



User Guide
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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.)
- Sort by name, category, contract partner, and contract person
- 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
- 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.)

PRIVACY POLICY

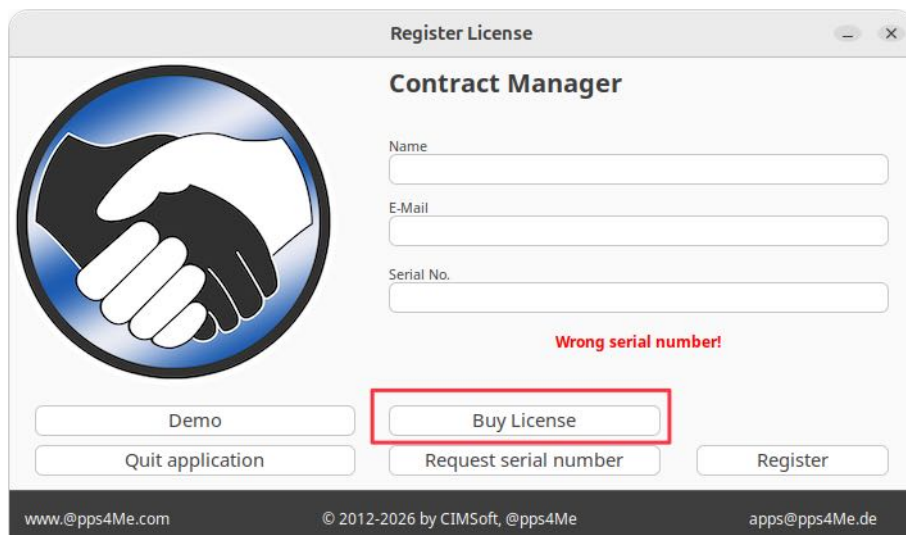
All data created using "Açana Contracts" remains entirely on the device used to create it (iPhone, iPad, Mac or PC). The only exception is synchronization with iCloud, where the data is stored in your personal "People" folder. The app does not collect any data, nor does it access data in the background. No data is shared with us or third parties.

DEMO MODUS

In demo mode, all of the program's features are available. A maximum of 3 contracts are displayed.

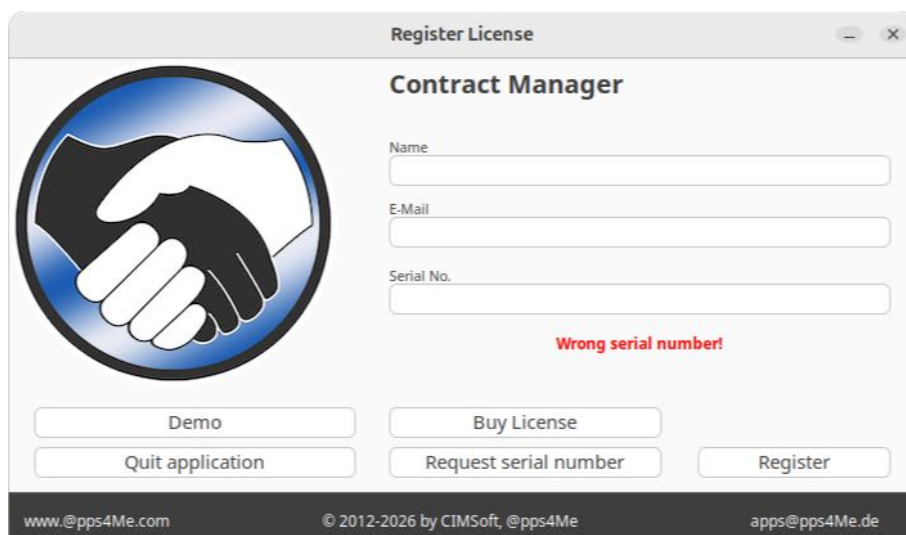
PURCHASE A LICENSE

You can purchase a license in the online store. To do so, click on "Buy License".



ACTIVATE LICENSE

Enter the license information in the "Name," "Email," and "Serial Number" fields.



APPLICATION START

Once you launch "Contract Manager," you can immediately start entering your contracts. The database and all attachments for "Contract Manager" are stored in the "\$HOME/Contract Manager" directory. The program settings are stored in the "\$HOME/.ContractManager" file. The configuration settings are stored in the "\$HOME/.ContractManager" file.

The application is divided into the following areas:

Top:

Toolbar menu

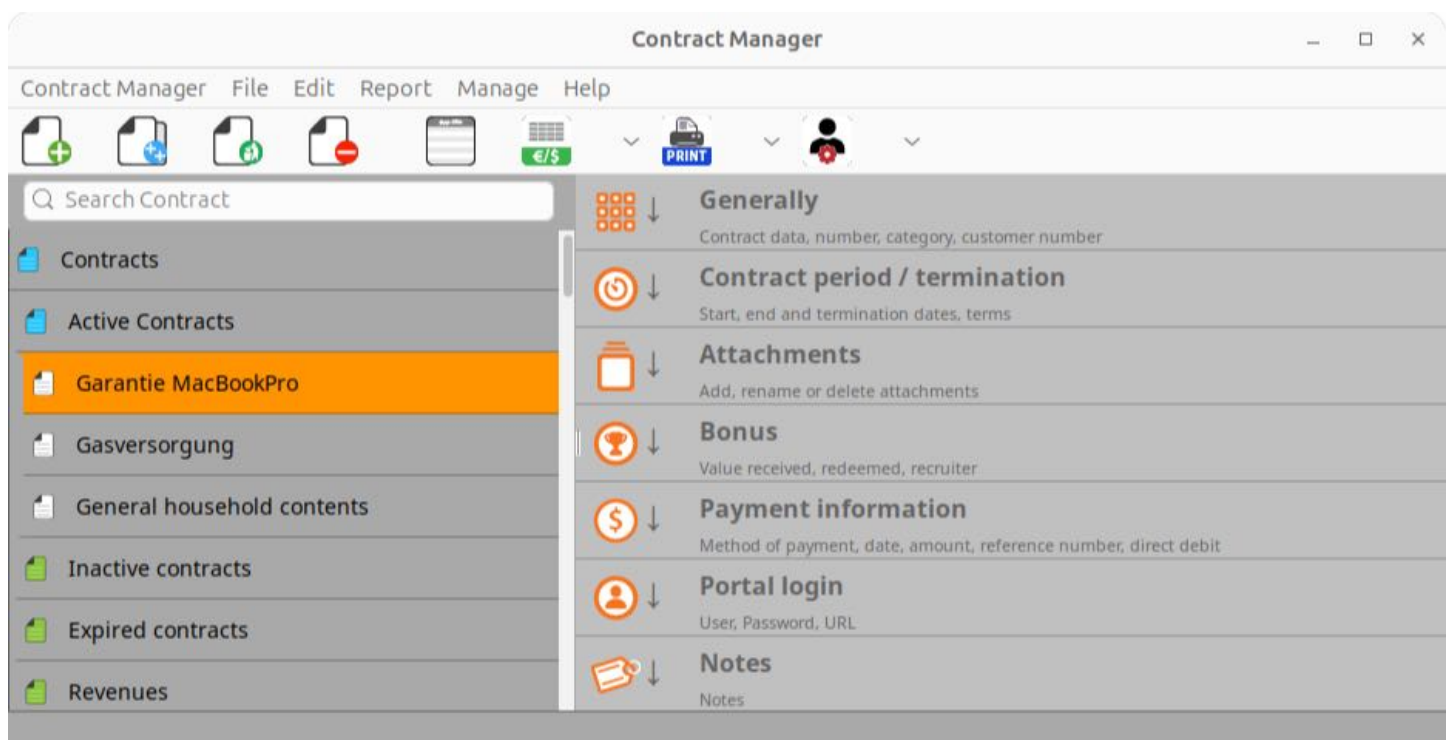
Left:

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

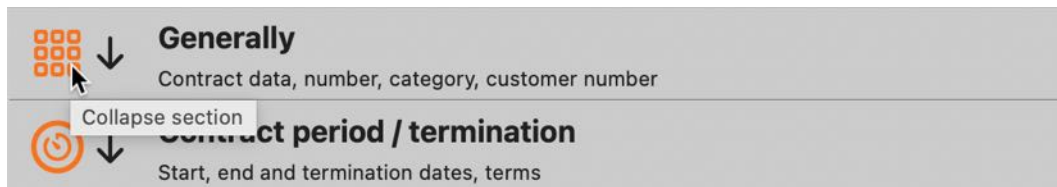


- Notes

EXPAND OR COLLAPSE SECTIONS IN DETAILS

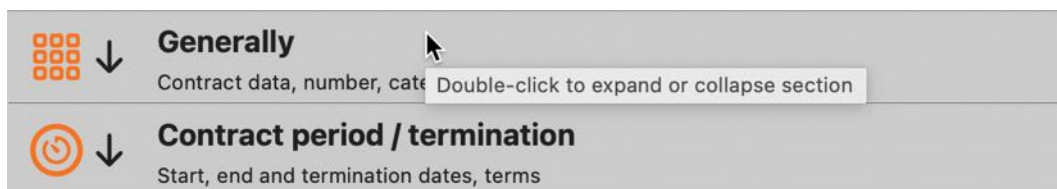
In the details, the sections can be expanded or reduced as follows:

By clicking on the icon in the header

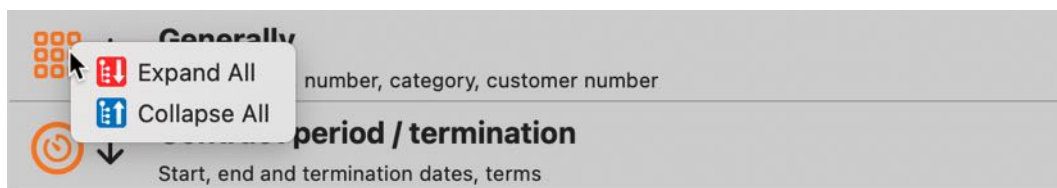


Double-click on the header

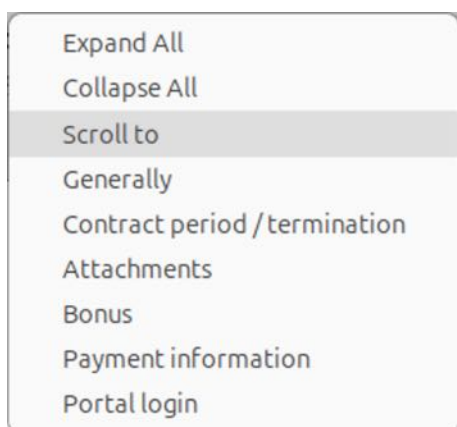
With the context menu



The status of the individual sections (expanded or reduced) is saved automatically. After restarting the

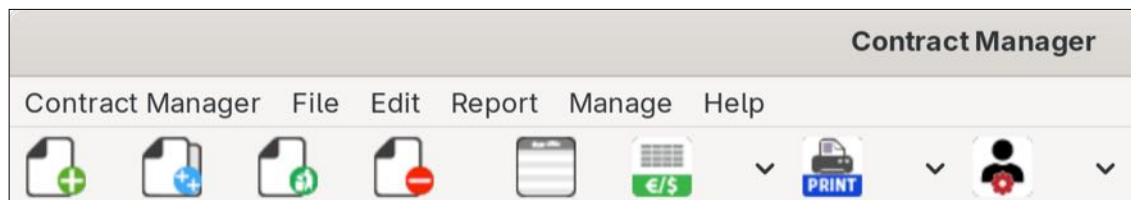


application, the sections are displayed exactly as they were when you left the application.



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
 - Subcategories
 - Email
 - Contract partners

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
- Trash

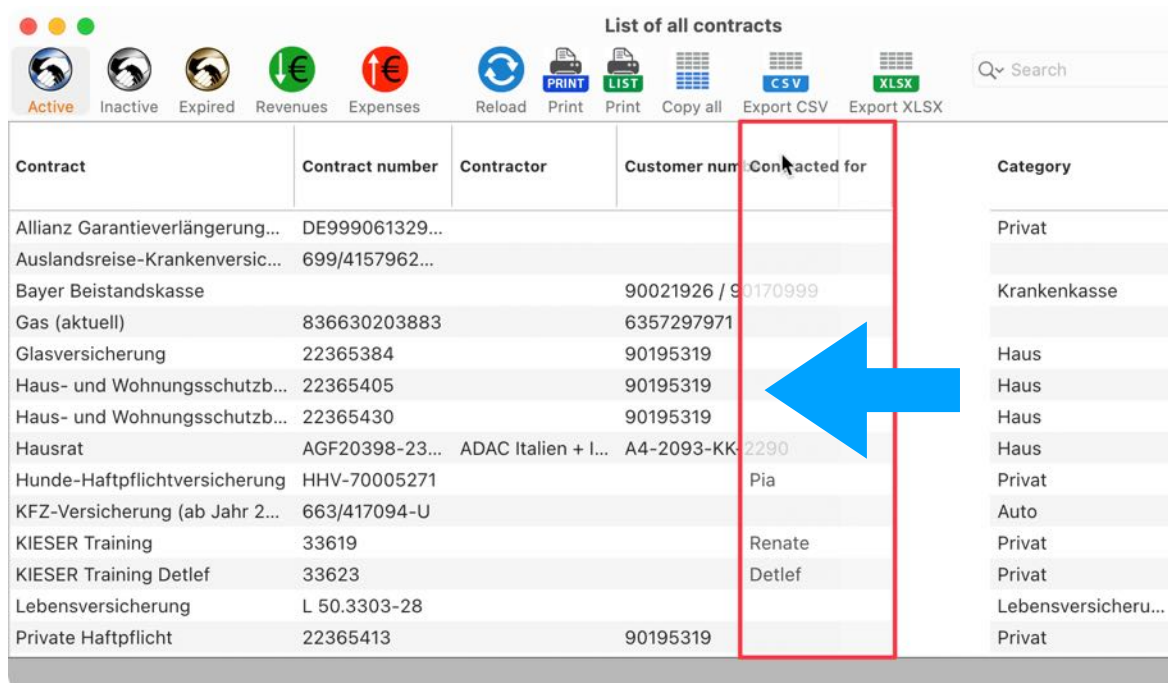
 Contracts
 Active Contracts
 Inactive contracts
 Expired contracts
 Revenues
 Expenses
 Categories
 Subcategories
 Contractor
 Persons
 Date
 Order date
 Start Date
 End of contract
 Termination Date
 Terminated on
 Automatic renewal
 Without renewal
 With renewal
 Sequence
 Payment
 None
 Day
 Month
 Every 2 month
 Quarter
 Half-year
 Year
 Trash

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.

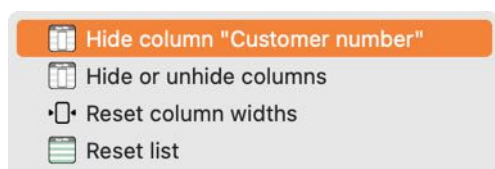


Contract	Contract number	Contractor	Customer number	Contacted for	Category
Allianz Garantieverlängerung...	DE999061329...				Privat
Auslandsreise-Krankenversic...	699/4157962...				
Bayer Beistandskasse			90021926 / 90170999		Krankenkasse
Gas (aktuell)	836630203883		6357297971		
Glasversicherung	22365384		90195319		Haus
Haus- und Wohnungsschutzb...	22365405		90195319		Haus
Haus- und Wohnungsschutzb...	22365430		90195319		Haus
Hausrat	AGF20398-23...	ADAC Italien + I...	A4-2093-KK-2290		Haus
Hunde-Haftpflichtversicherung	HHV-70005271			Pia	Privat
KFZ-Versicherung (ab Jahr 2...	663/417094-U				Auto
KIESER Training	33619			Renate	Privat
KIESER Training Detlef	33623			Detlef	Privat
Lebensversicherung	L 50.3303-28				Lebensversicheru...
Private Haftpflicht	22365413		90195319		Privat

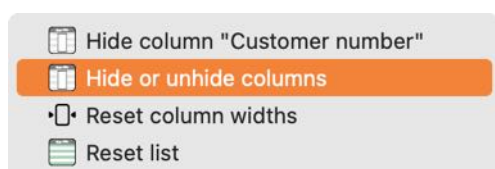
Show or hide columns

The current column can be hidden using the context menu.

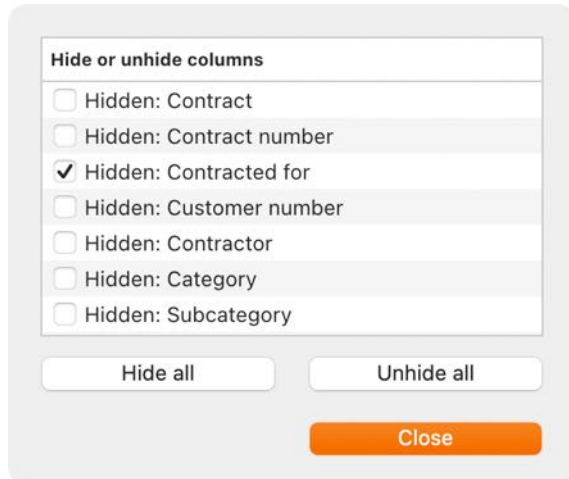
Mehrere Spalten können einfach über ein Options-Fester ein- oder ausgeblendet werden. Verwende



dazu "Spalten ein- oder ausblenden" aus dem Kontext-Menü.

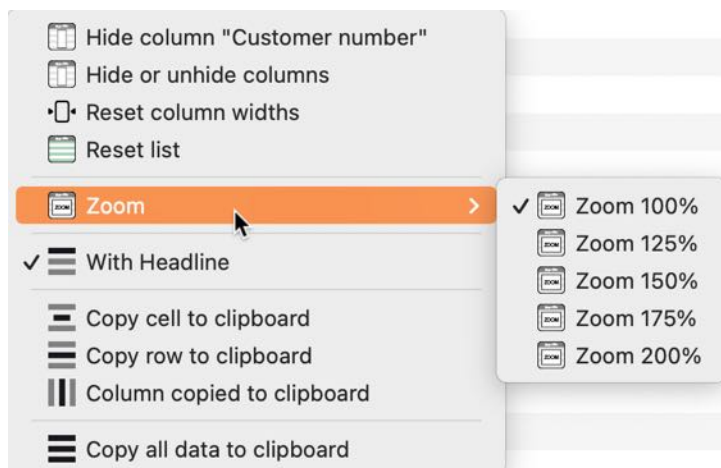


The columns that are shown and hidden are listed in their original order in the Options window.



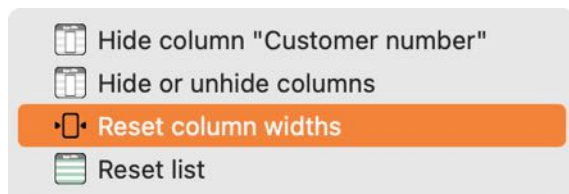
Adjust the size of the list

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%.



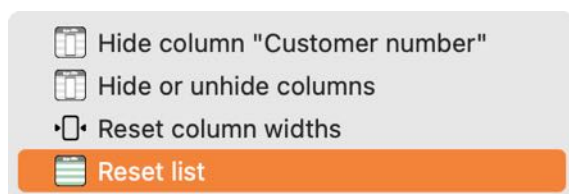
Spaltenbreiten zurücksetzen

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



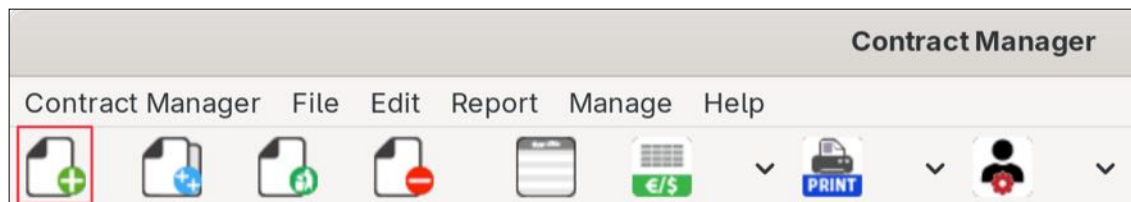
Reset list

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



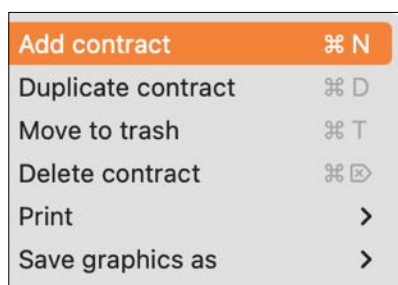
ADD NEW CONTRACT

To enter a new contract, click on the “Add” icon in the top left corner.

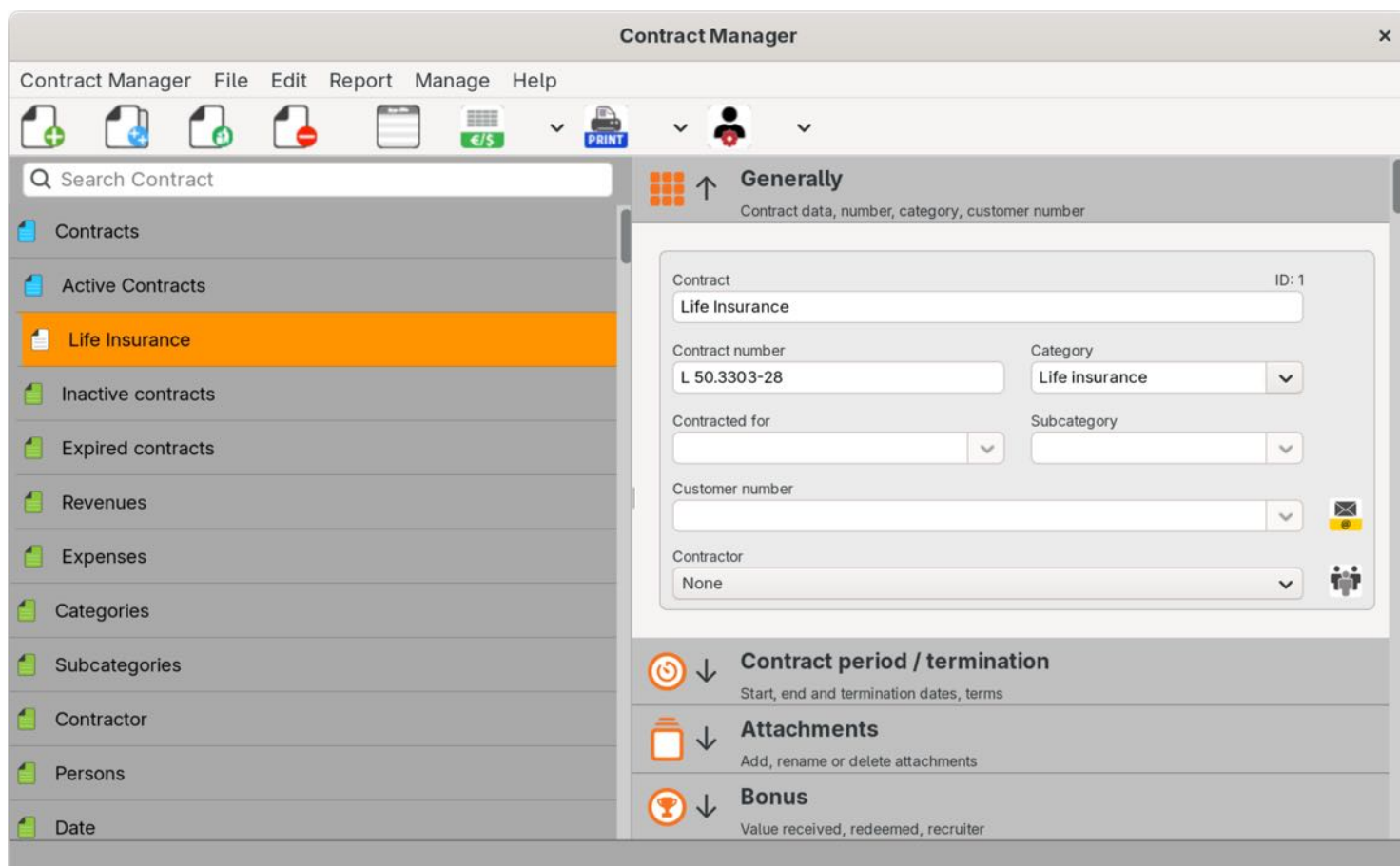


This can also be done via the “File” menu.

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.

Automatically calculate contract end and termination date

Order date ☒ 05/01/2021

Period of validity 1 None

Start Date ☒ 05/17/2021

Period of notice 6 None

End of contract ☒ 06/17/2021

Automatic renewal ☒

Termination Date ☒ 11/16/2021

jährlich Select sequence

Terminated on ☐

Deactivate contract ☐

Receive termination confirmation ☒

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

Terminated on ☐

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

Lebensversicherung Private Haftpflicht

Attachments Add, rename or delete attachments

Successful Record number «21» was saved • Allianz Garantieverlängerung iMac

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.

Automatically calculate contract end and termination date ☐

Order date ☐ Today

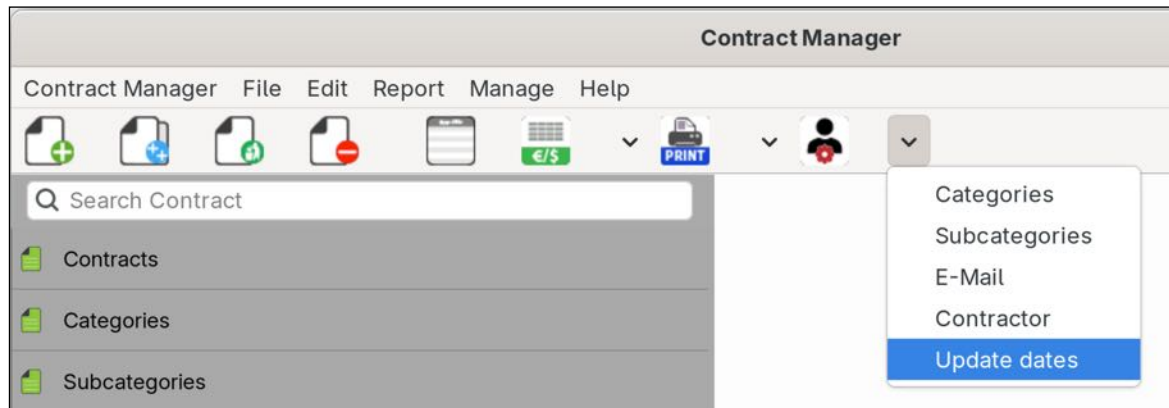
Period of validity 1 22 Event

Start Date ☒ 1/ 8/2023

Period of notice None

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

Update information on dates

The dates can be updated here for all contracts that meet the following conditions:

- A contract date must be entered
- A term must be selected and a number entered
- A notice period must be selected and a number entered
- Automatic renewal must be activated and a sequence entered
- No custom sequences may be entered
- Only standard sequences are supported
- The contract end date must be earlier than the current date

Contract period / termination

Start, end and termination dates, terms

☐ Automatically calculate contract end and termination date

Order date

☒ 8/ 3/2020

Start Date

☒ 8/ 4/2020

End of contract

☒ 8/10 /2021

Termination Date

☒ 8/10 /2021

Terminated on

☐

Period of validity

1 Months

Period of notice

1 Months

Automatic renewal

☒

Yearly

Select sequence

Deactivate contract

☐

Receive termination confirmation

☒

☒ Don't show this note again

Close

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

ID	Contract	Start Date	End of contract	Termination Date
4	Allgemeiner Hausrat	May 17, 2021	Aug 16, 2022	May 16, 2025
6	Glass insurance	Aug 4, 2020	Aug 10, 2021	Aug 10, 2021

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.

ID	Contract	Start Date	End of contract	New end of contract	Termination Date	New termination date
6	Glass insurance	Aug 4, 2020	Aug 10, 2021	Aug 10, 2025	Aug 10, 2021	Jul 10, 2025
4	Allgemeiner Hausrat	May 17, 2021	Aug 16, 2022	Aug 16, 2025	May 16, 2025	May 16, 2025

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.

Should the dates of the selected contracts be updated?

This action cannot be undone!

ATTENTION!

This action cannot be undone.

EDIT CONTRACT

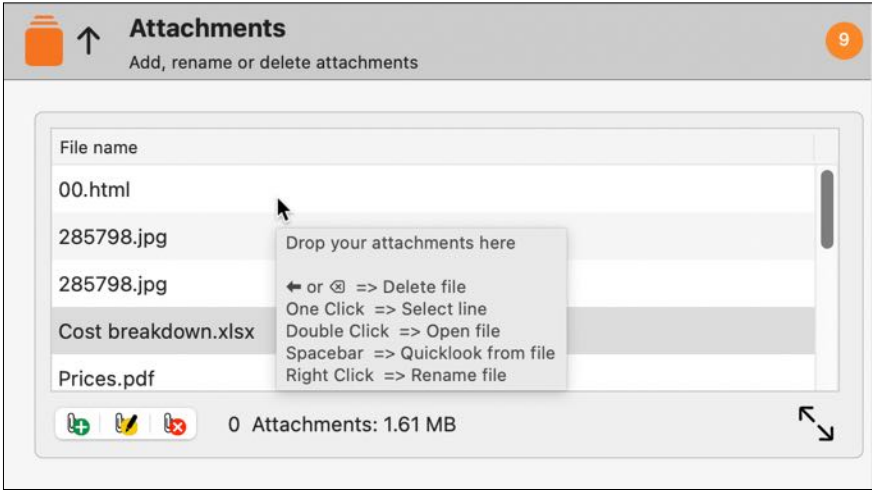
To modify an existing contract, select a contract from the list. Enter the desired changes in the respective sections.

	Generally Contract data, number, category, customer number
	Contract period / termination Start, end and termination dates, terms
	Attachments Add, rename or delete attachments
	Bonus Value received, redeemed, recruiter
	Payment information Method of payment, date, amount, reference number, direct debit
	Portal login User, Password, URL
	Notes Notes

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.



The attachments can also be opened in a separate window.



This window offers the following options for managing attachments:

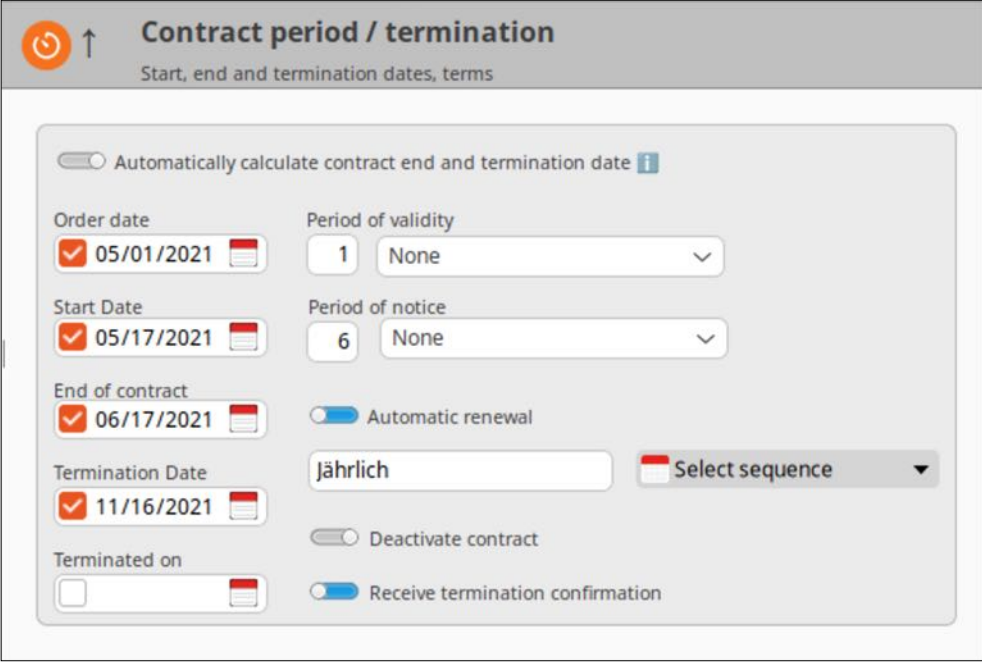
- Create new folder
- Add attachments
- Rename attachments/folders
- Delete attachments/folders
- Move attachments/folders

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.

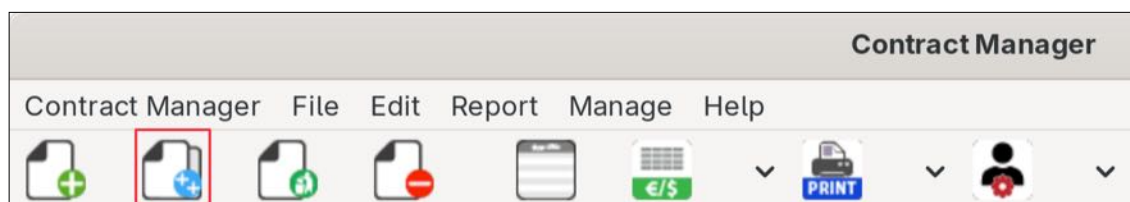


The screenshot shows the 'Contract period / termination' form. At the top, there is a title bar with a power icon and the text 'Contract period / termination' and 'Start, end and termination dates, terms'. Below this is a section with a toggle switch for 'Automatically calculate contract end and termination date'. The form contains several date pickers: 'Order date' (05/01/2021), 'Start Date' (05/17/2021), 'End of contract' (06/17/2021), and 'Termination Date' (11/16/2021). There are also dropdown menus for 'Period of validity' (1, None) and 'Period of notice' (6, None). A 'Select sequence' dropdown is set to 'Jährlich'. At the bottom, there are two toggle switches: 'Deactivate contract' (unchecked) and 'Receive termination confirmation' (checked).

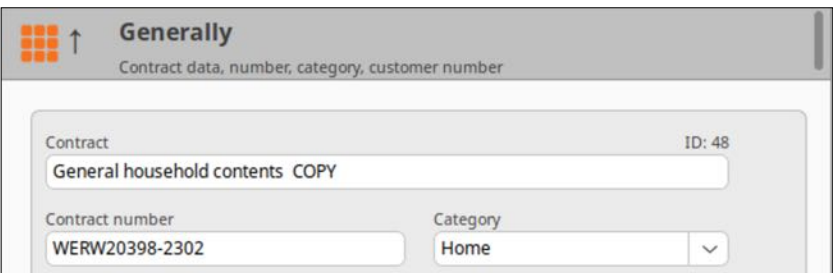
Once this field is checked, the contract will be moved to the “Inactive Contracts” section. It will also not appear in any lists or when printing. If you want to reactivate an inactive contract, uncheck the “Mark contract as inactive” box..

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.



The screenshot shows the 'Generally' form. It has a title bar with a power icon and the text 'Generally' and 'Contract data, number, category, customer number'. The form contains several input fields: 'Contract' (General household contents COPY), 'Contract number' (WERW20398-2302), and 'Category' (Home). There is also a label 'ID: 48' next to the 'Contract' field.

Any attachments to the selected contract will not be duplicated. In the [settings](#), you can specify whether the contract partner should also be copied.

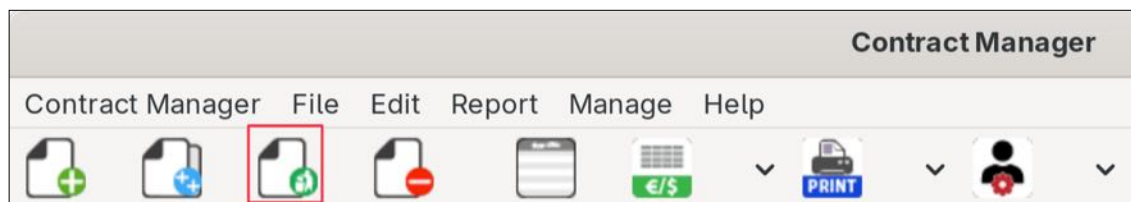
MOVE CONTRACT TO TRASH

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

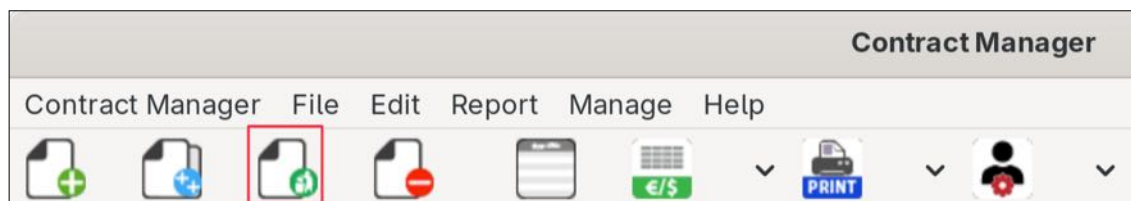
To move a contract to the trash, select a contract from the list and click on “Trash” in the toolbar menu.



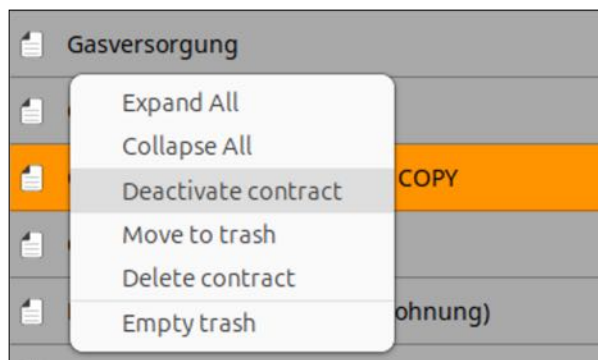
RESTORE CONTRACT FROM TRASH

To restore a contract from the Recycle Bin, select a contract from the list and click “Recycle Bin” in the toolbar menu.

Or select “Restore from Recycle Bin” from the context menu.



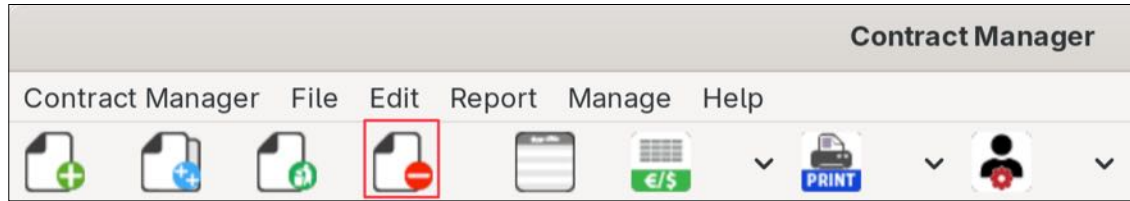
If the restored contract was marked as “inactive,” it will be moved to the “Inactive Contracts” section. If



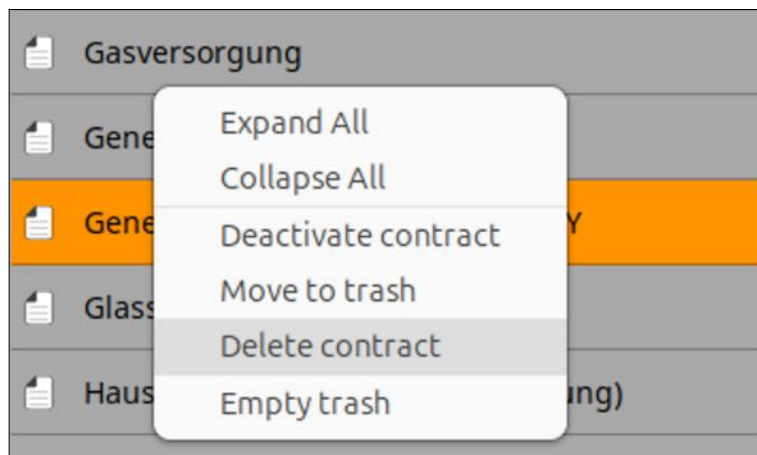
this is not the case, it will be moved to the “Active Contracts” section.

DELETE CONTRACT FROM TRASH

To delete a contract from the trash, select a contract and click “Delete” in the toolbar menu.

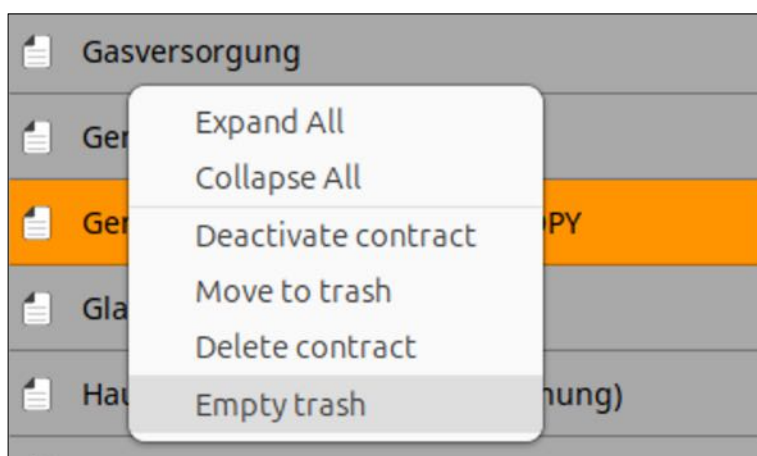


Or select “Delete contract” from the context menu.



EMPTY TRASH

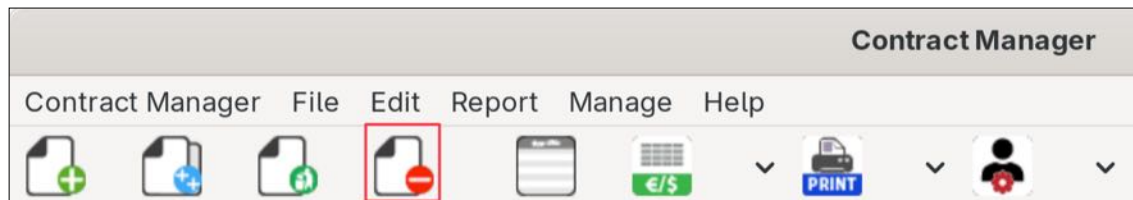
Select “Empty trash” from the context menu to completely empty the trash and delete all contracts it contains.



Deleting individual contracts and emptying the trash cannot be undone!

DELETE CONTRACT

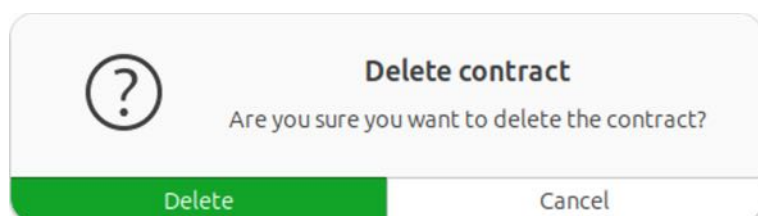
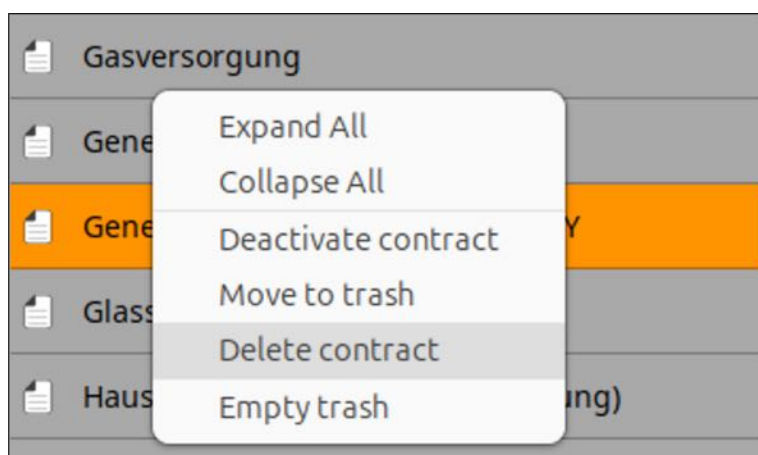
To delete a contract, select a contract from the list and click "Delete" in the toolbar menu.



Or use the menu "File => Delete contract".



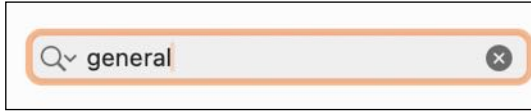
You can also use the context menu to delete a contract.



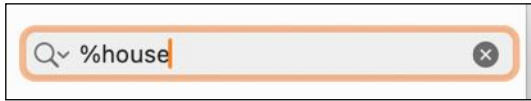
Deleting a contract cannot be undone!

SEARCH CONTRACT

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

A screenshot of a search input field. It has a light gray background with a thin orange border. Inside, the word "general" is typed in a dark gray font. To the left of the text is a small magnifying glass icon, and to the right is a small circular icon with an 'x' inside, used for clearing the search.

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.

A screenshot of a search input field, similar to the one above. It has a light gray background with a thin orange border. Inside, the text "%house" is typed in a dark gray font. To the left of the text is a small magnifying glass icon, and to the right is a small circular icon with an 'x' inside, used for clearing the search.

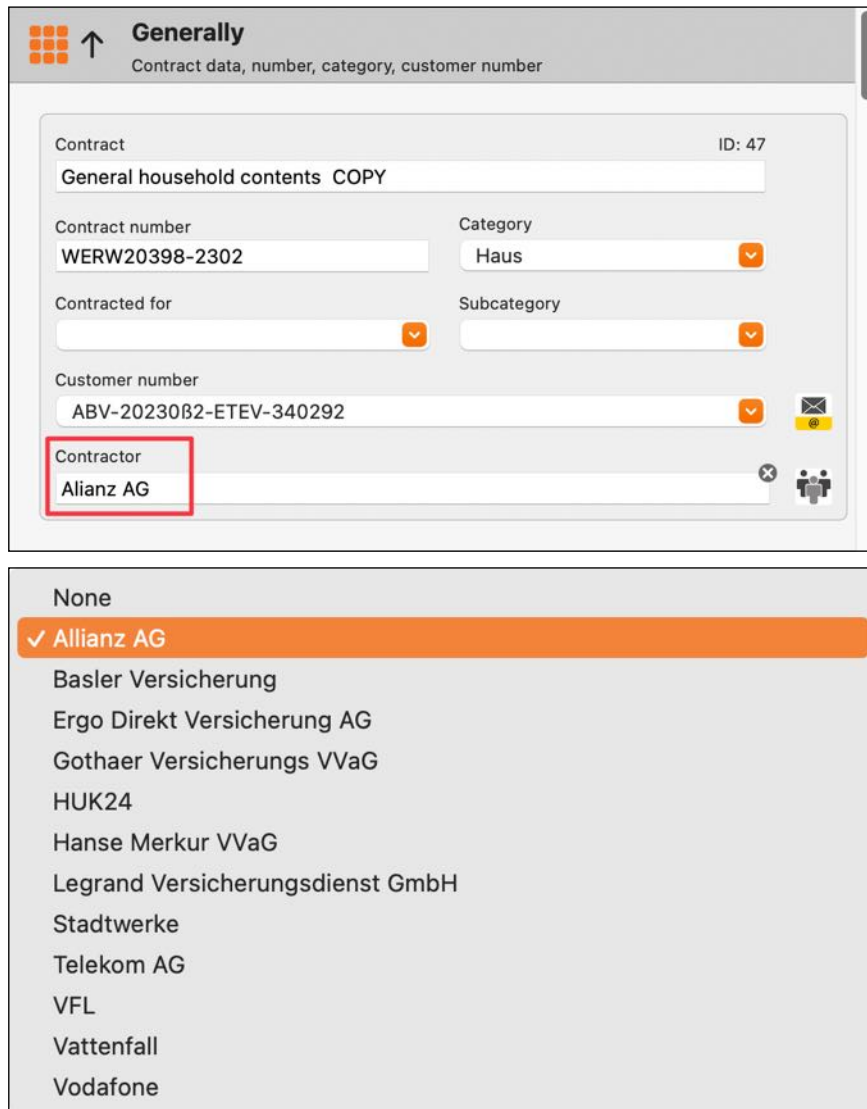
The following fields are included in the search:

- 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

You can manage your contract partners and agents directly using the “Contract Manager.” Select an entry from the pop-up menu.



Generally
Contract data, number, category, customer number

Contract ID: 47
General household contents COPY

Contract number: WERW20398-2302
Category: Haus

Contracted for:
Subcategory:

Customer number: ABV-20230B2-ETEV-340292

Contractor: Allianz AG

None

✓ Allianz AG

Basler Versicherung

Ergo Direkt Versicherung AG

Gothaer Versicherungs VVaG

HUK24

Hanse Merkur VVaG

Legrand Versicherungsdienst GmbH

Stadtwerke

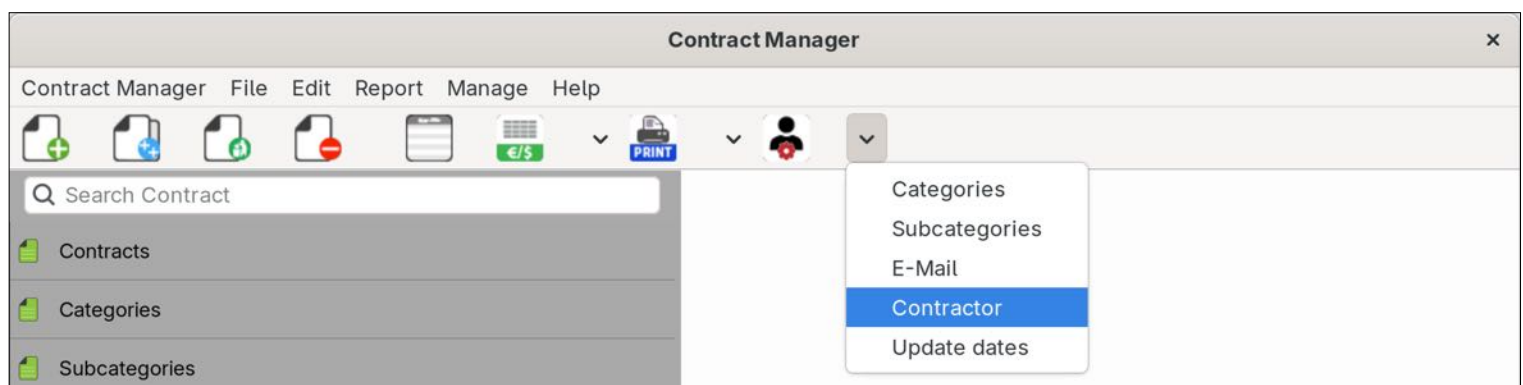
Telekom AG

VFL

Vattenfall

Vodafone

To manage the contacts in the “Contract Manager,” click on “Manage” and “Contract Partners” in the toolbar menu.



Contract Manager

Contract Manager File Edit Report Manage Help

Search Contract

Contracts

Categories

Subcategories

Categories

Subcategories

E-Mail

Contractor

Update dates

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).

The screenshot shows the "Contractor" window. On the left is a list of contractors with their assigned contract counts. The "Gothaer Versicherungs ..." entry is highlighted. On the right is a detailed form for the selected contractor, "Gothaer Versicherungs WaG".

Contractor	Count
ADAC e.V.	0
Allianz Deutschland AG	1
Basler Versicherung	5
Ergo Direkt Versicherung ...	0
Gothaer Versicherungs ...	1
HUK24	1
Hanse Merkur WaG	0
Hanse Merkur WaG	0
Legrand Versicherungsdie...	1
Neuer Vertragspartner	0
Nicolas Dornweier	0

Contractor Details:

- Name / Company: Gothaer Versicherungs WaG
- Street: Gereonswall 68
- ZIP: 50670, City: Köln
- Country:
- Phone: +49 89-55987210, Fax: +49 221 - 1636 - 1098
- E-mail: info@envivas.de, URL:

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".

The screenshot shows the "Contractor" window with a search filter applied. The search field contains "huk", and the list on the left is filtered to show only "HUK24" with a count of 1.

Contractor	Count
HUK24	1

If you want to search for a contract partner that contains a specific text, enter a % sign before the search text.

Add contract partner

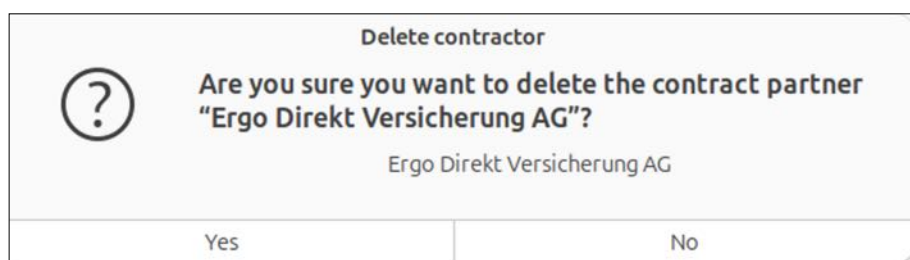
Click on the "Add contract partner" icon and enter the necessary values in the corresponding fields. All changes are saved automatically.

Duplicate contract partner

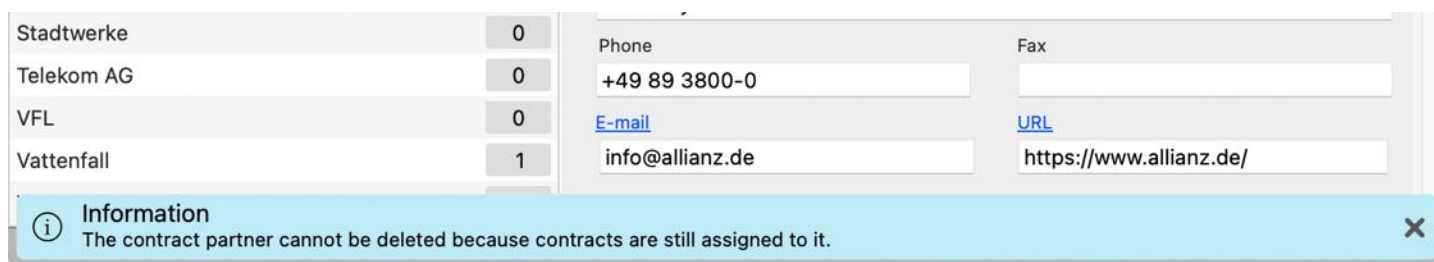
Select a contract partner from the list and click on the "Duplicate contract partner" icon. Change the necessary values in the corresponding fields. All changes are saved automatically.

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.



Import contract partners via a vCard file

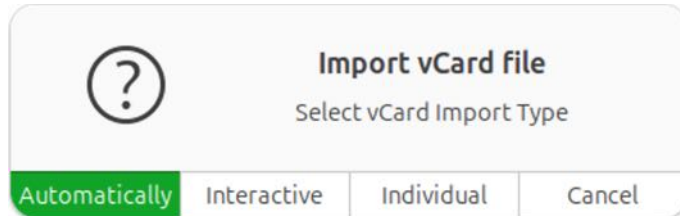
To do this, click on the "Import vCard" icon in the toolbar menu.



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

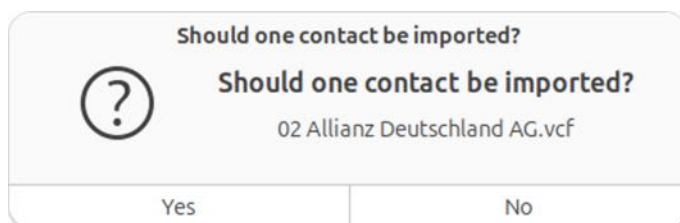
- Automatically (recommended option)
- Interactive
- Individual

Option: Automatically



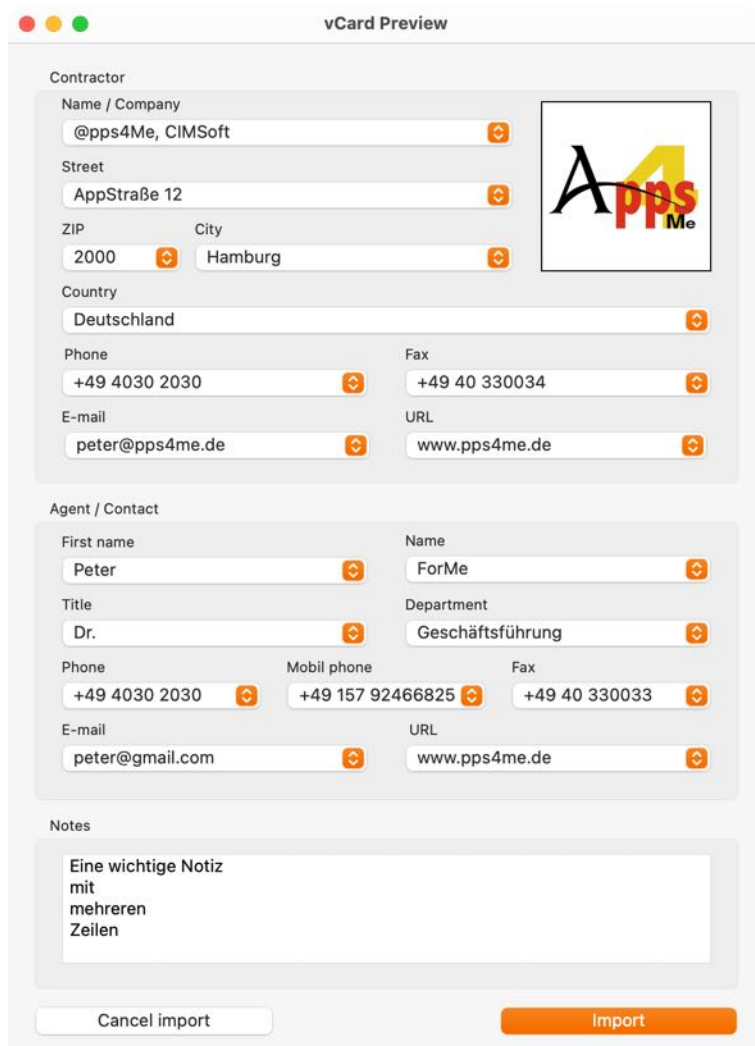
A dialog box titled "Import vCard file" with a subtitle "Select vCard Import Type". It features a question mark icon in a circle. Below the title, there are four buttons: "Automatically" (highlighted in green), "Interactive", "Individual", and "Cancel".

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



A dialog box titled "Should one contact be imported?" with a subtitle "Should one contact be imported?". It features a question mark icon in a circle. Below the title, the text "02 Allianz Deutschland AG.vcf" is displayed. At the bottom, there are two buttons: "Yes" and "No".

Now you can see the vCard preview. Click on "Import". The selected contact will be entered as a new contract partner.



A window titled "vCard Preview" showing the details of a vCard. It is divided into two main sections: "Contractor" and "Agent / Contact".

Contractor section:

- Name / Company: @pps4Me, CIMSoft
- Street: AppStraße 12
- ZIP: 2000, City: Hamburg
- Country: Deutschland
- Phone: +49 4030 2030, Fax: +49 40 330034
- E-mail: peter@pps4me.de, URL: www.pps4me.de

Agent / Contact section:

- First name: Peter, Name: ForMe
- Title: Dr., Department: Geschäftsführung
- Phone: +49 4030 2030, Mobil phone: +49 157 92466825, Fax: +49 40 330033
- E-mail: peter@gmail.com, URL: www.pps4me.de

Notes section:

Eine wichtige Notiz mit mehreren Zeilen

At the bottom, there are two buttons: "Cancel import" and "Import".

Option interactive

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

The screenshot shows the 'Agent / Contact' form with the following fields and values:

- First name: Peter
- Name: ForMe
- Title: Dr.
- Department: Geschäftsführung
- Phone: +49 4030 2030
- Mobil phone: +49 157 92466825
- Fax: +49 40 330033
- E-mail: peter@gmail.com
- URL: A pop-up menu is open showing three options:
 - ✓ www.pps4me.de (selected)
 - www.peter.com
 - http://www.peterApps.net

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.

The screenshot shows the 'vCard Preview Individual' window with two main panels:

- Assign Import Fields:** This panel shows the vCard data being imported. The fields are:
 - Contractor Name / Company: FN:@pps4Me, CIMSoft
 - Street: ADR,type=WORK,type=pref;;;AppStraße 12;Hamb...
 - ZIP: ADR,typ... City: ADR,type=WORK,type=pref;;;App...
 - Country: ADR,type=WORK,type=pref;;;AppStraße 12;Hamburg;;;2000;Deutschland
 - Phone: TEL,type=CELL,type=VOICE;typ... Fax: TEL,type=HOME,type=FAX;+49...
 - E-mail: EMAIL,type=INTERNET,type=W... URL: URL,type=HOME:www.peter.com
- Preview:** This panel shows the vCard data as it will appear in the system. The fields are:
 - Contractor Name / Company: @pps4Me, CIMSoft
 - Street: AppStraße 12
 - ZIP: 2000 City: Hamburg
 - Country: Deutschland
 - Phone: +49 157 92466825 Fax: +49 40 330034
 - E-mail: peter@gmail.com URL: URL,type=HOME:www.peter.com

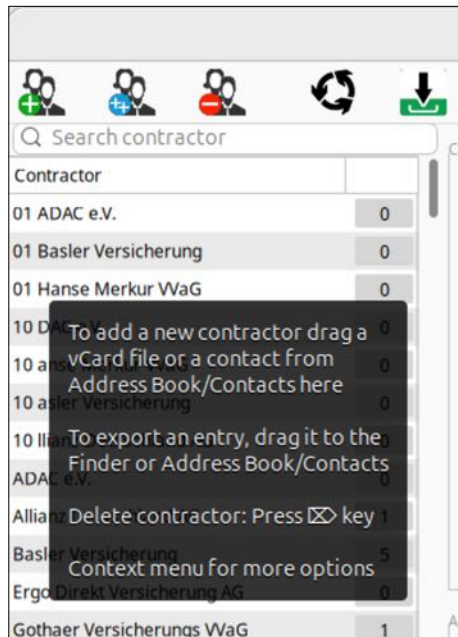
Below these panels, there is an 'Agent / Contact' form with the following fields and values:

- First name: N:ForMe;Peter;;Dr.;
- Name: N:ForMe;Peter;;Dr.;
- Title: N:ForMe;Peter;;Dr.;
- Department: ORG:@pps4Me, CIMSoft;Gesc...
- Phone: TEL,type=WORK;t... Mobil phone: TEL,type=APPLE... Fax: TEL,type=WORK;t...
- E-mail: EMAIL,type=INTERNET,type=W... URL: URL,type=WORK,type=pref:ww...

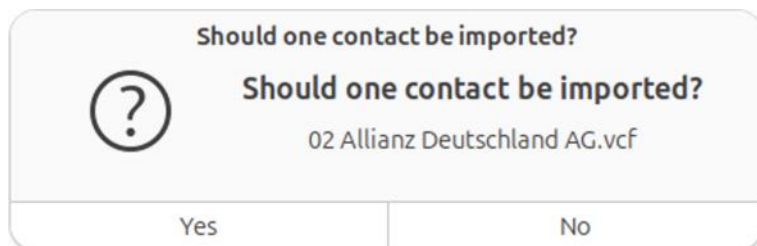
At the bottom, there is a 'Notes' field with the text: 'NOTE:Eine wichtige Notiz\nmit\nmehreren\nZeilen'. Below the notes field are two buttons: 'Cancel import' and 'Import'.

Import contract partners via drag and drop

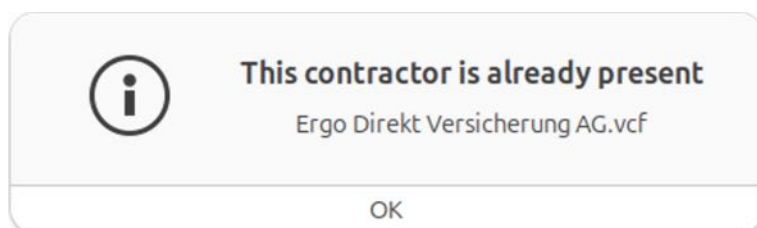
To do this, drag a vCard file or a vCard into the contract partner list.



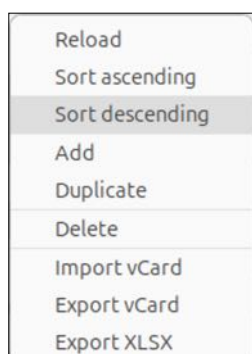
The selected contact will be added as a new contract partner. If the vCard file contains multiple contacts, all contacts in the file will be imported.



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

Save as vCard file

Select folder for vCard file

Save As: @pps4Me, CIMSoft

Tags:

Where: Desktop — iCloud

Cancel Save

of contract partners to the desktop or any folder in Finder.

Add

Duplicate

Delete

Reload

Sort ascending

ADAC e.V.	0
Basler Versicherung	4
Ergo Direkt Versicherung AG	0
Gothaer Versicherung @ VaG	2
Hanse Merkur VVaG	0
Legrand Versicherungsdienst GmbH	1
VFL	0
Vattenfall	1
Vodafone	1

EXPORT ALL CONTRACT PARTNERS AS CSV FILE

To do this, click on the “Export” icon in the toolbar menu and select “Export CSV”.



Select a location to save the CSV file. The parameters for the CSV format can be configured in the [settings](#).

CSV file

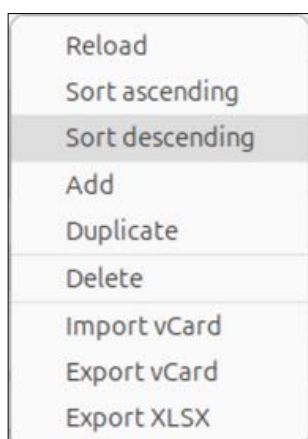
Enter a file name or select a XLSX file

Save As:

Tags:

Where:

All available fields for the contract partner are exported. All functions are also available via the context menu.



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.

XLSX file

Enter a file name or select a XLSX file

Save As:

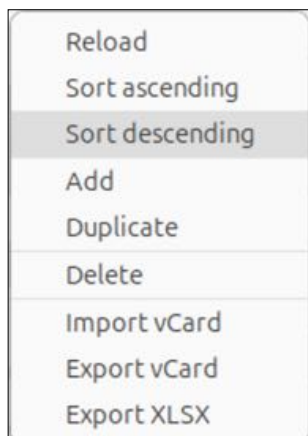
Tags:

Where: Desktop — iCloud ↕ ▼

Cancel Save

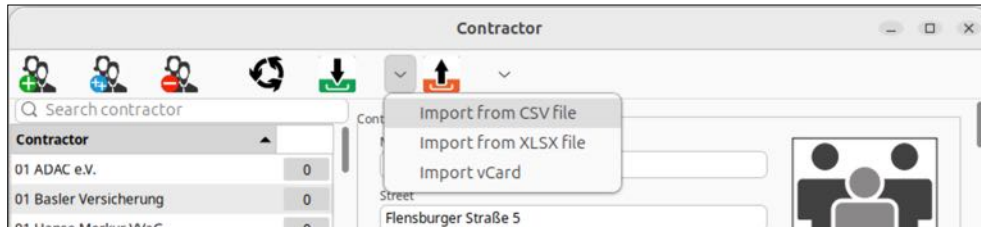
All fields for email and URL are exported with a hyperlink (mailto:, https://).

All features are also available via the context menu.

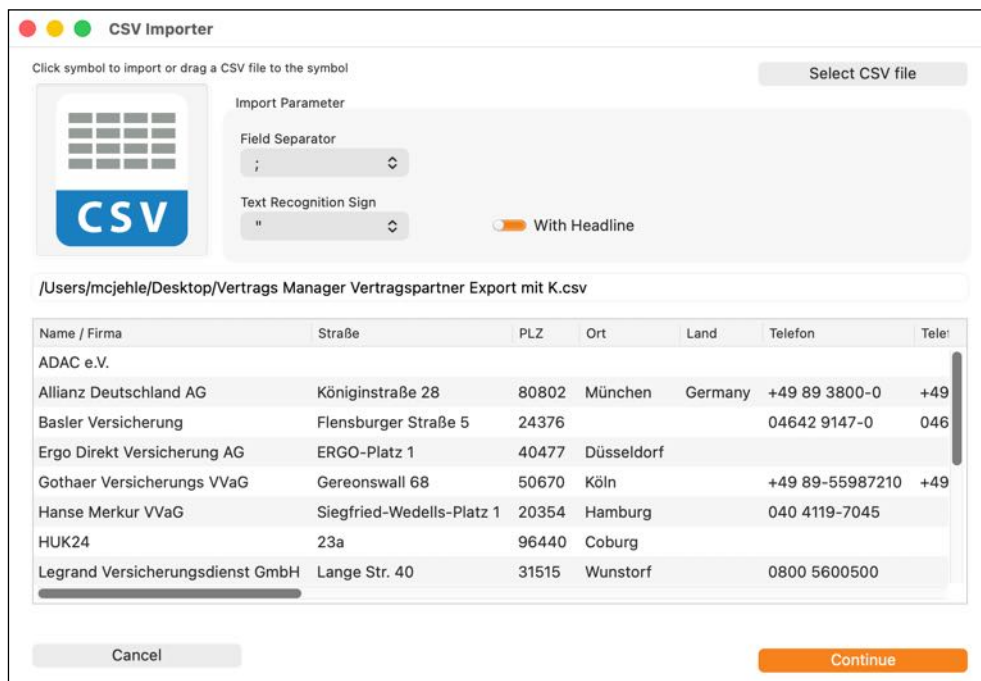
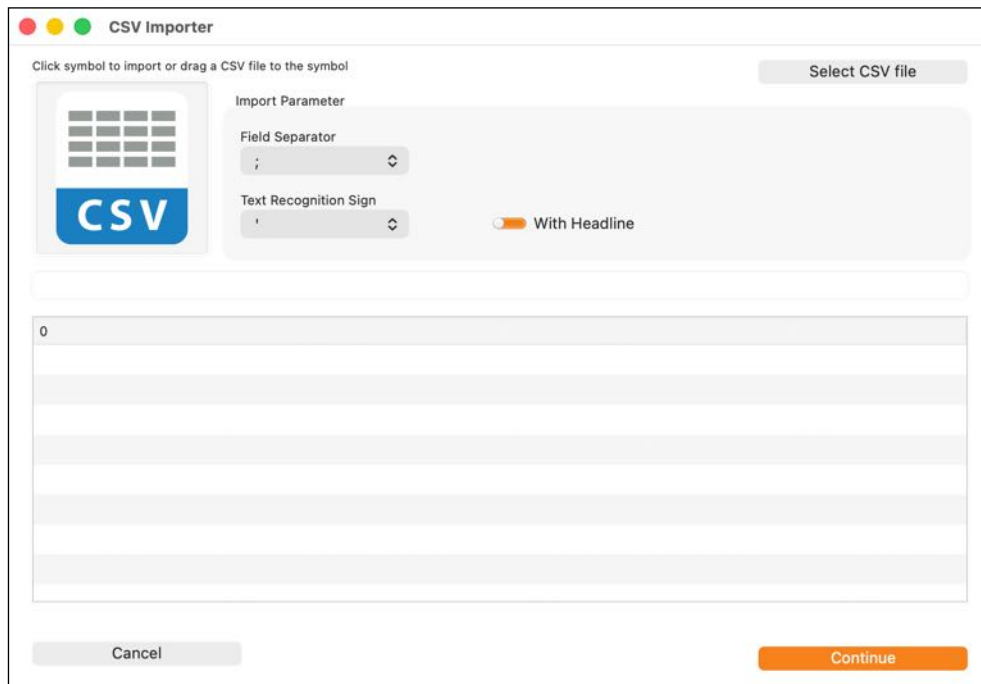


IMPORT CONTRACT PARTNER FROM CSV FILE

To do this, click the "Import" icon in the toolbar menu and select "Import from CSV file".



Select a CSV file or drag a file from the Finder onto the "CSV" icon. A preview of the CSV file will now be displayed. Click "Continue".



In this window, you can map the individual columns. You can either map them all at once (if the number and order match) or map each field using drag-and-drop.

Now click on "Preview CSV Import".

Preview CSV Import

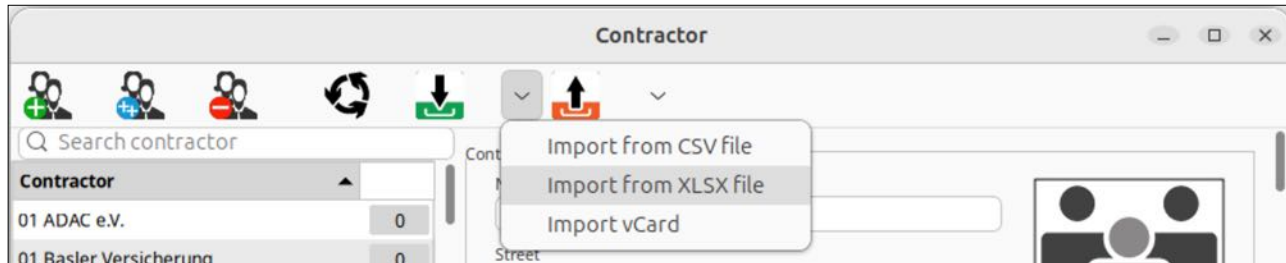
Name / Company	Street	ZIP	City
ADAC e.V.			
Allianz Deutschland AG	Königinstraße 28	80802	München
Basler Versicherung	Flensburger Straße 5	24376	
Ergo Direkt Versicherung AG	ERGO-Platz 1	40477	Düsseldorf
Gothaer Versicherungs VVaG	Gereonswall 68	50670	Köln
Hanse Merkur VVaG	Siegfried-Wedells-Platz 1	20354	Hamburg
Hanse Merkur VVaG	Willy-Brand-Platz 1	70113	Stuttgart
HUK24	23a	96440	Coburg

Cancel Import into database

Click "Import into the database." Entries that already exist will not be imported. To do this, the "Name / Company" and "City" fields are compared.

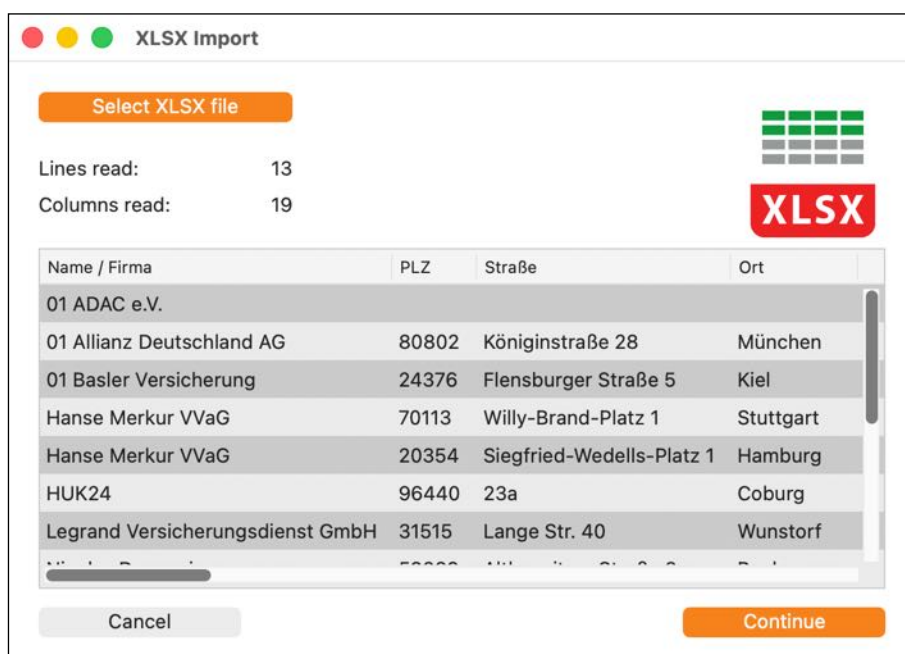
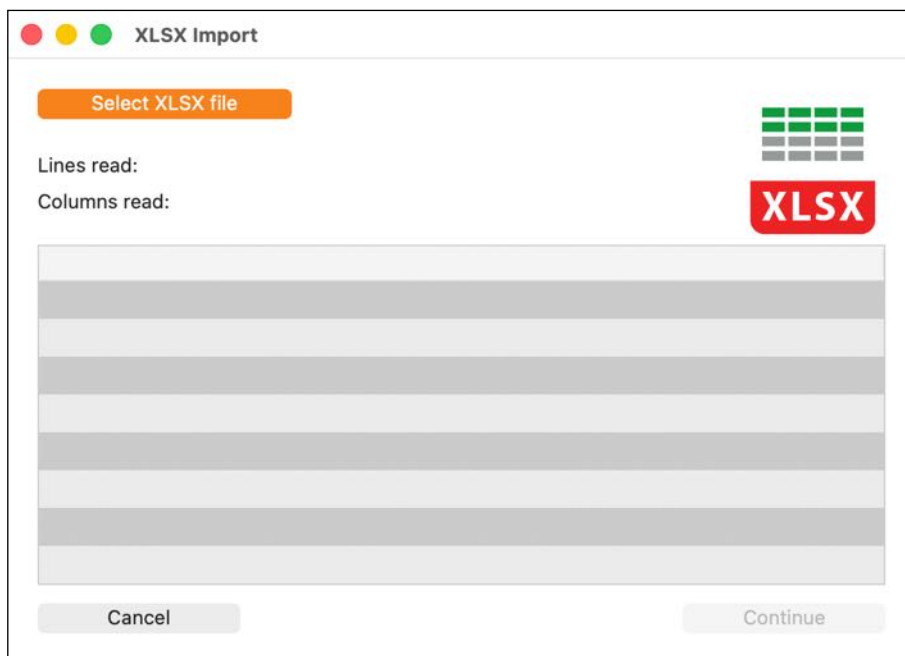
IMPORT CONTRACT PARTNER FROM EXCEL® XLSX FILE

To do this, click the "Import" icon in the toolbar menu and select "Import from XLSX file".

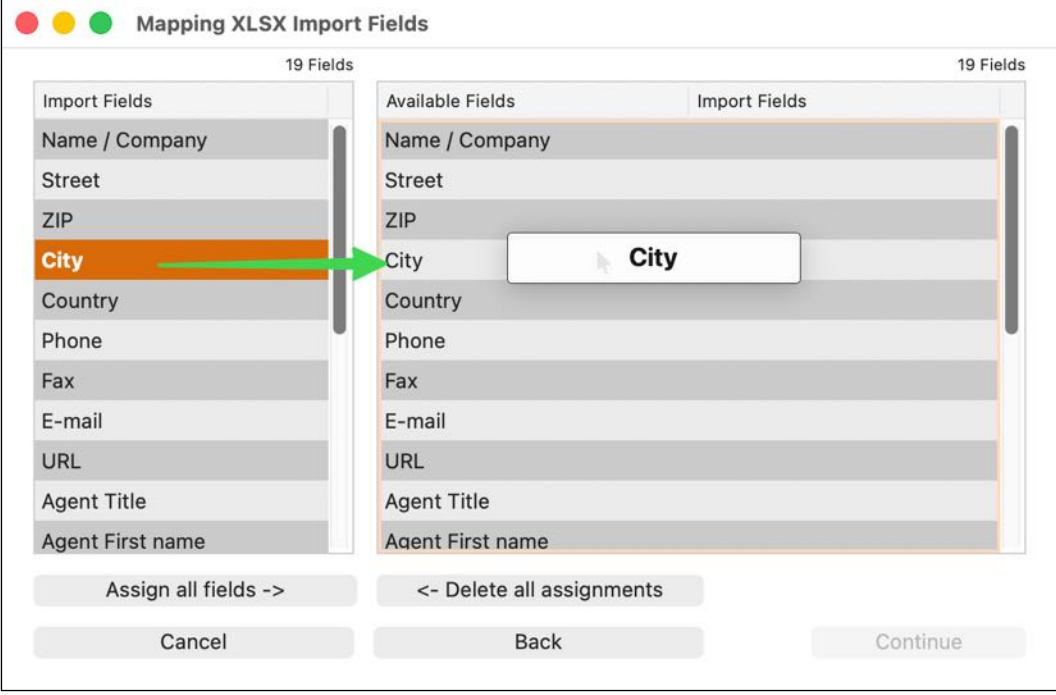


Select an Excel® XLSX file or drag a file from the Finder onto the "XLSX" icon.

Now click "Continue".

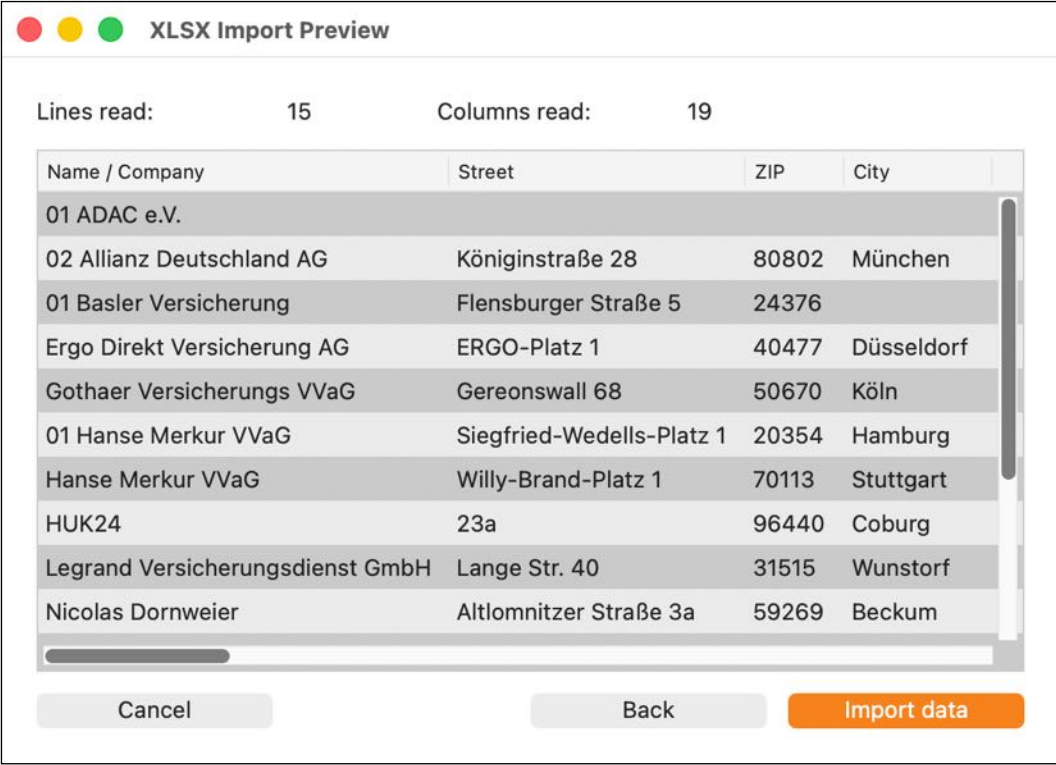


In this window, you can map the individual columns. You can either map them all at once (if the number and order match) or map each field using drag-and-drop.



The dialog box titled "Mapping XLSX Import Fields" shows two lists of 19 fields. The "Import Fields" list on the left and the "Available Fields" list on the right both contain: Name / Company, Street, ZIP, City, Country, Phone, Fax, E-mail, URL, Agent Title, and Agent First name. A green arrow points from the "City" field in the "Import Fields" list to the "City" field in the "Available Fields" list. Below the lists are buttons for "Assign all fields ->", "<- Delete all assignments", "Cancel", "Back", and "Continue".

Now click "Continue".

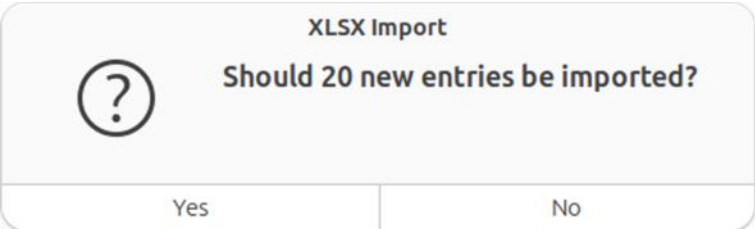


The dialog box titled "XLSX Import Preview" displays the data to be imported. It shows "Lines read: 15" and "Columns read: 19". The data is presented in a table with the following columns: Name / Company, Street, ZIP, and City.

Name / Company	Street	ZIP	City
01 ADAC e.V.			
02 Allianz Deutschland AG	Königinstraße 28	80802	München
01 Basler Versicherung	Flensburger Straße 5	24376	
Ergo Direkt Versicherung AG	ERGO-Platz 1	40477	Düsseldorf
Gothaer Versicherungs VVaG	Gereonswall 68	50670	Köln
01 Hanse Merkur VVaG	Siegfried-Wedells-Platz 1	20354	Hamburg
Hanse Merkur VVaG	Willy-Brand-Platz 1	70113	Stuttgart
HUK24	23a	96440	Coburg
Legrand Versicherungsdienst GmbH	Lange Str. 40	31515	Wunstorf
Nicolas Dornweier	Altlomnitzer Straße 3a	59269	Beckum

At the bottom of the dialog are buttons for "Cancel", "Back", and "Import data".

Finally, click "Import Data".



The dialog box titled "XLSX Import" asks the question "Should 20 new entries be imported?". It features a question mark icon on the left and two buttons at the bottom: "Yes" and "No".

REMOVE CONTRACT PARTNER FROM CONTRACT

To remove a contractual partner from the contract, select "None" from the pop-up menu.

Generally
Contract data, number, category, customer number

Contract ID: 47
General household contents COPY

Contract number: WERW20398-2302
Category: Haus

Contracted for:
Subcategory:

Customer number: ABV-20230B2-ETEV-340292

Contractor: None

SEND E-MAIL NOTIFICATION TO CONTRACT PARTNER

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

The following options are available:

Customer number: 20230B2-ETEV-340292

Contractor: Allianz Deutschland AG

Click to show menu

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

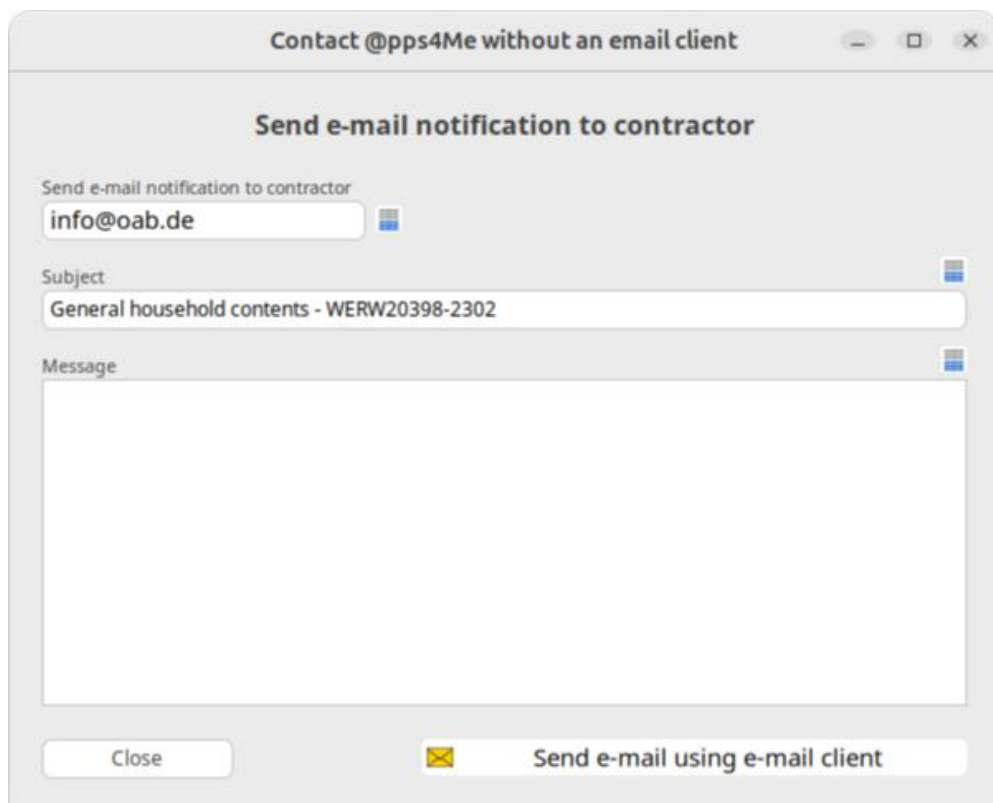
Send e-mail notification to contractor

Send contract change notification to contractor

Send contract termination notification to contractor

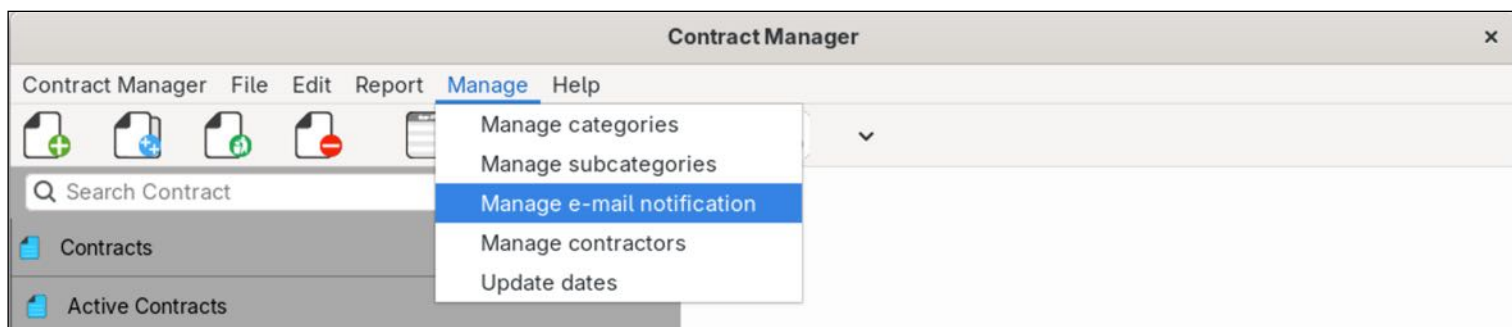
2. E-mail for a contract change (new address) with the contract name and contract number in the subject line
3. E-mail for contract termination with the contract name and contract number in the subject line

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

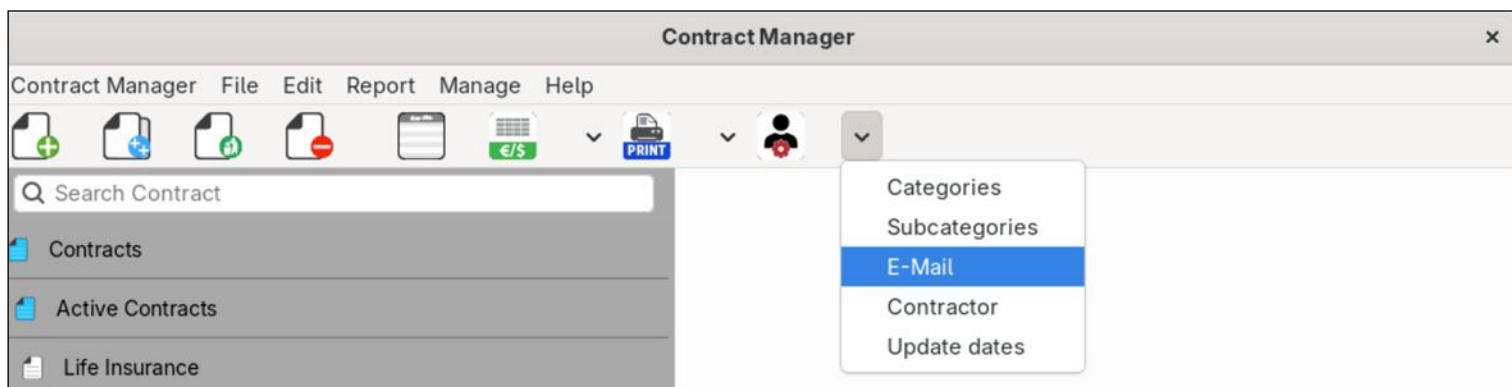


MANAGE E-MAIL NOTIFICATION

If you want to change the predefined text, select "Manage => Manage e-mail notifications" from the menu.

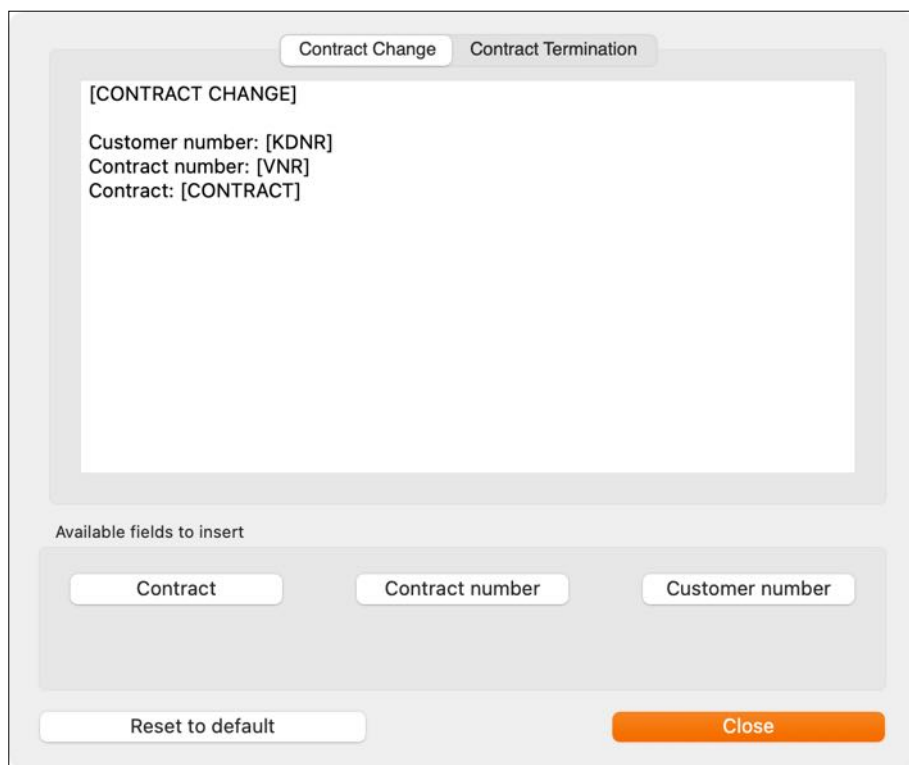


Or click on the "Email" icon in the toolbar menu.



You can customize the text in the following window.

Contract change



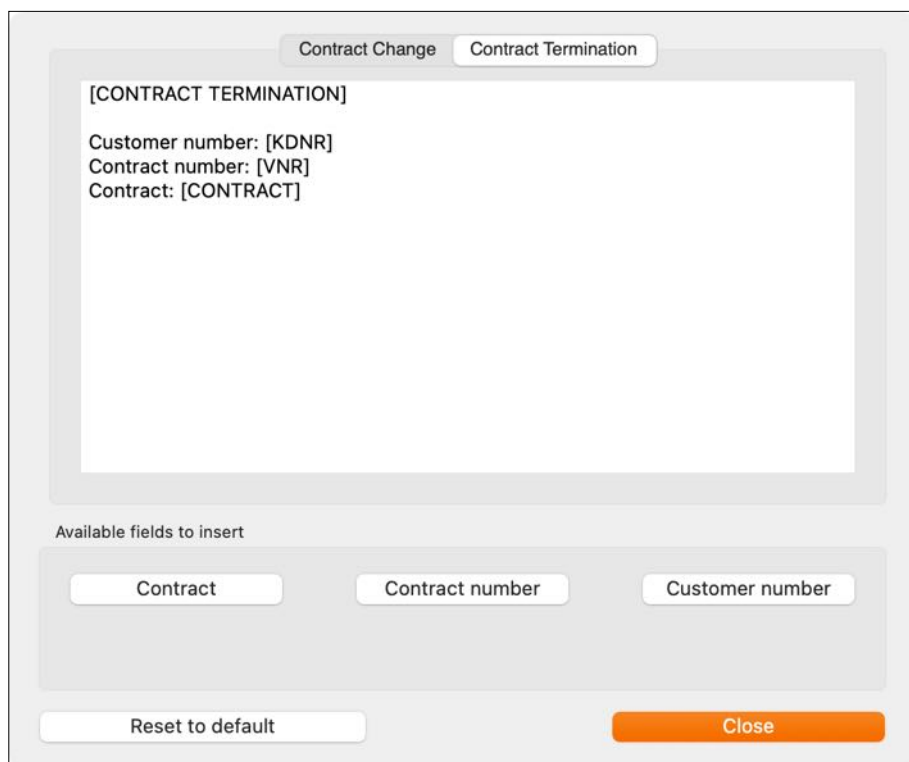
The screenshot shows a window titled 'Contract Change' with two tabs: 'Contract Change' (selected) and 'Contract Termination'. The main text area contains the following text:

```
[CONTRACT CHANGE]

Customer number: [KDNR]
Contract number: [VNR]
Contract: [CONTRACT]
```

Below the text area is a section titled 'Available fields to insert' containing three buttons: 'Contract', 'Contract number', and 'Customer number'. At the bottom of the window are two buttons: 'Reset to default' and 'Close'.

Contract termination



The screenshot shows a window titled 'Contract Termination' with two tabs: 'Contract Change' and 'Contract Termination' (selected). The main text area contains the following text:

```
[CONTRACT TERMINATION]

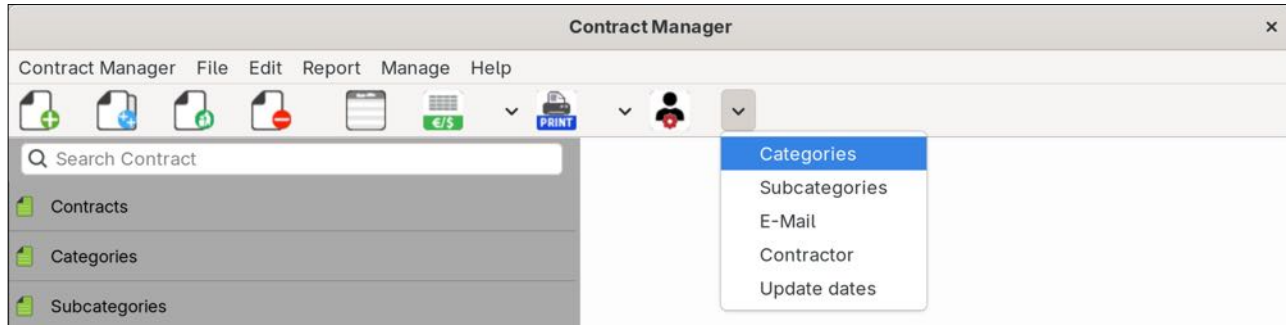
Customer number: [KDNR]
Contract number: [VNR]
Contract: [CONTRACT]
```

Below the text area is a section titled 'Available fields to insert' containing three buttons: 'Contract', 'Contract number', and 'Customer number'. At the bottom of the window are two buttons: 'Reset to default' and 'Close'.

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 add, edit or delete categories, select "Manage" and "Categories" in the toolbar menu.



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,

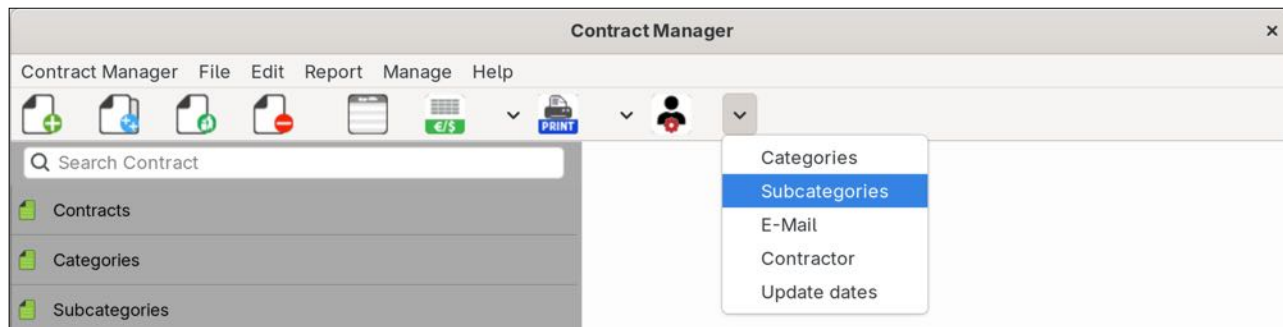
Manage categories
Manage subcategories

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	
11 Categories	
Search category	
Auto	1
Gesundheit	2
Haus	0
Haus 2	2
Home	2
Kommunikation	1
Krankenkasse	0
Lebensversicherung	1
Privat	2
Rechtsschutz	0
Versicherung	0

MANAGE SUBCATEGORIES

To add, edit or delete subcategories, select “Manage” and “Subcategories” in the toolbar menu.

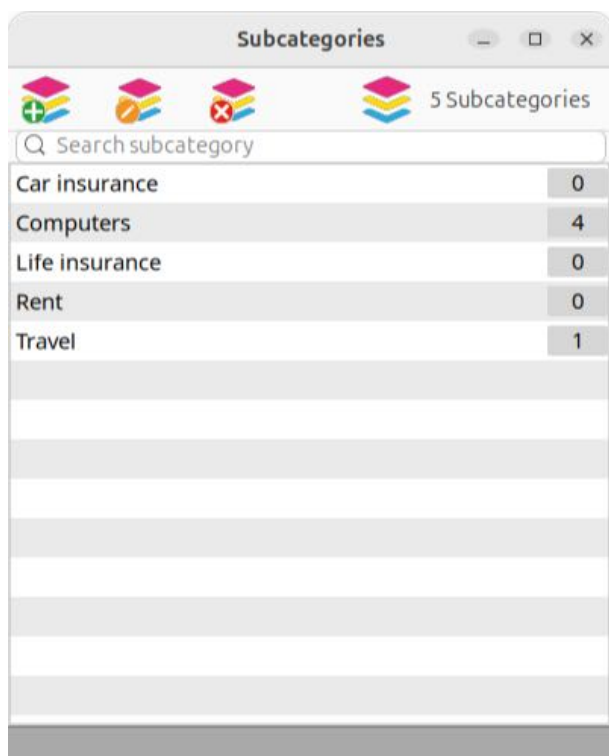


Or select “Categories => Manage subcategories” from the menu.

Manage categories

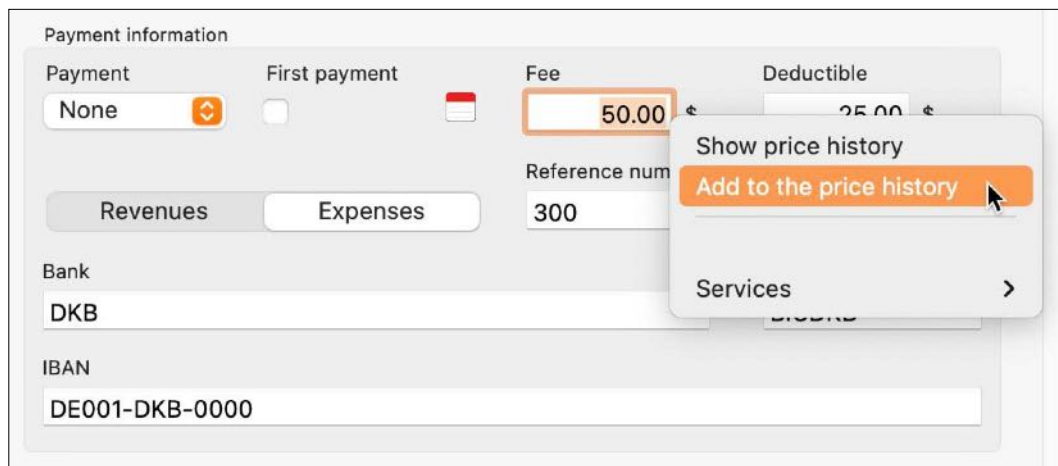
Manage subcategories

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).



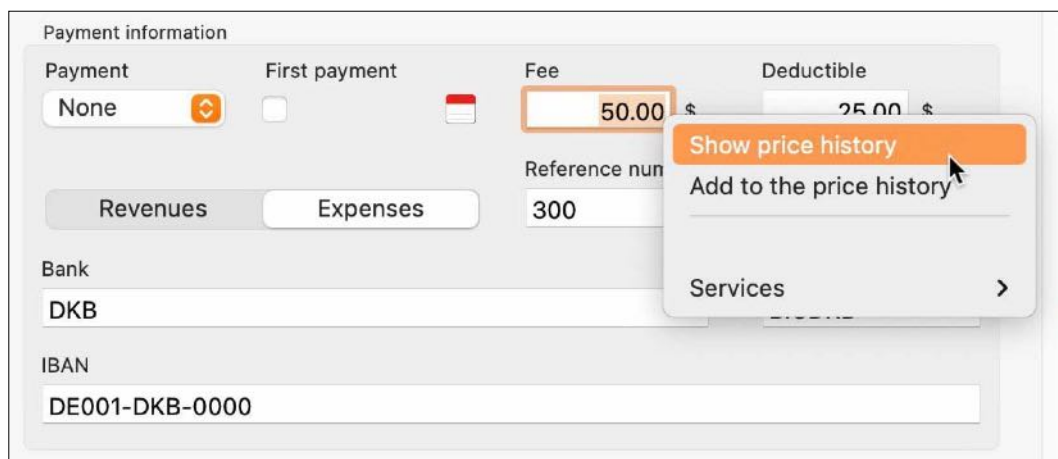
ADD PRICE INCREASES TO HISTORY

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.



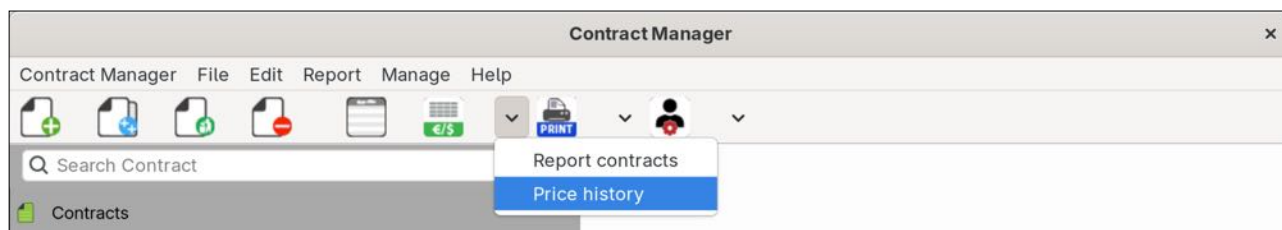
The screenshot shows the 'Payment information' form. The 'Fee' field is highlighted with a value of 50.00 €. A context menu is open over the 'Fee' field, showing options: 'Show price history', 'Add to the price history' (highlighted in orange), and 'Services'. The form also includes fields for 'Payment' (None), 'First payment', 'Deductible' (25.00 €), 'Reference num' (300), 'Bank' (DKB), and 'IBAN' (DE001-DKB-0000). There are tabs for 'Revenues' and 'Expenses'.

To view the price history, select the context menu "Show price history".

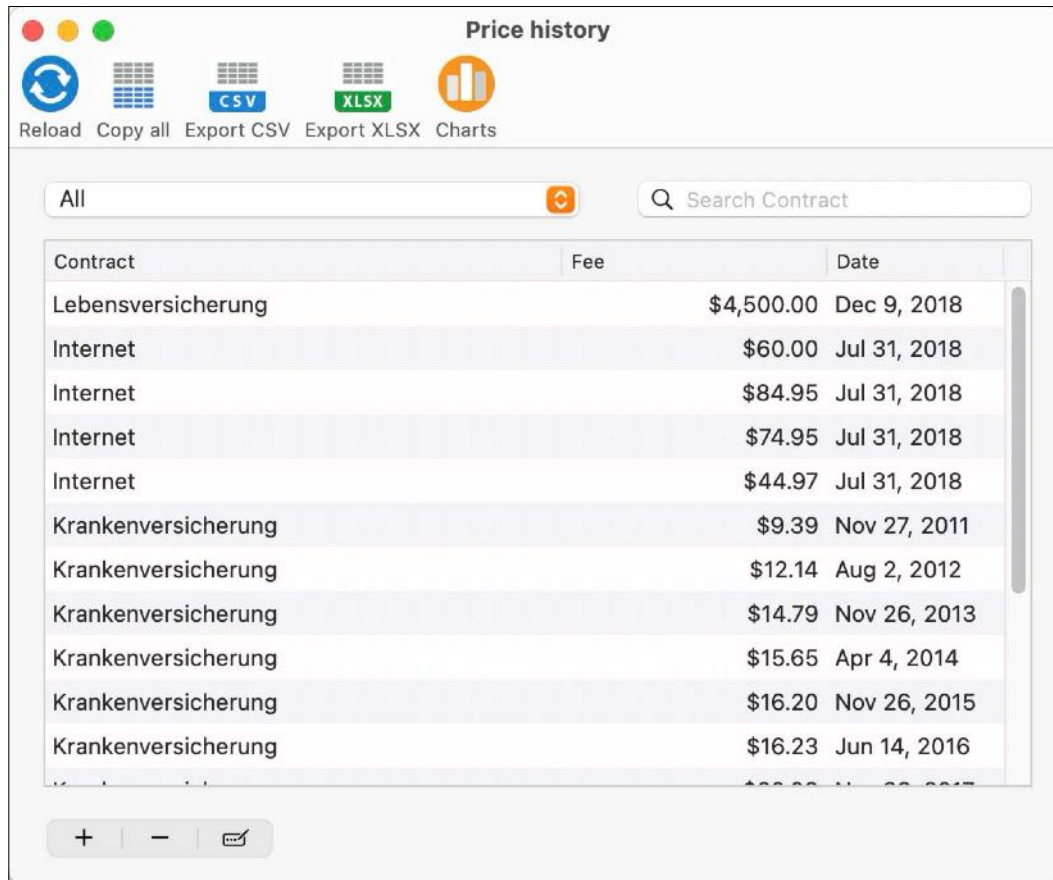


This screenshot is identical to the previous one, showing the 'Payment information' form with the 'Fee' field highlighted and the context menu open. The 'Add to the price history' option is highlighted in orange.

This opens the "Price history" window. This window can also be opened via the icon menu "Evaluation => Show price history" 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.



Price history

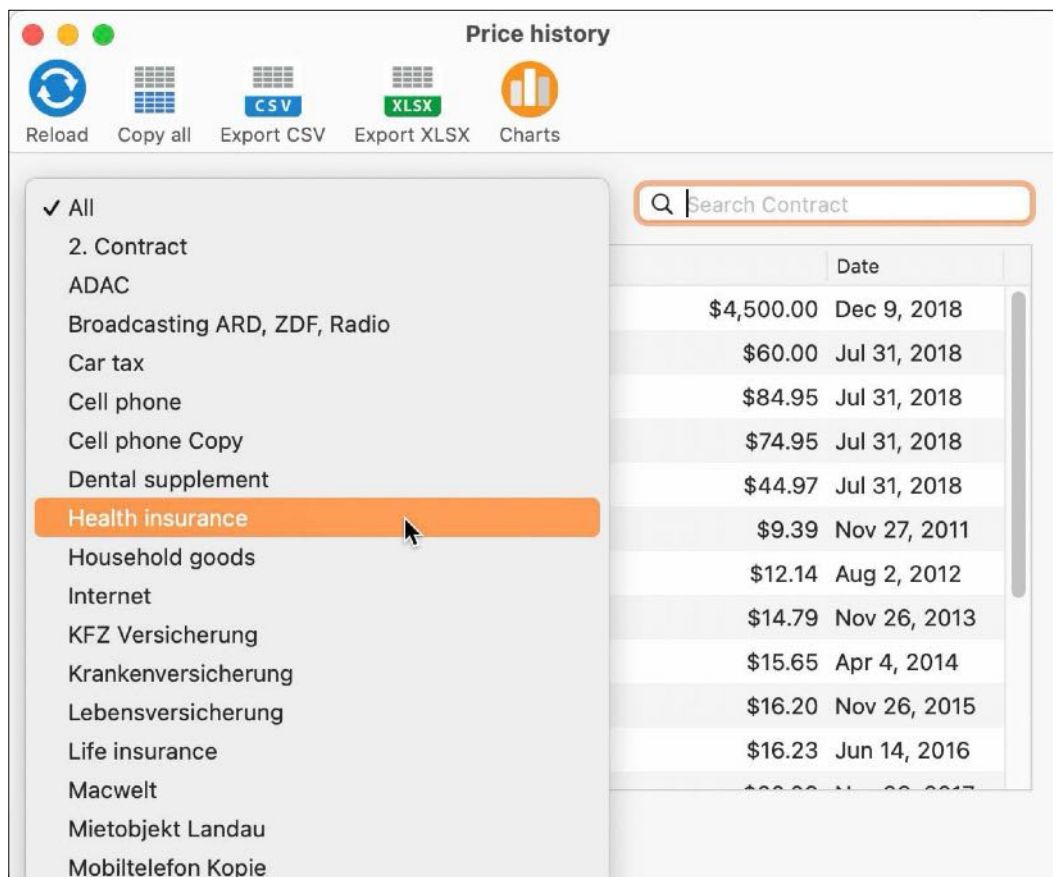
Reload Copy all Export CSV Export XLSX Charts

All Search Contract

Contract	Fee	Date
Lebensversicherung	\$4,500.00	Dec 9, 2018
Internet	\$60.00	Jul 31, 2018
Internet	\$84.95	Jul 31, 2018
Internet	\$74.95	Jul 31, 2018
Internet	\$44.97	Jul 31, 2018
Krankenversicherung	\$9.39	Nov 27, 2011
Krankenversicherung	\$12.14	Aug 2, 2012
Krankenversicherung	\$14.79	Nov 26, 2013
Krankenversicherung	\$15.65	Apr 4, 2014
Krankenversicherung	\$16.20	Nov 26, 2015
Krankenversicherung	\$16.23	Jun 14, 2016

+ -

You can also select the relevant contract directly from the selection menu.



Price history

Reload Copy all Export CSV Export XLSX Charts

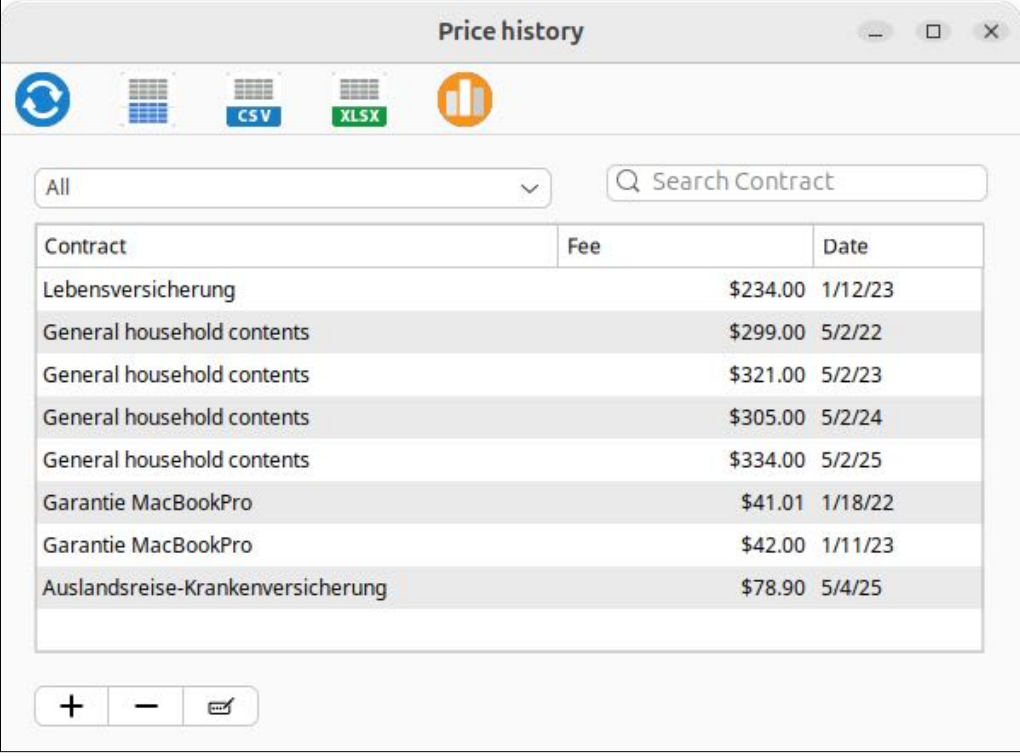
Search Contract

- ✓ All
- 2. Contract
- ADAC
- Broadcasting ARD, ZDF, Radio
- Car tax
- Cell phone
- Cell phone Copy
- Dental supplement
- Health insurance**
- Household goods
- Internet
- KFZ Versicherung
- Krankenversicherung
- Lebensversicherung
- Life insurance
- Macwelt
- Mietobjekt Landau
- Mobiltelefon Kopie

Contract	Fee	Date
	\$4,500.00	Dec 9, 2018
	\$60.00	Jul 31, 2018
	\$84.95	Jul 31, 2018
	\$74.95	Jul 31, 2018
	\$44.97	Jul 31, 2018
	\$9.39	Nov 27, 2011
	\$12.14	Aug 2, 2012
	\$14.79	Nov 26, 2013
	\$15.65	Apr 4, 2014
	\$16.20	Nov 26, 2015
	\$16.23	Jun 14, 2016

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.

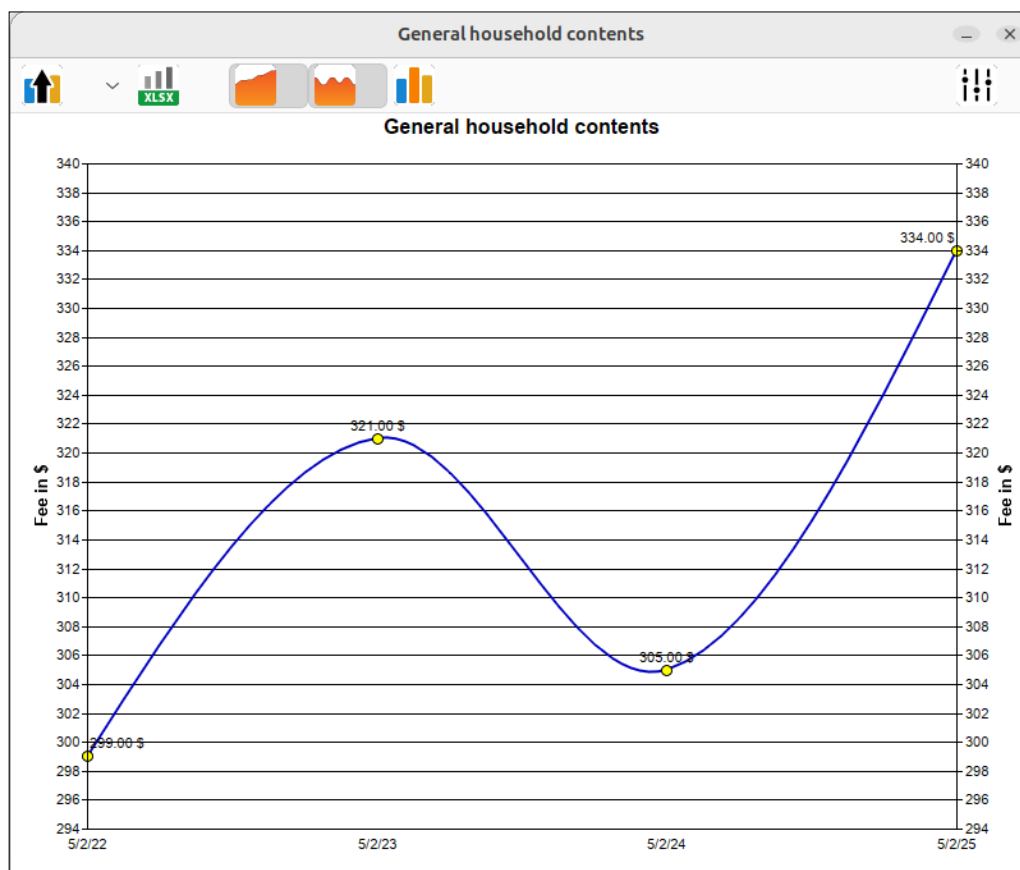


The screenshot shows a window titled "Price history" with a toolbar containing icons for refresh, grid, CSV, XLSX, and a bar chart. Below the toolbar is a dropdown menu set to "All" and a search bar labeled "Search Contract". The main area contains a table with three columns: "Contract", "Fee", and "Date".

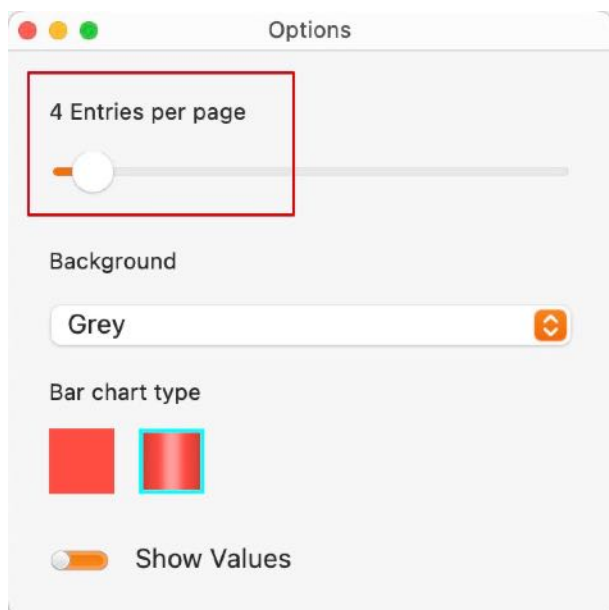
Contract	Fee	Date
Lebensversicherung	\$234.00	1/12/23
General household contents	\$299.00	5/2/22
General household contents	\$321.00	5/2/23
General household contents	\$305.00	5/2/24
General household contents	\$334.00	5/2/25
Garantie MacBookPro	\$41.01	1/18/22
Garantie MacBookPro	\$42.00	1/11/23
Auslandsreise-Krankenversicherung	\$78.90	5/4/25

At the bottom of the window are three buttons: a plus sign (+), a minus sign (-), and a document icon.

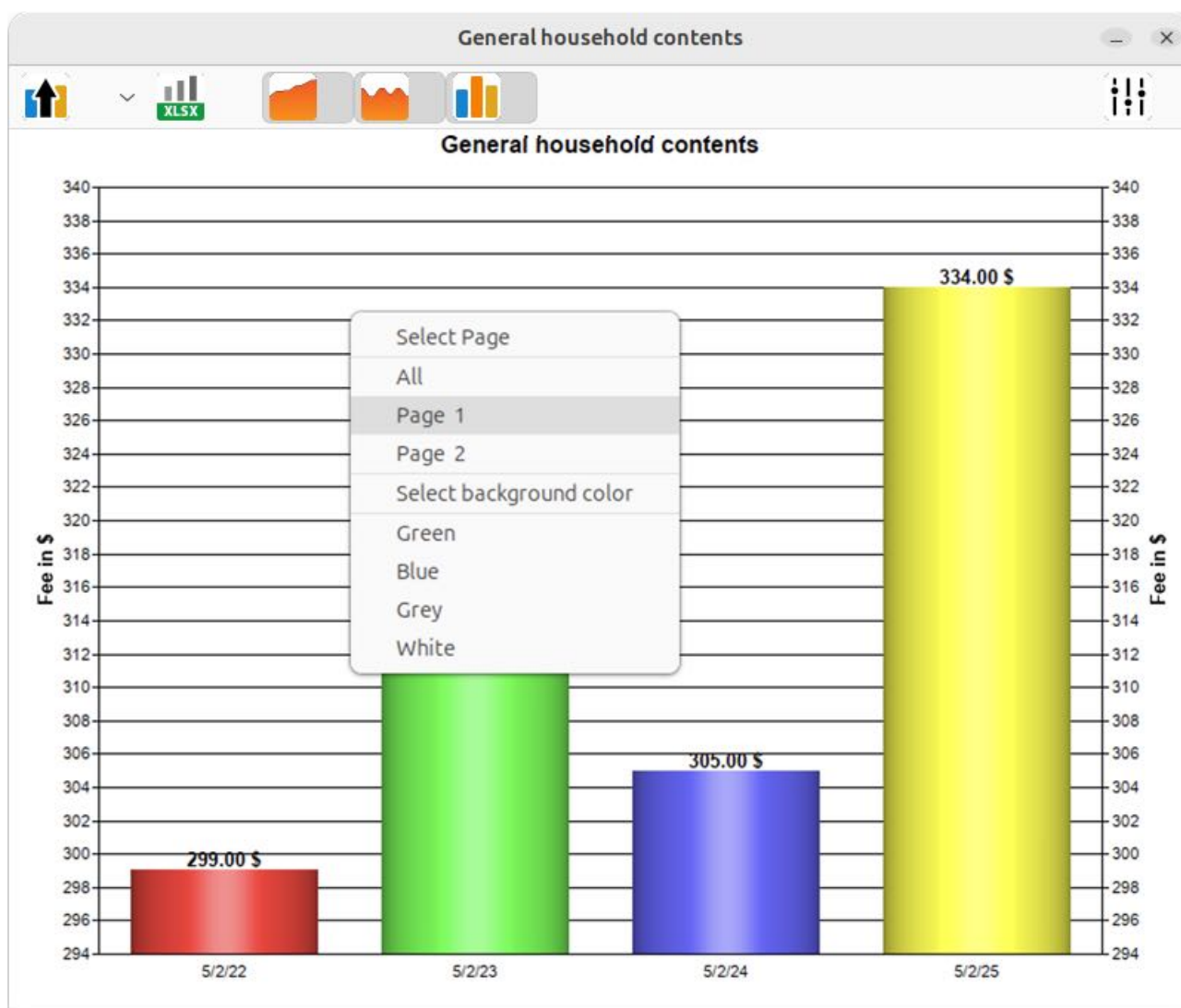
All data sets are displayed by default.



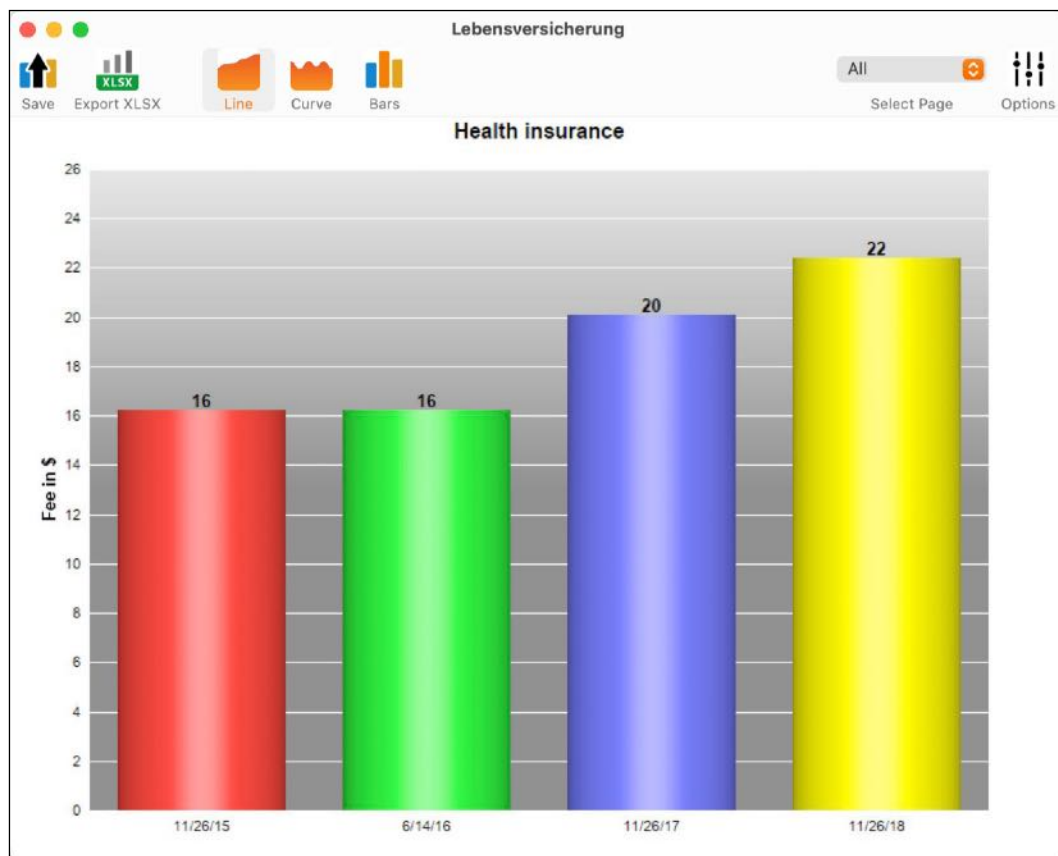
The number of entries per page can be set using the options.



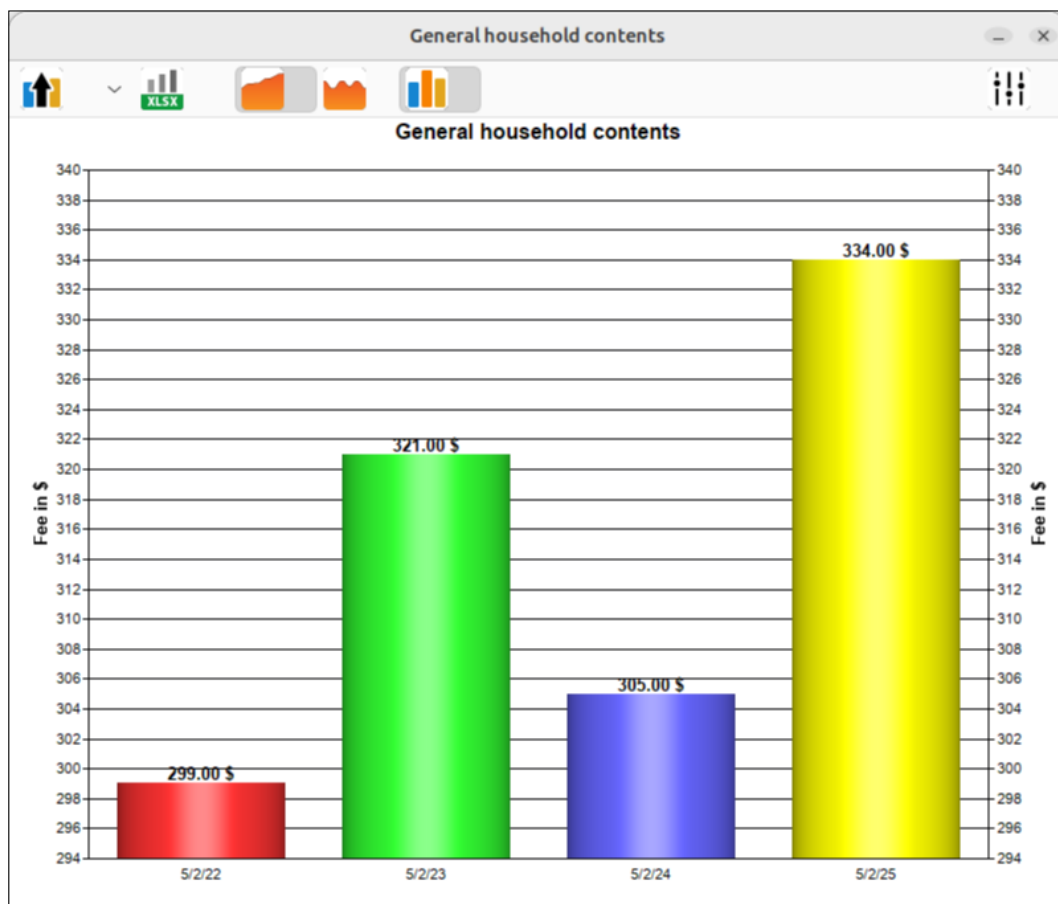
The pages can then be accessed individually via context menu.



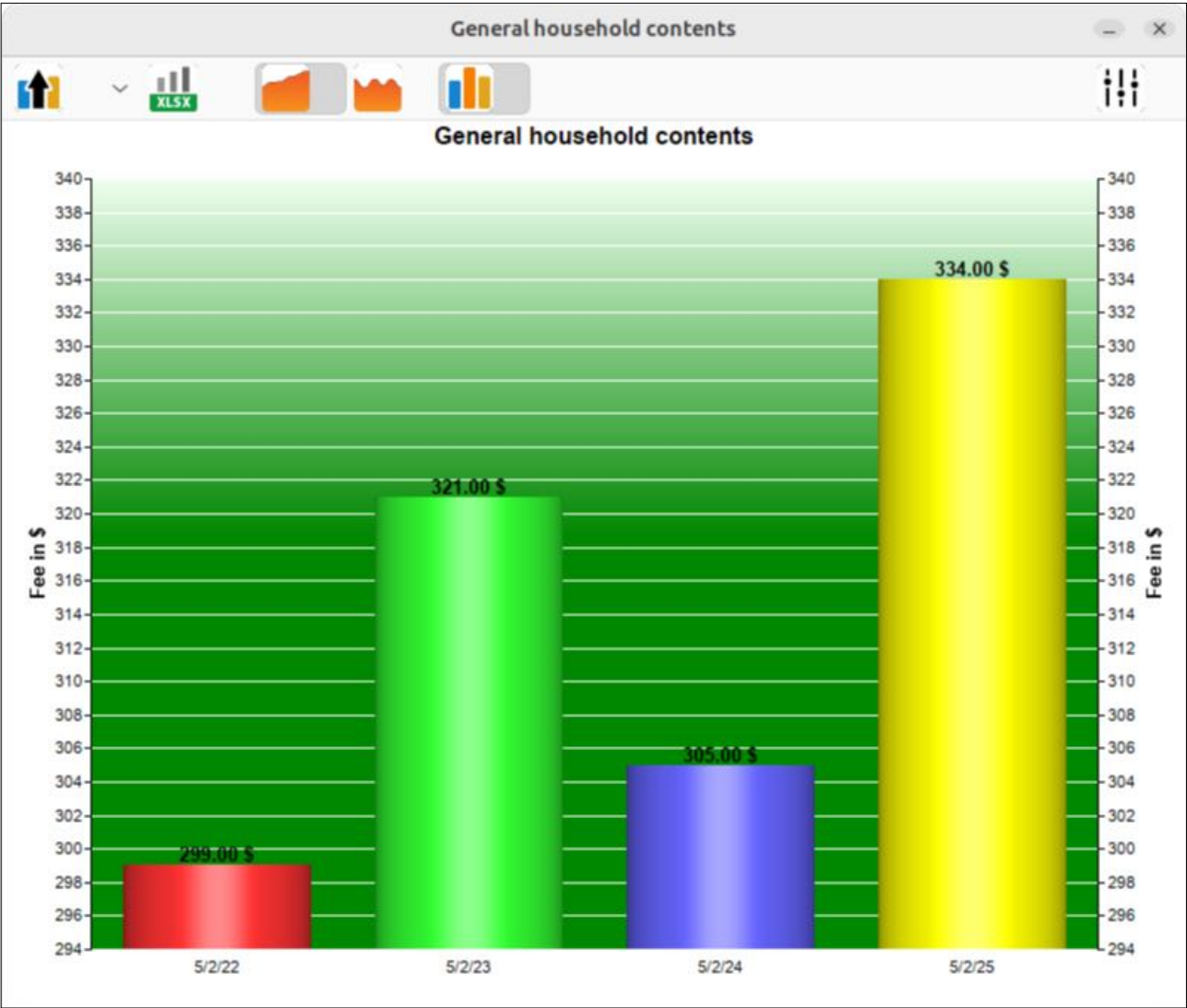
All data sets



A selected page



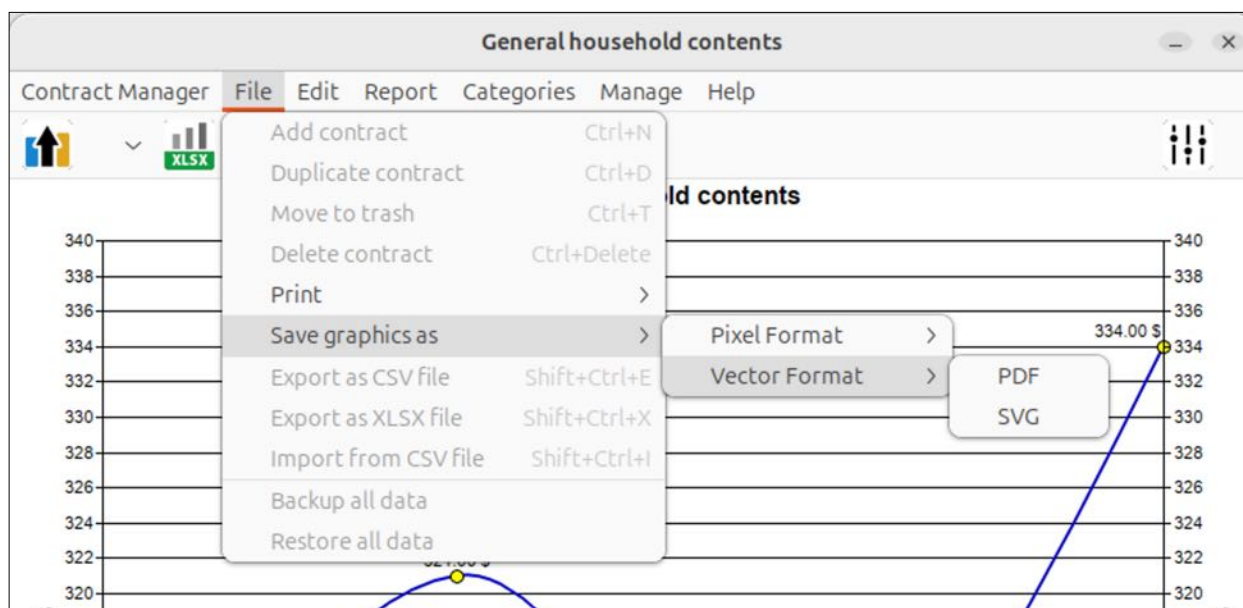
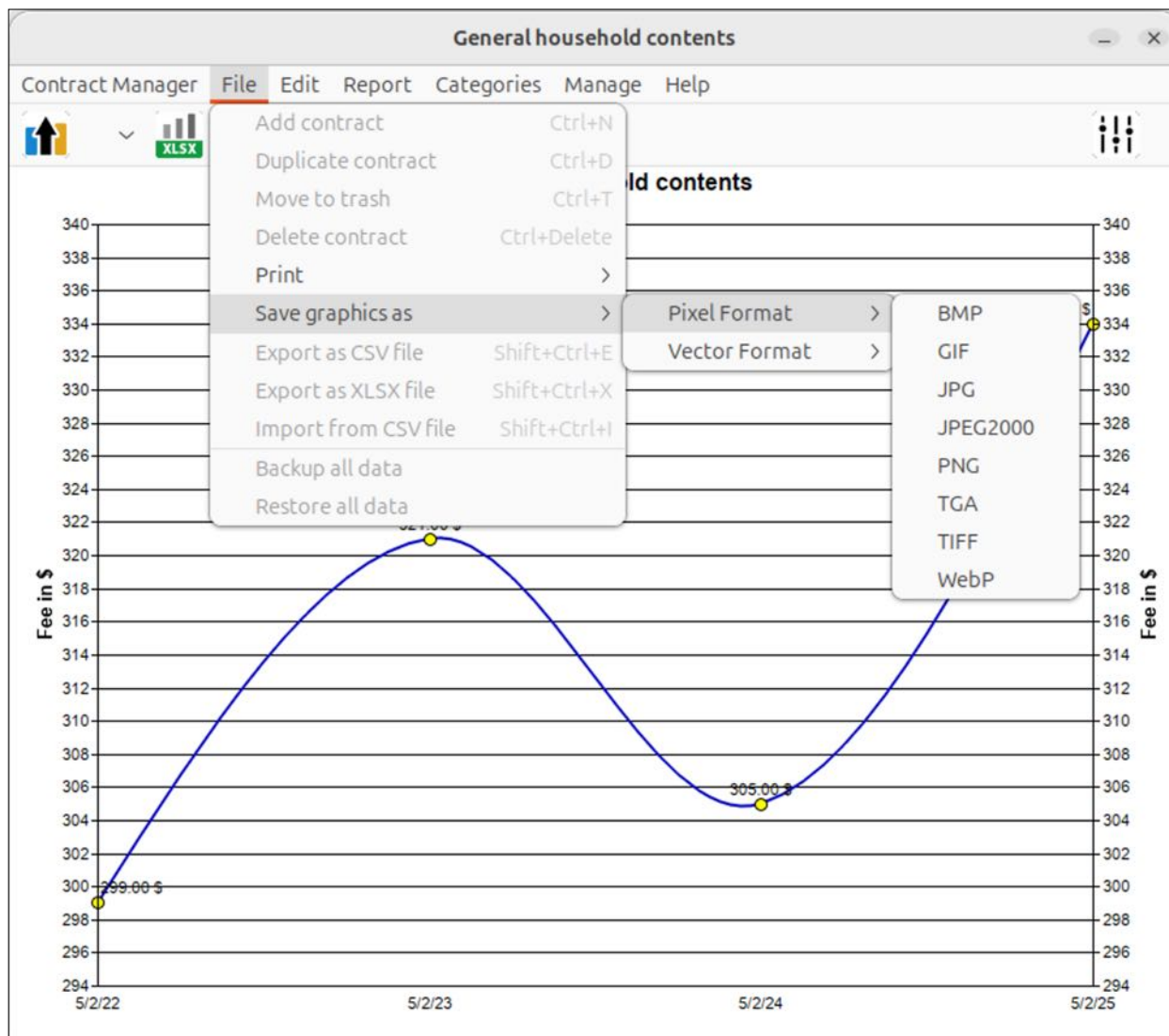
A different background color can be selected using the context menu.



Further options and the background color can be specified in the [settings](#).

EXPORT GRAPHICAL OVERVIEW OF PRICE INCREASE

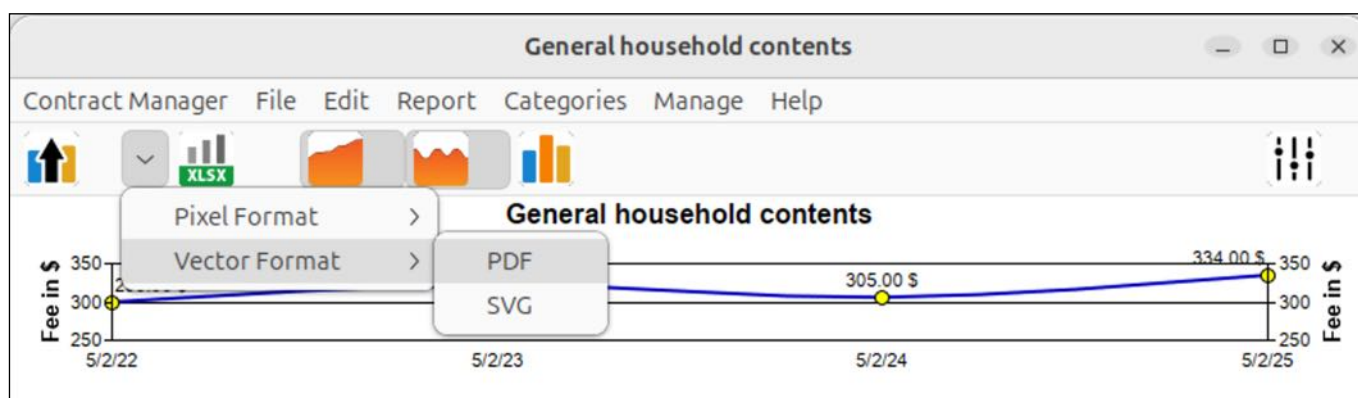
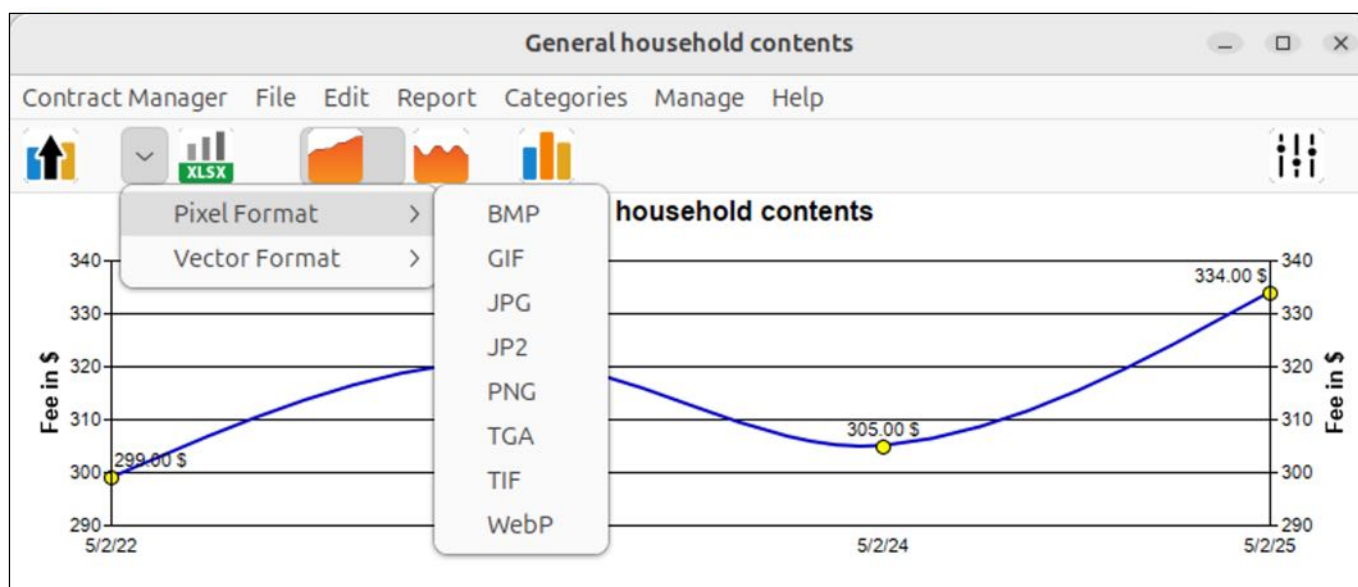
You can export a graphical overview of the price increases for your contracts. To do this, select "File => Save graphic as" from the menu and choose the appropriate format.



The export can be done in the following formats:

- Pixel format
 - BMP
 - GIF
 - JPG
 - JP2
 - PNG
 - TGA
 - TIF
 - WebP
- Vector format
 - PDF
 - SVG

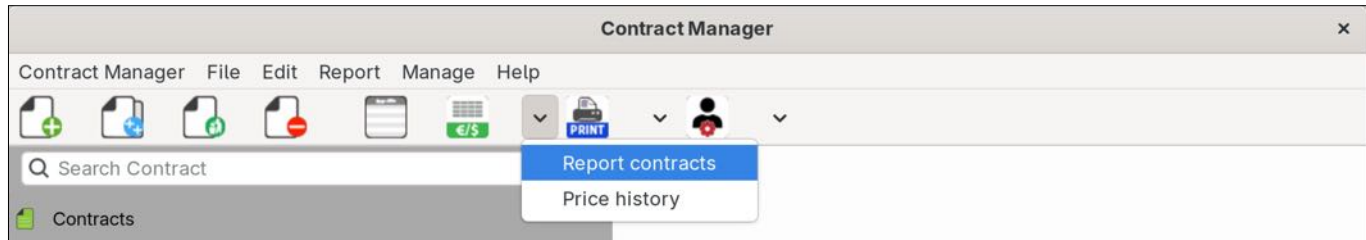
The export functions are also available via the toolbar menu.



In the [settings](#), you can specify whether export files should be opened immediately after saving.

REPORT CONTRACTS

To evaluate the contracts, select "Report contracts" from the menu or toolbar menu.



The "Report" 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.

Report					
Contract Manager File Edit Report Categories Manage Help					
CSV	XLSX	PRINT			
Active Contracts	Contract	Number	Contract Partner	Fee/Year	Revenue/Y...
Revenues	Garantie MacBo...	DE999061329023	Allianz Deutschla...	\$0.00	
Expenses	Gasversorgung	836630203883	Vattenfall	-\$44.22	
Categories	General househo...	WERW20398-2302	Basler Versicher...	\$0.00	
Subcategories	General househo...	WERW20398-2302	Basler Versicher...	\$0.00	
Contractor	Glass insurance	230982342	Basler Versicher...	-\$156.00	
Persons	Hausrat-Schutzb...	09290498023	Basler Versicher...	-\$50.00	
	KFZ-Versicherung	663/417094-U	HUK24	-\$365.51	
	Lebensversicher...	L 50.3303-28		-\$2,808.00	
	Private Haftpflicht	22365413	Basler Versicher...	-\$58.64	
	Reisekrankenver...	175003009	Gothaer Versiche...	\$0.00	
	Strom	2983749082	Vattenfall	\$0.00	
	Tier-Krankenvers...	PG00028677	Legrand Versich...	-\$436.98	
Total				-\$4,399.23	Year

Functions Toolbar menu.

	Save report as CSV file
	Save report as Excel® XLSX file
	Copy report to clipboard
	Print report
	Graphical overview of contracts

Existing categories in the selection menu

	Active contracts
	Revenue
	Expenses
	Categories
	Contract partners
	Persons

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 preview

Contract Manager • Print

First Back Next Last Refresh PDF HTML Print

Grid off Automatic Width Manual Options

Page 1/1

Scale: 140%

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

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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:



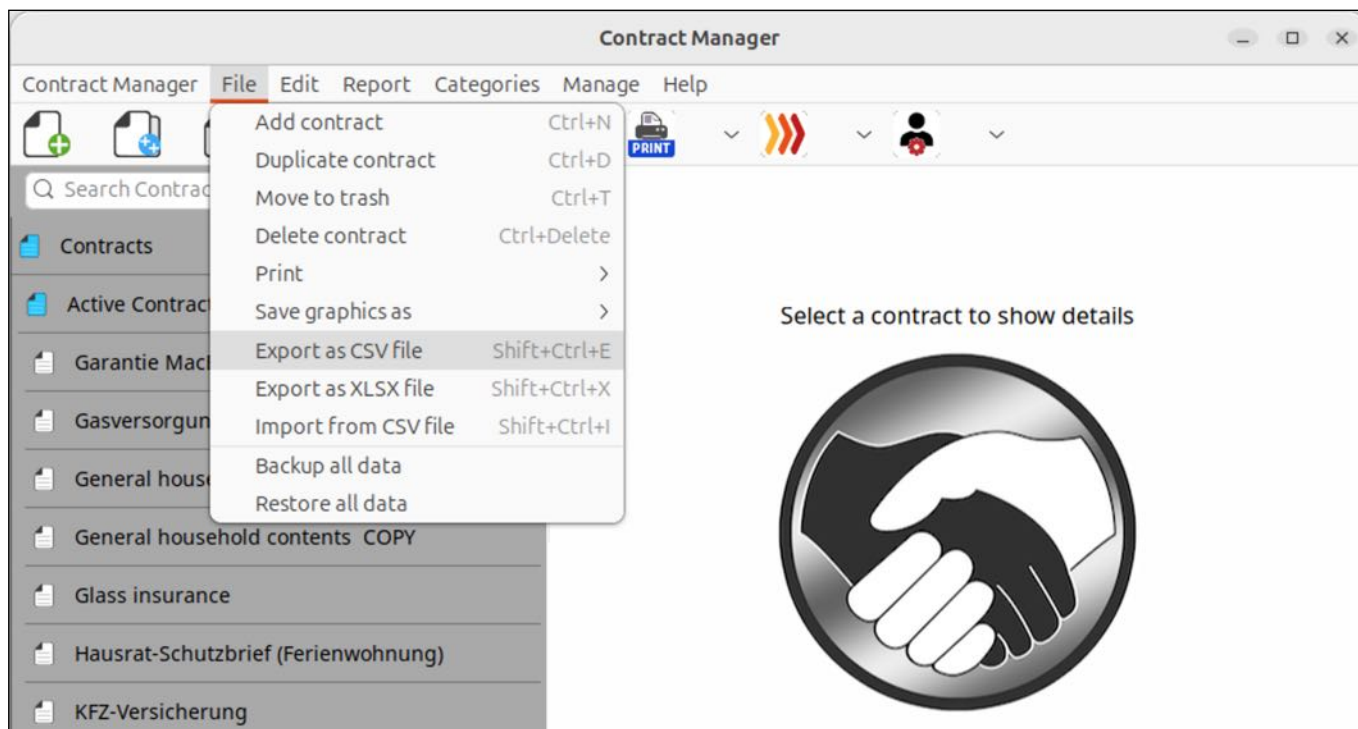
CSV

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](#)".



Save report as Excel® XLSX file

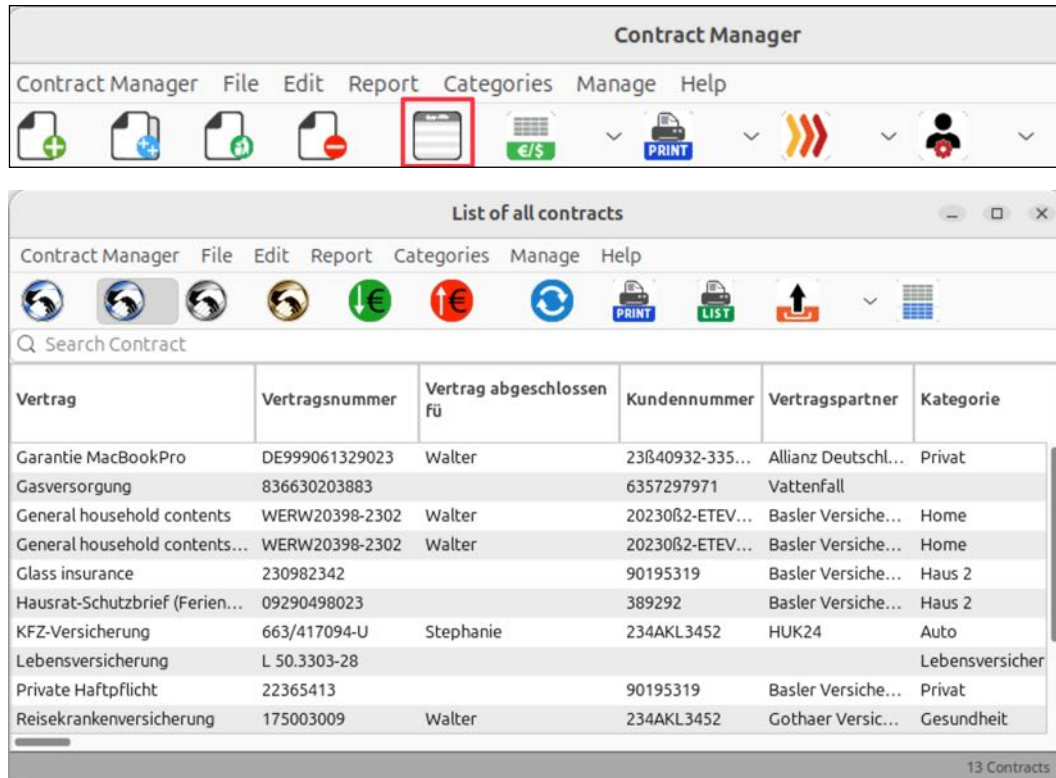
If you would like to save the report as an Excel® XLSX file, click on this icon.



Start Einfügen Zeichnen Seitenlayout Formeln Daten Überprüfen An					
C28					
	A	B	C	D	
1	Vertrag	Vertragsnummer	Kategorie	Vertragspartner	V
2	1&1 Internet	23.12.2017 FW	Internet	1&1 AG	S
3	ADAC	23.12.2017 991			P
4	Hausrat	90.12.2017 448	Hausrat		R
5	Hausverwaltung Mietobjekt	23.12.2017 WE33	Hausverwaltung	Asstel Sachversicherungs AG	P

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:



Save as Excel® XLSX file

Customize list

The list can be freely customized. See chapter "[Customize list](#)".

Print contracts



Print

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

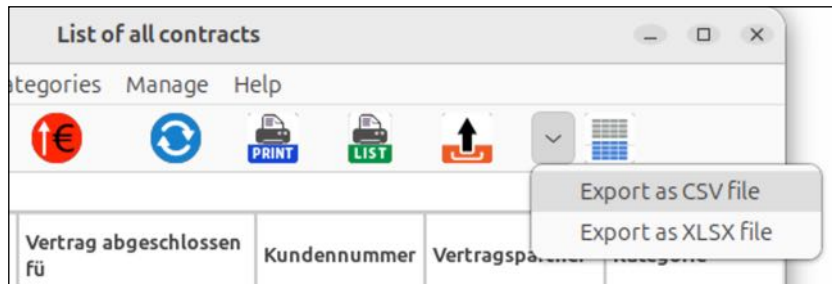
If you want to process the contracts further in an external application (Excel®, Numbers®, LibreOffice, or similar programs), you can quickly copy all contract data to the clipboard and paste it into the application of your choice. The columns and rows will of course be transferred.

Example: Microsoft Excel®

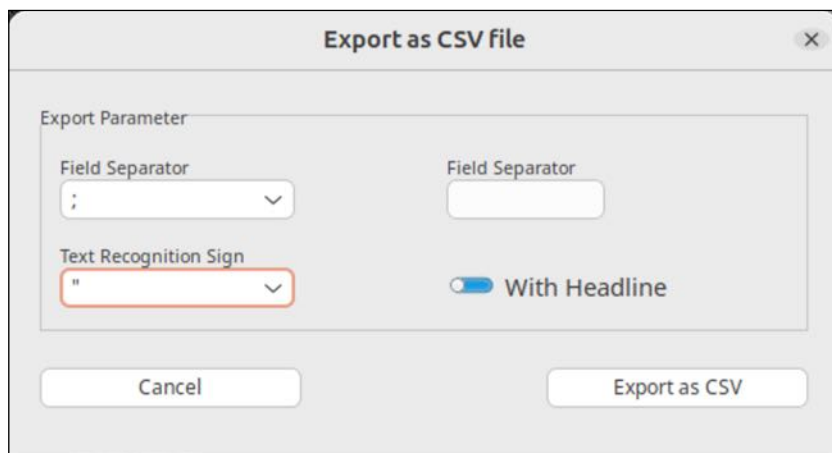
Start Einfügen Zeichnen Seitenlayout Formeln Daten Überprüfen				
C28				
A	B	C	D	
1 Vertrag	Vertragsnummer	Kategorie	Vertragspartner	
2 1&1 Internet	23.12.2017 FW	Internet	1&1 AG	
3 ADAC	23.12.2017 991			
4 Hausrat	90.12.2017 448	Hausrat		
5 Hausverwaltung Mietobjekt	23.12.2017 WE33	Hausverwaltung	Asstel Sachversicherungs AG	
6 Internet	R.9.12.2017 927	Internet	Neuer Vertragspartner	
7 KFZ Steuer	K09.12.2017 992	Steuer		
8 KFZ Versicherung	907.12.2017 09	KFZ Versicherung	Asstel Sachversicherungs AG	
9 Krankenversicherung	K-34.12.2017 923	Krankenversicherung	Basler Lebensversicherung AG	
10 Krankenversicherung	K-99.12.2017 02	Krankenversicherung	Deutscher Ring Versicherungs AG	
11 Lebensversicherung	L 10.12.2017 12	Lebensversicherung	Basler Lebensversicherung AG	
12 Macwelt	RF61.12.2017 30384	Zeitschriften	ZENIT Pressevertrieb GmbH	
13 Miete Büro		Miete	Hausverwaltung Hamburg	
14 Mobiltelefon	23.12.2017 77	Mobiltelefon	vodafone	
15 Rundfunk ARD, ZDF, Radio	90.12.2017 238	Rundfunk	ARD & ZDF	
16 Strom	V81.12.2017 033	Stromkosten	EnBW AG	
17 Unfallversicherung	P-20.12.2017 33	Unfallversicherung	Asstel Sachversicherungs AG	
18 Zahnzusatz	2.12.2017 18	Zahnzusatz	Axa	
19				
20				
21				

Export all contracts as CSV file

To export the displayed entries, you can use the CSV export function in the toolbar menu. To do this, click the "Export" icon and then select "Export as CSV file."

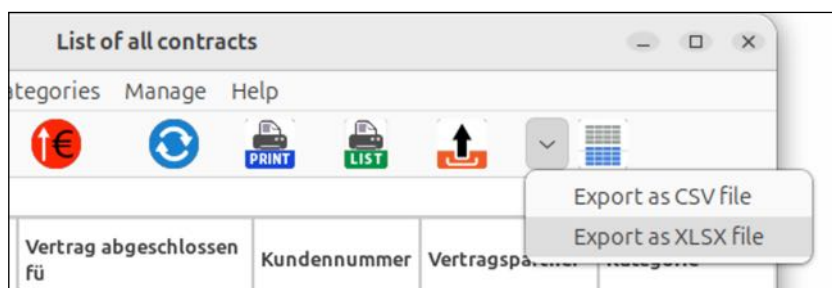


You can also specify various parameters for the export.



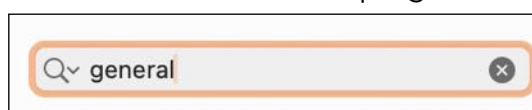
Export list as an XLSX file

To export the displayed entries, you can use the XLSX export function in the toolbar menu.



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.



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.

Qv %house

The following fields are taken into account during the search

- Contract
- Contracted for
- Contract number

List of all contracts

Contract Manager

File

Edit

Report

Categories

Manage

Help

Q general

X

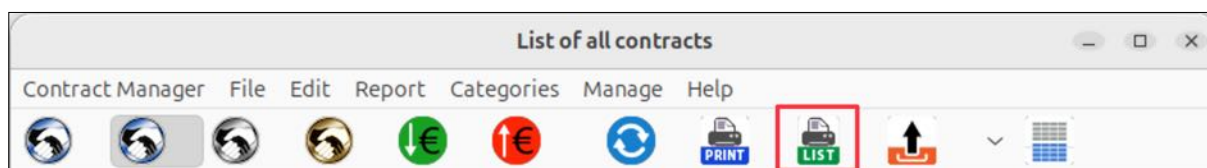
Vertrag	Vertragsnummer	Vertrag abgeschlossen für	Kundennummer	Vertragspartner	Kategorie
General household contents	WERW20398-2302	Walter	20230ß2-ETEV...	Basler Versiche...	Home
General household contents...	WERW20398-2302	Walter	20230ß2-ETEV...	Basler Versiche...	Home

2 Contracts

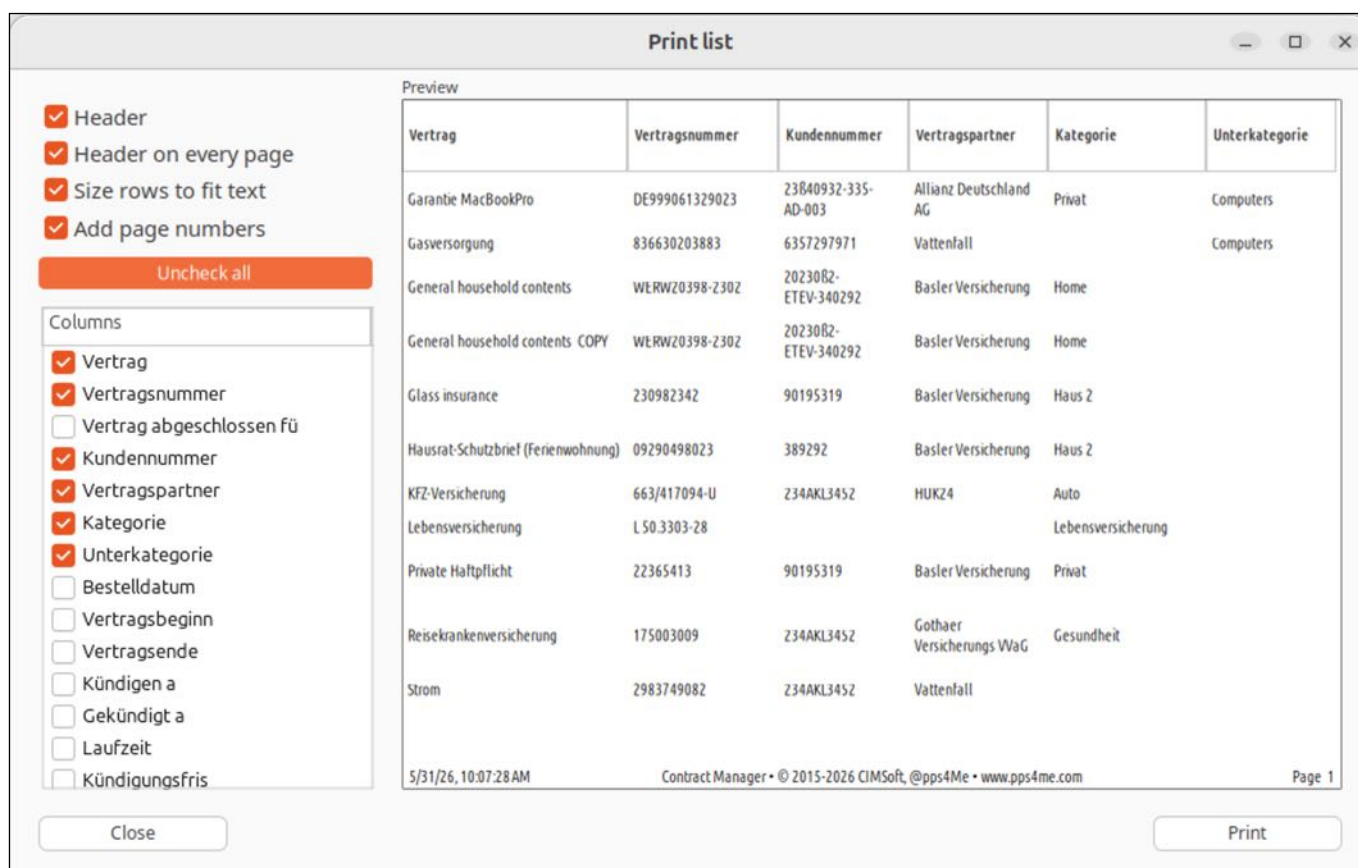
You can also [search for contracts](#) in the main window. In the [settings](#), you can specify whether the additional fields "Contracted for" and "Contract number" are used for the search.

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.

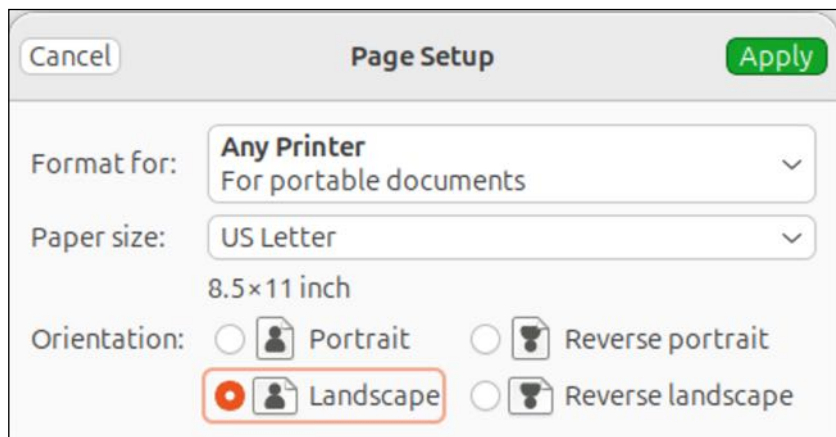


The following window will open.



Each column can be shown or hidden. You can also set parameters for the header, row height, and page numbering. Click on “Print”.

You can still set the page parameters here. Click "Apply."



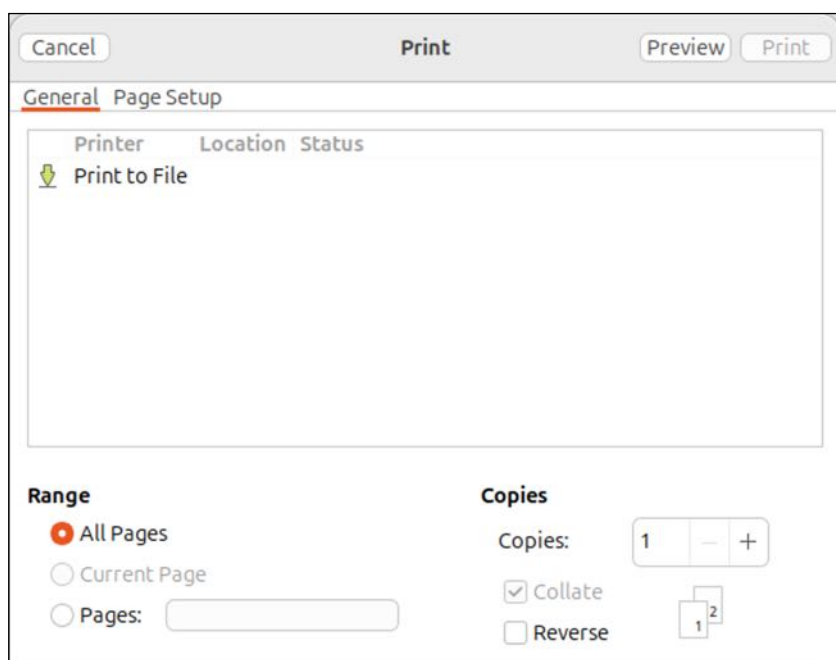
Cancel Page Setup Apply

Format for: Any Printer
For portable documents

Paper size: US Letter
8.5x11 inch

Orientation: ☒ Portrait ☐ Reverse portrait
☒ Landscape ☐ Reverse landscape

Now select "Print" or "PDF" => "Open in Preview" or "Save as PDF."



Cancel Print Preview Print

General Page Setup

Printer	Location	Status
Print to File		

Range

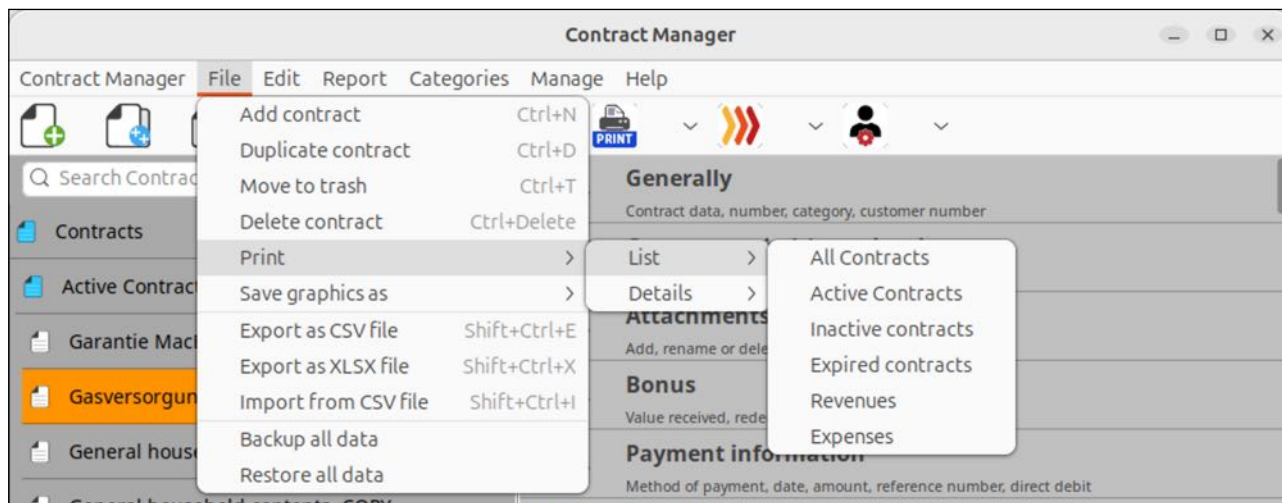
☒ All Pages
☐ Current Page
☐ Pages:

Copies

Copies: 1 - +
☒ Collate
☐ Reverse

PRINT LIST

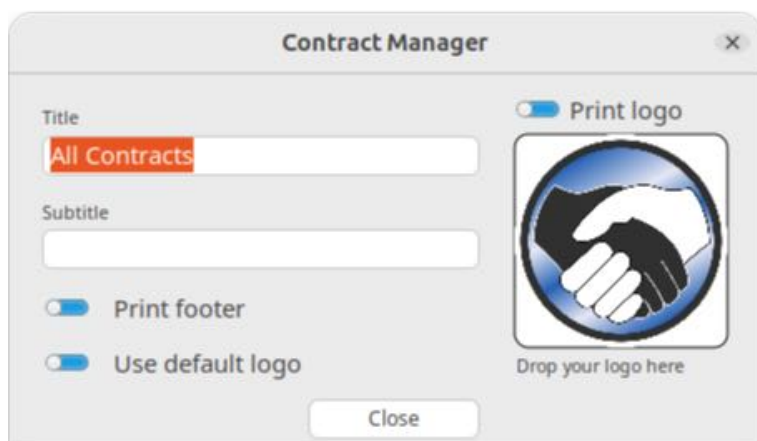
To print the contracts as a list, select "File => Print => List" from the menu and choose one of the following print functions.



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



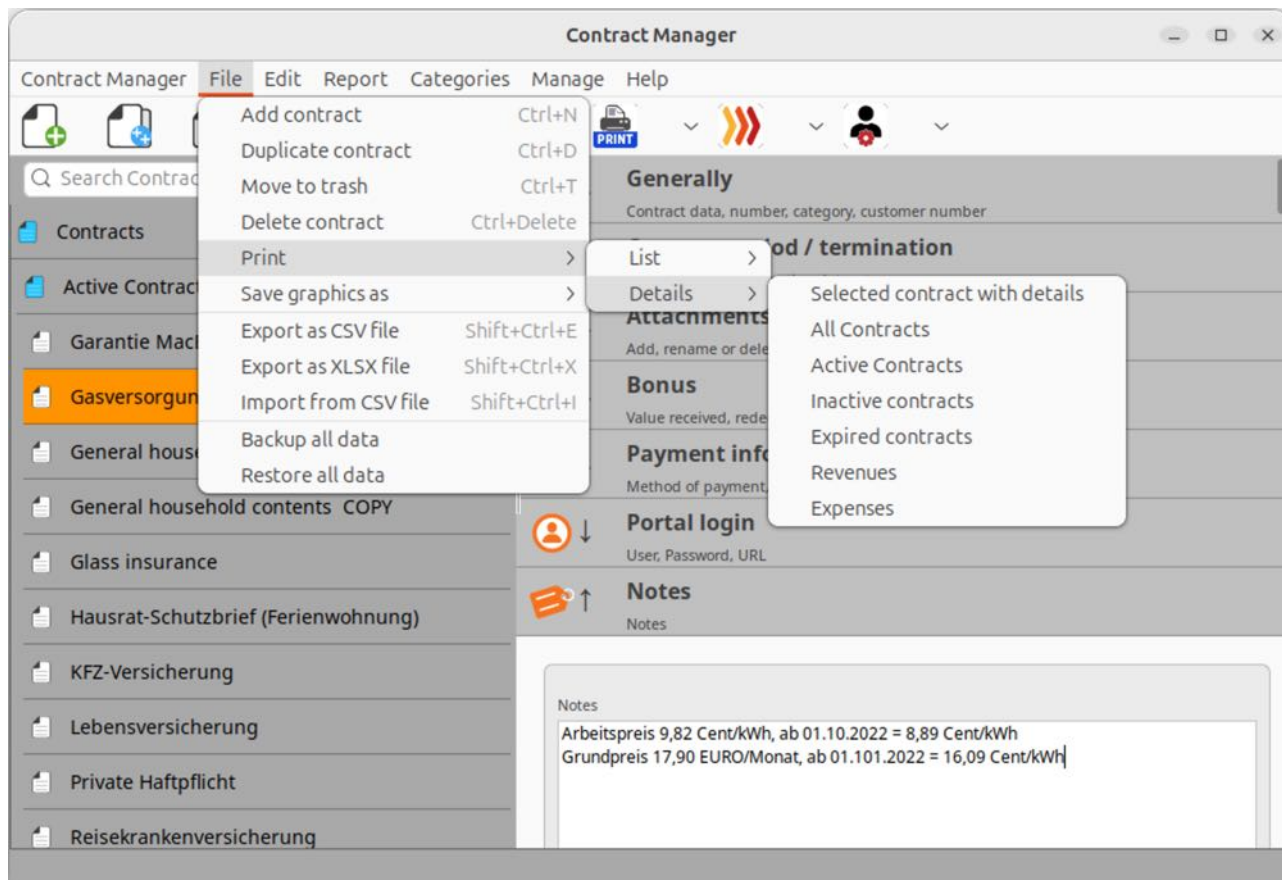
The parameters for the page format can be set via "[Settings](#) => [Print](#)".

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 DETAILS

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



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.



Example

Print details

K

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>

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PDF

HTML

PRINT

📐

📐

📐

⋮

Page 3/13

Scale:

⊖

⊕

 131%

Active Contracts

🌐

Description

General household contents

Contract number:

WERW20398-2302

Category:

Home

Contracted for:

Walter

Customer number:

2023082-ETEV-340292

Contractor:

Basler Versicherung

Order date:

5/1/21

Start Date:

5/17/21

End of contract:

6/17/21

Termination Date:

11/16/21

Terminated on:

Period of validity:

1 None

Period of notice:

6 None

Automatic renewal:

Yes

Sequence:

Jährlich

Receive termination confirmation:

Yes

Bonus value:

Bonus received:

No

Bonus redeemed:

No

Advertiser:

Payment:

First payment:

Fee:

173.42

Deductible:

0.00

Kind:

Ausgaben

Reference number:

None

Direct debit:

No

Bank:

Bank:

Bank:

Note:

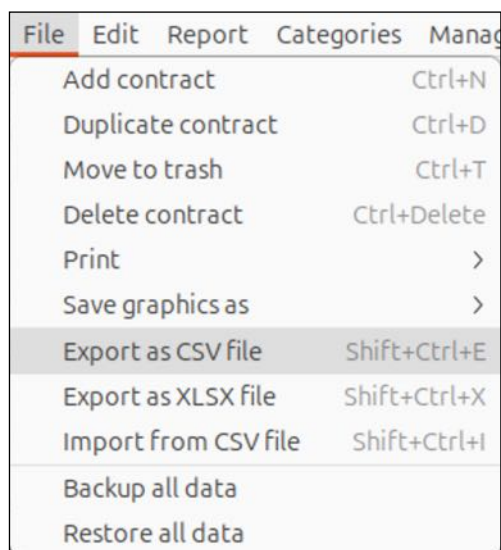
05/31/2026 01:35 PM

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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.

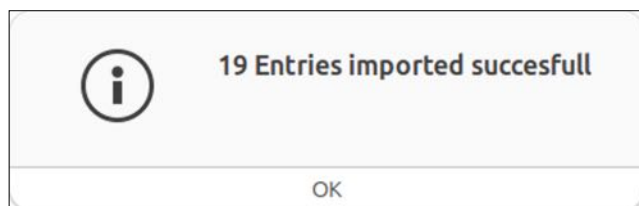


You can select all available fields for export using the "Export all fields" button. Alternatively, drag and drop the required fields from the "Available fields" list to the "Export fields" list. You can change the order of the export fields by moving them with the mouse. If an export field is no longer needed, it can be dragged back to the "Available fields" list.

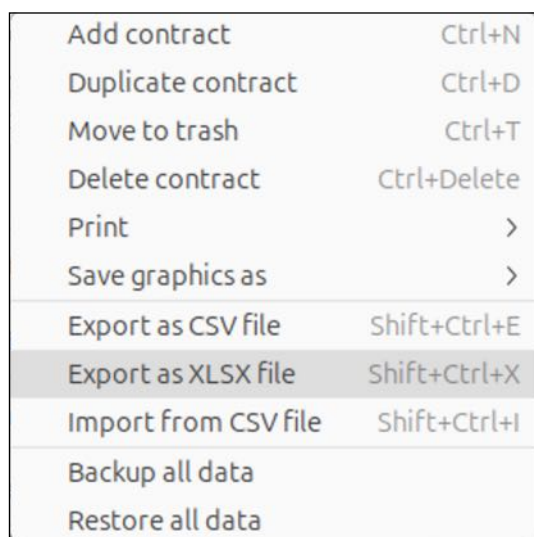
A screenshot of the 'Export as CSV' dialog box. It features two columns of fields. The left column, titled 'Available Fields: 32', contains: Category, Customer number, Contractor, Order date, Start Date, End of contract, Termination Date, and Terminated on. The right column, titled 'Export Fields: 3', contains: Contract, Contract number, and Contracted for. Below the fields are two buttons: 'Export all fields ->' and '<- Remove all fields'. Underneath these is the 'Export Parameter' section, which includes a 'Field Separator' dropdown set to ';', a 'Text Recognition Sign' dropdown set to "'", and a 'With Headline' toggle switch that is currently turned on. At the bottom are 'Cancel' and 'Export as CSV' buttons.

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



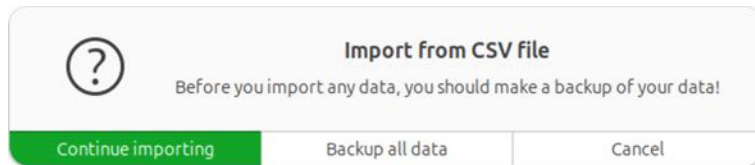
file" from the menu.



After saving the XLSX file, it will open directly if this has been specified in the [settings](#).

IMPORT FROM CSV FILE

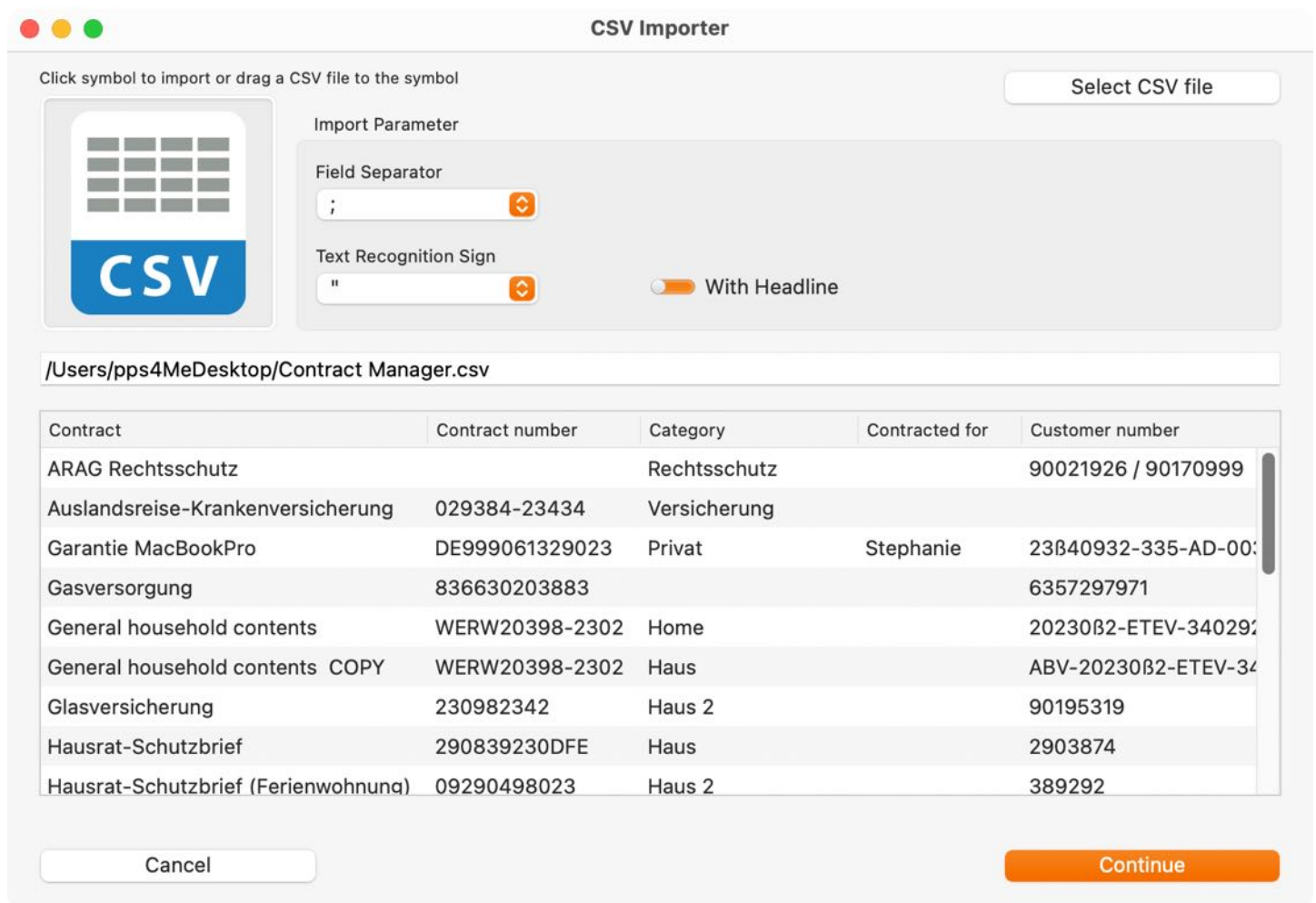
To import data via a CSV file, select "File => Import CSV file" from the menu.



Before importing data, you should back up all data. For more information, see the chapter "[Backup all data](#)".

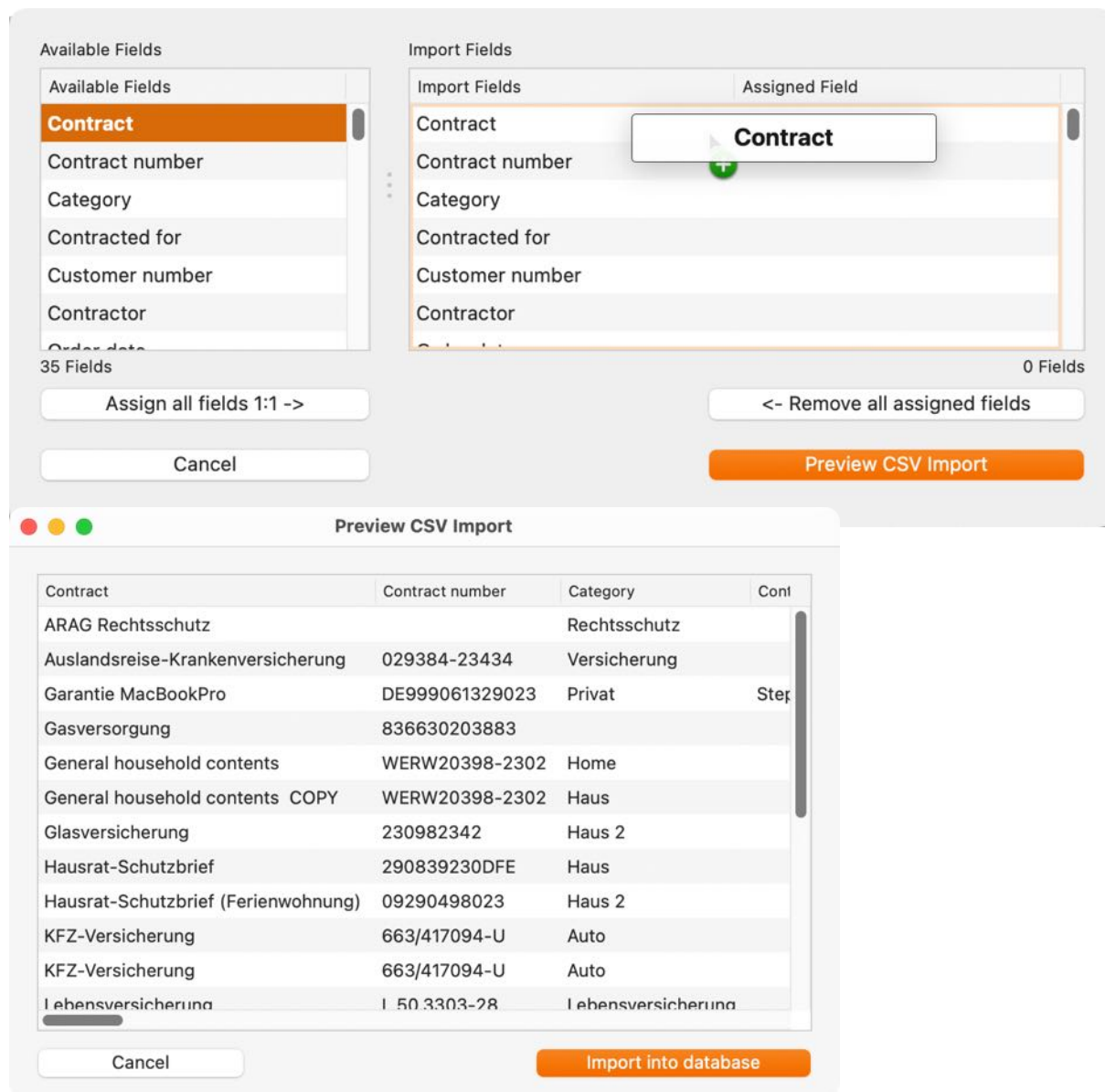
In the following window, you can drag a CSV file from Finder onto the CSV icon. Or simply click on the CSV icon. A Finder dialog will then open, allowing you to select a CSV file. Now set the parameters for recognizing the CSV file. You will then see a preview of the data in the list below. Then click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

Now you need to assign the fields of the data to be imported to the fields of the existing data. A field



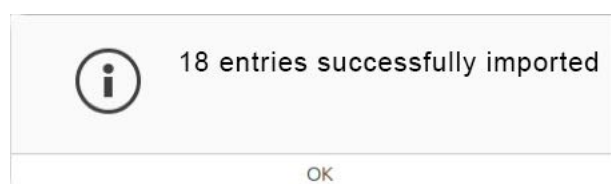
must be assigned to the import field "Contract".

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”.



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.



Clicking “OK” closes all import windows.

The following values are accepted for these fields:

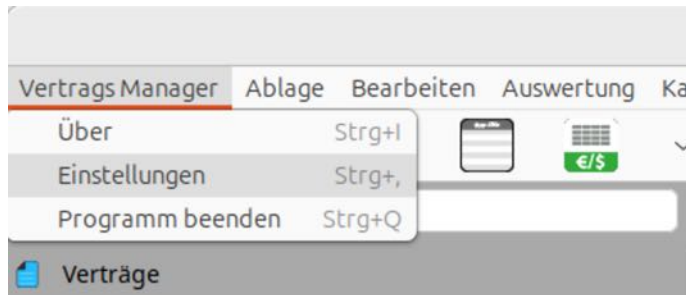
Contract	Text
Contract number	Text
Category	Text
Contract for person	Text
Customer number	Text
Contract partner*	Text
Order date	Date
Contract start	Date
Contract end	Date
Termination on	Date
Terminated on	Date
Term	Integer
Term units	None, weeks, weeks to quarter end, months, months to quarter end, 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".

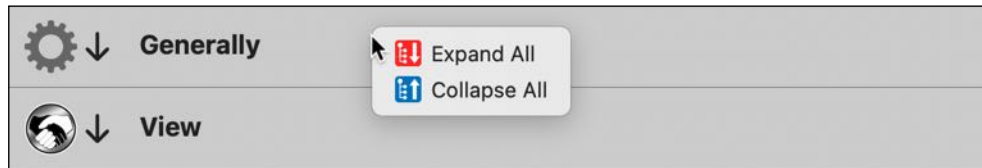


The following sections are available in the settings:



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.



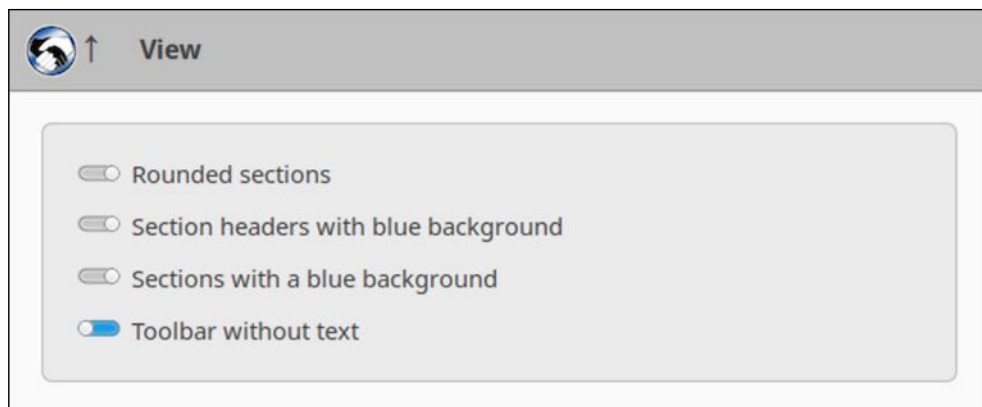
Generally

Here you can specify whether the contract partner should be transferred when copying a contract and check for update on start up

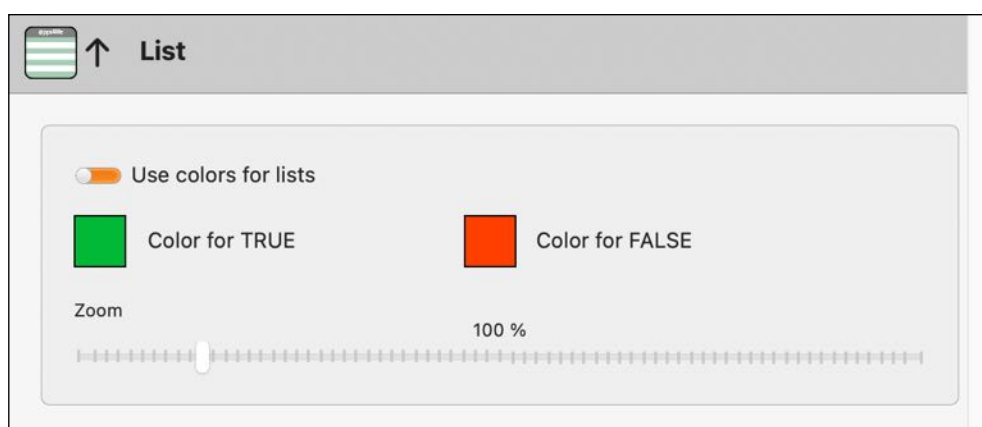


View

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



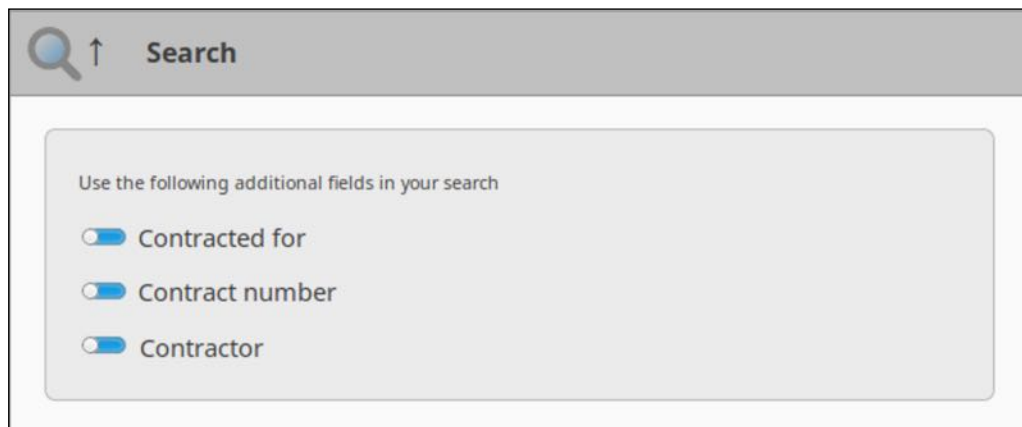
List



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.



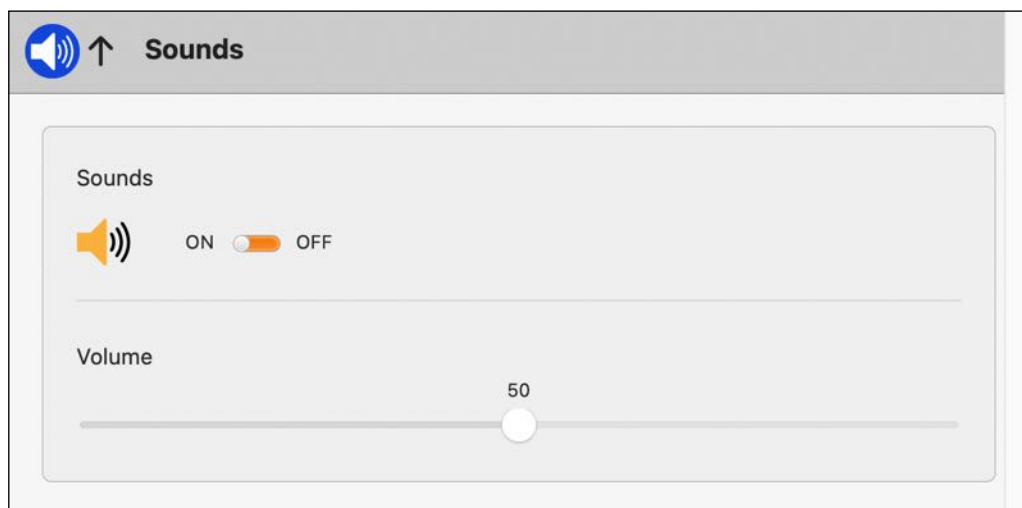
Search

Use the following additional fields in your search

- ☒ Contracted for
- ☒ Contract number
- ☒ Contractor

Sounds

Here you can set the parameters for the sounds below.



Sounds

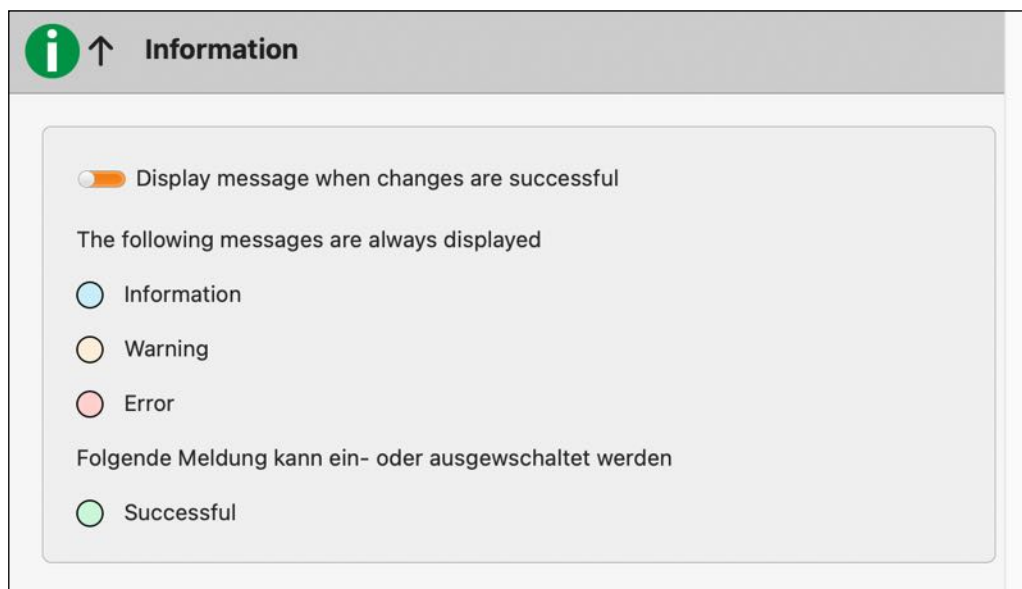
 ON ☒ OFF

Volume

50

Information

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



Information

☒ Display message when changes are successful

The following messages are always displayed

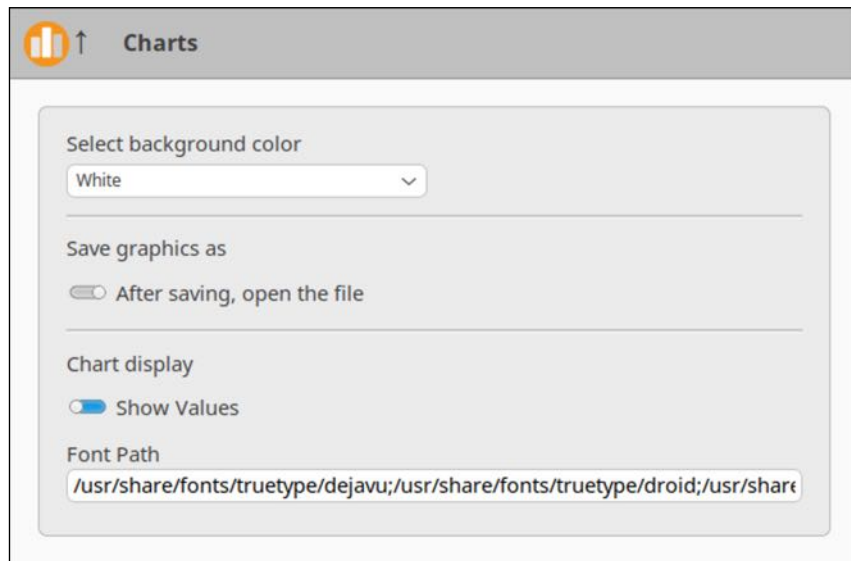
- ☒ Information
- ☐ Warning
- ☐ Error

Folgende Meldung kann ein- oder ausgeschaltet werden

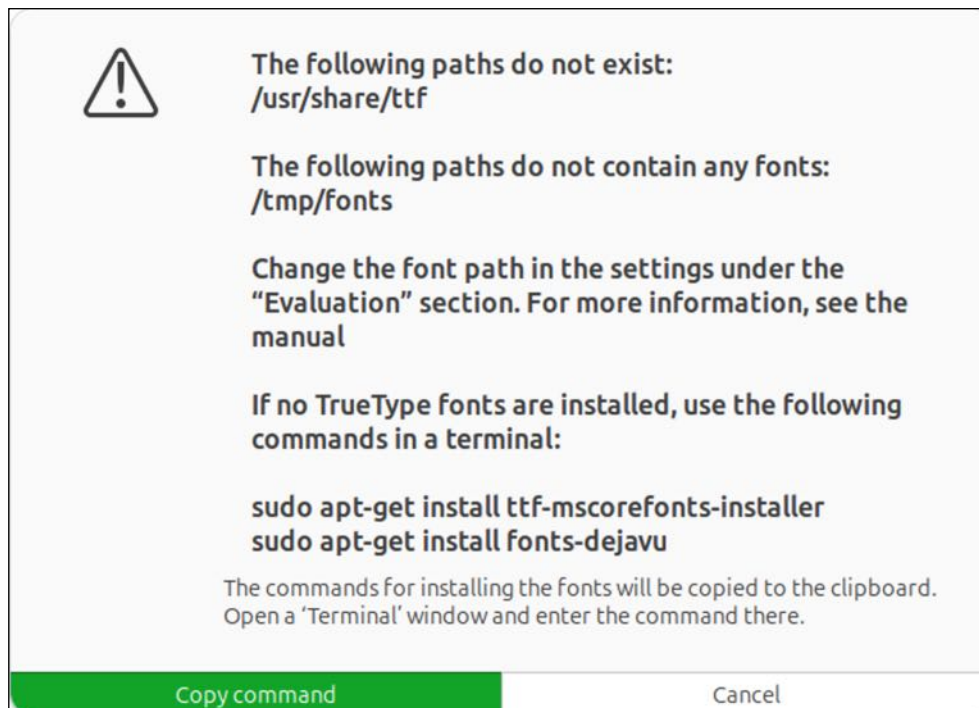
- ☐ Successful

Charts

Here you can set the parameters for the evaluation.



When the program starts, the folders containing the TrueType fonts are automatically scanned. If multiple paths are specified, they must be separated by a ";". If no fonts are found, they must be installed manually via the Linux system. If one of the folders does not exist or does not contain any fonts,



a corresponding message will be displayed.

If no TrueType fonts are installed, use the following commands in a terminal on Debian Linux:

```
sudo apt-get install ttf-mscorefonts-installer
```

```
sudo apt-get install fonts-dejavu
```

After that, the fonts are usually located in `/usr/share/fonts/truetype`.

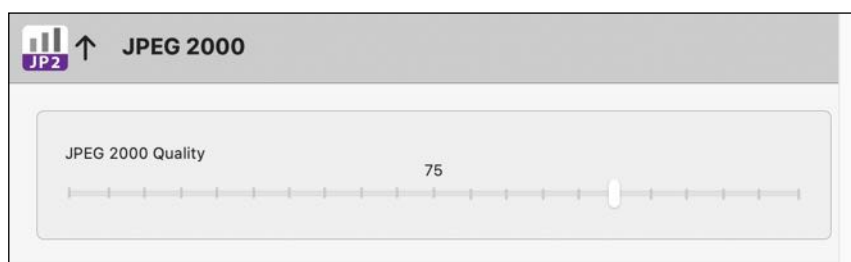
JPG

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



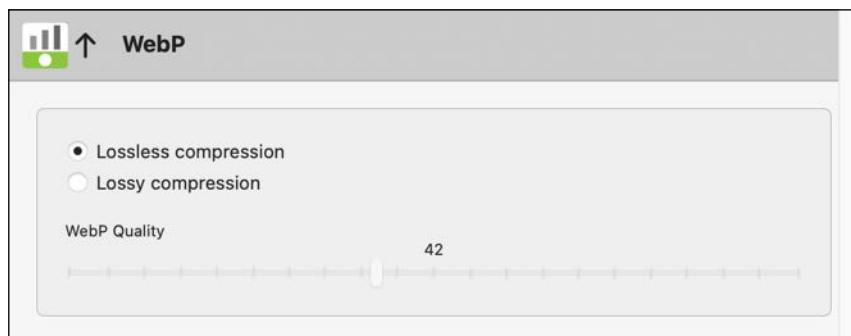
JPEG2000

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



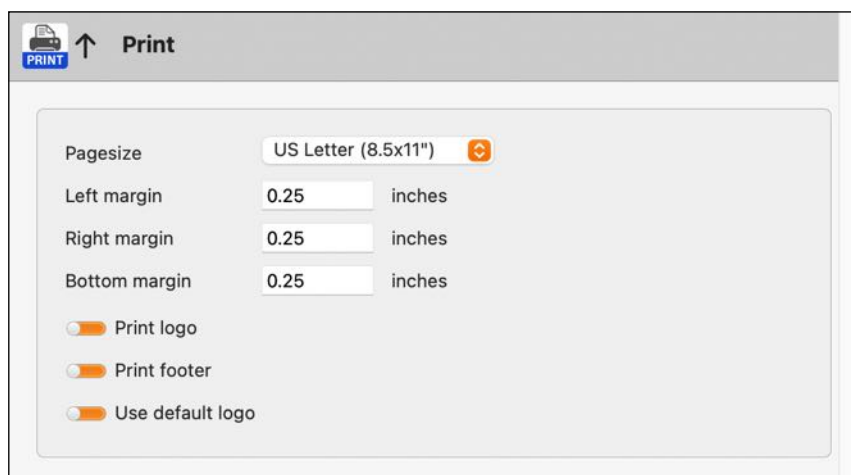
WebP

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 and set some export parameters.


Export

Export Options

☒ Export unencrypted portal password to CSV and XLSX file

Export Parameter

Field Separator

Text Recognition Sign

☒ With Headline

Debug

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

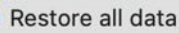

Debug

☒ Debug

Debug mode ensures that the program does not crash if an error occurs. If debug mode is disabled, crashes and malfunctions may occur.

BACKUP ALL DATA

Use appropriate backup software to back up the data in the <~/ContractManager/> folder. 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."

A rectangular button with an orange gradient background and the text "Backup all data" in white.A rectangular button with a light gray background and the text "Restore all data" in gray.

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.

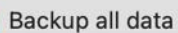


Backup folder "/home/ /Downloads/Contract Manager/" has been created

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".

A rectangular button with a light gray background and the text "Backup all data" in gray.A rectangular button with an orange gradient background and the text "Restore all data" in white.

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

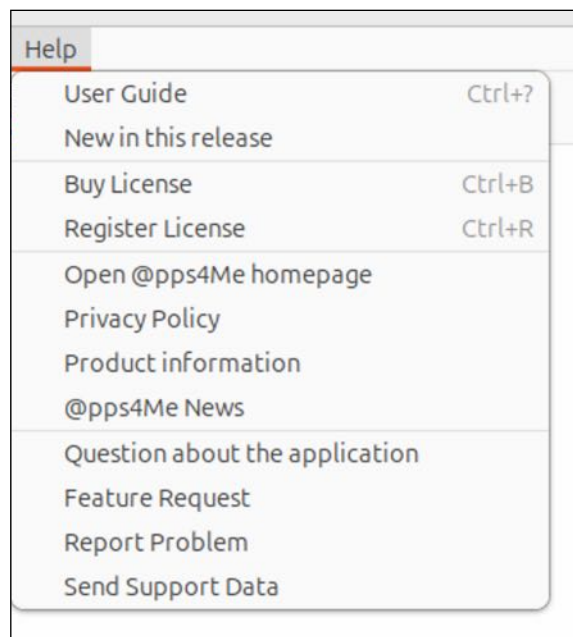


The restore location "/home/ /Downloads/Contract Manager/vPartnerPicture/" doesn't contains the database file "Contract.rsd". Please choose the correct backup folder

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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