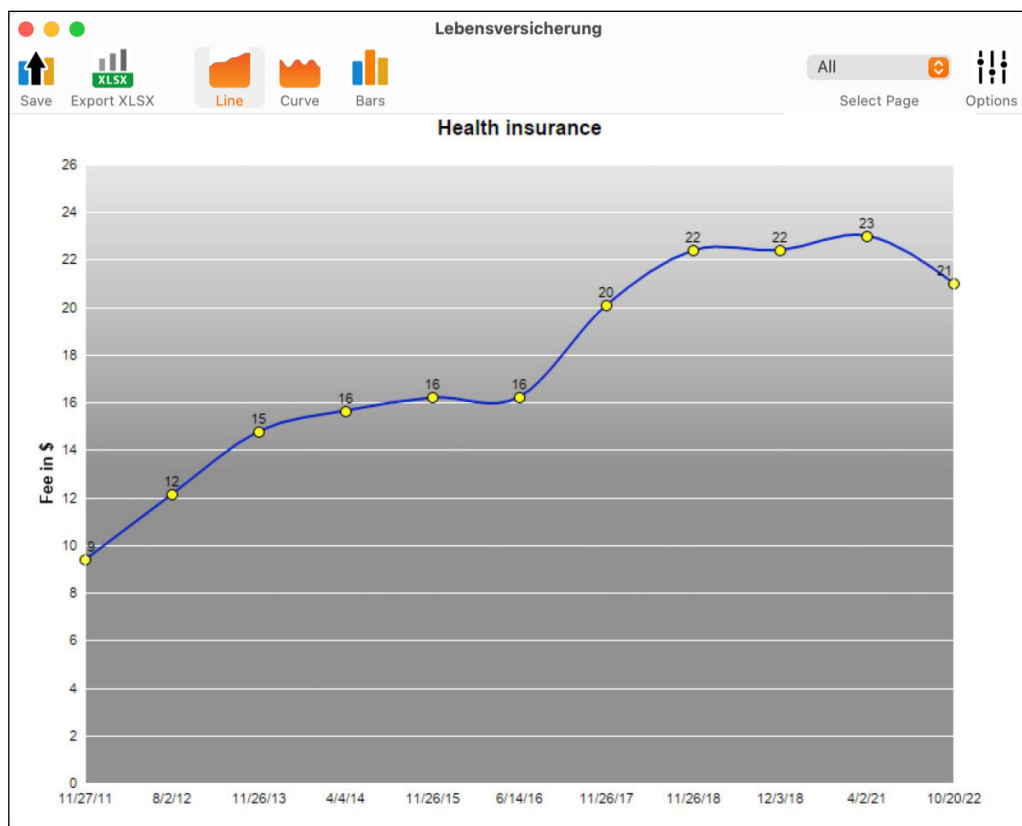
The number of entries per page can be set using the options.
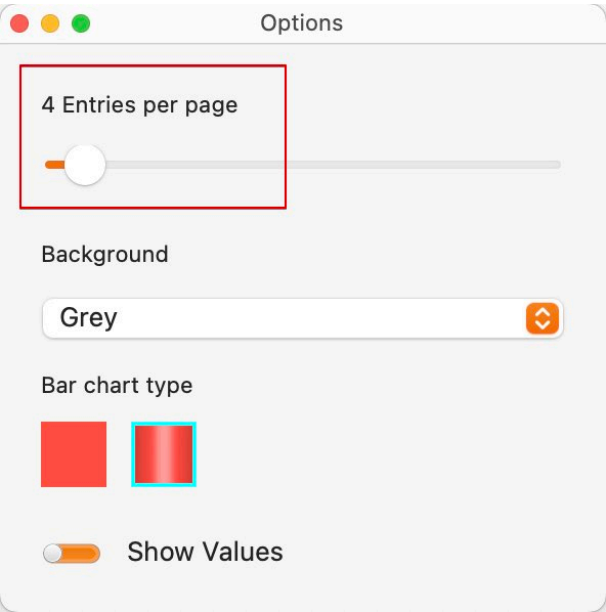
The pages can then be accessed individually.
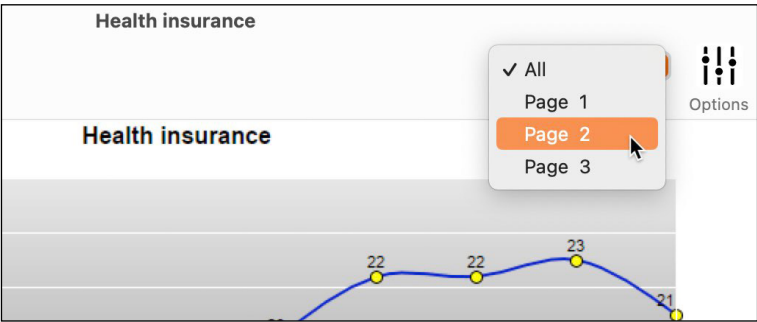
All data sets

A selected page
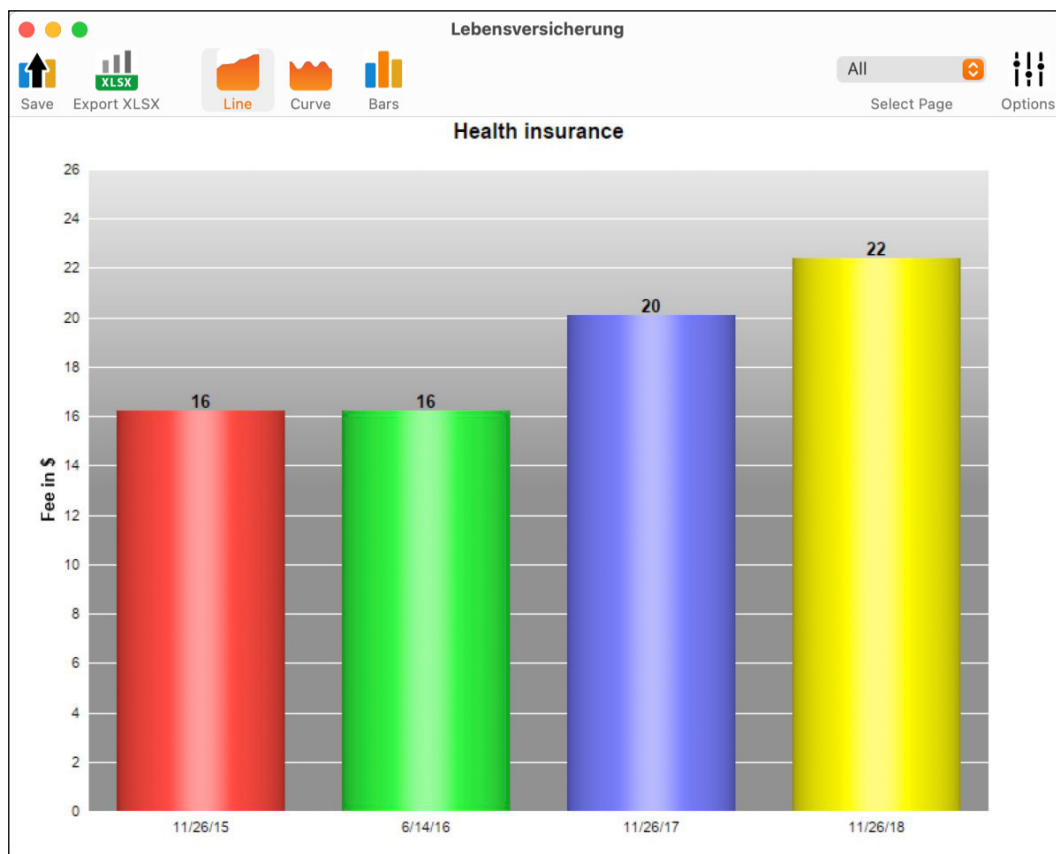
A different background color can be selected using the context menu.
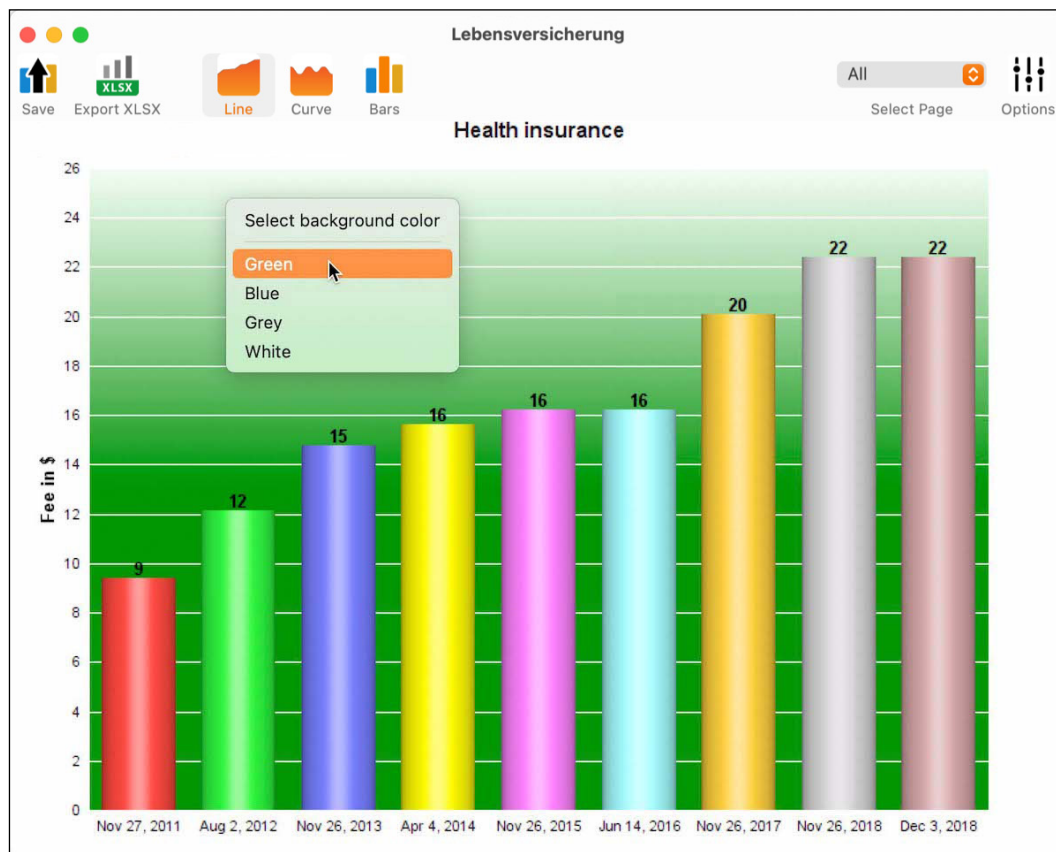
Further options and the background color can be specified in the settings.

EXPORT GRAPHICAL OVERVIEW OF PRICE INCREASE

You can export a graphical overview of the price increases for your contracts. To do this, select "File => Save graphic as" from the menu and choose the appropriate format..
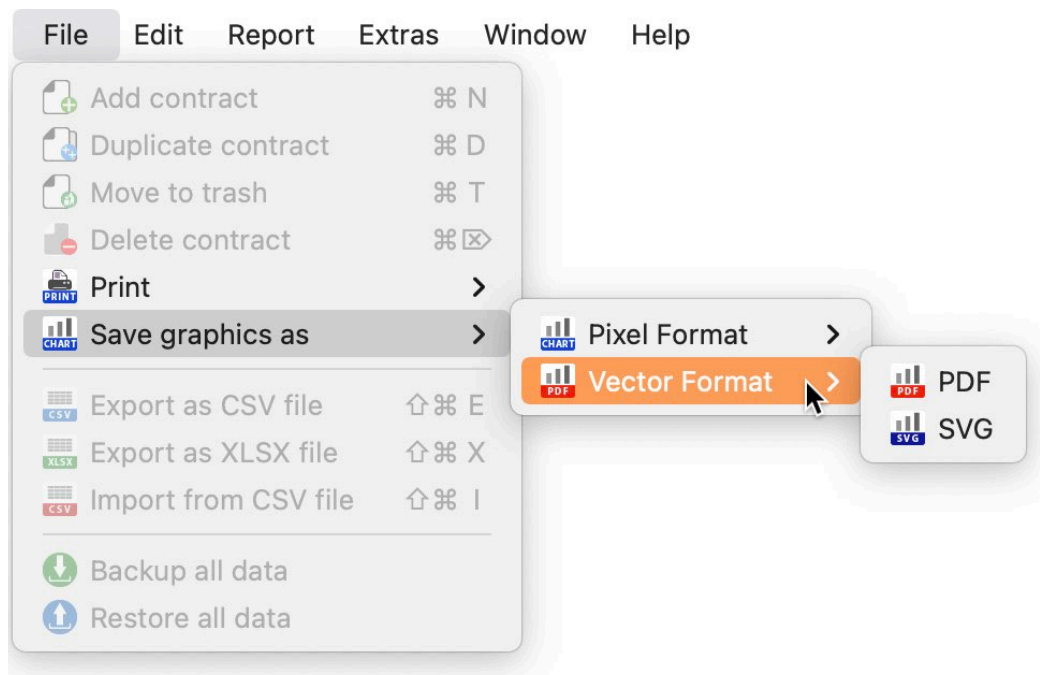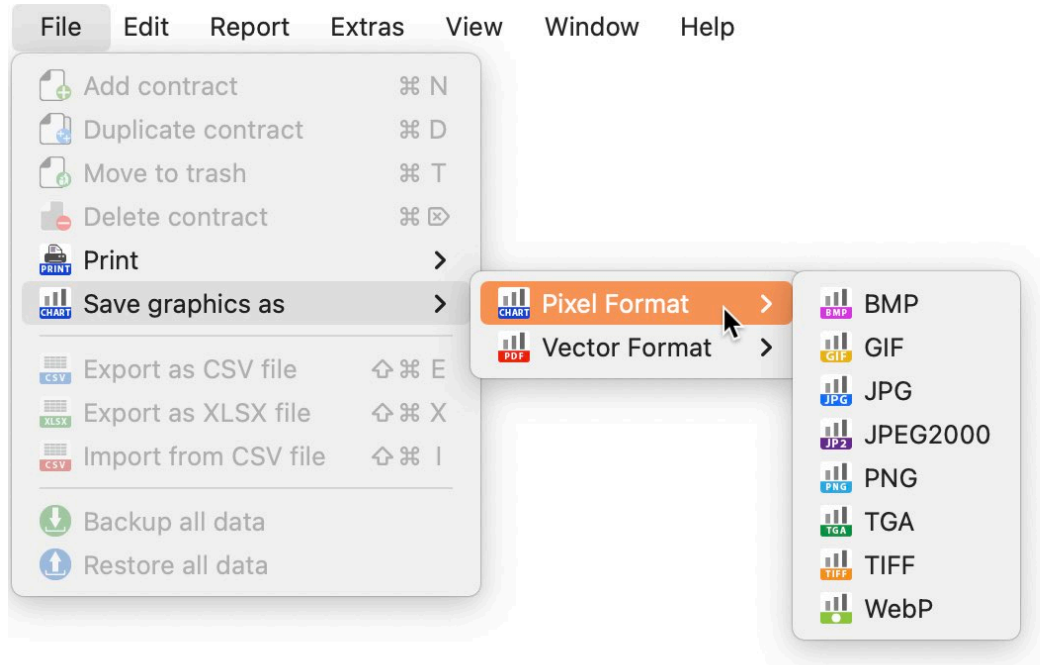
The export can be done in the following formats:

- Pixel format
  - BMP
  - GIF
  - JPG
  - JP2

- PNG

- TGA

- TIF

- WebP

- Vector format

  - PDF

  - SVG

The export functions are also available via the toolbar menu and in the touch bar.
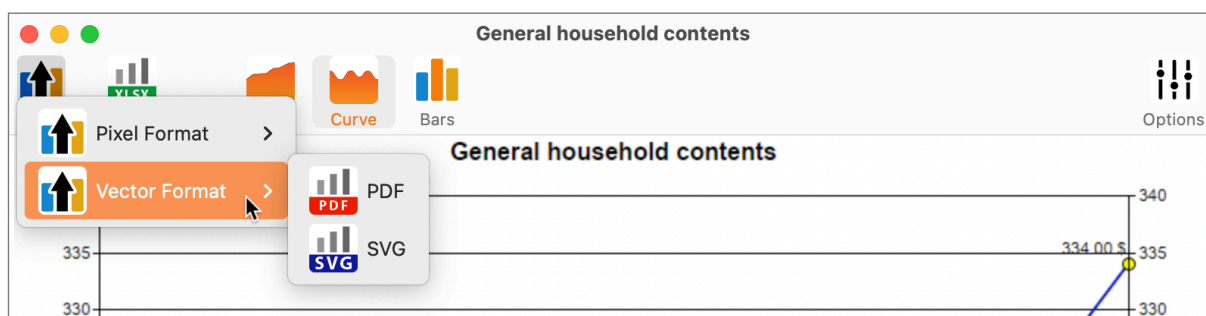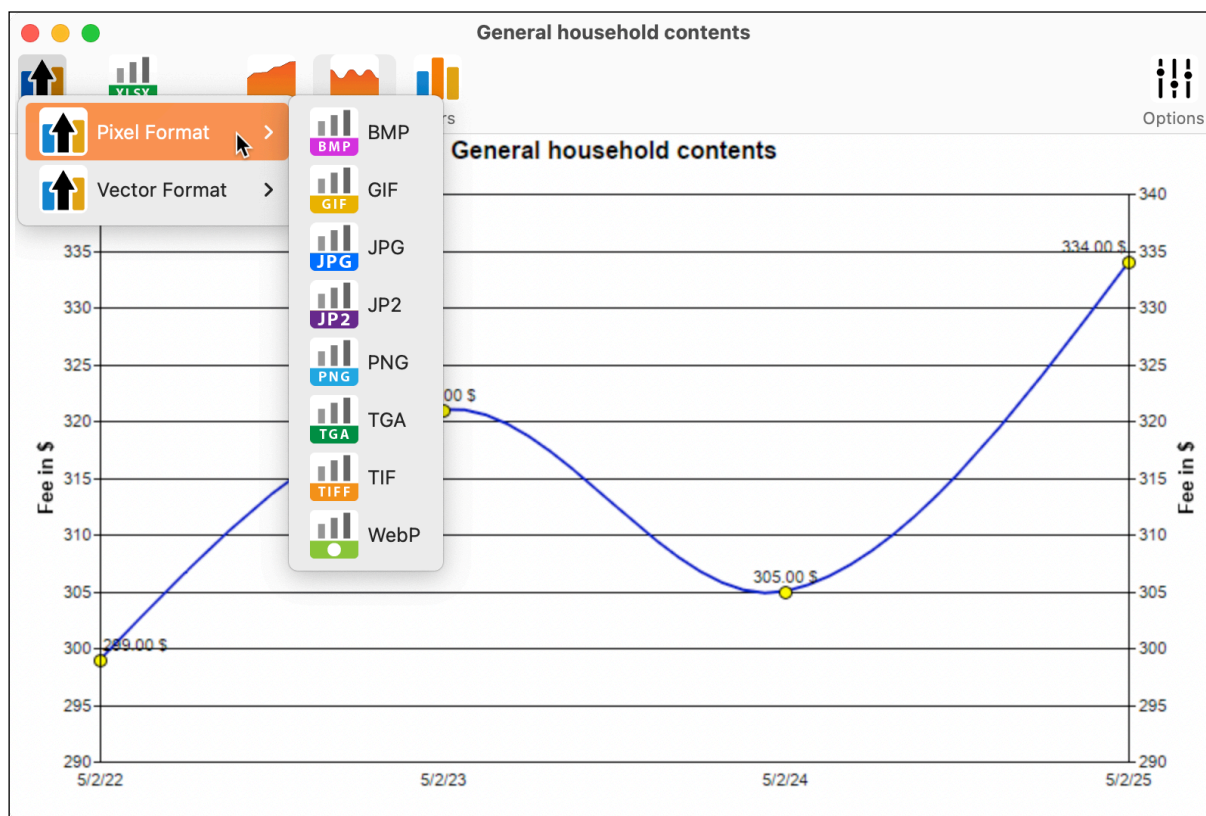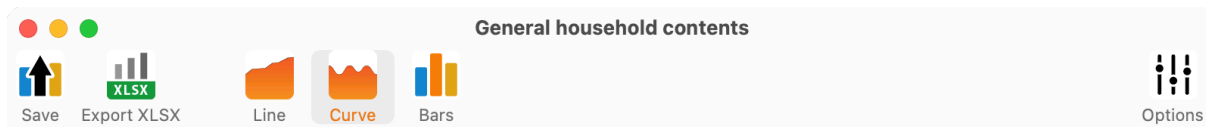
In the settings, you can specify whether export files should be opened immediately after saving.

REPORT CONTRACTS

To evaluate the contracts, select "Evaluation => Contract evaluation" from the menu.

🟧 Report contracts	
📊 Show price history	
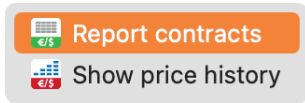
Or select "Evaluation" from the toolbar menu.
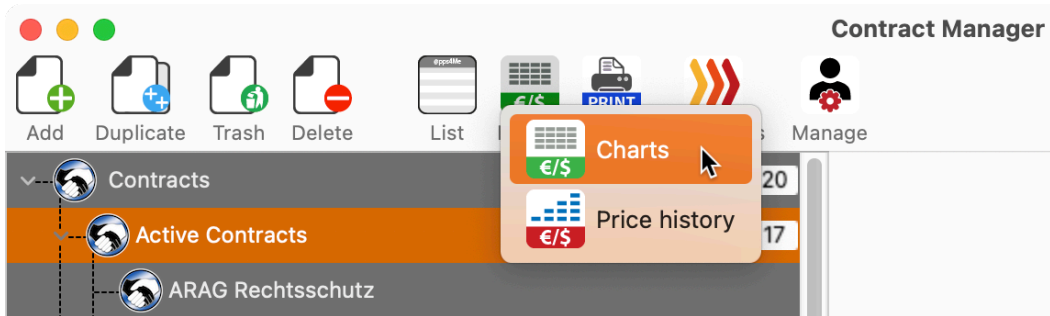
The "Evaluation" window will then open with the active contracts. On the left-hand side, you can filter the evaluation according to different categories. The total amount of all contributions per month, quarter, half-year, or year is displayed at the bottom right.

Contract	Number	Contract Partner	Fee/Year
ARAG Rechtsschutz		Allianz Deutschland AG	-$145.68
Auslandsreise-Krankenversicherung	029384-23434	Gothaer Versicherungs VVaG	$0.00
Garantie MacBookPro	DE999061329023	Allianz Deutschland AG	$0.00
General household contents	WERW20398-2302	Allianz Deutschland AG	-$173.42
General household contents COPY	WERW20398-2302		-$173.42
Glasversicherung	230982342	Basler Versicherung	-$30.44
Hausrat-Schutzbrief	290839230DFE	Basler Versicherung	
Hausrat-Schutzbrief (Ferienwohnung)	09290498023	Basler Versicherung	-$50.00
KFZ-Versicherung	663/417094-U	HUK24	-$365.51
Lebensversicherung	L 50.3303-28		-$234.00
Private Haftpflicht	22365413	Basler Versicherung	-$58.64
Rechtsschutzversicherung	DA7284422	Ergo Direkt Versicherung AG	-$129.72
Reisekrankenversicherung	175003009	Gothaer Versicherungs VVaG	-$26.59

Total -$2,254.28   Year

Functions Toolbar menu and in the Touch Bar (if your Mac has a Touch Bar)

📄 CSV	Save report as CSV file
📄 XLSX	Save report as Excel® XLSX file

⊞	Copy report to clipboard
🖨 Print	Print report
📊	Graphical overview of contracts

Existing categories in the selection menu

🤝	Active contracts
↓€	Revenue
↑€	Expenses
》》	Categories
👥	Contract partners
👥	Persons

Functions in the context menu of the selection menu.
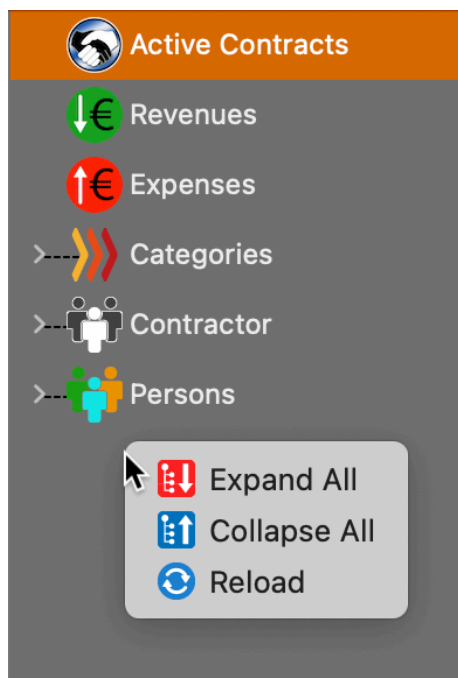
Print report

The evaluation can also be printed out on a printer or saved as a PDF or HTML file. Various parameters can be set for printing. For more information, see the "Printing" chapter.

🖨 Print

Print preview

Active Contracts

Contract	Contract number	Contractor	Fee
ARAG Rechtsschutz		Allianz Deutschland AG	$36.42
Auslandsreise-Krankenversicherung	029384-23434	Gothaer Versicherungs VVaG	$11.90
Garantie MacBookPro	DE999061329023	Allianz Deutschland AG	$41.00
General household contents	WERW20398-2302	Allianz Deutschland AG	$173.42
General household contents COPY	WERW20398-2302		$173.42
Glasversicherung	230982342	Basler Versicherung	$30.44
Hausrat-Schutzbrief	290839230DFE	Basler Versicherung	$50.00
Hausrat-Schutzbrief (Ferienwohnung)	09290498023	Basler Versicherung	$50.00
KFZ-Versicherung	663/417094-U	HUK24	$365.51
Lebensversicherung	L 50.3303-28		$234.00
Private Haftpflicht	22365413	Basler Versicherung	$58.64
Rechtsschutzversicherung	DA7284422	Ergo Direkt Versicherung AG	$129.72
Reisekrankenversicherung	175003009	Gothaer Versicherungs VVaG	$26.59
Strom	836630204503	Vattenfall	$0.00
Tier-Haftpflichtversicherung	TV-32094823	Hanse Merkur VVaG	$49.08
Tier-Krankenversicherung	PG00028677	Legrand Versicherungsdienst GmbH	$436.98
Vodafone Internet	39823432	Vodafone	$39.99

Total: $1,907.11

5/3/25 9:16 AM   Contract Manager • © 2014-2025 CIMSoft, @pps4Me • www.pps4Me.com   Page 1/1

Copy report to clipboard

If you would like to process the evaluation in an external application (Excel®, Numbers®, LibreOffice or similar programs), you can quickly copy all the evaluation data to the clipboard and paste it into the application of your choice. The columns and rows will of course be transferred.

Save report as CSV file

If you want to save the report as a CSV file, you can specify various parameters for the CSV file:

Field separator

Text recognition sign

Furthermore, the fields to be exported can be selected. The existing fields can be moved from left to right using drag and drop. All fields can be exported at once by clicking "Export all fields." Similarly, all export fields can be deleted again by clicking "Delete all export fields."

To export the complete data, you can use the export function from the menu. For more details, see the chapter "Export as CSV file".

Add contract	⌘ N	
Duplicate contract	⌘ D	
Move to trash	⌘ T	
Delete contract	⌘ ⌦	
Print	›	
Save graphics as	›	
Export as CSV file	⇧⌘ E	
Export as XLSX file	⇧⌘ X	
Import from CSV file	⇧⌘ I	
Backup all data		
Restore all data		
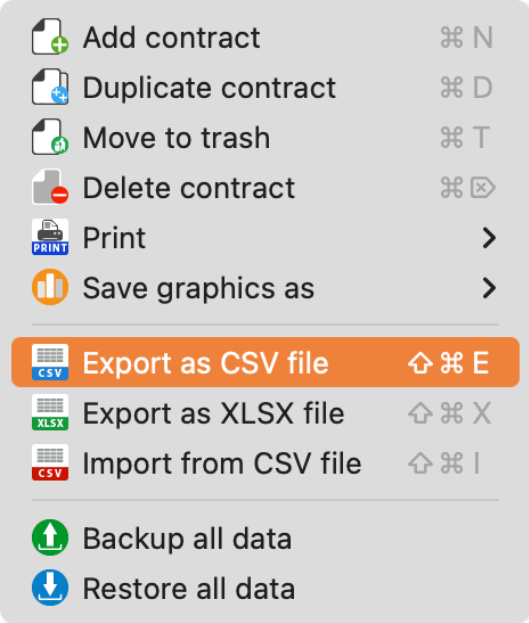
Save report as Excel® XLSX file

If you would like to save the report as an Excel® XLSX file, click on this icon.

LIST OF ALL CONTRACTS

You can access an overview of all contracts by clicking on the "List" icon in the toolbar menu.
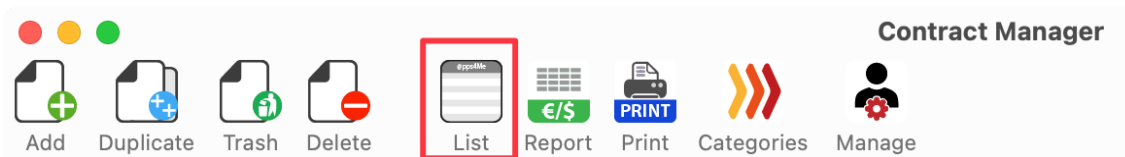
The following window opens with all contracts and all details (except for the Notes field).

The following functions are available:

Contract	Contract number	Contractor	Customer number	Contracted for	Category	Subcategory
ARAG Rechtsschutz		Allianz Deutsch…	90021926 / 90170999		Rechtsschutz	
Auslandsreise-Krankenversic…	029384-23434	Gothaer Versic…			Versicherung	Travel
Garantie MacBookPro	DE999061329…	Allianz Deutsch…	23ß40932-335-AD-0…	Pia	Privat	Computers
General household contents	WERW20398-…	Allianz Deutsch…	20230ß2-ETEV-3402…		Home	
General household contents…	WERW20398-…		ABV-20230ß2-ETEV-…		Haus	
Glasversicherung	230982342	Basler Versiche…	90195319		Haus 2	
Hausrat-Schutzbrief	290839230DFE	Basler Versiche…	2903874		Haus	
Hausrat-Schutzbrief (Ferienw…	09290498023	Basler Versiche…	389292		Haus 2	
KFZ-Versicherung	663/417094-U	HUK24			Auto	
Lebensversicherung	L 50.3303-28				Lebensversicheru…	
Private Haftpflicht	22365413	Basler Versiche…	90195319		Privat	
Rechtsschutzversicherung	DA7284422	Ergo Direkt Ver…			Privat	
Reisekrankenversicherung	175003009	Gothaer Versic…		Detlef	Gesundheit	
Strom	836630204503	Vattenfall	6357297971			
Tier-Haftpflichtversicherung	TV-32094823	Hanse Merkur…		Pia	Privat	
Tier-Krankenversicherung	PG00028677	Legrand Versic…		Pia	Gesundheit	
Vodafone Internet	39823432	Vodafone	2392892		Kommunikation	

	Show all contracts
	Show active contracts
	Display inactive contracts
	Display expired contracts
	Display contracts with income
	Display contracts with expenses
	Update list
	Print contracts

Print	Print contracts
LISTE	Print freely configurable list
	Copy
CSV	Save
XLSX	Save

Customize list

The list can be freely customized. See chapter "Customize list".
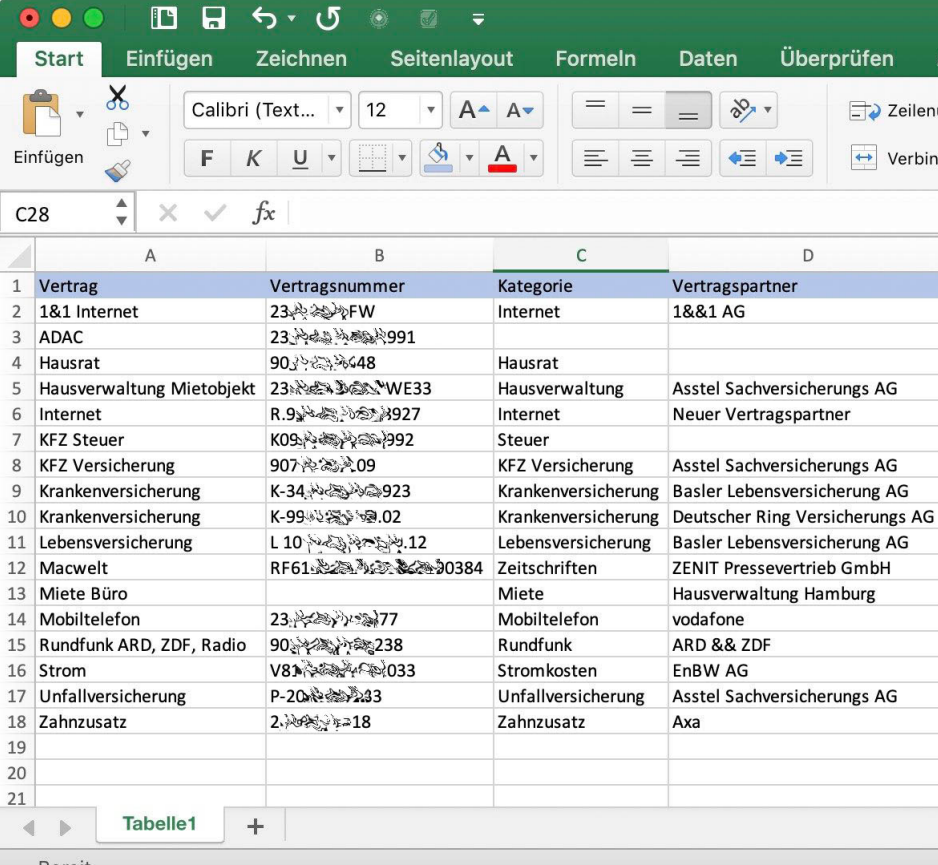
Print contracts

The contracts can be printed here. For more information, see the "Printing" section.

If you want to process the contracts further in an external application (Excel®, Numbers®, LibreOffice, or similar programs), you can quickly copy all contract data to the clipboard and paste it into the application of your choice. The columns and rows will of course be transferred.

Example: Microsoft Excel®

	A	B	C	D
1	Vertrag	Vertragsnummer	Kategorie	Vertragspartner
2	1&1 Internet	23⋯FW	Internet	1&&1 AG
3	ADAC	23⋯991		
4	Hausrat	90⋯648	Hausrat	
5	Hausverwaltung Mietobjekt	23⋯WE33	Hausverwaltung	Asstel Sachversicherungs AG
6	Internet	R.9⋯3927	Internet	Neuer Vertragspartner
7	KFZ Steuer	K09⋯992	Steuer	
8	KFZ Versicherung	907⋯09	KFZ Versicherung	Asstel Sachversicherungs AG
9	Krankenversicherung	K-34⋯923	Krankenversicherung	Basler Lebensversicherung AG
10	Krankenversicherung	K-99⋯.02	Krankenversicherung	Deutscher Ring Versicherungs AG
11	Lebensversicherung	L 10⋯.12	Lebensversicherung	Basler Lebensversicherung AG
12	Macwelt	RF61⋯0384	Zeitschriften	ZENIT Pressevertrieb GmbH
13	Miete Büro		Miete	Hausverwaltung Hamburg
14	Mobiltelefon	23⋯77	Mobiltelefon	vodafone
15	Rundfunk ARD, ZDF, Radio	90⋯238	Rundfunk	ARD && ZDF
16	Strom	V8⋯033	Stromkosten	EnBW AG
17	Unfallversicherung	P-20⋯33	Unfallversicherung	Asstel Sachversicherungs AG
18	Zahnzusatz	2⋯18	Zahnzusatz	Axa
19				
20				
21				

Export all contracts as CSV file

You can select the fields you want to export. The existing fields can be moved from left to right using drag and drop. All fields can be exported at once by clicking "Export all fields." All export fields can also be deleted again by clicking "Delete all export fields."

To export the complete data, you can use the export function from the menu. For more details, see the chapter "Export as CSV file".

If you would like to save the contracts as an Excel® XLSX file, click on this icon.

Search contracts in list

You can search for contracts in the list of all contracts. To do this, enter the term you are looking for in the search field at the top right.

Q∨ general   ⊗

The default search is always "Begin with." If you want to search for contracts that contain a specific text, enter a % sign before the search term.

Q∨ %house   ⊗

The following fields are taken into account during the search

- Contract
- Contracted for
- Contract number
- TAGs

You can also search for contracts in the main window. In the settings, you can specify whether the additional fields "Contracted for," "Contract number," and "TAGs" are used for the search.

PRINT FREELY CONFIGURABLE LIST

The list of contracts can be freely configured and printed. Click on the "Print" icon in the list of all contracts.
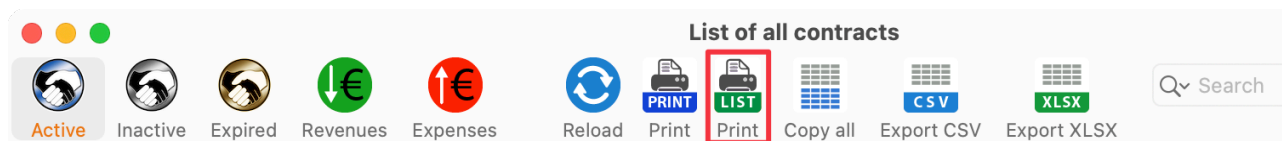
The following window will open.
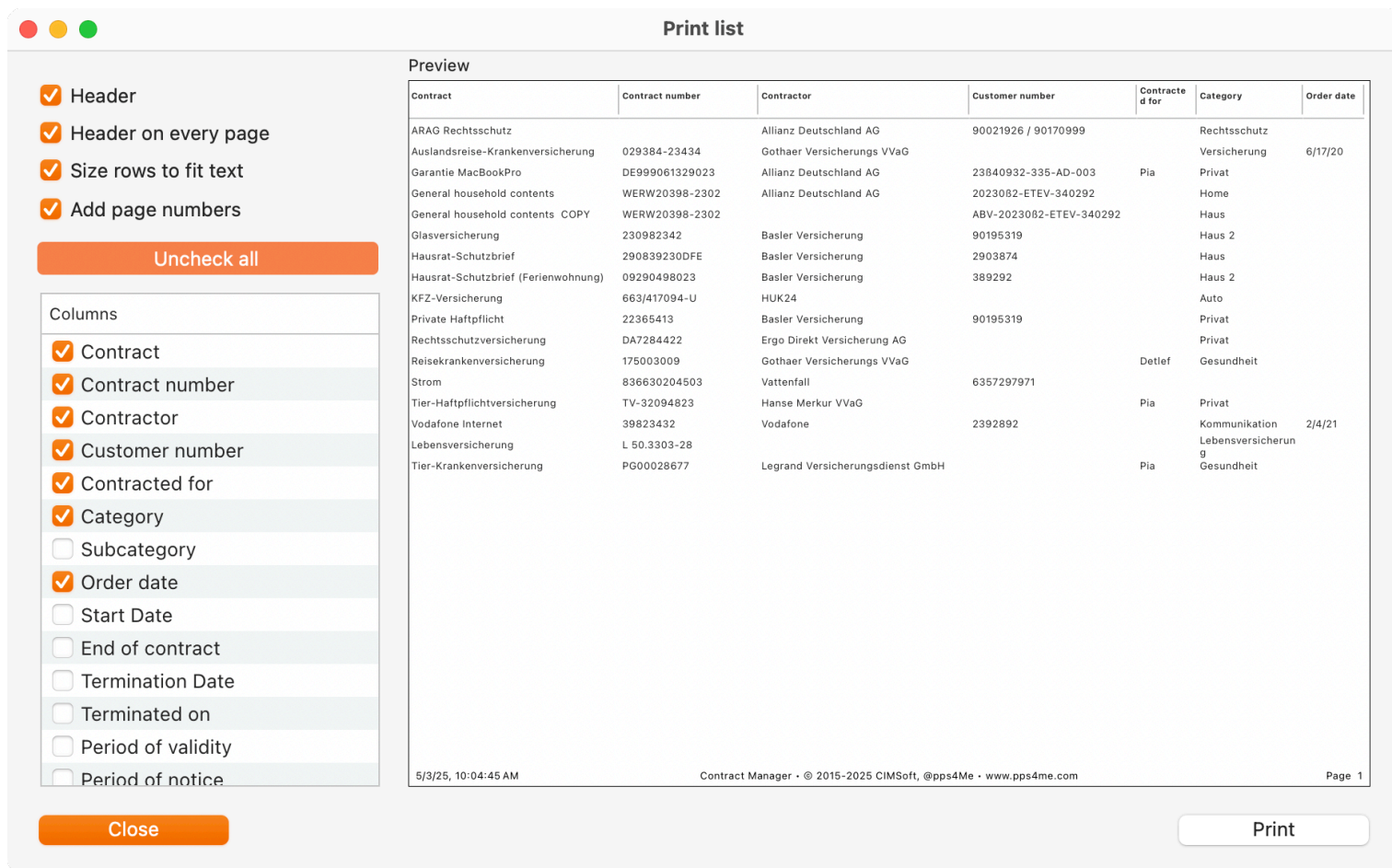
Each column can be shown or hidden. You can also set parameters for the header, row height, and page numbering.
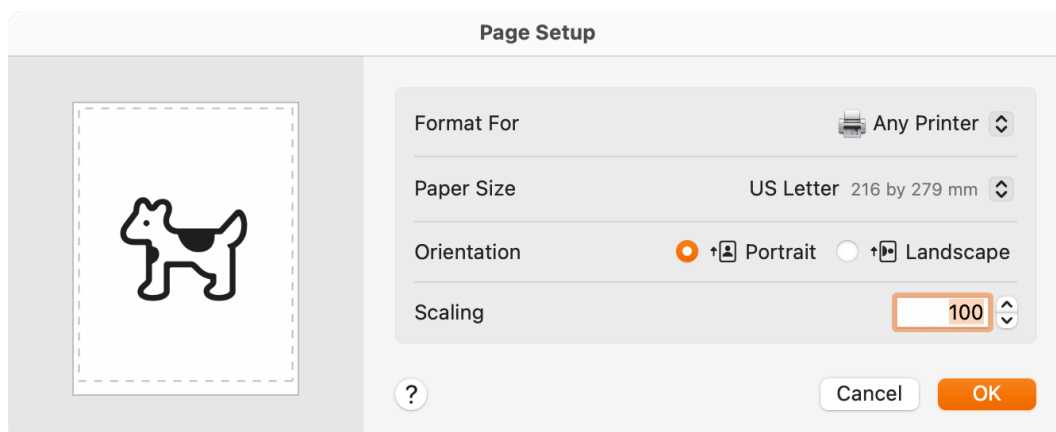
Now select "Print" or "PDF" => "Open in Preview" or "Save as PDF."

Print

Printer	🖨 Brother MFC-L3770CDW series – Fax (SiFi) ⇕
Presets	Default Settings ⇕

Copies   1 ⇕

Pages
🔘 All Pages
⚪ Range from   1   to   1

Double-sided   On ⇕

⌄ Fax Information

? [PDF ⌄]   Cancel   Fax

PRINT LIST

To print the contracts as a list, select "File => Print => List" from the menu and choose one of the following print functions.

Add contract	⌘ N	
Duplicate contract	⌘ D	
Move to trash	⌘ T	
Delete contract	⌘ ⌫	
Print	**>**	
Save graphics as	>	
Export as CSV file	⇧⌘ E	
Export as XLSX file	⇧⌘ X	
Import from CSV file	⇧⌘ I	
Backup all data		
Restore all data		

Submenu:
- List >
- Details >

List submenu:
- All Contracts
- Active Contracts
- Inactive contracts
- Expired contracts
- Revenues
- Expenses
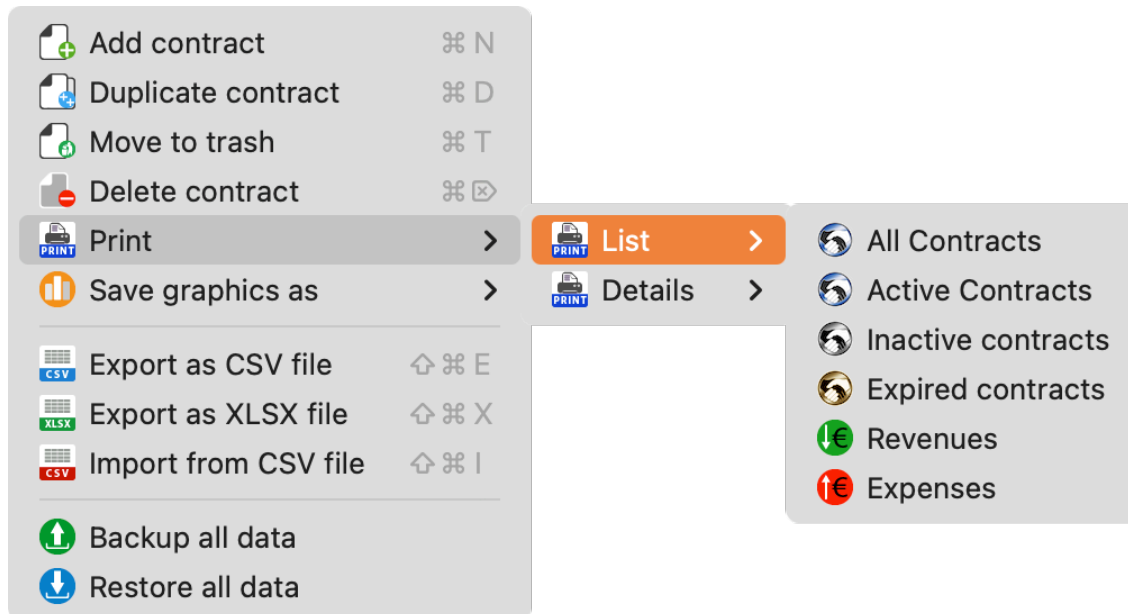
The following options can be specified for all printout variants:

- Print with (only for list printing) or without borders
- Print with any title
- Print with any subtitle
- Print with or without footer
- Print with or without logo
- Print with your own logo
- Print as PDF file
- Print as HTML file

Options

Title

Active Contracts

Subtitle

Print logo

Print footer

Use default logo

Drop your logo here

Close

The parameters for the page format can be set via "Settings => Print".

All, active, inactive, expired contracts, revenues and expenses

In this case, all contracts are always printed as a list or table in landscape format. The filter setting is not taken into account here.

Print: Active Contracts

First | Back | Next | Last | Refresh | PDF | HTML | Print   Grid on | Automatic | Width | Manual | Options

Page 1/1   Scale: — 134%

Active Contracts

Contract	Contract number	Contractor	Person	Cust. no.	Start Date	Period	PN	Termination	AR	Fee	Deductib.	Payment
ARAG Rechtsschutz		Allianz Deutschland AG		90021926 /	Jul 1, 1973	0 N	0 N	Jan 31,		$36.42	$0.00	Quarter
Auslandsreise-	029384-23434	Gothaer Versicherungs			Sep 5, 2020	0 N	3 M	Jan 18,	✓	$11.90	$0.00	None
Garantie MacBookPro	DE99906132902	Allianz Deutschland AG	Stephani	23ß40932-	Jan 8, 2023	1 n	0 N	Jan 22,	✓	$41.00	$0.00	None
General household	WERW20398-	Allianz Deutschland AG		20230ß2-	Aug 1, 2019	1 n	1 n		✓	$173.42	$0.00	Year
General household	WERW20398-			ABV-	Aug 1, 2019	1 n	1 n		✓	$173.42	$0.00	Year
Glasversicherung	230982342	Basler Versicherung		90195319	Aug 1, 2019	1 n	0 n		✓	$30.44	$0.00	Year
Hausrat-Schutzbrief	290839230DFE	Basler Versicherung		2903874	Aug 1, 2019	1 n	1 n			$50.00	$0.00	Year
Hausrat-Schutzbrief	09290498023	Basler Versicherung		389292	Sep 1, 2019	1 n	1 n		✓	$50.00	$0.00	Year
KFZ-Versicherung	663/417094-U	HUK24			Jan 1, 2023	1 n	1 n	Nov 15,	✓	$365.51	$0.00	Year
Lebensversicherung	L 50.3303-28				Nov 22, 2003	0 N	0 N		✓	$234.00	$150.00	Year
Private Haftplicht	22365413	Basler Versicherung		90195319	Jun 1, 2019	1 n	1 n		✓	$58.64	$0.00	Year
Rechtsschutzversicherung	DA7284422	Ergo Direkt Versicherung			Oct 1, 1985	0 N	3 Q		✓	$129.72	$0.00	Year
Reisekrankenversicherung	175003009	Gothaer Versicherungs	Walter		Aug 19, 2024	0 N	1 n		✓	$26.59	$0.00	Year
Strom	836630204503	Vattenfall		635729797	Apr 1, 2022	1 n	6 W			$0.00	$0.00	None
Tier-	TV-32094823	Hanse Merkur VVaG	Stephani		Aug 19, 2018	0 N	0 N		✓	$49.08	$0.00	None
Tier-Krankenversicherung	PG00028677	Legrand	Stephani		Sep 1, 2019	1 n	1 n		✓	$436.98	$20.00	Year
Vodafone Internet	39823432	Vodafone		2392892	Feb 4, 2021	2 n	3 n	Nov 1,	✓	$39.99	$0.00	Month

Total: $1,907.11

5/3/25 12:56 PM   Contract Manager • © 2014-2025 CIMSoft, @pps4Me • www.pps4Me.com   Page 1/1

Save as HTML or PDF

In the print preview, the printout can also be saved directly as an HTML or PDF file.

Print: Contracts details

First | Back | Next | Last | Refresh | PDF | HTML | Print

PRINT DETAILS

To print the details of your contracts, select "File => Print => Details" from the menu and choose one of the following print functions.

Add contract	⌘ N	
Duplicate contract	⌘ D	
Move to trash	⌘ T	
Delete contract	⌘ ⌦	
Print	>	List >
Save graphics as	>	Details >
Export as CSV file	⇧⌘ E	
Export as XLSX file	⇧⌘ X	
Import from CSV file	⇧⌘ I	
Backup all data		
Restore all data		

Details submenu:
- Selected contract with details
- All Contracts
- Active Contracts
- Inactive contracts
- Expired contracts
- Revenues
- Expenses

Selected contract with details

This prints the currently selected contract with details in portrait format. The filter switch setting is taken into account. The "Comments" field is printed with a maximum of 19 lines of 90 characters per line.

Active contracts with details

All contracts are printed in portrait format with details. The filter switch setting is not taken into account. The "Comments" field is printed with a maximum of 19 lines of 90 characters per line.

Save as HTML or PDF

In the print preview, the printout can also be saved directly as an HTML or PDF file.

Print: Contracts details

First   Back   Next   Last   Refresh   PDF   HTML   Print

Contract Manager

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Release 25.1.0

Example

First | Back | Next | Last | Refresh | PDF | HTML | PRINT Print | Automatic | Width | Manual | Options

Page 4/17

Scale: — ⬤————⬤ + 117%

Active Contracts

Active Contracts

Description

General household contents

Contract number:	WERW20398-2302
Category:	Home
Contracted for:	
Customer number:	20230ß2-ETEV-340292
Contractor:	Allianz Deutschland AG
Order date:	
Start Date:	8/1/19
End of contract:	7/31/20
Termination Date:	
Terminated on:	
Period of validity:	1 none
Period of notice:	1 none
Automatic renewal:	Yes
Sequence:	
Receive termination confirmation:	No
Bonus value:	
Bonus received:	No
Bonus redeemed:	No
Advertiser:	
Payment:	Year
First payment:	
Fee:	173.42 $
Deductible:	0.00 $
Kind:	Ausgaben
Reference number:	None
Direct debit:	No
Bank:	
Bank:	
Bank:	
Note:	

5/3/25 2:41 PM   Contract Manager • © 2014-2025 CIMSoft, @pps4Me • www.pps4Me.com   Page 4/17

EXPORT AS CSV FILE

The data for all contracts can be saved as a CSV file. To do this, select "File => Export as CSV file" from the menu.
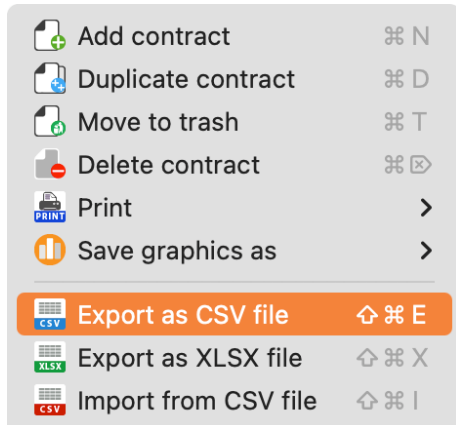
You can select all available fields for export using the "Export all fields" button. Alternatively, drag and drop the required fields from the "Available fields" list to the "Export fields" list. You can change the order of the export fields by moving them with the mouse. If an export field is no longer needed, it can be dragged back to the "Available fields" list.

EXPORT AS XLSX FILE

The data for all contracts can be saved as an Excel® XLSX file. To do this, select "File => Export as XLSX file" from the menu.

Add contract	⌘ N	
Duplicate contract	⌘ D	
Move to trash	⌘ T	
Delete contract	⌘ ⌫	
Print	›	
Save graphics as	›	
Export as CSV file	⇧ ⌘ E	
Export as XLSX file	⇧ ⌘ X	
Import from CSV file	⇧ ⌘ I	
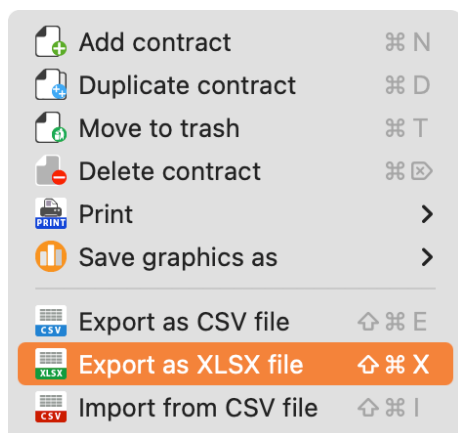
After saving the XLSX file, it will open directly if this has been specified in the settings.

IMPORT FROM CSV FILE

To import data via a CSV file, select "File => Import CSV file" from the menu.

Add contract ⌘ N	
Duplicate contract ⌘ D	**Import from CSV file**
Move to trash ⌘ T	Before you import any data, you should make a backup of your data!
Delete contract ⌘ ⌫	**Continue importing**
Print >	Backup all data
Save graphics as >	Cancel
Export as CSV file ⇧⌘ E	
Export as XLSX file ⇧⌘ X	
Import from CSV file ⇧⌘ I	
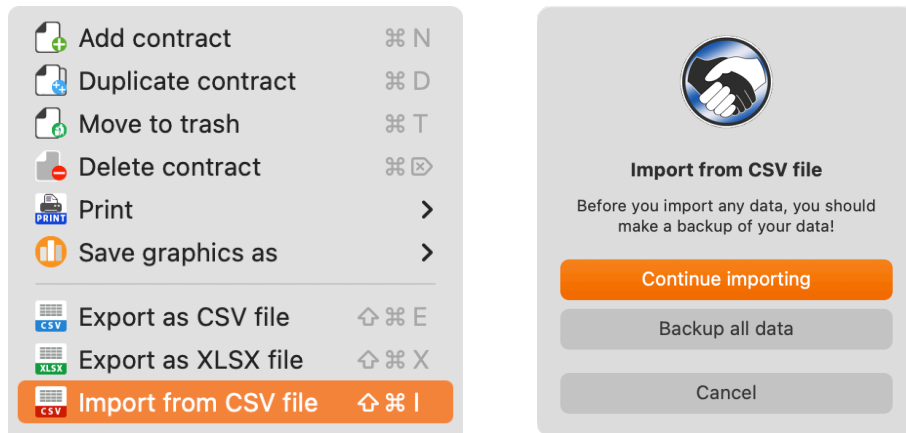
Before importing data, you should back up all data. For more information, see the chapter "Backup all data".

In the following window, you can drag a CSV file from Finder onto the CSV icon. Or simply click on the CSV icon. A Finder dialog will then open, allowing you to select a CSV file. Now set the parameters for recognizing the CSV file. You will then see a preview of the data in the list below. Then click on "Import CSV".

CSV Importer

Click symbol to import or drag a CSV file to the symbol   Select CSV file

Import Parameter

Field Separator
;

Text Recognition Sign
"   With Headline

/Users/pps4MeDesktop/Contract Manager.csv

Contract	Contract number	Category	Contracted for	Customer number
ARAG Rechtsschutz		Rechtsschutz		90021926 / 90170999
Auslandsreise-Krankenversicherung	029384-23434	Versicherung		
Garantie MacBookPro	DE999061329023	Privat	Stephanie	23ß40932-335-AD-00
Gasversorgung	836630203883			6357297971
General household contents	WERW20398-2302	Home		20230ß2-ETEV-34029
General household contents COPY	WERW20398-2302	Haus		ABV-20230ß2-ETEV-34
Glasversicherung	230982342	Haus 2		90195319
Hausrat-Schutzbrief	290839230DFE	Haus		2903874
Hausrat-Schutzbrief (Ferienwohnung)	09290498023	Haus 2		389292

Cancel   Continue

Now you need to assign the fields of the data to be imported to the fields of the existing data. A field must be assigned to the import field "Contract".

Available Fields	Import Fields	Assigned Field
Contract	Contract	
Contract number	Contract number	
Category	Category	
Contracted for	Contracted for	
Customer number	Customer number	
Contractor	Contractor	
Order date	Order date	

35 Fields   0 Fields

Assign all fields 1:1 ->   **<- Remove all assigned fields**

Cancel   **Preview CSV Import**

The available fields can be assigned to the import fields using drag and drop. If you have accidentally assigned a field incorrectly, simply drag it back to the "Available fields" area. All fields can be assigned at once using the "Assign all fields 1:1" button. However, this only makes sense if the order is the same in both areas. All assigned fields can be deleted again using "Delete all assigned fields".

Available Fields	Import Fields	Assigned Field
Contract	Contract	**Contract**
Contract number	Contract number	
Category	Category	
Contracted for	Contracted for	
Customer number	Customer number	
Contractor	Contractor	
Order date		

35 Fields   0 Fields

Assign all fields 1:1 ->   **<- Remove all assigned fields**

Cancel   **Preview CSV Import**

Available Fields	Import Fields	Assigned Field
	Contract	Contract
	Contract number	Contract number
	Category	Category
	Contracted for	Contracted for
	Customer number	Customer number
	Contractor	Contractor
	Order date	Order date

0 Fields   35 Fields

Assign all fields 1:1 ->   **<- Remove all assigned fields**

Cancel   **Preview CSV Import**

Now click on "Preview CSV Import." Please check the fields or columns with special values such as date or currency fields. If all data is displayed correctly in this preview, click on "Import into database."

After a successful import, the following message appears.

20 Entries imported succesfull

OK
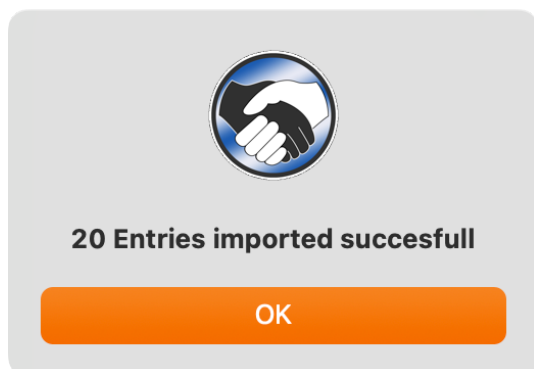
Clicking "OK" closes all import windows.

The following values are accepted for these fields:

Contract	Text
Contract number	Text
Category	Text
Contract for person	Text
Customer number	Text
Contract partner*	Text
Order date	Date
Contract start	Date
Contract end	Date

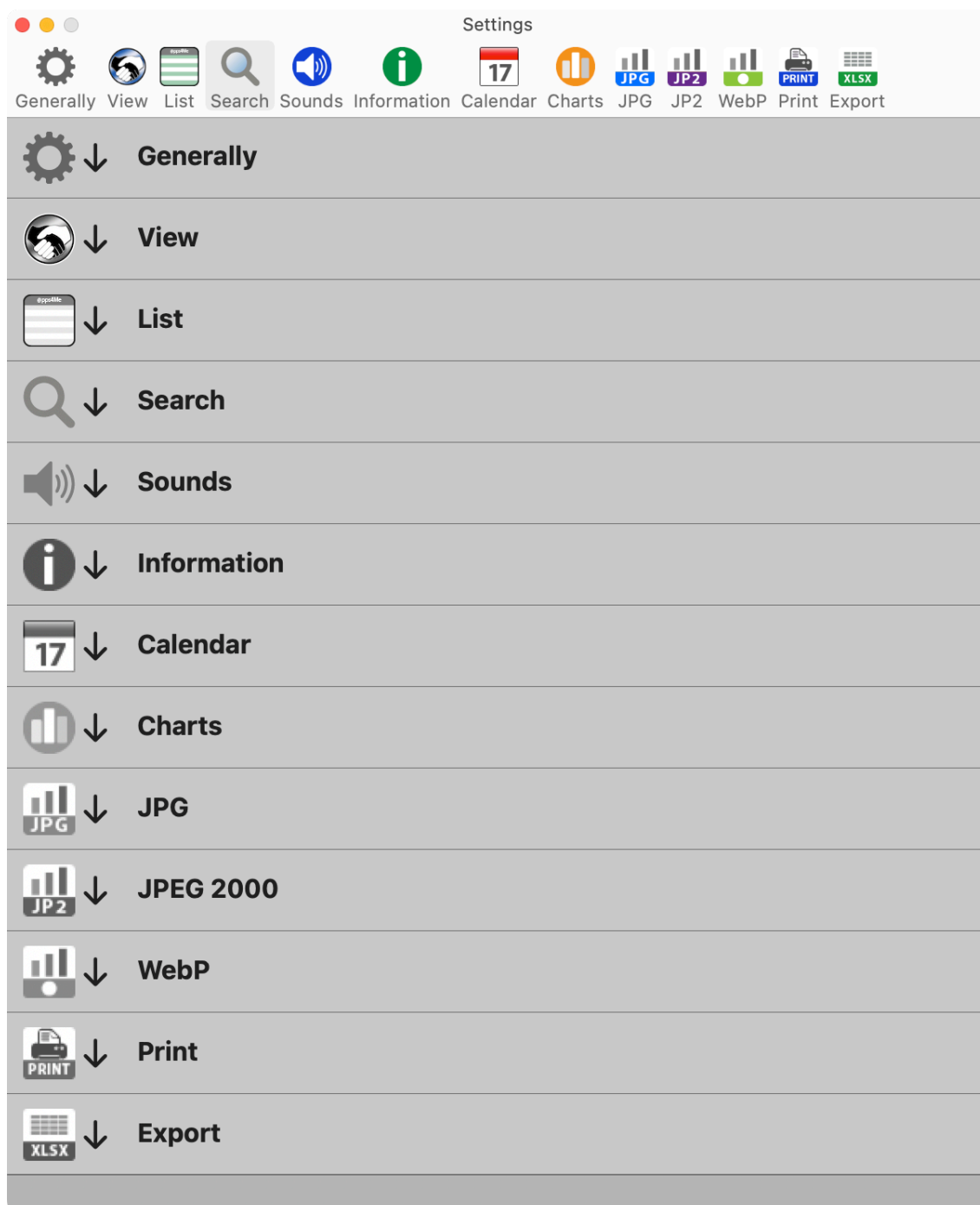| Termination on	Date
Terminated on	Date
Term	Integer
Term units	None, weeks, weeks to quarter end, months, months to quarter end, months to year end, quarter, quarter to year end, years
Notice period	Integer
Notice period units	None, weeks, weeks to quarter end, months, months to quarter end, months to year end, quarter, quarter to year end, years
Automatic renewal	0, false, Onwaar, 1, true, waar
Termination received	0, false, Onwaar, 1, true, waar
Contract inactive	0, false, Onwaar, 1, true, waar
Premium value	Text
Premium received	0, false, Onwaar, 1, true, waar
Premium redeemed	0, false, Onwaar, 1, true, waar
Premium Referrer	Text
Payment method	None, day, week, month, quarter, half-year, year
First payment	Date
Contribution	Double
Excess	Double
Type	Expenses, Uitgaven, Revenues, Inkomsten, Revenues, Inkomsten
Reference number	Text
Bank	Text
BIC	Text
IBAN	Text
Portal user	Text
Portal password	Text
Portal URL	Text
Comment	Text

* The "Contract partner" field is only imported if contract partners are managed using the "Contract Manager." For more information, see chapter "Settings".

SETTINGS

The settings can be accessed via the menu "Contract Manager => Settings".

About	⌘ I
Settings	**⌘ ,**
Services	>
Hide Contract Manager	⌘ H
Hide Others	⌥ ⌘ H
Show All	
Quit Contract Manager	⌘ Q
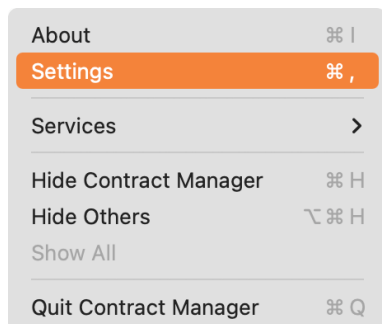
The following sections are available in the settings:

Generally

View

List

Search

Sounds

Information

Calendar

Charts

JPG

JPEG 2000

WebP

Print

Export

The individual sections can be accessed directly via the toolbar menu. The sections can be expanded or reduced by clicking on the corresponding icon or double-clicking on the header.

It is possible to extend or reduce all sections.
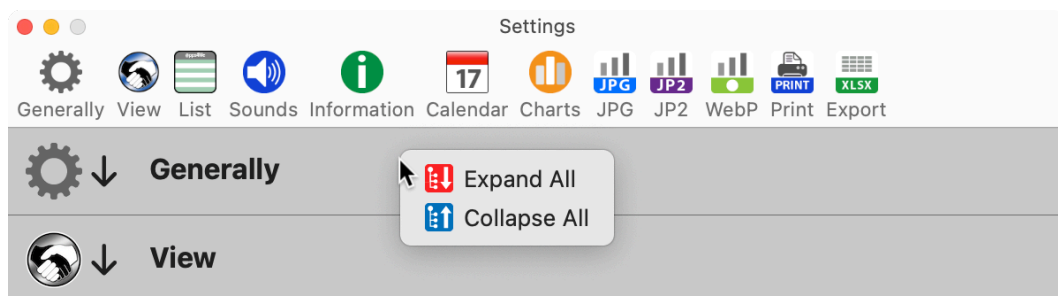
Generally

Here you can specify whether the contract partner should be transferred when copying a contract. You can also enable or disable access to contacts (macOS address book), calendar, and reminders.
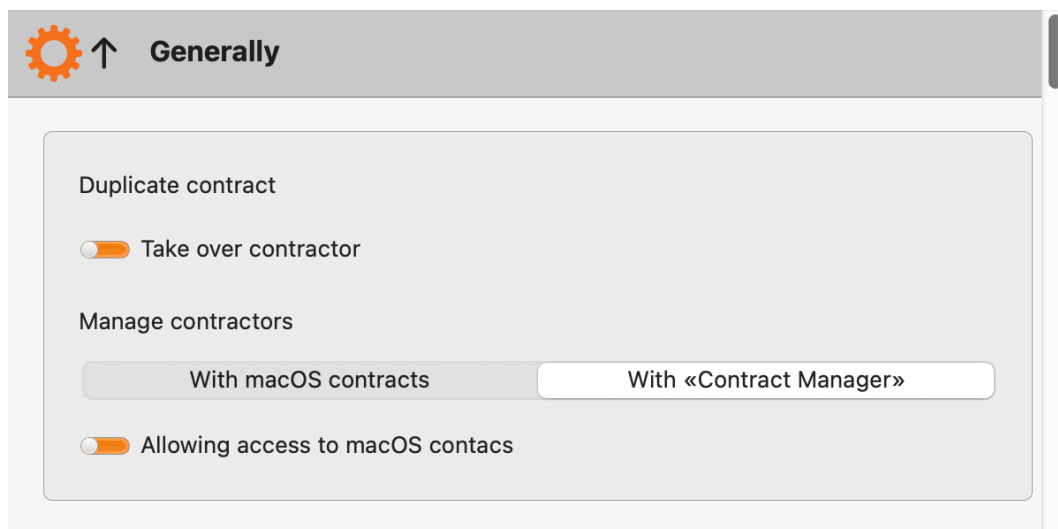
View

Here you can configure various settings for the list view, tree structure and sections, as well as the display of contracts in the dock.
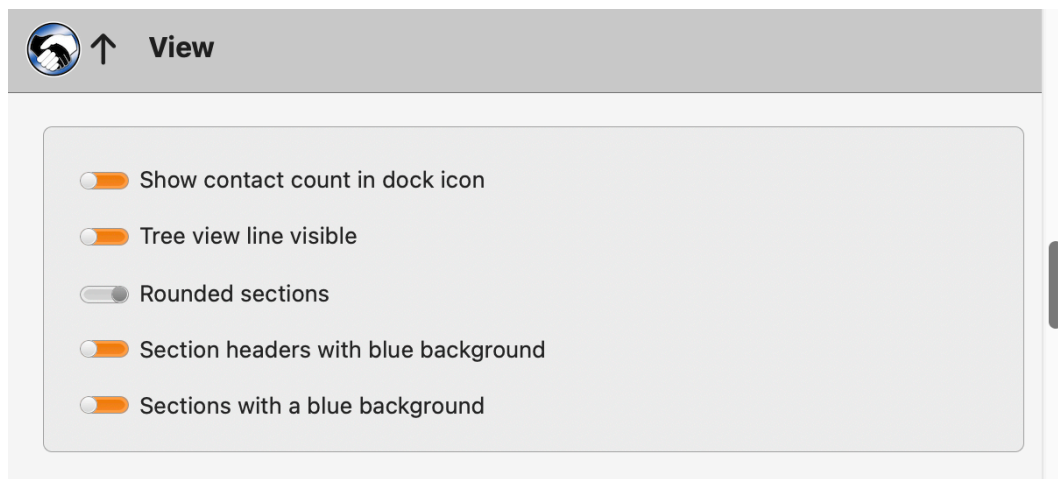
List

Here you can set the zoom factor and colors for the list.

Search

Here you can set the parameters below for searching in the main window and the list.

Sounds

Here you can set the parameters for the sounds below.

Information

Here you can set the parameters below for the information or notifications.

Calendar

Here you can set the parameters below.

Charts

Here you can set the parameters for the evaluation.

JPG

Here you can specify the quality for the export format of the evaluations.

JPEG2000

Here you can specify the quality for the export format of the evaluations.

WebP

Here you can specify the quality for the export format of the evaluations.

Print

You can set the following parameters for printing.

Export

Here you can specify whether the password for the portal user should be exported unencrypted.

BACKUP ALL DATA

If you have activated TimeMachine®, you do not need to perform any further data backups. If not, back up the data from the following folder: <~/Library/Containers/de.pps4me.ContractManager/Data/ Library/Application Support/Contract Manager>. From macOS 14.x onwards, the following path will be used: <~/Library/Containers/Vertrags Manager/Data/Library/Application Support/Contract Manager>

The backup function allows you to back up the database, all attachments, and pictures from "Contract Manager." To do this, select "Menu -> File -> Back up all data."

🗋 Add contract	⌘ N
🗋 Duplicate contract	⌘ D
🗋 Move to trash	⌘ T
🗑 Delete contract	⌘ ⌦
🖨 Print	❯
🔵 Save graphics as	❯
📗 Export as CSV file	⇧ ⌘ E
📗 Export as XLSX file	⇧ ⌘ X
📗 Import from CSV file	⇧ ⌘ I
🔼 **Backup all data**	
🔽 Restore all data	
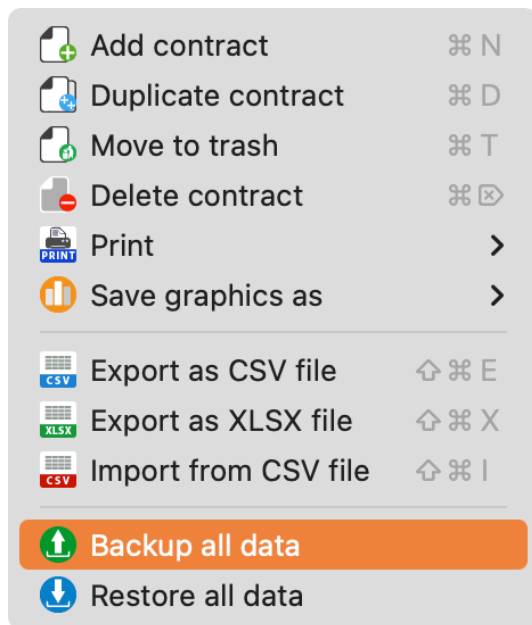
Select any data carrier/folder. A folder named "Contract Manager" will be created in the selected folder. The database, attachments, and pictures will be saved in this folder. In addition, all data will be exported to this folder as Excel® XLSX and CVS files.

Backup folder „/Users/pps4Me/ Desktop/Contract Manager" has been created

OK
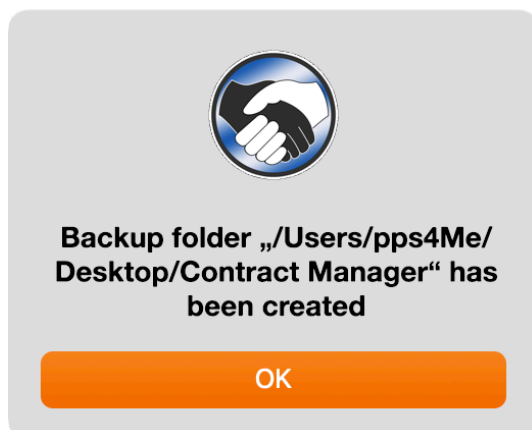
RESTORE ALL DATA

With the restore function, you can restore the database, all attachments, and pictures from "Contract Manager." To do this, select "Menu -> File -> Restore all data".

📊 Export as CSV file	⇧ ⌘ E	
📊 Export as XLSX file	⇧ ⌘ X	
📊 Import from CSV file	⇧ ⌘ I	
⬆ Backup all data		
⬇ Restore all data		
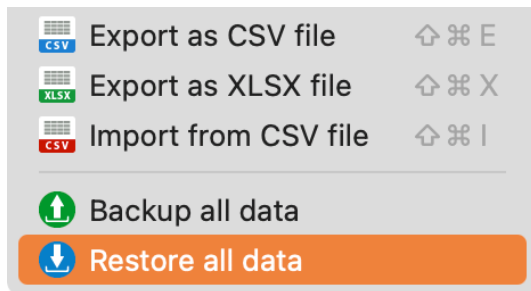
Select the folder containing the backup data from the "Contract Manager." The database and all attachments will now be restored and the database will be reloaded.

All data has been successfully restored

OK
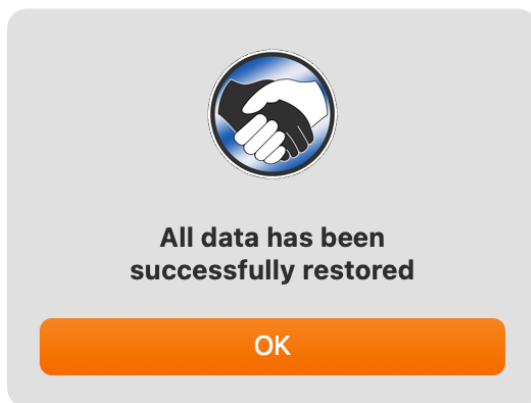
If the selected folder does not contain any backup data from the "Contract Manager," this error message will be displayed.

The restore location „/Users/ pps4Me/Desktop/Temp" doesn't contains the database file „Contract.rsd". Please choose the correct backup folder.

OK
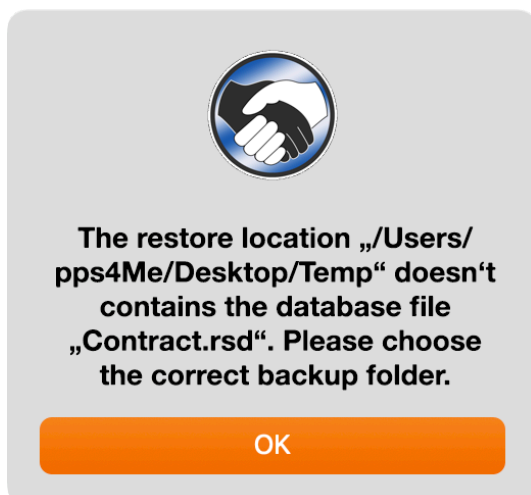
HELP MENU

The "Help" menu provides access to the following features:
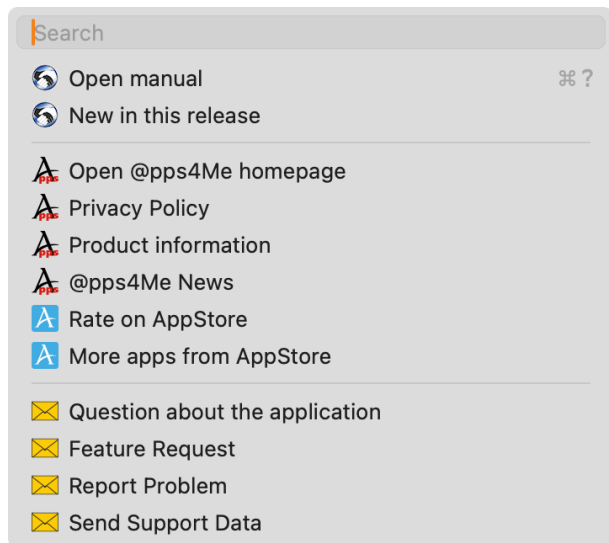
Contract Manager Help	Access this help
New in this version	View new features and changes
Show access information	Permissions for calendar, reminders, and address book
Go to @pps4Me homepage	Open @pps4Me URL
Privacy	Open privacy policy URL
Product information	Open product URL
@pps4Me News	View the latest news on the homepage
Rating in the AppStore	Submit a rating
More apps from the AppStore	View all apps from the App Store
Question about the application	Send a question about the application to @pps4Me
Request new feature	Send a request for a new feature to @pps4Me
Report problem	Send a problem report by e-mail to @pps4Me
Send support data	Send the support data by e-mail to @pps4Me

* Only send the support data after we have requested it.

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