ezContact 2.4.0
CRM software for the documentation and administration of customer relations

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Please apologize the very poor english -
the documentation has been translated by automatic tools which may result in some nonsense.

Pretty welcome

With this CRM software for the documentation and administration of customer relations ezContact 2.4.0 you receive a CRM software very comfortable and still simply to be served for the administration of your contacts with addresses, relations, appointments and documents.

ezContact 2.4.0 offers you all functions of a modern address administration and CRM software:

- highly productive, intuitive user interface
- support for MS Word and MS Excel as well as OpenOffice Writer
- integrated appointment administration with appointment calendar and Outlook comparison
- integrated document administration with direct scan possibility in PDF, JPG, gif
- extensive communication possibilities (e-mail, phone, SMS, fax, the web, letter…)
- alternatively with APP for Smartphone / Tablet PC to the entrainment of mobile data
- telephony (CTI) with Anwahl about TAPI and caller's detection about ISDN or TAPI
- varied printing functions (computer letters, lists and reports)
- complicated paging functions and filter functions, storable - also with phonetic search
- caller's list, remember lists, birthday and appointment recollection, double's search and double's settlement, mass updates
- configure very adaptably and customizeable (card indexes, user-defined fields…)
- and a lot more…
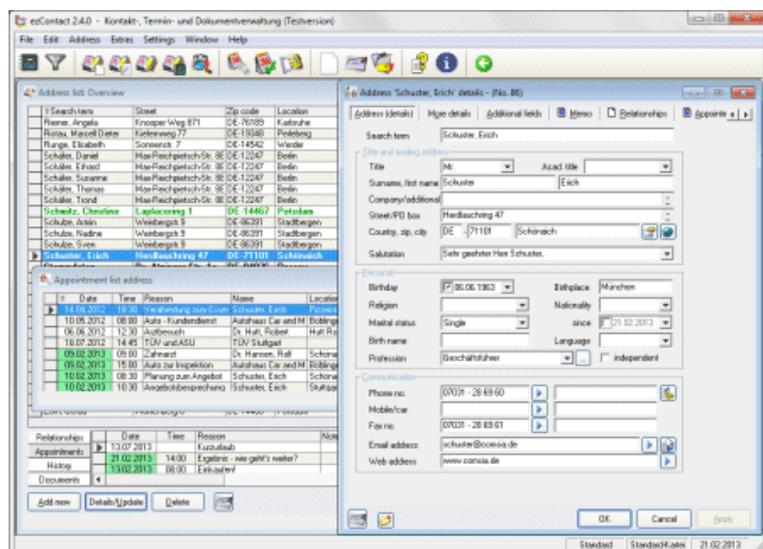
Next chapter General introduction …

General introduction

ezContact 2.4.0 is a very adaptable and comfortable address administration with intuitively and with it of simply serveable face, very well suitable for offices, small enterprises (SOHO) as well as in the private range.
With strong appointment administration, input of any documents, reports, list expressions and a lot more.

In this chapter you find an overview about the capacity extent and the available additional modules as well as general information to ezContact 2.4.0.

Description

Comfortably - Already in the basic version the CRM software for the documentation and administration of customer relations ezContact 2.4.0 administers arbitrarily many addresses, relations, appointments and documents. Besides, ezContact 2.4.0 offers you extensive filters, search possibilities and export possibilities, freely permits determinable printing lists, and creates different reports.
With strong appointment administration, comfortable postal book to the correspondence about Word, Excel, e-mail (also computer letters and standard e-mails) as well as functions like birthday and appointment recollection, double's search and double's settlement, mass updates.

Scalable - The standard design of ezContact 2.4.0 permits the input of unrestrictedly many addresses, appointments and documents on a job.
However, the CRM software for the documentation and administration of customer relations ezContact 2.4.0 is also available as a version capable of network. With it many users can work under a network (e.g., Windows Server or Novell NetWare) indefinitely at the same time with ezContact 2.4.0.

"Data comparison (notebook module)" - with it you can carry out a data comparison between a computer not connected in the net (notebook) and the server or office computer. They can maintain outwards (with the customer, at home or on vacation) data and change, and after return in the office match with the office computer (server).

Characteristics

- administration of indefinitely many contacts with addresses, appointments and documents
- between the addresses many relations of any kind can be defined arbitrarily
- possibility for the categorisation of the addresses in up to six different address types, so-called roles
- extensive correspondence function for single documents and standard documents (Word, RTF, Excel, e-mail and reports)
- with automatic PDF production about the CIB pdf brewer (must be installed)
- with the possibility to sign PDF documents about a StepOver-Signature-PAD directly
- comfortable template administration with many provided example templates to the correspondence function
- documents can be scanned directly, e.g., for associating of original correspondence or pictures an address
- an audiofile (virtually as a linguistic memo) can be taken up by Micro/Headset/etc to record, for example, dictations for employees
- with strong appointment administration / appointment calendar and a History table to the holding on of any events
- with functions like caller's list, remember lists, birthday and appointment recollection, Outlook comparison, double's search and double's settlement, mass updates
- with an incoming phone call the concerning address is automatically indicated (only with ISDN or TAPI possibly)
- import port and export of VCard files and iCalendar files, for example, for transmitting of contacts and appointments from and to Smartphones (iPhone, iPad or Android-Phones) or

desktop computers
- all lists with the possibility for the update of the columns and definition of colours, with Filterable, mouse radian support and a lot more
- freely determinable input masks to the addresses for up to 42 own fields
- smart and adaptable paging functions and filter functions, also for export and printing lists
- with phonetic search, so after similarly sounding names, like Maier, Mayer, Meier, Meyer, Mair
- export possibility of the address data, e.g., for computer letters in Word or other
- alternatively fully automatic and/or semiautomatic data protection
- intuitively serveable and modern 32-bit user interface, with many setting possibilities for the individual work
- optionally as a SQL server version with the possibility to put on an ezContact data bank also on a SQL server or to migrate an existing ezContact data bank
- optionally with additional module ezCloud / ezAPP for Android Smartphone / Tablet PC to the entrainment of mobile data
- optionally with additional module 'notebook module to the data comparison' for matching of the ezContact data between a replizierten data bank and a main data bank, for example, between notebook and office computer
- optionally with network ability for indefinitely many users

The basic

The CRM software for the documentation and administration of customer relations ezContact 2.4.0 is built up for all addresses, all the same with which role, strictly after the same pattern and, therefore, easy to open. Thus there is in each case a comfortable whole list which are equipped everybody with the same basic functions for putting in, edit and delete of the data. Moreover, lists can be exported in print (see lesson "Print") and data (see lesson "Export").
You find a general description to the service of the lists in the chapter "List service".

Also all detailed masks are built up after the same principle: You can associate to every address any relations, appointments, events and documents which are indicated then in the different so-called bleeds listed.

So that you are supported effectively at your work, reference tables which you yourself can fill and change exist behind many entry fields (see lesson "The reference data" in the chapter "Settings"). With it the data entry becomes quicker, more perfect and more standardised - then this also makes a selection more comfortable.

In every list and in every address mask you have access to the correspondence function. This enables to you letters (also computer letters) to create e-mails (also standard e-mails) and reports (e.g., "hand file for the customer visit"). Many example templates are already included.
More to this correspondence function you find in the chapter "Documents/Letters/E-mails" in the lessons "Correspondence / postal book (Word, RTF, Excel, e-mail, report)".

Copyright note

The program ezContact 2.4.0 including the documentation is subordinate to the copyright. The copyright lies exclusively with the author,
- ezSoftware e.K. (Erich Schuster), Dr. Atzinger-Str. 1a, 94036 Passau, Germany -
This means that the full version of the program (licence) must not be passed on to other persons, nor be installed on more than one PC or network.

However…
… You may transmit the program with pleasure to other prospective customers, provided that your personal licence file (ezContact.lic) is not given. Without this personal licence file the program is a test version which is fully functioning, and only at the beginning indicates a tip to the test version.
So: transmit the program ezContact calmly, but please NOT your personal licence file 'ezContact.lic'.

System requirements

The system requirements to the installation and using of ezContact are:

- PC with Pentium processor and 512 mb of main memory (or more). At least 2 GB of main memory are recommended.
- Windows XP / Vista / 7 / 8 - on Mac: Virtual PC, Parallels or Bootcamp with Windows installed. Windows XP from service pack 2 (SP2) or Windows 7 with at least service pack 1 is recommended.
- hard disk with at least 50 mb of free storage space.
- graphics card and display with a resolution of at least 1024 x to 768 image points (pixel). A resolution of 1280 x to 1024 image points is recommended.

To use all possibilities of ezContact following hardware and software is recommended:

- installed Windows printers, for correspondence and printing lists
- Microsoft Word or OpenOffice Writer to the construction of the everyday correspondence and computer letters
- Microsoft Excel to the construction of Excel-based reports
- printer driver CIB pdf brewer to the automatic construction of PDF documents from Word templates
- StepOver-Signature-PAD for signing of PDF documents
- the software for the safe handwritten e signature **eSignatureOffice standard** from the company StepOver GmbH
- printer driver FinePrint for a printing preview
- Adobe Acrobat reader to the display of the created PDF files
- Internet Explorer (from version 8.0) to the construction of reports based on HTML
- phone capable of TAPI with installed TAPI driver to the phoning from ezContact
- ISDN or TAPI to the display of incoming phone calls
- scanner / digital camera (able of TWAIN) for scanning / taking a photo of documents / figures

The first steps

Thus you lay the base for the work with ezContact: If you begin with the work with the CRM software for the documentation and administration of customer relations ezContact 2.4.0, we recommend you to carry out the in the following described steps.

Installation and the first start

Step 1: Installation
First you instal ezContact. The installation is very easy to carry out and requires no special knowledge. After you have quit the installation, find ezContact in the menu "Start" on your desktop under the menu item "Programs" registered.
To every possibility of the installation there is a suitable paragraph in the documentation (see chapter "Installation").

Step 2: the first start put on "database"
By the first start of ezContact 2.4.0 the database (an Access data base 'ezContact.mdb') is put on. In addition appears a dialog "welcome to the first steps" with the possibility to determine the data folders and to put on the database anew. Then with it you have a completely new, empty data bank. (See lesson "The first start - settings".)

Step 3: Input of the master data
Your master data must be entered unique for what you receive after the first start from ezContact again about the menu "Welcome to the first steps" also immediately the opportunity. The master data are used, for example, around the letterhead of the correspondence correctly to befüllen.

Step 4: Input of addresses
The first steps are concluded with click on **"completion"** and now you can already enter the first

addresses. See in addition the chapter "Working with ezContact".

If you have worked before ezContact 2.4.0 with another program, the data integration (takeover of the data) becomes as a rule free of charge from ezSoftware e.K. carried out, if you can make available the data in an open format (e.g., Excel table or Access data base) to us. See also chapter "Contact possibilities".

Next chapter Installation …

Installation

This chapter describes the installation options of ezContact are described. That's basically once the installation from the CD or from the Internet. In addition, the installation on a network (server and workstation).

The installation directory

It is recommended to perform the installation of ezContact in the Setup program suggested folder, eg C:\Program Files\ezContact.
In no way should the installation be carried out directly on the desktop!
The ezContact data, however, can easily be due to a different location, such as another hard drive or on a server. This separation of the data from the program is also recommended necessarily. However, also the data should **not** be located directly on the desktop.

Installation of CD

1. On Windows normally starts immediately after inserting the CD, the installation program. If not, please start the Windows Explorer, for example, by clicking the right mouse button on the Windows "Start" button and then select and click on "Explore" menu. Click in the left column, click on the CD-ROM drive (eg D:). In the right column, then contained ezSoftware CD appears. Now start the installation program by double clicking on the file "setup.exe" that is displayed in the right column of the Explorer.
2. Now, the initial dialogue of the installation program opens with a program list. There, you now select in the left list box under the heading "Office applications" to choose ezContact 2.4.0, simply by clicking. Then click on the button **Install** .
3. The following dialog appears, click "Install from CD" and follow the instructions of the installation program. Here are the default settings, eg for the installation folder, usually the recommended way.
4. After installation, it is recommended to download and install the latest available on the Internet the latest updates (at "www.ezSoftware.eu/ezContact/update.htm").

Now you can start ezContact already for the first time and create the database. (See Lesson "The first start - settings")

Installation of the Internet

In "www.ezSoftware.eu/ezContact" you can download the program. By clicking on "ezContact 2.4.0 Install / Download" opens the first window "File download" that asks how you want to handle the file. Once there, click on the **"Save"** . In the "Save As", select a folder and save the file with the specified name in the selected folder on your hard disk. Please remember this the location (drive and folder) of the file.

After a successful download of the file, start the Explorer, for example, by clicking the right mouse button on the Windows "Start" button and then select and click on "Explore" menu. In Explorer, go to the folder where you saved the downloaded from the Internet ezContact installation file. Double-click the file name, then follow the instructions in the setup program. Here are the default settings, eg for the installation folder, usually the recommended way.

Now you can start ezContact already for the first time and create the ezContact database. (See Lesson "The first start - settings")

Network installation

Should ezContact is to be installed in a network initially the **network license** is mandatory. A

single user license is not running on a server.

For a network installation, we recommend that you copy the program package and the license file (ezContact.lic) on the server in a generally shared folder. This can eg be a folder 'Setup'. From this folder, then each workstation to install the program and get the license file (copy).
Even with a later update then copy each the update installer package in these Setup folder on the server. Then again, every job is very easy to install the update directly from the server.
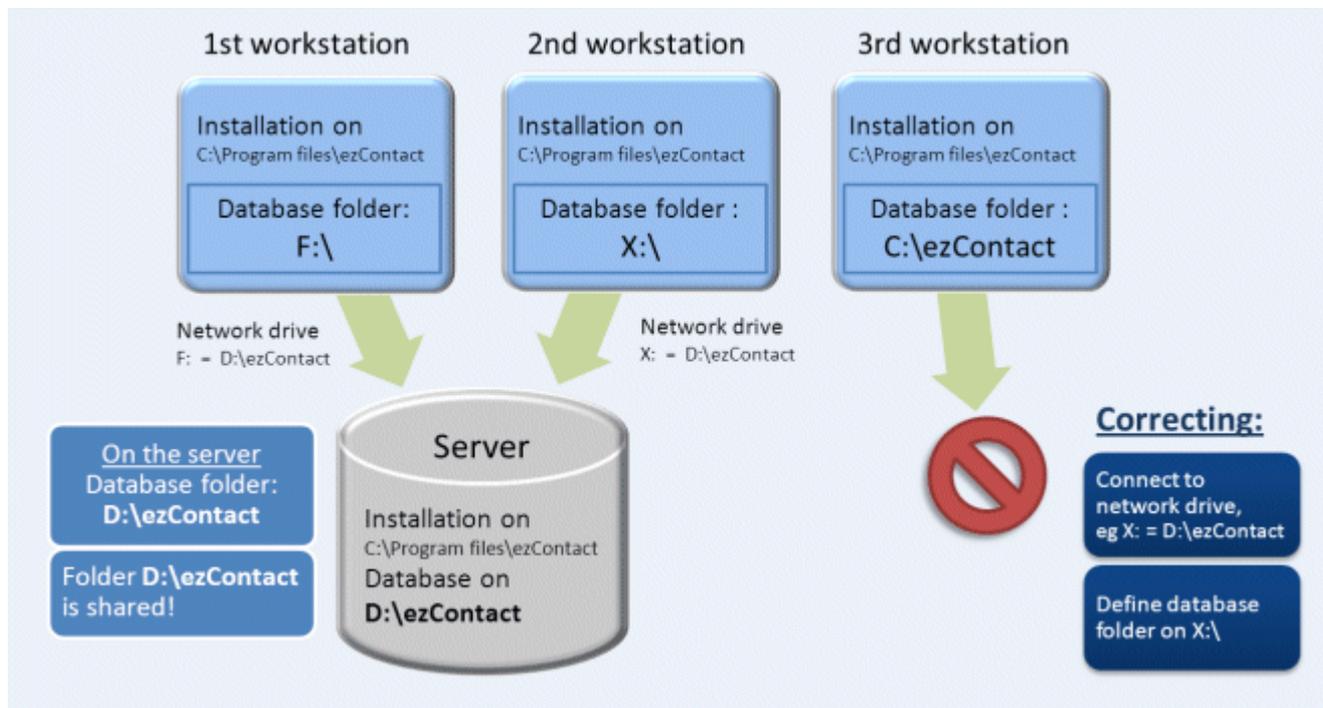
When installing on a network, note the sequence:

1. Installing ezContact on the server (not mandatory)
2. Create (or copy) of the ezContact database on the server, eg by starting ezContact
3. Installing the license (if licensed) - best in the database folder
4. Share the folder with the ezContact database on the server
5. Connect to the workstation, the shared folder as a network drive
6. Installing ezContact on the workstation
7. Selection of the network drive as ezContact database folder
8. If the license file in the database folder, then install the license on each workstation is NOT necessary!

Server installation

Before you perform the installation work, should the ezContact database on the server to be present, either by installing ezContact directly on the server, or by the database has been copied from another installation on the server.

Option 1 - install directly on the server:
After the installation on the server (either from the Internet or from CD) have performed as described, you create the ezContact database by starting ezContact once. To do so, double-click the ezContact icon on your desktop or click the Windows "Start" menu under "Programs" - "ezContact" from the appropriate program entry. First, the window "Welcome to first steps." After you determine **Select folder...** will have determined the desired database create folders by clicking on the **Create database...** created the database in this folder. When then running database operations are completed, you can enter the master data after these first steps now by clicking on the **Completion** now complete, thus closing the window. Now, ezContact started and you can work with it at the server when installing the license available - or quit ezContact immediately - preferably directly in the database folder. (See Lesson "The first start - settings")

Option 2 - database copy to the server:
This requires ezContact be installed on any computer, either a later workstation or to temporarily unused computer. Then lay there on the ezContact database by starting ezContact once. When, as described above, the data base was created in the specified database folder, you can copy the collected data to a folder on the server.

Note: No matter which of these two variants of the ezContact database on the server is created in the database folder, how to access this database folder, this folder must now be enabled for writing. On the workstations then this shared folder each connected as a network drive and is therefore available as a drive.

Workstation installation

The condition is that the database on the server folder has been shared with write access and connected to the workstation, this shared folder as a network drive.

After you have completed the installation of server ezContact, install ezContact according to the previously described installation instructions on a workstation. Now start ezContact, either by double-clicking the ezContact icon on your desktop or from the Windows "Start" menu under "Programs" -. "ezContact" by clicking on the appropriate program entry First, the window "Welcome to first steps." Once you have determined to decide **Select folder**... existing on the server database folder the button changes from **Create database**... in **Open Database** . After opening the database by clicking on the **Completion** now the workstation installation is closed. Now starts ezContact and open the specified database on the server.

Note: In case of a network installation, the license file (ezContact.lic) - if a licensed version is installed - should be not only on the server, but at the same time as possible on all workstations. It is advisable, therefore, also to store the license file in the database folder. Then each workstation has automatic access to this License and requires NO license installation on the workstation.

Terminal server solution

ezContact also runs fine on a terminal server. A requirement is a ezContact network license.

A terminal server solution allows you to run a program on the server via any intranet standing terminal. A terminal refers to a unit of the keyboard and screen, which communicates with the server and only screen content changes as well as keyboard and mouse information.
A further internal processing in the PC is not, it can be described only receive and display information transmitted keys and mouse information to the server. In this way, any programs running on a server.

A similar concept could be realized through a remote desktop server solution. For this purpose we choose a remote software on the server and controls it virtually from afar, as if you were sitting in front.

Both solutions have the advantage of greatest flexibility and independence. The drawback is that the burden on the construction of this infrastructure higher costs for Terminal Server or Remote Desktop Server solution.

The first start - settings

When you first start of ezContact 2.4.0 opens the window "Welcome to first steps - only necessary with first startup!". The window consists of several buttons behind those for the installation of ezContact 2.4.0 necessary functions. A brief explanation is available next to each button. Always the buttons are active, not yet serviced. The buttons should be operated in the order from top to bottom.
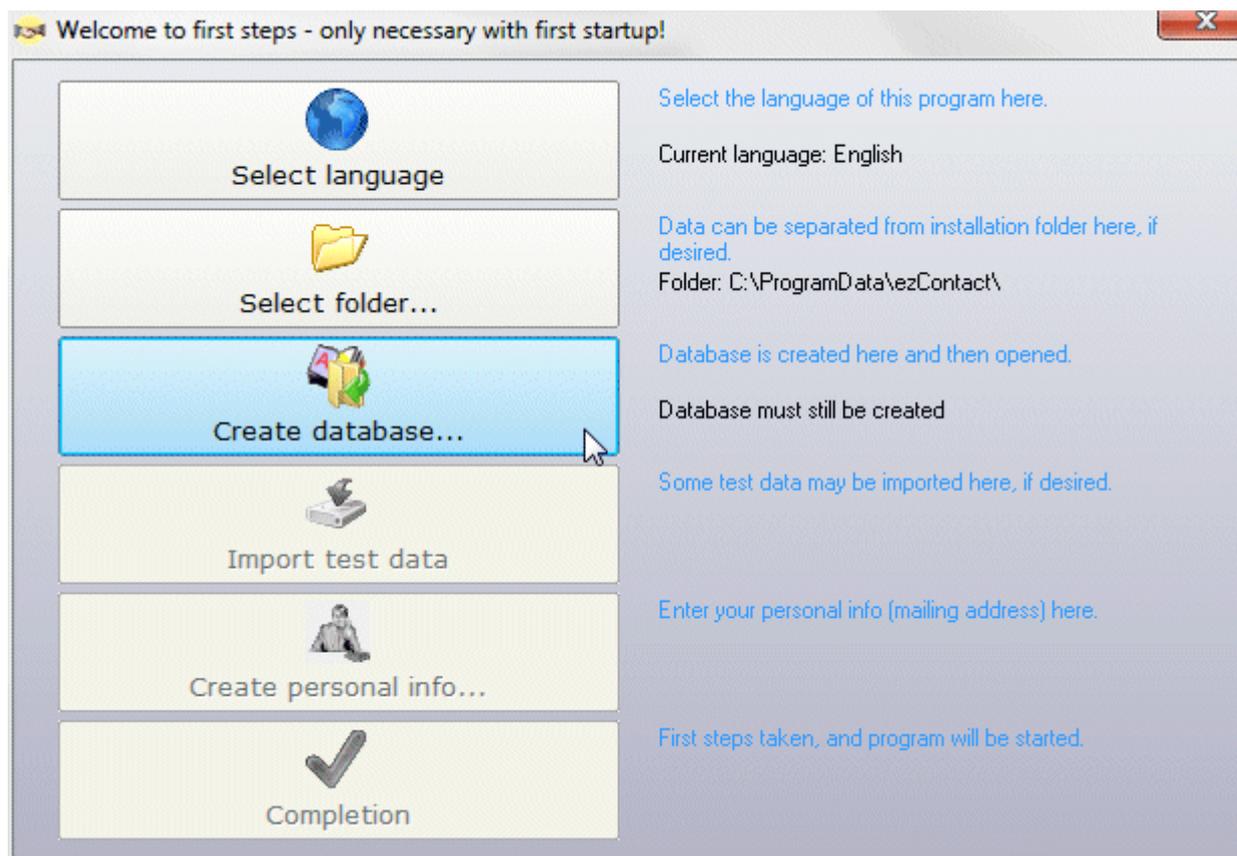
There are the following buttons and how they work:

Select folder...
Here, you can determine the main folders. These are installation folder, local data folders, database folder, template base folder and documents home folder. The three options "Windows default" "our proposal" and "Installation folder" are selectable.
The settings that you make in this window, can be changed even in hindsight. If so, want to change your settings in the program, click "Options" in the "Settings" menu. There, all folders are listed and can be changed. (See lesson "Folder definitions" in the section "Settings")
Installation folder:
The installation folder can no longer be changed. This field is used only to display. In the installation folder ezContact 2.4.0 is installed.
Local folder:
This folder contains all the files that are generated while running the program. The best example is the log file. This file logs each session in the program.
Note: The ezContact 2.4.0 license file can be stored here also.
Database folder:
The database folder contains the data base. If so later the data base is created, it is saved in this folder. The data base is an Access data base 'ezContact.mdb'. With the small "folder"-button next to the field you can select the databases folder.
Note: The license file in the database folder can be placed in a network installation, then install of the license on any workstation is not necessary!
Template home folder:
This field is to facilitate in particular the input. The folder you specify here as a templates-based, applies to all templates folder (Excel, letters, reports, email). An example for the letters template folder: C:\ezContact\Vorlagen\Briefe. With the small "folder"-button next to the field you can choose the template base folder, i.e. "C:\ezContact\Vorlagen".
Documents home folder:
This field should also in particular that prompts. The folder you specify here as documents base, is applied to all documents folder (documents, scans, letters, Excel, emails). An example of the document folder for letters: C:\ezContact\Briefe. With the small "folder"-button next to the field you can select the documents base folder, here so "C:\ezContact".

Create database…

Now, the data base is created or determined. Usually a new database is created when you first start of ezContact 2.4.0. In the "Welcome" window are available the following ways:

Create new database in selected folder:

This is the most meaningful when first working with ezContact 2.4.0. A completely new, empty database is created in the database folder that appears above again.

Copy database file from other source:

If you have already a ezContact 2.4.0 database, you can now copy this from a source in the specified database folder.

Select another folder:

If you have the database in a folder other than the specified database order, you can now define this folder as database folder. Then, the data base in this folder is opened.

Import test data

If you want to import test data, click this button. After you have confirmed this action, test data are then automatically imported.

Test data can be imported even more behind. This goes beyond "Settings" - "Load defaults".

Create personal info…

Personal info is the data of the licensee. They are required for correct filling of data-based document templates. That means in this case that the entered personal info as a sender address automatically be included in the letterhead.

The personal info can be entered also still behind. This is from the Main menu "Address" - "Personal info…".

Completion

By click on the Completion button ezContact 2.4.0 will open now with all settings. Now, the window of "Welcome to first steps" will never be opened. However, the settings which you could carry out over this window afterwards can carry you out in the program, too. Have fun at work with ezContact 2.4.0.

Separating the data from the program folder

It is recommended to perform the installation of ezContact in the folder suggested by the Setup program. The ezContact data can however easily be somewhere else, E.g. on another hard disk or to a network drive on the server.

This separation of data from the program folder can be done directly during the installation, but be carried out at any time later. That is in any case ezContact database (an Access data base 'ezContact.mdb') just is located in a different folder.

Disconnect the data during the installation

1. Prior to the installation, create the folder in which the data should be.
2. Install ezContact, either from CD or from the Internet.
3. Start ezContact first and then in the Welcome window on the button **Select folder**… .
4. "Database folder" select the folder that you previously created and defined as ezContact database folder. Confirm the folder by clicking on the **OK** button.
5. Close the window "Select folder…" by clicking on the button **Next** .
6. Now in the Welcome window click **Create database…** .
7. Confirm the creation of the database in the specified folder with one click on the button **Next** in the window "Create database…".
8. Now, created the basis of the data in the selected folder and open the database immediately.

Disconnect the data at somewhere later

1. Move the ezContact data base (an Access data base 'ezContact.mdb') from the current database folder (for example, the ezContact installation directory) to any other folder, which is intended as a new ezContact database folder.
2. Start ezContact and enable in the window "Create database…" the RadioButton **"Select**

another folder…"

3. With a click on the button **Next** you can now select the folder containing the ezContact database as new ezContact database folder.
4. Confirm the folder by clicking on the **OK** button.
5. Now to start ezContact and open the database from the selected folder.

Next chapter Settings …

Settings

Top menu and role definitions

Up to 15 most important functions available in ezContact can be associated in the easiest way to the single buttons of the start menu. With it the start menu can be customised to the individual demands.

To associate certain functions to the buttons you click on the small symbol button below on the right. Then, besides, appears the dialog with a listing of all available functions.
To associate a certain function of a certain button of the start menu you hold on the desired function with the mouse (left mouse click on the function without letting go the mouse button again) and move this function to the desired button of the start menu. There you let go the mouse button again, then the button is booked with the selected function. This kind of the mouse service is called, by the way, "drag and drop".

Note: The functions which are not available to you - either because of a missing additional module or because of missing user's rights - are indicated grey.

Note: With a right mouse click on the small symbol button below on the right the start menu is put again in the delivery state back, so all buttons again is booked with the original functions.

display of the appointments
The allocation of the button with the appointment calendar or the appointment list can be toggled with right mouse click between appointment calendar and appointment list.

role definitions
One of the very interesting possibilities in ezContact is the role definition with which can be freely defined up to six different so-called roles. These can be, for example, the roles of "customers", "prospective customer", "employees", "authorities" and "advisers" who are given so also exemplarily.
Then of every address can be associated one or several these roles by which these addresses "Scroll" then very simply about the suitable button in the start menu (or from the suitable list from the main menu "address") can be selected.
Middle five buttons of the start menu are prebooked with the so defined roles. Then, besides, only the addresses which are associated to this role are indicated in each case. It is, in principle, a predefined filter which comes here to the application.
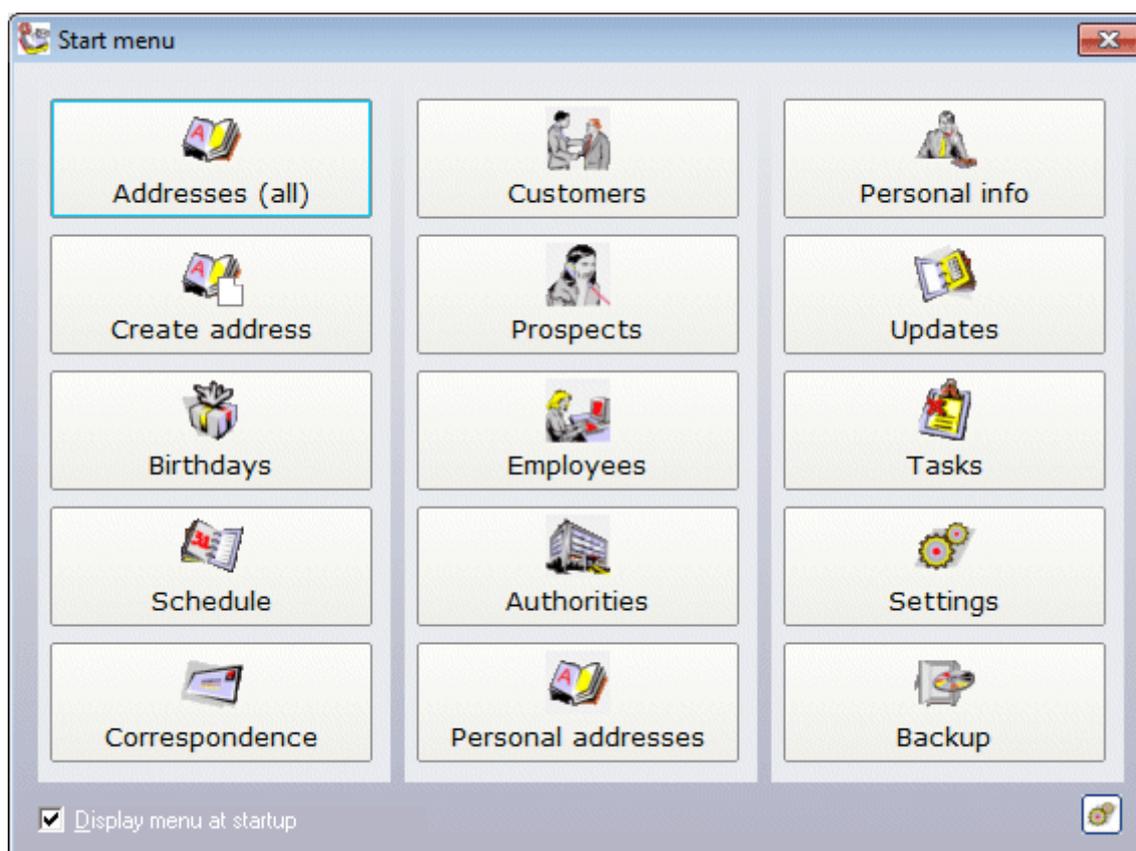
You can change the roles from the start menu with right mouse click on one of these buttons with the roles or also about the main menu "Address", menu item "Roles" - "Definitions". Then, besides, a small dialog appears to the input up to six different roles.

Also the icon which should be used for a certain role and for an address with this role can be fixed arbitrarily. In addition only one icon file (*.ico) with a filename must be removed according to the role in the folder "icons".
Example: For the given role of "customers" there exists an icon file customers.ico, for the role of "prospective" an icon file prospective.ico also already exists. Need a role of "mandators", then you just create a new icon file mandators.ico in the folder "icons".

List settings

 You can make all the big lists (eg, the Address list) in ezContact content and appearance to your liking. All changes are always based on the currently open list. The list settings dialog is accessed via the small button at the bottom right of each list. On a list, the following things are changed:

General settings

The general list settings are available in the list settings dialog to select "General and color settings" in the "General" tab. Here you can select among other things in the looks of the list, ie whether flat or 3-dimensional, whether with or without a frame, whether the list should be colored or lined. You can also make the following settings:

Filter bar
Using filter bar can be sought in the individual columns of the table (see Lesson "The filter bar"). Here you can determine whether the filter bar of the list always to be displayed or only when requested via the toolbar.

Cell tool tips

Here you can switch on and cell tool tips and make their view. Cell tool tips are tied to the mouse pointer. As soon as the mouse pointer on a field in the table, as indicated by the cell tool tips the contents of the field. This is especially handy if you can not read the contents of the box completely and to the corresponding column would not move higher.

Allow multiple selections

Multi-selection allows the simultaneous selection of multiple records in the list, for example, to delete multiple records at once or for mass updates. If you disable this function, you prevent multiple records in a list can be marked.

Allow record dragging

This option is only available if at all drag / drop operations are supported. A prerequisite for this is the presence of an export template with theme of "DragDrop", for example, the supplied VCard template "Drag-and-drop Template: Address" (DragDrop VCard.vct). This export template is then used when dragging a record from the list and creates an export file that is pulled in as a different ezSoftware application where it can be imported by dropping.

Switch to automatic scroll

The automatic scrolling results in the current data sets being always shown when scrolling the list. The list "runs" so to speak at the down ache of the scrolling up joist or when operating the scrolling up wheel of the mouse.

Toolbar

The toolbar consists of a maximum of 8 thumbs behind which puts one functionality. All 8 icons are represented here in the form of 8 checkboxes. By ticking the relevant box, you can determine which small picture and therefore what functionality you want to have displayed under the appropriate list. By default, the toolbar consists of the pictures "Select all", "Line Color", "Filter bar", "Remove Filter" and "Print list". A detailed description of the individual functions with the appropriate small picture can be found at "The tool bar".

Row markings

The row markings help you to structure your data and are therefore a useful working tool. For all lists ezContact already supplies with some row markings, such as all on this day changed or newly added records are highlighted. Row markings are defined in the list settings dialog with selection "General and color settings" in the tab "Row markings". The appearance of the row markings (color and font attributes), you can also determine in the tab "Colors" of this dialogue.

Column definitions

All lists in ezContact offer you the opportunity to decide for themselves what content they should have, so the data to be displayed in the columns.
Besides of the content of lists, you can also determine the visual design of the columns themselves. You have a valuable work equipment which helps you to organize your data.
The column definitions can be reached in the list settings dialog by selecting "Dialog for column definitions." Here, you define both the content as well as the visual design of the list.

Export settings

 Right-clicking on the small button at the bottom right of each list will be a small selection window with these two options:

- "Export list settings to a file"
- "Import list settings from a file"

This means that all settings of a list in a file is exported to transfer settings such as on another computer and then re-importing it.

Tab display

[>>] The input mask for addresses can be designed to display a tab right in the first window. This means, that you can display next to the address and contact details of the first tab Address (details) also, for example, the Appointments.

Of course, it is clear that the display of a tab in the input window calls an about twice as large window, as only the display of the input fields. Therefore, the function is only active when the input window is significantly larger than the default size. This is done so the double arrow button will repeated opening of the input window >> displayed. Now click on the double arrow button, so a small dialog is active, with which you can cause the display of a desired rider in the first window. Choosing a tab from the list box of the dialog, this tab appears immediately in the free area of the window.

The reference data

Reference data as E.g. places and banks, religions, nationalities, marital status, note templates, and more usually requirements to various input fields, to facilitate the entry.
In some cases still a certain functionality (example titles and priorities) hides behind a certain reference data set in addition to the pure information.

Note: You have a quick access to the reference tables also directly from the input masks, by simply double clicking on the corresponding identifier from the input field. You will know a such active identifier, that the term blue turns up and is pointed out as soon as you drive over it with the mouse pointer.
Example: A double click on the identifier "Title" the reference table for entering titles will open immediately.

Country list

ezContact 2.4.0 already provides a complete list of countries. This list of countries is used in three places:

1. Settings - Options - Preferences - Country codes
   Because any country codes are supported in ezContact, the country code defined in the specifications is used when creating an address. There appears a list with all features from the country list as a suggestion to enter. (see also "Standards and default settings")
2. Enter of a foreign address
   Enter a foreign address, then you can simply override the country code in the address. Alternatively get a country selection list to choose of the country with double click on the identifier 'Country zip city' from the input fields for country, postal code and location.
3. Correspondence function (new addresses rules of the german post)
   There is a new variable (placeholder or bookmark) 'LANDNAME'. Place that variable to the desired location in the address field of a letter, then enter the name of the country of the recipient of the letter there. The special feature: the country name is entered only if the country is not their own country, so only for foreign recipients.

Location directory

ezContact 2.4.0 provides a comprehensive German site directory with already which can be completed here, however. When entering a postal code in an address, the place will then automatically find from this table and entered in the address.

You can also completely update the directory of the site and, for example, own places from another Access database. Thus you can among other things, from the Internet to our reference

database provided download page with local and bank directory for Austria and Switzerland these places in ezContact to import.
Just get the zip file http://www.ezSoftware.de/files/Referenzdaten.zip and unpack the zip file after downloading, for example with WinZip. Then, you copy the database "Referenzdaten.mdb" in the import folder of ezContact. Now, in the site directory with right mouse click from the small PopUp menu, you can delete all existing sites (if desired) and import locations from any Access database with locations (for example, from the "Referenzdaten.mdb").

Bank directory

ezContact 2.4.0 provides a German bank directory with already which can help a bank type, to select the correct bank.

You can also completely update the Bank directory and load for example, own banks from another Access database. Thus you can among other things, from the Internet to our reference database provided download page with local and bank directory for Austria and Switzerland these banks in ezContact to import.
Just get the zip file http://www.ezSoftware.de/files/Referenzdaten.zip and unpack the zip file after downloading, for example with WinZip. Then, you copy the database "Referenzdaten.mdb" in the import folder of ezContact. Now you can delete all existing banks (if desired) in the Bank directory with right mouse click from the small PopUp menu and import banks from any Access database with banks (for example, from the "Referenzdaten.mdb").

Titles

Here you can define any titles which are available when entering an address to select via a pull-down selection list.

Special functions

Correspondence of Word or E-Mail:
Certainly with the main purpose of the titles is as a salutation for correspondence about Word or email. The salutation is automatically populated with the name and given name of the letter recipient. Is a placeholder for the name in the appropriate place $Name$, or the given name $Vorname$ used.
This salutation is available as a variable BANREDE.

Other lists

These lists have no extra functionality, but serve only as guidelines to the appropriate input fields, to simplify the entry and also to unify.

This applies to the following reference data:

- Title
- Religions
- Nationalities
- Marital status
- Professions
- Note templates
- Blocking reasons
- Address categories
- Address types
- Phone types
- Relationships
- Date reasons
- Event templates

- ▶ Priorities
- ▶ Editors

Layout of the address mask

The address input mask can be individually adjusted. This means that you can set yourself which data groups where you want to appear on the form.
Data groups are related data, a frame and referred to. For example, the data group "Title and mailing address" includes title, name, street, postal code, residence and salutation. The data group "Communication" includes telephone and fax numbers, e-mail and Web address.
You can now set which data groups in what order on which tab of the input mask will be placed.

So it goes:

1. Open the settings dialog for the address input mask in 'Settings' - 'Layout of the address mask'.
2. The individual data groups are here represented by each designated frame, E.g. "Title and mailing address".
3. To move a specific data group, hold the data group with the mouse (left click within the frame of this data group, without releasing the mouse button again).
4. Use the mouse to the desired position to move this data group.
5. There release the mouse button, then the data group is placed there.

Note: The moved data group falls **behind** the data group where it is dropped. This means that want to place a data group at the top, then move them first on the first data group there already placed, in order to come to the second position. Then move down to the first data group, so your second data group slides upward to the first position.

Note: This type of mouse operation is called "Drag and drop".

Color definitions

A currently open address can be marked with a colored frame to immediately assign a special feature of this address down. Whether and on what color an address to be tagged so can be adjusted for different features:

1. a blocked address
2. a recent birthday
3. one marked with marker address
4. for various potential markers for the analysis of potential Alchimedus

The additional fields

If you want more input fields for the address data, ezContact 2.4.0 offers a convenient way to set up up to 42 additional input fields that are available for each data record.

The input fields

Enter any field name. The imput format can be left empty, then any input in this field can be made. Or choose a particular format for the input, for example, to allow only numbers. You have the following options:

Text	allows all inputs
Number	only allows integers
Amount	allows currency entries (numbers with two decimal places and thousands of

Interpuncts)

Date	enables you to enter of a date
Yes/No	allows a Yes or no about a checkbox (check mark)
List	allows you to select of predefined values from a selection list
Learning list	allows you to select of predefined values from an Auto-adaptive selection lists
Required field	allows you to define fields that absolutely must be entered

Typing a semicolon (;) a more accurate description prompt can be specified according to the definition of the format. The following are possible:

Specification of the length	Text	E.g. Text;10 = 10 digit input field
	Number	E.g. Number;3 = 3-digit number
	Amount	E.g. Amount;12 = a total of 12 characters
Specification of explanatory text	only with Yes/No	E.g. Yes/No;please click here
Specify of the name of the list	List	E.g. List;Hobby
	Learning list	E.g. Learning list;Hobby
As a mandatory field	all formats	E.g. Amount;Required field oder Date;Required field

To populate a list or learning list with predefined values, open with the F5 key in this input format field in the reference table associated with this field. Here you have the possibility to enter new values or modify previously entered values from the reference list, or delete.
By specifying the name of a list, you can define as many different lists and maintain. Thus you can various additional fields several lists, or also several additional fields have the same name each assign same selection list.

Options

In ezContact you have the opportunity to make a variety of program settings (options), which are explained here.

Display settings

Start window
Here you can select which window is to be opened immediately when you start ezContact. The following options are available:

- Main window: start with the main window WITHOUT any list
- Schedule: open immediately at the start of the calendar
- Appointment list: open immediately at the start the appointment list
- To-do list: opens when you start immediately the task list

Form size
Here you can specify the size of the windows (dialogs and lists). This is especially useful if you are using a screen with very high resolution, and the font in ezContact therefore appears very small. Then simply increase the form size until it is comfortable for you.

Display toolbar above

It lets you determine whether the toolbar above should be displayed directly below the menu or disappears.

Window position
The Windows standard stipulates that open new windows always moved slightly overlapping. This has the advantage that the window mutually obscure little as possible. Disadvantage: You never know where a window is open. That is why there are another alternative settings in ezContact:

- according to Windows standard, ie as described in overlapping
- all windows always centered position. Disadvantage: windows can cover each other. Nevertheless, the recommended setting.
- remember the position of each window. Each window is opened so as it was previously closed.

Display options

- **Always display maximized lists**
  So lists can display as many records, there is the possibility (which is also recommended), lists always maximizes display. If this is not checked, then ezContact remembers the position and size of each list and opens each list as it was previously closed.
- **Tab in contemporary flat style**
  Much of the dialogue in ezContact consist of multiple tabs, behind which lurk in other input options or lists (including the Options dialog). You can adjust the appearance of this tab (classic three-dimensional or flat).
- **Tab icon**
  With tabs, which conceal turn data entries in a list (eg dates or documents), can be identified by an icon, whether data is present or not. For this icon, various options are available.

Create log file for each startup
At each program start a log file is written, which is then usually overwritten when the program restarts. It means that only the current program progress is logged. Enable this setting, then for each program start a separate log file is written, which is then stored. So then you have a log file for each program course (history), which can be viewed at a later time.

Color settings

Here you can see some colors - background-color gradients - set for various windows and dialogs. You can define the Start menu, for lists, tab dialogs and other dialogues each different color gradients.

Color Start Menu
If enabled, you can define a gradient for the start menu. If disabled, the Start menu is displayed in gray.

Color gradients of other windows
If enabled, you can define a gradient for each lists, tabs dialogs and other dialogues. If disabled, all windows are displayed in the same color.

Background
The color set here is used as the background color of the whole application, if the file does not open its own background color is defined.

Color suggestions

- **blue**: all the windows in a bright blue with a subtle gradient.
- **green**: all the windows in a bright green with a subtle gradient.
- **red**: all the windows in a bright red with a subtle gradient.
- **orange**: all the windows in a bright orange with a subtle gradient.
- **pink**: all the windows in a bright pink with a subtle gradient.
- **violet**: all the windows in a bright purple with a subtle gradient.
- **win.blue**: all the windows in a shade of blue corresponds to the Windows color scheme

"Blue".
- **win.olive**: all the windows in a Olivton corresponds to the Windows color scheme "Olive".
- **win.silver**: all windows in Silver (light gray) corresponds to the Windows color scheme "Silver".
- **black**: all the windows in a shade of black with color gradient from gray to black.
- **ezSoftw.** all windows with a gradient in ezSoftware house color.
- **colorful**: all windows with customized gradient, very colorful.
- **beige / pastel / light**: all the windows in beige (Windows98 standard).
- **gray / pastel / light**: all the windows in gray (WindowsXP-standard).

For custom color settings, is that with a double in the appropriate input box above or below the standard Windows dialog appears for color selection, so you can choose the color easier. The notation of the color is displayed in HTML syntax, so hexadecimal encoding. The gradient of colors chosen will be displayed in the corresponding box, so you have a perspective on the results.

Standards and default settings

Country code
Enter the flag of your country, E.g. 'DE' for Germany, 'AT' for Austria, 'CH' for the Switzerland or any otherwise. This value is used as the default when you create a new address. All enabled in the country list, hidden so not to select countries will be shown for selection.

Default currency
Here enter the standard currency, with whom worked in ezContact. This has particularly impact on the currency, which appears first in the checksum calculations. All currencies of the activated on the country list, hidden so not to choose are displayed for selection.

Sales tax in % (VAT)
Here, the currently valid rate of value added tax can registered that may be used in various places in ezContact as a default.

Automatically format names
If this setting is enabled, then when entering the name, first name, street and place the first letter is automatically converted to uppercase. Thus, you can enter in lowercase, which can speed up the entry.

Format routing number automatically
If this setting is enabled, then it is automatically formatted in the German format (123 123 12) when entering a Bank code. Of course, this setting should be disabled for Austria or Switzerland or other countries.

Comfort selection with multiple accounts
This setting is not enabled, then the 'additional accounts' - button in the address are displayed more accounts of an address only. Otherwise - if selected - the different accounts can be comfortably selected to address directly in the address via a selection list.

Preferences for new documents
Here you can set the document name and subject for new documents of the different categories (address, date, event, task,…) should be specified. These are variables available: [keyword], [name], [first name], [editor], [timestamp] and [date]

- [Timestamp]: the current date and time in the format "YYYYMMDD ssmm", so "YearMonthDay HourMinutes"
- [Date]: the current date in the format "YYYY-MM-dd", so "year-month-day"

Priority (appointment)
Here, you can choose the value which should be specified at re-entering an appointment as a priority. These are all values entered in the reference table 'Priorities'.

In calendar
Here you set whether and when an appointment in the calendar to run: never, always, or only if the appointment time is entered.
This setting sets the default to only when you create a new appointment, you can record yourself at any time individually in each date, whether it should or not occur in the calendar.

Automatic
Here you can set how the appointment automatic entering a new date should be set. The date function describes what should happen with the appropriate date if it has expired:

- ▶ 'keep appointment' - date remains without that demand when the program starts
- ▶ 'enquire' - at program startup is asked what should be done with the date
- ▶ 'move to today' - the date is automatically created to the present day
- ▶ 'move to tomorrow' - the date is automatically placed on the next day
- ▶ 'move to history' - the date is automatically moved to the history
- ▶ 'delete' - the date will be automatically deleted

Automatically set editor
If this setting is enabled, then the agent designated in this workplace is entered automatically as a editor when you create a new appointment or history entry.

Appointment location
Here you can set what should be specified at a date in the "Location" field: name, first name, street, city.

Preferences for new history entries
Here you can set which event text, note and description can be entered to created history entries in auto from the correspondence function. These are variables are available: [DokumentTyp] (documenttype), [Betreff] (subject), [Thema] (topic), [Bemerkung] (comment) and [Datum] (date). History entries from an email or SMS in addition: [Inhalt] (content).

Priority (history entry)
Here, you can choose the value which should be specified at re-entering a history entry as a priority. These are all values entered in the reference table 'Priorities'.

Telephony and e-mail settings

Phone settings
Here, you can to set, what should be done with the click on the arrow icon next to the phone number:

1. Selection via phone adapter: thus the telephone number is passed through the TAPI interface to the phone, so that can be dialing directly from ezContact. While you still can set whether to use the default dialer or the internal small TAPI interface (recommended). Also a prefix to the outside line can be specified here, as it is required E.g. for telephone systems, to get a dial tone at all.
   Uses the internal TAPI interface you can set yet, whether the window after the selection be closed automatically (recommended) to.
2. Display phone pad when dialing: it opens a window to enter of a note about the phone call. This telephone note can be placed as date or as a history entry (event).

In addition, you can here disable the call monitor if this is not desired, or if so should encounter problems with your telephone system. The call monitor monitors incoming calls via ISDN or TAPI and displays in the status bar or in the caller list. Requirement to do so is that the computer to the ISDN is connected, for example with an ISDN card or a TAPI enabled phone to the computer is connected.
If you have activated the call monitor, then you can choose also whether to be enlisted for this incoming call in the caller list and whether automatically the concerned callers to search, unless it is specified in ezContact. This then, whether a found address should be displayed and whether to create a telephone note can be stored as a date or as a history entry (event).

Comfort selection with multiple phone numbers from list
If this setting is not enabled, then more phone numbers of an address are displayed only via the
'Other phone numbers' - button in the address. Otherwise - selected - the different numbers can
be comfortably selected to address directly in the address via a selection list.

Email settings
Here, you define what application, an email should be sent:

- the internal correspondence function (default and recommended).
- internal email dialog - is an alternative email dialog, otherwise as the correspondence function
  exclusively for sending emails.
- Standard MAPI - the email program, which is defined as the default MAPI program with you. If
  not otherwise specified, then this is Outlook Express.
- Microsoft Outlook Express (mailto:) - here starts the program like from an Internet site with a
 click of an E-Mail address.

Comfort selection with multiple email addresses from list
If this setting is not enabled, then more E-Mail addresses of an address appear only by clicking the
'Other email addresses' - button in the address . Otherwise - if selected - the different email
addresses can be comfortably selected to address directly in the address via a selection list.

Dial-up connection
Here a list of the available dial-up connections is displayed (if available), which you can specify,
aims a dial into the Internet with what dial-up connection automatically. It is recommended to
perform the selection before and not to enable this setting.

Folder definitions
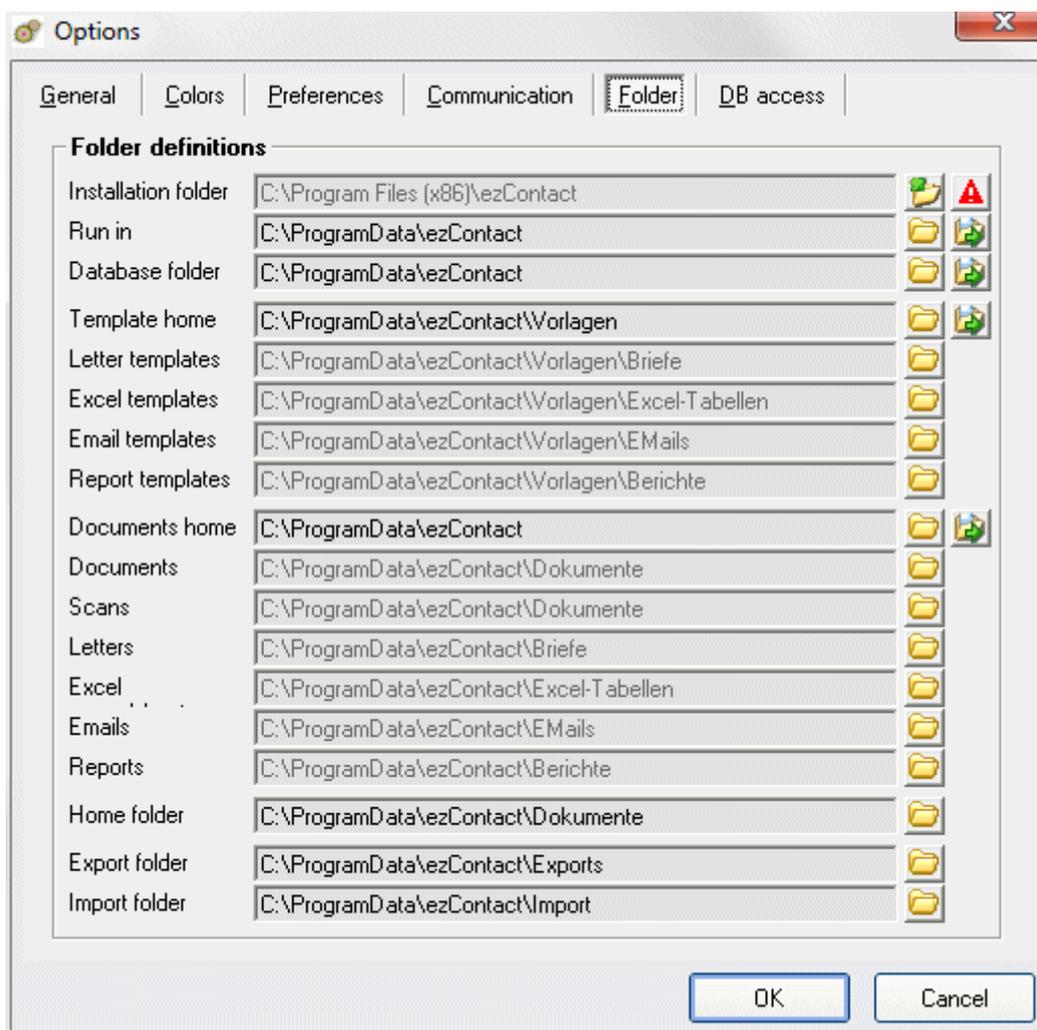
Here, you see all folder definitions used in ezContact, which can also be changed.

Installation folder
Here, it will be shown in what folder the program ezContact 2.4.0 has been installed. The default installation folder is C:\program files\ezContact
Of course, this folder can not be changed here, for that the program must be reinstalled.

Run in
The program will be executed in this folder. This folder contains required and created local files such as the log files at run time. The license file also can be placed in this folder.
Click on the "Home Folder" button is applied to this folder for all following folder as the home folder.
Example: This folder is D:\ezContact, then the template home folder will be D:\ezContact\Vorlagen (templates) and the letter template folder will be D:\ezContact\Vorlagen\Briefe (templates\letters).

Database folder
The database folder contains the data base (an Access data base 'ezContact.mdb').
Note: If the license file is located in the database folder, then the installation of the license on any workstation is not necessary, because then every workplace has access to the license file directly.

Template home
This field should primarily facilitate the entry of another template folder. The folder you specify here as templates base can be applied to all the templates folder (letters, Excel, e-mail, reports).
Apply for this folder as a base for all the template folder, click the "Home Folder" button after the field.
Example: The template base is D:\ezContact\Vorlagen (templates), then the folder for the letter templates will be D:\ezContact\Vorlagen\Briefe (templates\letters).

Documents home
This field should primarily facilitate the input of the various documents folder. The folder you specify here as base documents can, for all documents folders (documents, scans, letters, Excel, emails, reports) are adopted. Apply for this folder as the basis for all documents folder, click the "Home Folder" button after the field.
Example: The documents base is D:\ezContact, then the Documents folder will be D:\ezContact\Dokumente (documents) and folders for the letters will be D:\ezContact\Briefe (letters).

Home folder
For each address, you can define a personal folder. To facilitate the selection of these personal folders and standardize you can centrally set the home folder for that.
Example: The home folder is D:\ezContact\Dokumente (documents), then the personal folders for 'John Doe' will be D:\ezContact\Dokumente\John Doe.

Export folder
This folder is used for export. So here are the files are stored with data exported.

Import folder
This folder is the default folder to select files (Access database or text file) to import. Of course you can then import the folder to be changed.

Functions of the icon buttons

The definitions include different folder icon buttons whose functions are explained below:

	Reset current values	Thus, the currently stored folders can be retrieved. This allows new entries to undo if they have not been saved.
	Reset default values	With this button, the program established by the default values ??are set for all folders.
	Select folder	With that any folder can be selected, which is then defined for this folder definition. Right-click opens the currently selected folder in Windows Explorer.
	Home folder	To facilitate the entry of another folder, the current folder will be used with a single click for all subsequent folders as so-called home folder.

Database access method

These settings are only important for network mode, if several people are accessing the data. In a network that is always the record that is currently in progress, locked so that no one else can access it. If so many people at a time on a network working with the data, you may see fast as many records are locked, that does not work any more. On the other hand, if it is not locked, then all the work easily. But two people have the same record in progress, and a store back its changes, they will be overwritten by the second when the saves his changes.
In other words, you have virtually the decision to make 'security' against 'comfort'.

Secure access
Describes how the records are immediately blocked the access, with the consequence that they will no longer be accessible to others. For large networks with many jobs may have a problem.

Do not lock
Here the records are locked immediately, so that even in large networks there is no mutual interference and everyone can work smoothly. But at the cost of the risk that is not warned about double access, and you may lose changes when two people edit the same record simultaneously.

TAPI properties
.

Here you can select the desired TAPI driver, suitable for your TAPI phone, called the TAPI Service Provider (TSP). Also the properties of the selected TSP are displayed.
For testing, you can also enter a phone number and select the TAPI driver can be selected.
With the **settings** for the TAPI driver associated settings dialog will open, so you can also make settings for your TAPI driver.
With the **dialing properties** opens depends on your operating system setting window Phone and Modem Options, locations or other dial-up properties.

E-mail accounts

Before you can send e-mails via internal correspondence function, at least, an e-mail account with your email address and information to the mail server (SMTP server) has to be created. Therefore, the first time the e-mail program open this window for creating the e-mail accounts at once.
All necessary information can be obtained from your provider, so the company with which you have your e-mail address (eg T-Online).
When you want to receive e-mails, then you also need the information on the receiving mail server (POP3 server), you also get from your provider.

You can create in ezContact several e-mail accounts, for each sender as a separate e-mail account with your own email address. When sending e-mail via the internal correspondence function, you can then determine the sender's account.

FTP connections

Thus created on the internal correspondence function documents can be transferred via FTP, at least one FTP connection must have been created with information on the FTP server and user information.
All necessary information can be obtained from your provider, so the company with which you have your FTP account.

Toolbar

The toolbar at the top right below the menu (called the Toolbar) can be customized. This means you can select what features to include in the position in this toolbar (toolbar).

So it goes:

1. Open the configuration dialog from the toolbar in the 'Settings' - 'Toolbar…'. It also displays a dialog with the list of all available functions.
2. To assign a specific function of a particular button on the toolbar and hold the desired function has been determined using the mouse (left click on the function, without releasing the mouse button).
3. Move this function with the mouse on the desired button of the settings dialog for the toolbar.
4. There release the mouse button, the button is assigned to the selected function.
5. The function of a currently occupied with the right mouse button to remove the finished button.

Note: This kind of mouse operation is called "drag and drop".

Note: A right mouse click on the small button at the bottom left shows it again set back to factory settings, so all the buttons is back with the original functions.

Properties

In addition to the options, there are several program properties that can be changed. Unlike the

options only describe the properties settings that can be enabled or disabled.

Run at Windows startup
This can be set to ezContact is immediately opened when Windows starts - so soon after switching on the computer.

Start with password
When you enable this setting, a password can be set. When you start ezContact this password is requested to prevent the use of the application by unauthorized persons.

Show toolbar
This property allows the toolbar at the top right of the menu below, or hide.

Confirm before exit
Normally, exiting the application must be confirmed. This confirmation message before closing can be turned on or off.

Automatic data backup
When this setting enabled, an existing backup job can be selected to run automatically when you exit ezContact. See also chapter "Data protection".

Address list with details
Certain details can be shown for the just highlighted address at the mailing list below. This indication of the details can be activated or deactivated here.

Show address on call
Only when having the call monitor enabled (via ISDN or TAPI), then this property is available, otherwise not, of course. You can then decide whether with an incoming call it shall be tried to find the corresponding address from the phone number and show the address mask.

Set up last contact
Use this setting to certain events for which the date of last contact to the appropriate address should be set up to date. In this moment, the following events are available: "with correspondence" - "with finished appointment" - "with phone pad" - "with incoming call" - "when address is opened".

Insert after copying
If in the address list an address is copied using Ctrl+C, then with activated setting the address is inserted just again (equivalent to pressing Ctrl+V). Otherwise, the address is copied to the clipboard and can then be inserted even with Paste (Ctrl+V) here or in other applications.

Automatic appointment with new address
If you usually like to enter an appointment to a new address, then here you can specify that when creating a new address automatically an appointment is created.

Appointment monitoring
With the active appointment monitoring you are automatically reminded of the appointment to the registered time provided that a time was typed in. When you enable this setting, you can specify how often to check the system on their maturity dates (interval) and how many minutes before the time of the due appointment you want to be remembered by the system (time period).

Appointment filter by editor
Once you've set for this machine a particular editor (main menu item "Settings" menu item "Set editor"), then you can turn on or off, in which actions the dates are automatically filtered based on this editor: - with 'Appointments due', - in appointment monitoring, - with schedule, - in appointment list, - in history list, - to Outlook synchronization

RTF word processor (with .rtf)
Use this property to determine whether the small word processing enclosed at ezContact shall be used for RTF documents or another installed word processing.

Use .rtf as default
This property refers to the correspondence function. Normally when writing letters is an installed Open Office or Word provided and used. Did not both, then we recommend the use of RTF documents, which can be edited with many other word processors.

Select templates from file list
Would you like the template files to create a letter, email or report directly select about the Windows file list, then you activate this quality (not recommended). Otherwise, to select a template file, a list turns up with the defined templates.

Template automatic switch off
When you create a letter or report on the correspondence function, you usually need always a template file. Therefore, when you click on the correspondence function also immediately opens the selection list of the templates. If you don't like this, then you can disable this automatic here.

Personal Folders automatically
If you want for each address a separate folder for storing the documents for correspondence, then you can adjust here that these personal documents folders are created directly when you create the address. Then you no longer have to create and assign these folders for each address yourself.

Start functions
Here, certain functions that can be performed directly at the start of ezContact, on or off as required. These are for a system functions as the system check, the search for Outlook and an ISDN / CAPI and TAPI test exam. In addition, application functions as the selection of the database (Folder selection), the Start window 'current issues', the Birthday reminder, the List of due dates and the Task list.

Select DB folder

Here you can specify a folder that is then used as a "startup folder" on the next start of ezContact 2.4.0. The Startup folder contains the ezContact database.
You have therefore the possibility to separate the ezContact data from the program folder (see also lesson "The first start - settings").

Database folder:
Here the folder is defined in the ezContact database to be stored. With the "Folder" button after the field you can select the database folder.

In order for the documents and templates of the database are assigned, you can also specify a template-based folder and a document-based folder.
Template home:
The folder you specify here as templates-based, will be applied to all the templates folder (letters, Excel, emails, reports). With the "Folder" button behind the field you can select the template folder basis.
Documents home:
The folder you specify here as document-based, will be applied to all documents folders (documents, scans, letters, spreadsheets, e-mails). With the "Folder" button behind the field you can select the documents home folder.

Background color and logo image
So you can see immediately, on which database you use, you can assign each database a color and logo. Selects the color simply double-click the small color display behind "background color". To select a picture file, click on the small colored button behind "logo image file".

Note: The Startup folder in the file list is entered as 'standard' and can be deleted or modified.

Note: You can create additional databases and manage.

Protect database

Thus, the database is password protected and can NOT be opened without this application ezContact 2.4.0, not even with Access itself or other applications you want to read the database.

Note: The password used is automatically assigned by ezContact, so also you can not open such a protected database!

Note: This protection can NOT be undone!

General print lists

With this setting "General print lists" you can determine the general appearance (layout) of the printed lists. These settings apply to all print lists for which no printer definition has been assigned as an individual layout.

Printer definitions

Here, any number of printer definitions can be created. A printer definition describes the font, font size, paper size and the printer to use. Such a definition can then be assigned to a print list, making the appearance (layout) is set this print list.
Don't you have created any printer definitions, or for print lists without an associated printer definition, the "General print list settings" is used (see Lesson "General print lists").

Load default values

Here the with the product supplied data for backups, export definitions, filters, lists, reports, template files, and other reference data can be reloaded.

Why? With a software update we may or updated with new versions of backups, export definitions, filter definitions, print lists, reports and document template files. But these are NOT automatically integrated into the current database, and are therefore not visible at first.
Here you can always reload the supplied data backups, export definitions, filter definitions, print lists, reports and document template files.

Note: Thus, any custom changes to the selected settings are overwritten!

Template manager

The Template manager

- gives an overview of all in ezContact embedded templates
- is used to manage all in ezContact integrated templates
- separates the management from the usage of templates
- opens a template directly with the appropriate program for the handling
- facilitates the integration of new templates in ezContact
- checks whether templates are included correctly in ezContact, so if the template folder actually contains the template file

A detailed description of how to work with the template management, see chapter "The template administration".

Stationery theme

Here you can specify a motive which then all letter templates with a defined graphics for the letterhead (bookmark "stationery design") is used.
ezContact is already delivering with some themes (graphics) that can be used freely. In addition, of course, sample templates that uses this stationery design.

So it goes:

1. Open a document in Word for editing, which will now include a letterhead design.
2. Add a frame on (no text box) and place it at the point at which the stationery design should go.
3. Mark the position of the frame and add a bookmark to "stationery design" added.
4. When using this Word template will now take the place of the object frame, the graphics of the stationery motif inserted.

Export of the program settings

If the settings you have set up on a computer, effortlessly want to transfer to another computer, proceed as follows:

- Select the "Settings" menu, the "Export" function. Now, an export file is created with the settings.
- This export file you can save and get to the other computer (eg a memory stick).
- On the other computer: Make a double click on the file. So that the settings on the other computer will be entered into the registry.

Note: A so-created registry file contains specific settings for this machine, which may fit in to another machine not. These are for example folder definitions on another computer may be different.
Therefore is highly recommended that the created registry file to look at before - with an editor such as Notepad - and change if necessary, so as to delete inappropriate settings.

Next chapter List service …

List service

This chapter describes not only ezContact-specific operational functions of the displayed lists, but also the generally usual in Windows programs, which are not always known.

The filter bar

With the filter button in the tool bar (see lesson "The tool bar") the filter bar (the filter input-possibility directly below the title bar of the table) can be hide on and off. Depending on the filter criteria (field) you want to find, click the filter input field under the corresponding column title. You are looking for a particular surname, for example, so click in the filter input below the "LastName" column title. There you can now enter your search query. Thus, the search via the filter line with the contents of the respective list is connected, because the query is always on the table column, in their filter line input field she entered.

The following rules are to observe:
Example: Search in a column name or search term

Input	Result
Müller	all persons with the name "Müller" at the beginning of the column
*Hugo	all persons with "Hugo" somewhere in the field

With the Enter key or click the column title the search query is executed and the records that match the search query appear in the list.
You can doing several searches together, because all requests automatically "and" queries are interpreted. This means, for example, that you can search for people with the name "Müller" in "Munich". Enter the name "Müller" the "Name" column simply in the filterable and filterable "Location" column one, the city of "Munich" and then confirm your input by pressing the Enter key (or enter). Now, the result of this query is shown in the list. Now, you can further restrict this result through more queries.

Click on the filter Remove button, the filter removed, and thus again display the list with all records.

Note: More demanding and not dependent on the content of the respective lists search queries are made via the filter function of the menu "Edit" (or the drop-down menu right mouse button, or the filter icon). See Lesson "Filters".

Sort

The contents of each column in a list can be sorted. Words are listed alphabetically and numerically sorted numbers. To sort you go with the mouse pointer in the title bar of the column whose contents you want to sort. Changing the mouse cursor to an arrow pointing downwards, click once in the title bar. The collation of the column content is reversed, if you click a second time in the title bar.
The collation of the column will be maintained also after the application exits.

Search / jumping

To find specific records in the list, there is a search function. If you are looking for, for example, a person with the name "Müller", you first sort the column "Name" in the list (see lesson "Sort"). The search query is always refers to the most recently sorted column. To perform the query, you must just start to type the name. In the lower-left corner of the status bar, you will see what you just give up. The result of the query is issued from the record pointer. In this example, the record

pointer jumps immediately after you type the letter "M" on the first record, with an "M" in the "Name" column. Entering another letter, the search is spelled out accordingly.

List window

It is basically to say that ezContact remembers what position and size had the window after the last time this was working. ezContact also remembers the width of each column and the current collation.

Change the layout of lists
The layout can be changed very easily with the help of the mouse:
To change the column width, you go with the mouse pointer in the title bar of the list above the dividing line between two cells. Change the mouse pointer into a double-headed arrow, hold down the left mouse button and drag the line to the right or left to the desired position.
The line height can be changed directly. This depends on the font size being used and automatically changes to a corresponding setting of the General size of the form. (see lesson "Options")

Using the function "Column definitions", you can find links below each list, you define which fields ever to appear and the order of the columns. You can read more about this in the lesson "List settings" after.

Menu 'Edit'

A so-called context menu which shows different ways to edit the list opens in a click with the right mouse button in a list (such as the Address list). Always same opportunities as main in the "Edit" menu are displayed. You can use so either both choices.

Cut

With **Cut** or Ctrl+X to delete a record from the list. This function always refers to the currently selected record or just the selected records (multiple delete!) and thus corresponds exactly to the **Delete** button in the list.
Note: A deleted record is removed from the database and can NOT be restored!

Copy

With **Copy** , or press Ctrl+C to copy the currently selected record. This function always refers to the record with the record selector (arrow to the left of the front row).
Alternatively, such a data set can be copied immediately inserted here, then you have in this list is an exact copy of the data set.
Or do NOT paste the copied data record here, then the copy remains in the clipboard and can be pasted from there with **Paste** again. This allows you to copy a record, for example in a different database.

Paste

With **Paste** or by pressing Ctrl+V a previously to the clipboard copied data record will be inserted here again.
Even if no records were copied to the clipboard, then opened up here just a window to enter a new record. This corresponds exactly to the button **Add new** in the list.

Merge

This function is a special function and is not available in all lists. When this feature is available at all, only when exactly TWO records are selected. With **Merge** the two selected records are merged into one record. So you can clean up duplicates.

Filters

On the open list, you can perform a query filter to the entire list to the set of records to narrow that interest you.
Select "Filters" section of the main menu "Edit", or if you click the right mouse button in the list. Whether the list that you are viewing is the result of a query or filter the complete list will appear in the lower right corner of the status bar.
The filter is removed when closing the list, so next time the list always contains the entire contents.

Select

ezContact features via the menu item "Select" the two options:

- "Select all records"
- "Remove all highlighting"

More possibilities for marking

- Select all: hold Ctrl key and click in the upper left corner of the list
- Select single records: hold Ctrl and click records
- Select a block: mark the first record by clicking, hold Shift key and click the lowest record in the desired block

Bookmark

This function is a special function and is not available in all lists. If this feature is not available, then with **Bookmark** , or press Ctrl+M, the currently selected record are marked in a bookmark list, for later processing, for example.

Print

Using the menu "Edit" - "Print" from the context menu or by right clicking, you can print the displayed list completely or partially. Here, the list will be printed exactly as you see on the screen. Therefore, you can perform the following changes before you start printing:

- If you do not want to print the entire list, you can perform a filter query (see lesson "Filters").
- You can use the sort function to print the records in a specific order (see lesson "Sort").
- Use the mouse to make the column widths change slightly.
- If you do not want to print with a column, you can minimize the column width so that it does not appear.

Print function of the toolbar
Another option for printing lists, see as an optional toolbar button (see lesson "The tool bar"). It also has a list printed with either all or all selected records. In this case, however, also corresponds to the visual representation of the print list largely those of the on-screen list.

Reports

This function always refers to the currently selected record and will allow you to present to the record a report with specific data. On the main menu item "Edit", or by clicking the right mouse

button in the list, you will find the menu item "Reports". It opens the window "Select report template" in which you then select from the list presented by the reporting facilities. After clicking the **OK** button, the selected report is automatically generated and displayed.

Export

In each list, you have the ability to export records, that is, to convert to another format for editing in another program.

Note: Please note that only the records are exported, which were previously marked.

So, you can first filter the list (see lesson "Filters") on an interesting group (eg all having birthday in the current month), and then mark one or all records for export (see lesson "Select").
This possibility of choice and export, you can use for example to write a serial letter.

More on "Export", see chapter "Data export and data import".

The tool bar

All large lists in ezContact include a so-called toolbar in the bottom button bar. The tool bar can be pushed certain functionality of the list control. The default setting of the tool bar consists of four functions:

	Select all	Allows all of the records in a list marked or marking to be disabled.
	Row/line colors	Adjusts the color of the list to enable or disable. This refers only to the line colors and not on color settings for individual columns.
	Filter bar	This allows the filter bar (the filter input option directly below the title bar of the table) can be displayed or hidden. (See Lesson "The filter bar")
	Remove filter	This function removes a filter applied, then the list of search results disappear and the list of all the records is restored. It does not matter whether the search using the search function of the filter bar was carried out or the filter function in the menu "Edit". (See Lesson "Filters")

In addition, the toolbar provides additional functionality that can be displayed via the settings dialog. This settings dialog can be called with the small button bottom right in the list. See the lesson "List settings". The settings made apply for the tool bar in the currently opened list.

	Print list	Herewith a list of all visible or all selected records will be printed. It corresponds to the visual representation of the list of those printing the screen list.
	Default report	This function creates a simple list standard report in HTML format in all records or all marked records.
	Column widths	Pressing this function, the columns of the table are aligned in width at the widest field content. Only all currently visible rows in the list to be considered.
	Default settings	NOTE: Pressing this function, all settings to default itself. This feature is especially useful when a correction of the settings would be too much hassle.

Single field mass update

This function is a very powerful and hence potentially dangerous feature in ezContact 2.4.0, therefore very carefully and if possible only should be used after a current data backup.
Hereby you can assign a new content to one field of many records of the open list (such as the Address list). Thus, the selected field is filled with new content at all marked records or also

deleted.
A single field mass update is unrecoverable!

Performing a mass change

1. In the opened list highlight the records which you want to change. Take also the functions "Sort", "Filters" and "Select" for help.
2. By clicking on the **Details/Update** button, the above dialog opens to perform the mass change.
3. Choose from the list the desired field to be modified.
4. In the box 'New field contents' choose one of three ways to enter any content, to select a field as the source, or delete the field's contents.
5. Depending on the selected option now enter either a new field content, or select a field as the source for the new content.
6. By clicking the **OK** button for each selected record the selected field to be changed will be overwritten with the new field content.

Next chapter Working with ezContact …

Working with ezContact

Fundamentals

The CRM software for the documentation and administration of customer relations ezContact 2.4.0 is built up for all addresses, all the same with which role, strictly after the same pattern and, therefore, easy to open. Thus there is in each case a comfortable whole list which are equipped everybody with the same basic functions for putting in, edit and delete of the data. Moreover, lists can be exported in print (see lesson "Print") and data (see lesson "Export").
You find a general description to the service of the lists in the chapter "List service".

Also all detailed masks are built up after the same principle: You can associate to every address any relations, appointments, events and documents which are indicated then in the different so-called bleeds listed.

So that you are supported effectively at your work, reference tables which you yourself can fill and change exist behind many entry fields (see lesson "The reference data" in the chapter "Settings"). With it the data entry becomes quicker, more perfect and more standardised - then this also makes a selection more comfortable.

In every list and in every address mask you have access to the correspondence function. This enables to you letters (also computer letters) to create e-mails (also standard e-mails) and reports (e.g., "hand file for the customer visit"). Many example templates are already included.
More to this correspondence function you find in the chapter "Documents/Letters/E-mails" in the lessons "Correspondence / postal book (Word, RTF, Excel, e-mail, report)".

Relationships

Relationships can be created for each address (person). One or several relationships, a person can be linked with one or more other persons, can also be captured with all their address and contact details. So, the point of contact with the exact contact data can be specified, for example, to a root address - as a headquarters. In addition to business relationships, personal relationships can enter. Thus, also members of the family to a person can be applied.
All people, even those who are covered without associating a role only as the relationship with their data will occur under someone else, see the address list. This list opens with the button "Addresses (all)" in the start menu or from the main menu of "Address", menu item "Total list".

Creating a relationship
In this example, a member of the family (here: wife) is added to an address.

1. The address is opened and clicked the tab "Relationships", so that the list of relations with the address will be shown.
2. Click on the button **Add new** under the list opens the window "Relationship", with which you can create a new relationship.
3. The fields in the upper half of the window are already filled and must not be changed.
4. From the pull-down-list "Relationship", select the relationship "Family: Wife". The root relationship is now automatically changed in "Family: Husband".
5. With the small colorful button next to the bottom field "Name, address" you can select an already existing person or address. The small button with the address icon beside it - tool-tip: "Create address of relationship or open to edit" - allows to enter a new address as the address of the wife.
6. When you create a new person here, then the address of the root relationship is automatically entered, but of course can be here modified and supplemented. To finally apply the new person/address then click the **OK** button of the window "New relationship 'Family: Wife'".
7. Finally, save the new relationship by clicking the **OK** button of the "Relationship". Thus, the relationship appears as an entry in the relationships list of this address (tab "Relationships")

and in the address list.

Appointment administration

Appointment administration in ezContact 2.4.0 offers a variety of features and capabilities.

1. Appointments for each address
2. Appointment reminder on startup
3. Appointment reminder of the time
4. Schedule with different views
5. History of past / completed dates

Appointments can be processed in each tab "Appointments" in the properties window of the corresponding address as well as directly in the calendar and in the general appointment list (main menu "Address" as a menu item "Appointment list...").

Functions and setting possibilities

Below is a summarized overview of the functions and settings in ezContact concerning the dates.

Function reference

- Appointment full List
- Schedule
- Outlook synchronization
- List of due dates when the program starts
- Window "Current issues" at startup
- Deadline Monitoring (appointment reminder of the time)
- Automatic appointments

Setting options

- "Settings" - "Reference data": appointment reason, editor and priorities
- "Settings" - "Properties": Automatic appointment with new address, scheduling, appointment filter of editors
- "Settings" - "Properties" - "Start functions": start window "current issues", list of due dates
- Settings in the individual event: Manage in calendar (schedule), display at startup (when mature), follow-up appointment set

Keyboard handling - overview of the 'hot keys'

In this chapter you will find a table with the so-called 'Hotkeys' to keyboard operation of ezContact.

Hotkey	Corresponding menu command	Meaning
Ctrl+N	File - New	Creates a new ezContact data base.
Ctrl+O	File - Open	Opens an existing data base.
Ctrl+P	File - Print	Opens to print a list of all defined print lists.
F3	File - Exit program	Closes all windows and exits the application ezContact. Feature: In Settings - Properties can be determined whether or not a confirmation query appears before ending ezContact.
Ctrl+X	Edit - Cut	In the entry field: cuts the selected field content to the clipboard (windows usual). In a list: deletes the selected record (equivalent to the 'Delete' button).
Ctrl+C	Edit - Copy	In the entry field: copies the selected field to the clipboard (windows usual). In a list: copies the selected record in the ezContact clipboard and allows a subsequent copy with Ctrl+V.
Ctrl+V	Edit - Paste	In the entry field: inserts the field content from the clipboard into the field (windows usual). In a list: allows the insertion of a data record copied into the ezContact clipboard (if available) or adds a new record (equivalent then to the 'Add new' button).
Ctrl+D	Edit - Duplicate	Only active in a list: Duplicates the selected record immediately without previous query or the detour via the

		Clipboard.
Ctrl+F	Edit - Filters	Only active in a list: Opens the Filter list to set a filter in the list.
Ctrl+M	Edit - Bookmark	Special function - not active in every list: Allows you to save the selected records in a Bookmark list for later processing.
F4	Address - New	Creates a new address.
Ctrl+L	Address - Total list	Displays all addresses entered in a convenient list.
Ctrl+K	Address - Schedule	Displays all appointments in a comfortable schedule.
Ctrl+T	Address - Appointment list	Displays all appointments in a convenient list.
Ctrl+G	Address - Birthdays	Opens the birthday reminder and shows all persons with birthday within a specific time period.
F11	Extras - Interfaces - Route planner Google Maps	Special function from the address list: Starts Google maps and displays the route to the selected address from you (master address).
F12	Window - Display start menu	Opens the start menu or bring it in the foreground.
Ctrl+F12	Window - Start window 'current issues'	Opens the start window with the current birthdays, upcoming appointments, and open tasks.
Shift+Ctrl+F6	Window - Forward	Goes to the next open window and bring it to the foreground.
Ctrl+F6	Window - Backward	Goes to the previous open window and bring it in the foreground.
F1	Help - Help topics	Opens the online help for ezContact.
Ctrl+A	-	Marks all records of the currently opened list (windows usual).
Ctrl+E	-	Only from the address list: sends an E-Mail to the selected recipients.
F5	-	Refreshes the display of the currently opened list (windows usual).
Ctrl+F4 oder Esc	-	Closes the currently active window (windows usual).
F2	-	Modifier key, works like a double click, among others to select of a value from a list (E.g. in the case of the place) or choose of a folder (E.g. the personal folder) or file (E.g. in the photo) or specify of a value (E.g. in the search term or IBAN). This modifier key is active only in special fields.
+/-	-	Only in date fields: date counts each day up or down.
Ctrl+/Ctrl-	-	Only in date fields: date counts each month up or down.
#	-	Only in date fields: Fills the date field with the current date.

Data comparison (notebook module)

Do you have the plug-in **'Notebook Module for data matching'**, or data reconciliation module, then you can perform data synchronization between a computer not connected to the network, eg, a notebook, and server or office computer. First, all the changes on your laptop data is transmitted to the server. Thereafter, the complete inventory from the server is transferred back to the laptop, so that both databases are identical.
In this way it is possible to also on a non-connected to the network computers have the same data, such as on the server. So you can away (at the customer's home or on vacation) maintain and modify data, and match on return to the office with the office computer (server).

Note: The condition is that the database on the server folder has been shared with write access and connected to the workstation, this shared folder as a network drive.

The principle of the comparison

Is absolutely essential that you understand the principle of the reconciliation process, before performing a synchronization.

For a reconciliation following happens

1. The on the laptop changed data is transmitted to the server.
    Only manually changed data is sent from the laptop to the server. This concerns the following categories:

    ▶ Address data with additional fields and relationships
    ▶ Dates and History Entries

    Other data is NOT transferred from the laptop to the server, so that such changes are lost after a data reconciliation!

2. The complete inventory is transferred back from the server to the laptop back.
    The entire database is transferred from the server to the laptop, so the addresses with relationships, dates and History.
    Here are also other on the server performed changes, such as mass updates, data import and the like, transferred to the notebook.

What the data synchronization module can not
As described several times, only individually modified address data transmitted from the laptop to the server. Not be transferred mass updates, imported data, and the like. Such changes have to be performed on the server. Since the data alignment in the second step "transfer" yes, the entire contents from the server is passed back to the laptop, these amendments will then be found on the notebook.

Completely disregarded, neither from the notebook to the server, or to the transfer from the server to the laptop transferred back to definitions such as filters, reports, print lists and reference data (styling, places, banks, …).

Realisation of the data comparison

The data reconciliation module is available as a standalone program in the Windows Programs menu under "ezContact" as a menu item "ezContact-Datenabgleich", ie on Windows "Start" - "Programs" - menu "ezContact" - item "ezContact-Datenabgleich".

Note: Before you perform the data synchronization you should perform a backup (see chapter "Data protection"). After matching check best your dataset (at least the number of addresses).

To perform the data synchronization can be the computer with which you have been working outside the system of course are connected to the network. It is for the implementation of the reconciliation really matter whether the data reconciliation module from the server or from the notebook is operated. However, it is highly recommended a uniform, unchanging approach to avoid errors that could cause a loss of data by itself.

The "Notebook folder": This field includes the name of the folder that contains the database of the computer (laptop) which is not connected to the network. Of course, the computer must be connected to the network before the data comparison by the data matching module. The folder you can select by clicking on the small button next to the box "Notebook folder".

The "Server folder": This field includes the name of the folder that contains the database of the server. This is usually the shared folder on the server database as a mapped network drive. The folder or network drive, you can select by clicking on the small button next to the field "Server folder".

The data synchronization is then started with a click on the button **Start synchronization** . First, all the changes on your laptop data is transmitted to the server. Thereafter, the complete inventory from the server is transferred back to the laptop, so that both databases are identical.

**Next chapter** Documents/Letters/E-mails …

Documents/Letters/E-mails

This chapter describes the options available in ezContact 2.4.0 to create documents of various types by the **correspondence function** and assign existing documents about the **document feature** to a receiver (eg, address, as well as appointments and history).
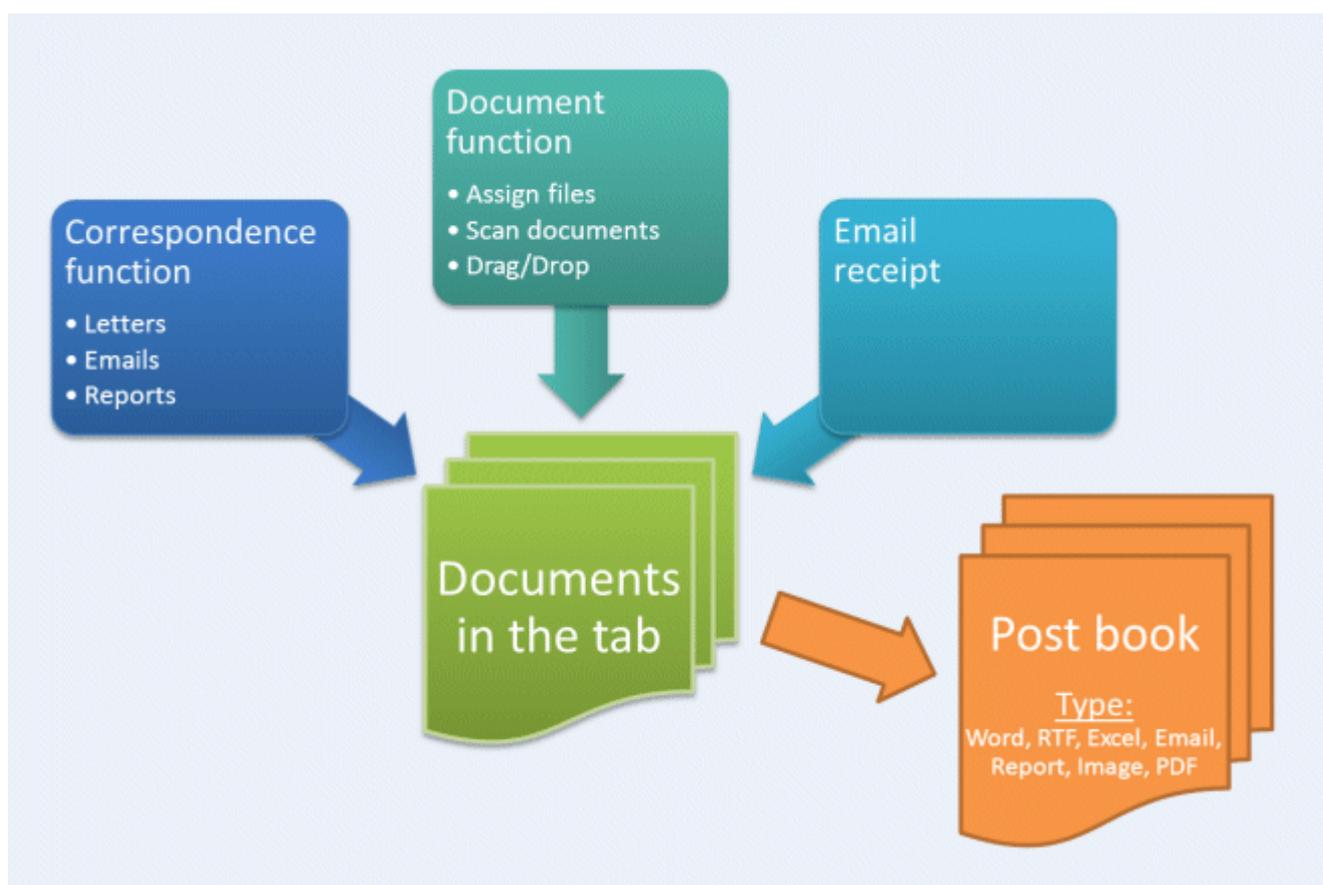
Correspondence / postal book (Word, RTF, Excel, e-mail, report)

ezContact 2.4.0 allows the **Correspondence function** the convenient creation of documents of various types (Word, RTF, Excel, emails, reports) to a designated recipient. It can be very fast, even letters or mass e-mails to create, simply by selecting multiple recipients. The created documents can either be stored in the receiver, directly printed or opened immediately. In addition, each document can also be sent immediately as an attachment in an e-mail to the recipient.
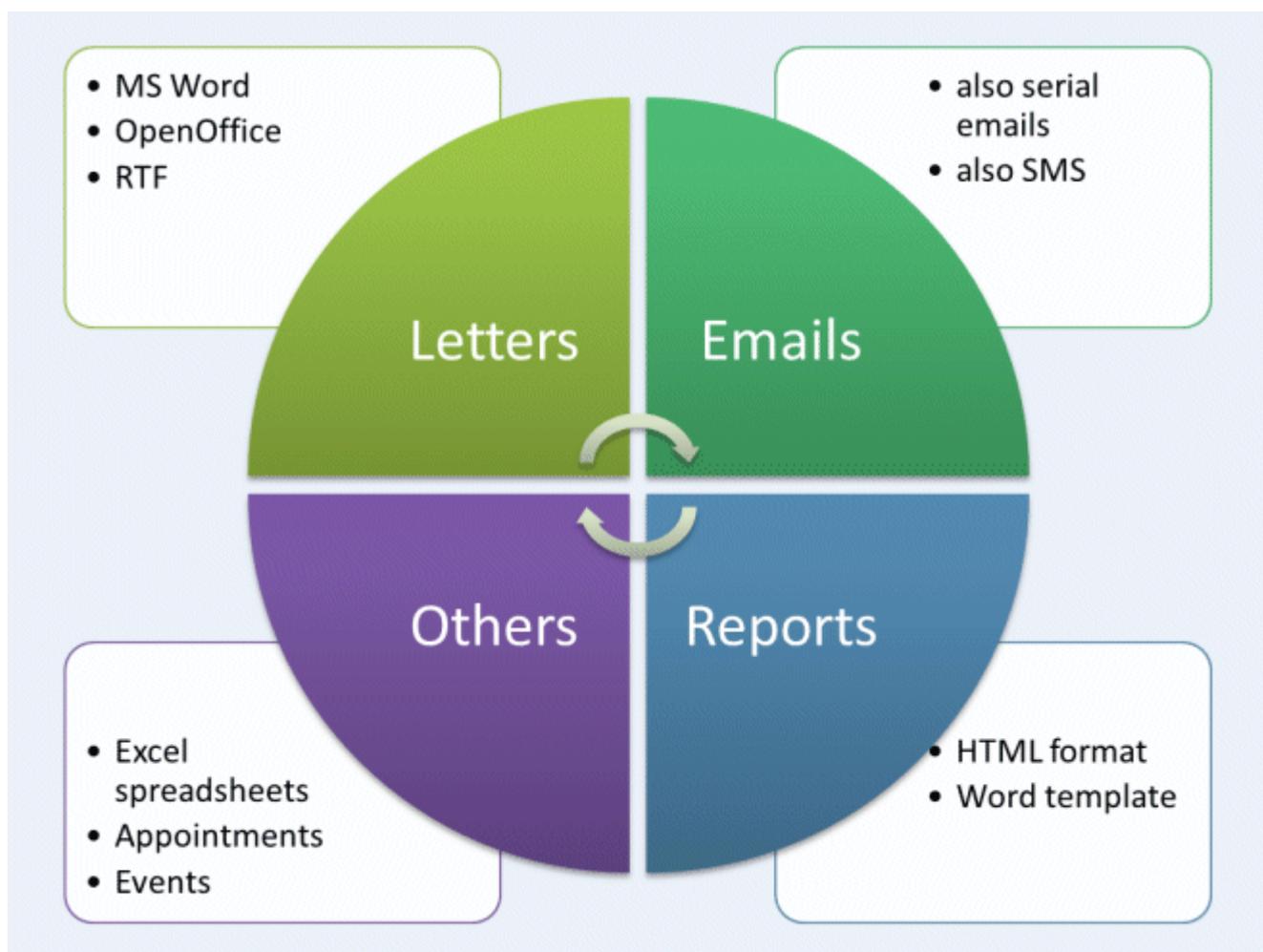
Each document is prepared by something called template, some of which are included as an example. You can easily copy the templates of course, as a basis for your own templates, for example with your letterhead or similar.
You can call the correspondence function from the address list or the address input mask, each with the small button with the correspondent icon.

Single documents (example Word)

Individual documents (eg, a letter or e-mail) to create primarily at the corresponding receiver (address) by clicking on the small button with the correspondent icon below in the entry screen. Alternatively, the selection of a recipient is in the appropriate list (eg Address list) and also click on the correspondent button.
In any case, the correspondence dialog appears to select the type of document (Word, RTF, Excel, e-mail, report) and a template file to and various options for saving and further edit the document (open, print, send by e-mail).

New Word document...   X

Date	21.02.2013 ▼	Document type Word ▼
Template folder	C:\ProgramData\ezContact\Vorlagen\Briefe	
Template	Personal letter.dot	
Document folder	C:\ProgramData\ezContact\Briefe	
File name	[Empfänger]_Personal letter.doc	

Recipient   Address   Schuster, Erich   ▼

Comment   Sample Word Template: Personal letter

Appointment for document

Appointment   ☐ 21.02.2013 ▼ ☐

Editor   ▼

Actions

Save   do not save ▼   on/   ▼   ☑ Close window now

Document...   ☐ print directly   ☑ open now   ☐ Send as email   ☐ Shortcut on desktop

ⓘ   OK   Cancel

Standard documents (example RTF)

Series documents - whether by letter, email, report or otherwise - can also be created in ezContact via the correspondence function by simply selecting multiple recipients from the appropriate list (eg Address list).
Then for each of the selected recipients a document will be created and edited according to the settings, eg saved by the recipient and instantly printed or sent as a mass e-mail to the recipient.

The template administration

The Template manager

- gives an overview of all in ezContact embedded templates
- is used to manage all in ezContact integrated templates
- separates the management from the usage of templates
- opens a template directly with the appropriate program for the handling
- facilitates the integration of new templates in ezContact
- checks whether templates are included correctly in ezContact, so if the template folder actually contains the template file

The template Manager is located under the main menu "Settings" - "Template manager...".

Computer letters about the export

The second way to create, form letters from ezContact is, on the export of the selected recipient data in a file, which then in Word or any other word processor that can create form letters can be used.

Belongs to a form letter always the actual letter (letter with text and various placeholders for the

different per-recipient data such as address and salutation), and a file containing a list of recipient data (the merge file):
The actual letter is created by the appropriate word processor, for example, Word. The merge file with different data for each recipient is generated by ezContact using the export function. This merge file is then associated with a word processor with the letter. Then it can be a word processor for each file contained in the letter recipient, a separate letter to print and generate.

The document function (tab 'Documents')

In addition to the correspondence function, you have the opportunity with the **document function** to deposit any files, Word documents and images to the most important ezContact data types (eg address, as well as appointments and history). Scheduling is also equipped with the document function. You can choose an existing document (any file) from a list or assign from Explorer via drag / drop.
You can also create a new document directly from Word or an RTF-compatible word processor from one of the included templates, or scan with a scanner or digital camera directly into ezContact.
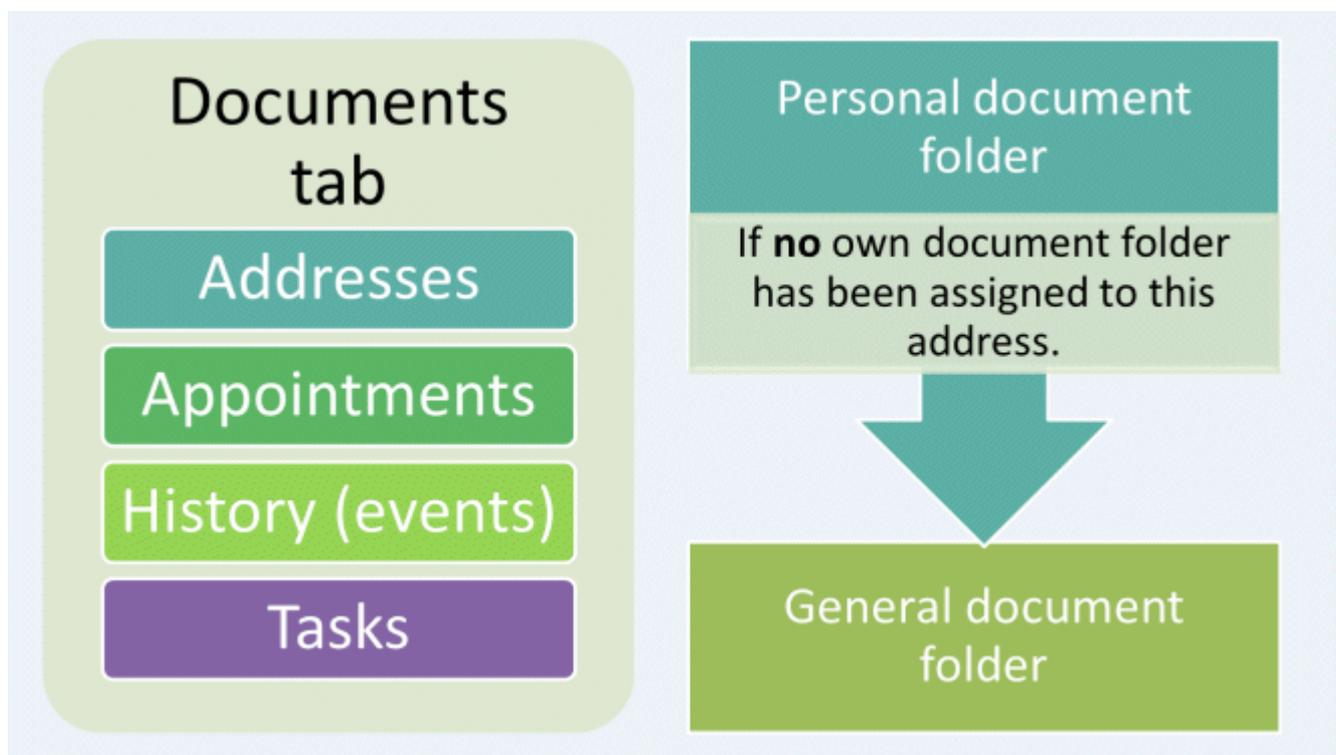
The document function can be found as a tab "Documents" in the "Properties" window of each ezContact data type (eg address, as well as appointments and history). To each record, you can create and maintain your own list of documents.

Next chapter The menu 'Extras' …

The menu 'Extras'

Tasks

Irrespective of an address common tasks can be held, which must be assigned to a specific editor. These objects are displayed in a clear task list from which they can be edited, moved or deleted.

Again, the general options and rules apply to list operation such as sorting, searching, jumping, filtering, printing, etc. as described in section: describe "List service".

Note: If "Settings" - "Properties" - "Start functions" the "Start window 'current issues'" is enabled, then the first window immediately after the start of ezContact displays an overview of "Current Events, Calendar and Tasks", which can be displayed and edited the current tasks.

Caller list

Did you use the options turned on the call monitor - see "Telephony and e-mail settings" - then you can have incoming calls automatically write in a call list, which can then be called back. The caller list is opened automatically on each incoming call. You can also open the caller list in the "Extras" menu at any time.

Callers from this list, you can double-click on this caller to call back immediately, if you have connected a TAPI-capable phone or the Windows Phone Dialer works.

Own shortcuts (links)

The "Extras" menu, you can set up yourself according to your needs. You can define links to Internet sites, programs (applications) or interfaces that are important for your work. This allows you to open web pages, programs and interfaces directly from ezContact 2.4.0.

Next chapter Data export and data import …

Data export and data import

This chapter describes various ways to export data from ezContact to other file formats, or import data from other formats into ezContact.

Export of data

ezContact 2.4.0 offers different features, to export individual records, groups of records or entire tables, so to migrate to various other file formats. You can flexibly handle your data and use it with other programs.

Export of complete tables

A common function with all available export definitions, see the main menu "File" - "Export". Thus, you can export complete list in a different file format to work with these data on a different machine with a different application.

In the window "Export definitions" is a list of the possible data sets that you can export. Select the export definition you want to use to export, and click the **OK** button.

Export of selected records

You have the option to export the selected - so marked - records in each list. The benefits that are offered here are that you directly can see the records, and that you this by filtering and mark (see chapter "List service") can restrict on an interest group (for example, all persons who have a birthday in the current month).

So it goes:

1. Filter the desired group, from the total list
2. Either mark all, or but the records you want (see lesson "Select")
3. Open the export window with "Edit" (or "Edit" click with the right mouse button context menu) and "Export"
4. Select the fields to be exported (E.g. title and address for form letters)
5. Select the file format, where you want to be exported
6. Start the export by clicking on **OK**

You can use the resulting file with the exported addresses, for example, in Word to create a serial letter (see also lesson "Computer letters about the export").

Address export in a VCard file

Individual addresses can be exported in a so-called VCard file. A VCard file is a standardized "electronic business card", which is also used in other systems, such as, for example, in Mac OS X (Apple address book) and Smartphones (iPhone, iPad or Android phones) or Tablet PCs. Thus addresses from ezContact can therefore be exported and imported in completely different systems.

So it goes:

1. Open the desired address is to be exported.
2. From the context menu 'Edit' (click with the right mouse button in the free area at the bottom of the window), select the "Export" function.
3. Choose an export template for VCards, E.g. the supplied template "VCard Template: Person" (VCard Person.vct) and confirm this by clicking on **OK**.

4. "Actions", select the options that you want to save and further edit of the VCard (open when send email, shortcut on desktop).
5. Click on **OK** creates the VCard according to the template definitions.

Alternative "Drag and Drop"
Is desired only the creation of a VCard file, without further action of the template file, such as sending E-Mail or transfer via FTP, then this goes also with "Drag and drop" from a mailing list.

Prerequisites:

1. the presence of a VCard export template with theme "DragDrop", for example, the supplied template "Drag-and-drop Template: Address" (DragDrop VCard.vct)
2. the enabled list setting "Allow record dragging" - see lesson "General settings"

This export template is then used when dragging a data set from the list and creates a VCard file, which can be pulled and there imported by dropping in another ezSoftware application.

Address export in a XML file

Individual addresses can be exported to an XML file. XML is used among other things for the platform-and implementation-independent exchange of data between different computer systems. This means that can be exported addresses from ezContact and imported in completely different systems.

So it goes:

1. Open the address you want to be exported.
2. Select from the menu "Edit" (click with the right mouse button in the empty space in the bottom of the screen), the "Export" function.
3. Select an export template for XML, for example, the supplied template "XML Template: Person" (XML-File Person.xmt) and confirm this by clicking on **OK**.
4. Choose from the "Actions" the options for saving and further edit the XML file (open, send an e-mail, desktop shortcut).
5. By clicking on **OK**, the XML file is created according to the template definitions.

Alternative "Drag and Drop"
Is desired only the creation of a XML file, without further action of the template file, such as sending E-Mail or transfer via FTP, then this goes also with "Drag and drop" from a mailing list.

Prerequisites:

1. the presence of a XML export template with theme "DragDrop", for example, the supplied template "XML Template: Person" (XML-File Person.xmt)
2. the enabled list setting "Allow record dragging" - see lesson "General settings"

This export template is then used when dragging a data set from the list and creates a XML file, which can be pulled and there imported by dropping in another ezSoftware application.

Appointment export in an ICalendar file

Individual appointments can be exported to a so-called iCalendar file. An iCalendar file is a standardized data format for exchanging calendar content, which is also used in other systems, such as in smart phones (iPhone, iPad or Android phones) or Tablet PCs. So therefore, appointments from ezContact can be exported and imported in completely different systems, provided they import such iCalendar files.

So it goes:

1. Open the required appointment, to be exported.
2. Select from the menu "Edit" (click with the right mouse button in the empty space in the bottom of the window) the "Export appointment".
3. Select a template for iCalendar export, for example, the supplied template "ICalendar Template: Appointment" (ICalendar Appointment.ict) and confirm this by clicking on **OK**.
4. In order for the iCalendar file is created according to the template definitions.

Alternative "Drag and Drop"

Is desired only the creation of a iCalendar file, without further action of the template file, such as sending E-Mail or transfer via FTP, then this goes also with "Drag and drop" from the appointment list.

Prerequisites:

1. the presence of a iCalendar export template with theme "DragDrop", for example, the supplied template "Drag-and-drop Template: Appointment" (DragDrop Appointment.ict)
2. the enabled list setting "Allow record dragging" - see lesson "General settings"

This export template is then used when dragging a data set from the list and creates a iCalendar file, which can be pulled and there imported by dropping in another ezSoftware application.

Import of data

You can import existing address data to ezContact from a different access database, Excel spreadsheet, dBase database or a VCard file (electronic business card) or a text file (semicolon separated). Import from access, Excel and dBase can be any field assignment, when importing from a text file, the fields must be specified in the text file.
Appointments can also be imported as individual dates from a so-called ICalendar file (calendar content).

Address import from Access, Excel or dBase

The function to import addresses, see main menu of "Address" menu item "Import".

Importing address data from access, Excel or dBase, first choose the desired import database, and then the table contained therein with the addresses to be imported. This displays the fields in the table available in fields list to the left.
In the right fields list, you can already see the target table "ADRESSEN" to the corresponding fields of the address table.

As an example, an Access database 'Testadressen.mdb', Excel spreadsheet 'Testadressen.xls' and a dBase database 'ADRESSEN.DBF' are supplied.

The important thing now is the mapping of individual fields from your import table to a field in the destination table "ADRESSEN". Thus a set which fields at all, and in which fields of the address table, your data will be imported.
This assignment is very simple by selecting the two boxes and click on the button > or double-clicking on one of the two fields. To simplify now also an field is selected when you select a field in the import table with this same name in the destination table, if there is such a field there.
To undo a mapping, a then just double click on the appropriate entry in the list with the field mappings or select the entry and click on the button <

The import is performed by clicking on the **OK** button.

Address import from a VCard file

The function to import VCard files, see the main menu of "Address" menu item "Import" -

"vCard…".

So it goes:

1. Select the desired file to import VCard with the file extension *.vcf.
2. If the address from the VCard file can be read in it appears to control in an address window.
3. You want to import the address displayed in fact confirm the import by clicking on **OK**.
4. Now, it is checked whether an address with this name already exists. If so, then will be asked whether you still want to import the address.
5. Confirmed the import, then the address is imported and is immediately displayed in the corresponding mailing list.

Alternatively, these VCard files can be dragged via "Drag and drop" directly on the address list or even on the application window.

So it goes:

1. Open ezContact at best, the address list. This list opens with the button "Addresses (all)" in the start menu or from the main menu of "Address", menu item "Total list"..
2. Start the program on your computer that displays files and also supports the drag/drop function. This can be for example the Windows Explorer included in Windows.
3. Open the folder where are located the VCard file you want to import into ezContact.
4. Select and mark your VCard files, click with the left mouse button on the mark and drag the files to the program button ezContact in the taskbar. Always keep the left mouse button pushed down. Now, ezContact automatically maximized and reappear in the foreground.
5. Drag the marker with the file names somewhere in the open address list. There, you can release the left mouse button.
6. Now each selected VCard file will be shown one after the other to check and confirm in an address window as described above.

Address import from a text file

The function to import text files, see the main menu of "Address" menu item "Import" - "Text file…".

When importing from a text file, there are two ways, depending on whether this text file content looks like:

1. The import of a single address:
   Here are the fields with field name and content with each other in the text file, each on a separate line, field name and content separated by colon.
   As an example, a file 'schuster.txt' is supplied.

2. Import of multiple addresses:
   Here are in the first row the field names with a semicolon ';' separated, indicated with the designation 'FELDER:'. In all other rows the data of an address, the individual fields with semicolon are then in a row separated and of course in the sequence shown in the first row.
   As an example, a file 'Testadressen.txt' is supplied.

Appointment import from an ICalendar file

"Drag and drop", iCalendar files can be dragged directly to a specific address or to the appointment list, or also on the application window.
Have one date to import so a single iCalendar file, then drag this file directly on the address that should be associated with this appointment. Even though several dates, so multiple iCalendar files should be assigned to the same address, you drag these files directly to the appropriate address.
Then, the mapping of the appointments to the address automatically without prompting.
You want to import several dates to be mapped to different addresses, then drag the iCalendar

files at best on the appointment list or on the application window. Then asked at each date prior to which address to associate this appointment.

So it goes:

1. Open the best the desired address or even the appointment list in ezContact.
2. Start the program on your computer that displays files and also supports the drag/drop function. This can be for example the Windows Explorer included in Windows.
3. Open the folder where are located the iCalendar files that you want to import into ezContact.
4. Select and mark your iCalendar files, click with the left mouse button on the mark and drag the files to the program button ezContact in the taskbar. Always keep the left mouse button pushed down. Now, ezContact automatically maximized and reappear in the foreground.
5. Drag the marker with the file name somewhere in the open address or appointment list. There, you can release the left mouse button.
6. Now each selected iCalendar file will be shown one after the other to check and confirm in an appointment window. When drag/drop directly into an open address an address must be selected as described above each one.


Next chapter Data protection …

Data protection

The "backup" contains two functionalities:
Once, you can create a compressed backup file (standard zip file) from which the original database state can be restored at a data loss.
However, you also can copy databases and optionally other files on any other drive in any other folder. Thus, the data E.g. on a laptop can be transferred so that you can work with your laptop on the road or over the weekend.
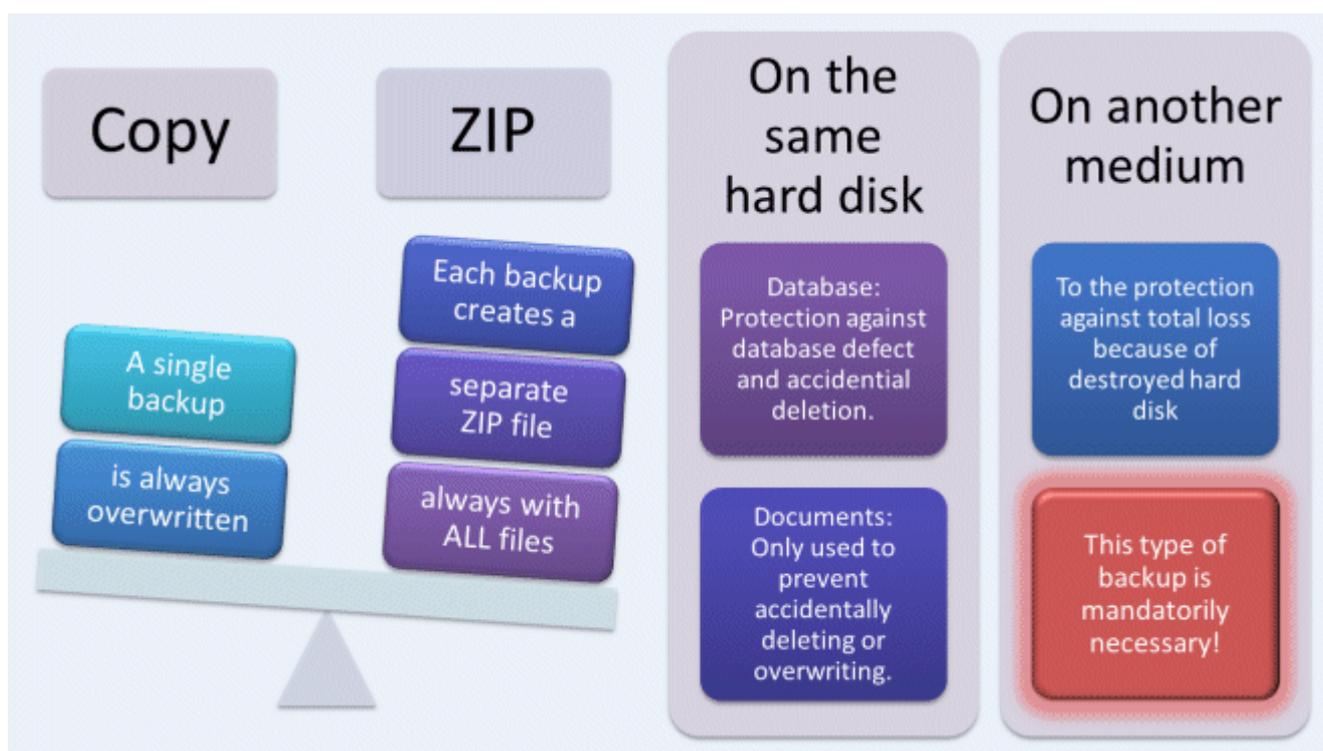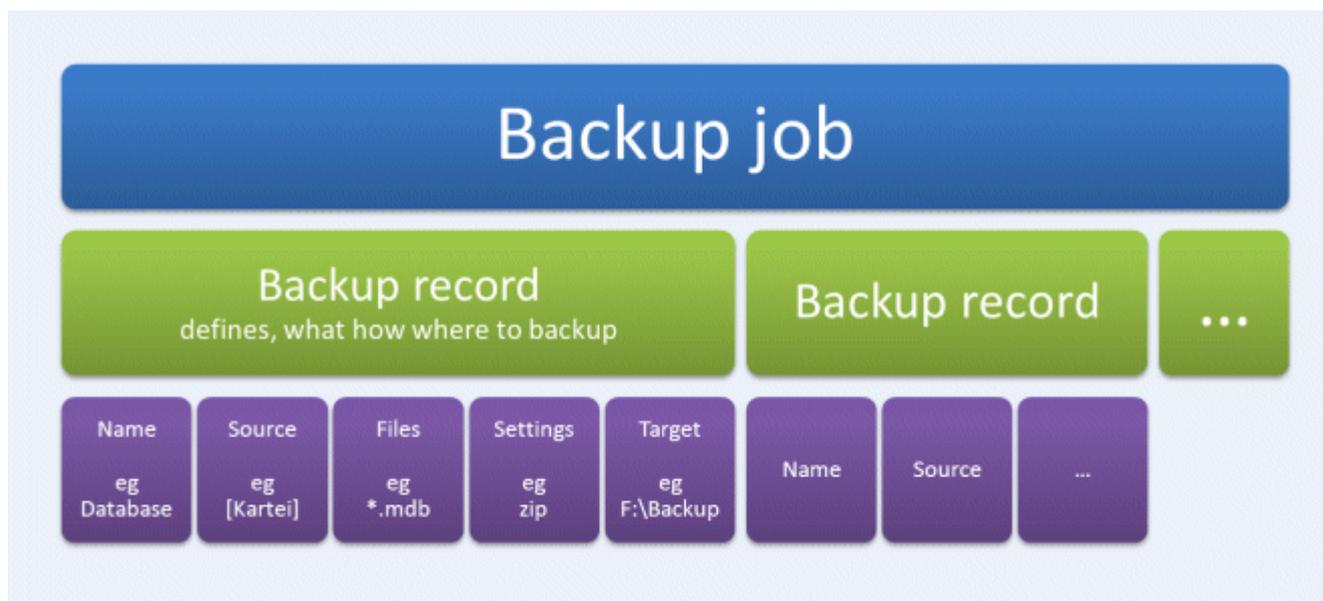

The data protection

First some terms are explained to help you understand:
Backup job: A backup job contains one or more data backup records. This means that with the execution of only one backup job just more data backup records can be processed. You can integrate your data backup records useful in backup jobs and save time when performing.
Backup record: A data backup record is part of a data backup job. A backup record describes a particular backup with a specific data source and backup target.
Data source: A data source identifies the folder with files and any subfolders that are to be backed up. The data source is named so by the exact path.
Backup target: The backup target is a certain folder that is to contain the compressed backup file or files to be backed up as copies. The backup target is also named by a path exactly.

Provided data protection missions

ezContact 2.4.0 already encloses some defined backup jobs with data backup records to your work support and as examples. The source files of the data backup records are folders or databases in the program installation directory and/or in the installation directory of the databases. Different examples are given as backup destinations. The disk drive F: stands exemplary for the backup destinations server, notebook computer or memory stick. Backups on the hard disk of the computer can be used without change since these disk drives are known and the backup folders either are already enclosed or are laid out at the first execution of the backup job.

The following are included backup jobs

Data transfer to server/notebook/USB:
This backup job includes exemplary multiple backup records, which on the one database and the templates as well as the resulting documents, letters and e-mails by copying it to the F: drive are backed up.

Complete backup of all folders:
This backup job also includes an example a number of backup records that allow for database, templates, documents, letters and e-mails each a compressed backup file is created by copying it to the C: drive is saved in the folder "Datensicherung\ezContact" and subfolders

Quick backup to disk (only database):
This backup job creates a compressed backup file that contains only the data base file, and places it in the folder "Backup" in the "Run in" folder

Realisation of data protection

1. Before you perform a backup, close all open windows of the program.
2. The backup feature is available in the main menu "File". Click on the sub menu "Save data" mode of the "Backup". It opens the "Start backup…" dialog. The dialog provides a list of all existing backup jobs.
3. Select the desired backup job and then to implement the backup job on the **Start backup** .
4. The backup will be performed automatically. Here, for each backup set with option "Compress Files (zip)", a backup file created and produced an entry for data recovery.
5. Upon completion of the entire backup job the backup date will be entered.

The data recovery

Of course, lost files can use a data recovery from a backup file to be restored again in the program or the appropriate folder.

Please note that with each performing a data backup, a backup file is created, and always in the target folder of the first backup of a data backup job.

Note: The data recovery restore process the data that are in the backup file, which is used for data restore. Data that has been changed since the creation of this backup file go, thereby inevitably be lost.

Fetch back of deleted addresses

Also accidentally deleted addresses can be retrieved from backup again, together with the associated data such as dates, events and documents. A prerequisite for this is that a backup exists - best is a ZIP file - in this the address is still available.

So it goes:

1. Extract the backup zip file to any folder - but of course not in the current database folder.
2. To retrieve a deleted address choose from the "Address" - "Import" - "ezContact...".
3. Select the ezContact database from the folder with the unpacked backup.
4. Find and select from the list the address to be imported.
5. Enter yet whether belonging to other data - such as appointments and documents - with imported to be or not.
6. Start bringing back the address with a click on the button **Import data** .

Next chapter Contact possibilities …

Contact possibilities

In this chapter you will find contact information and anything else you can get help and technical support for ezContact 2.4.0.

Our address is

```
ezSoftware e.K.
Erich Schuster
Dr.-Atzinger-Str. 1a
94036 Passau
Germany
```

Info-Telefon: +49 (0)700-39763892 (0700-ezSoftware)
Telefax: +49 (0)751-76462570

E-mail: hilfe@ezSoftware.eu
Internet: www.ezSoftware.eu

Technical support in the Internet

Here you can find help and technical assistance to ezContact 2.4.0 on the Internet:

- **Help on site remotely**
  You want rapid assistance on site? Our program for remote maintenance is no problem. So we can look directly to your computer and help right away. Without installation! Just download the program file, start typing in the PIN you received from us, ready.
  This service is free of charge for the first three months after purchase, and ALWAYS with software faults. Then we will call you!

- **Our forum for user questions**
  Users questions of a technical nature (including any ideas, suggestions, error messages) that are not answered in the FAQ section, you can ask here in our forum. There they will be answered sooner or later, guaranteed.

- **Request / Contact**
  Other non-technical inquiries - eg advertising inquiries, requests for individual development and the like - which are not yet answered in the FAQ section on our forum, you can request via our contact form.

- **Questions about the price and order**
  All prices and ordering options can be found on this order form. There you can direct debit or best advance order (with 5% discount). The price will be calculated automatically by the order according to your specifications and reported.
  In any case, you will receive an invoice including VAT by e-mail.

Prices and order possibilities

Buy: Order via Internet

Online order form
See all prices and ordering options on this purchase order. There, you can order via direct debit or by prepayment (with 5% discount). The price is calculated by the order form automatically according to your specifications and expelled.
In any case you will get an invoice with expelled VAT by e-mail.

Rent: Rental by post, fax or E-Mail

Lease agreement as PDF-document
Just click to open, then print, fill out and submit.

Software - Lease agreement

❑ **Modification of an existing software lease agreement.**
This eliminates the charge for the flat-rate processing fee.

between

ezSoftware e.K.

Dr.-Atzinger-Str. 1a

DE-94036 Passau

hereinafter referred to as Lessor

| District Court of Passau |
| Reg.-No. HRA 12245 |

E-mail: **info@ezSoftware.de**
Fax No. **0751 – 76 46 25 70**

and

Company _____

Last name, First name _____

Street _____

Postal code / City _____

Telephone _____

E-mail _____

hereinafter referred to as Lessee.

Both parties – Lessor and Lessee – agree to the following:

§ 1   Subject of the agreement

Subject of the agreement is the software **ezContact – CRM software for the documentation and administration of customer relations** in its latest version. This includes all updates and version changes during the term of the agreement. For the duration of the agreement, the lessee receives the non-exclusive right to use this software on a workstation or a network.

The ezContact program and documentation are subject to copyright protection. The lessee may copy the program solely for backup purposes and may not under any circumstances pass the program on to a third party, or install the program on more than one workstation or network.

Upon receipt of the signed agreement (by post, e-mail, or fax to **0751-76462570**) and the first payment (1st lease payment plus 30.– Euro flat-rate processing fee), the Lessor will provide the Lessee with the current program license via e-mail or as a CD-ROM.
Updates will be made available to the Lessee as Internet downloads.

The lessee is entitled to free [*)] support (by email, telephone hotline, ezSoftware Forum).

*) free of charge within the first three months after the beginning of the lease as well as **always** for software errors. For any other problems and questions, even regarding Windows or Word, or moving to other machines, please use our telephone hotline.

§ 2 Lease payment

Calculate your monthly lease payment here on the basis of the desired software version (Access version or SQL version) as well as the additional modules and user workstations that you require.

The specified lease charges and the flat-rate processing fee are already inclusive of the statutory value added tax of currently 19% (19 percent).

§ 2.1 Lease payment – Access version

The monthly lease payment amounts to (**please calculate and fill in**):

 10.00 Euro per month for the base level version

_____ Euro per month for add-on modules: **Quantity ____ x 5.00 Euro**
(please check the desired modules)

_____ Euro per month for ezContact-Mobile: **Number of users ____ x 10.00 Euro**
App for Android Smartphone / Tablet PC for synchronizing mobile data, 10 GB incl.

_____ Euro per month for additional cloud-based storage: **No. of 10 GB packets ____ x 5.00 Euro**

_____ **Euro total monthly lease payment.**

Desired modules:
 ¡ Network compatibility   ¡ User administration / Access permissions
 ¡ Notebook module

§ 2.2 Lease payment – SQL version

The monthly lease payment amounts to (**please calculate and fill in**):

 15.00 Euro per month for the base level SQL version

_____ Euro per month for user work places: **Quantity ____ x 3.00 Euro**
(please calculate for the required number of user work places)

_____ Euro per month for add-on modules: **Quantity ____ x 5.00 Euro**
(please check the desired modules)

_____ Euro per month for ezContact-Mobile: **Number of users ____ x 15.00 Euro**
App for Android Smartphone / Tablet PC for synchronizing mobile data, 10 GB incl.

_____ Euro per month for additional cloud-based storage: **No. of 10 GB packets ____ x 5.00 Euro**

_____ **Euro total monthly lease payment.**

Desired modules:
 ¡ User administration / access rights
 ¡ Notebook module (contains 1 additional user work place)

§ 3   Payment method

The desired method of payment:

○ Annually in advance by yearly invoice: Upon receipt of the lease agreement, the Lessee shall receive an invoice by e-mail and shall pay said invoice. For continued lease payments, the Lessee shall receive timely invoices each year, also by e-mail.

○ Monthly in advance by standing order: Starting in the second month, payment of current lease payments is made by standing order on the first of the month. The standing order is set up by the Lessee at Lessee's bank.

○ Monthly in advance by direct debit: only possible with a German account!
Starting in the second month, payment of current lease payments is made by direct debit and will be charged in advance on the first of the month.

For direct debit, you must fill out and submit the attached direct debit authorization!

With SEPA direct debit mandate; or for companies – if possible – with the SEPA B2B direct debit mandate

The first payment (1st lease payment plus 30.– Euro flat-rate processing fee) will be transferred by the Lessee to the account of the company ezSoftware e.K..:
Account No. 8 980 294 at BW-Bank Stuttgart, **Routing No.** 600 501 01
IBAN: DE12 6005 0101 0008 9802 94 - **BIC:** SOLADEST

There will be no additional costs to the Lessee at any time, and increases in the price of the lease are also generally excluded.
The price of the lease is inclusive of all updates, which can be obtained by the lessee from the Internet. If there is a version change, the Lessee will receive a new license by e-mail.

§ 4   Term and termination

The lease agreement begins on the _____ or, at the latest, on the day of the first payment (1st lease payment plus 30.– Euro processing fee) and runs indefinitely.

The minimum lease period is one year and is automatically extended for another year, if not previously terminated. Termination of the lease is possible at any time with a notice period of 14 days at the end of the current period. The notice of termination must be submitted in writing by registered mail and can be submitted by either party. In the event of termination, the Lessee is obliged immediately to remove the contractual software from all workstations, return all original CD ROMs and accompanying documents to the Lessor, and delete or otherwise destroy any copies of the program. Prior to this, the Lessee's own data can be exported for further use.

Termination fees and/or payments are excluded.

§ 5   Conversion to purchase (only with Access version)

A SQL version can only be leased, not purchased. Therefore, this section on conversion to purchase does not apply to a leased SQL version.

The lease agreement pertaining to a leased Access version can be converted to a purchase at any time, whereby all additional lease payments are automatically eliminated. At the subsequent purchase of the license, 50% of the lease fees previously paid will be applied to the purchase price up to a maximum of 80% of the purchase price.

For a subsequent purchase, the transfer of the appropriate balance by the Lessee to the account of the company ezSoftware e.K. shall suffice.

Account No. 8 980 294 at BW-Bank Stuttgart, **Routing No.** 600 501 01
IBAN: DE12 6005 0101 0008 9802 94 - **BIC:** SOLADEST

A subsequent purchase automatically ends the existing lease, thereby voiding all rights arising from the lease agreement and all obligations of the Lessee to the Lessor.

§ 6   Extraordinary notice of termination

The Lessor may terminate the lease agreement for serious breaches of obligations of the Lessee without adhering to a notice period. Particular reasons include:

- § Violation of usage restrictions by the Lessee, for example, by assigning the software to any third party or using the software on multiple machines in violation of the agreement,
- § Delayed payment of the lease payment. Details are governed by Section 7.

In the case of extraordinary termination, the Lessee is liable for all outstanding lease payments including the full month in which the notice of termination is received, plus interest and costs.

In the case of extraordinary termination, the Lessee is also obliged immediately to remove the licensed software from all workstations, return all original CD ROMs and accompanying documents to the Lessor at the Lessee's expense, and delete or otherwise destroy any copies of the program. Prior to this, the Lessee's own data can be exported for further use. Continued use of the software beyond the termination of the agreement represents a violation of licensing laws and is subject to civil and criminal prosecution.

§ 7   Delayed payment of the lease payment

If a lease payment is delayed due to non-payment of an invoice, non-fulfillment of a standing order, or reversal of debited lease amounts, the following rules apply:

The Lessee receives a first reminder by e-mail and is obliged to pay the Lessor the missed lease payment within one week after receipt of the reminder, plus an amount of 6 Euro as a courtesy and processing fee.

If there is another delay, the Lessee receives a termination warning and has until the end of the month in which the termination warning is sent to pay all outstanding lease payments including the lease and processing fee of 6 Euro per reminder. If this does not happen, a reason for extraordinary termination exists.

If the lease payment is delayed more than 3 times, the Lessor can exercise the right of extraordinary termination regardless of the eventual payment of the lease and processing fees.

§ 8 Liability

For a period of 24 months from the date of the initial transfer, the Lessor guarantees that the software will function substantially according the program description.

The Lessor shall be liable for the operational availability of the licensed software on condition of proper installation and use by the Lessee. If and insofar as there is neither intent nor gross negligence, the Lessor shall not be liable for damages or consequential damages which are directly or indirectly caused by the software with respect to contracting parties or third parties.

The Lessor does not guarantee that the licensed software will lead to specific performance results. The Lessee assumes the risk of economic utility.

The Lessee is responsible for regular and sufficient data protection.

§ 9 Other agreements

The agreement includes all agreements. No other written or oral agreements exist. Changes and additions must be made in writing.

The invalidity of any provision does not affect the validity of the other parts of the agreement. The contracting parties undertake to replace any invalid provision with an effective provision that comes as close as possible to the same economic effect and that best suits the purpose of the contract.

The location of the Lessor's headquarters is agreed as the place of jurisdiction and place of performance for all mutual claims arising from this contract.

_____

Place and date

_____   _____

Signature/stamp Lessee   Signature/stamp Lessor

Annex: Direct debit authorization and the SEPA direct debit mandate

Creditor identifier: DE27ZZZ00000105019

Mandate reference will be communicated separately

Granting a direct debit authorization and a SEPA direct debit mandate or SEPA B2B direct debit mandate. (please select a mandate by checking it)

1. Direct debit authorization

I give revocable authorization to ezSoftware e.K. to collect the payments due to be paid by me by direct debit from my account.

❑ 2.a. SEPA direct debit mandate

I authorize ezSoftware e.K. to collect payments from my account by direct debit. At the same time, I instruct my financial institution to honor the direct debits drawn by ezSoftware e.K. on my account. Before the first occurrence of a SEPA direct debit, ezSoftware e.K. will inform me about the debit in this manner.

Note: I may request a refund of the debited amount within eight weeks, starting with the date of the debit. The terms and conditions of my financial institution apply.

❑ 2.b. SEPA B2B direct debit mandate

We authorize ezSoftware e.K. to collect payments from our account by direct debit. At the same time, we instruct our financial institution to honor the direct debits drawn by ezSoftware e.K. on our account. Before the first occurrence of a SEPA B2B direct debit, ezSoftware e.K. will inform us about the debit in this manner.

Note: This direct debit mandate only applies to direct debits that are drawn on business accounts. We are not entitled to demand a refund of the debited amount after it has been honored. We are entitled to instruct our financial institution up to the due date, not to honor direct debits.

Financial institution (name and location) _____

Routing number and BIC   _____ / _____

Account number and IBAN   _____ / _____

Account holder   _____

Place, date, and signature(s)   _____