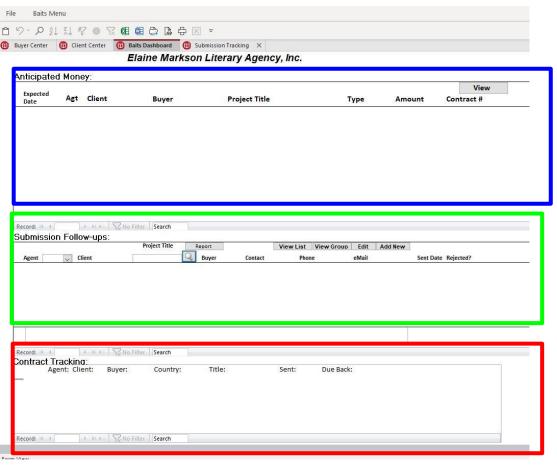# BAITS - Submission and Contract Tracking

Tracking Screen

On the BAITS Dashboard, visible when opening the program, you will find Anticipated money tracking, highlighted in blue, Submission tracking, highlighted in green, and Contract tracking, highlighted in red.
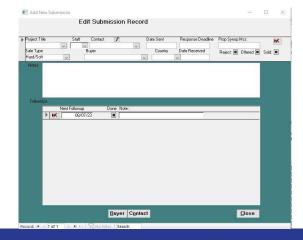
The Anticipated money screen displays unposted money pending on contracts, allowing for an immediate view on money that has yet to be paid but may be due.
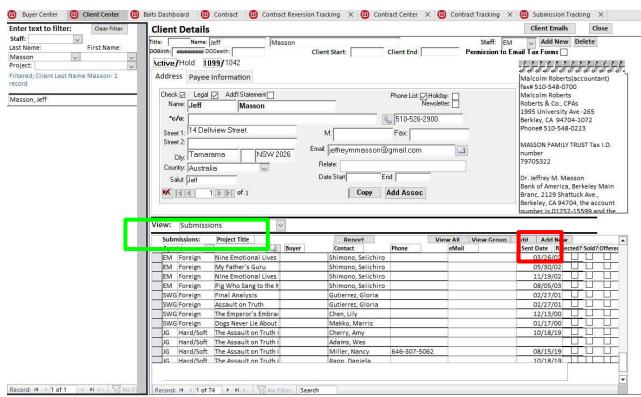
The Contract tracking screen displays contracts with follow-up tasks pending, such as signings and correspondence.

Creating New Submissions

From the Client Center, navigate to the dropdown highlighted in green, and select "Submissions." This will display the submissions for any given client.

By clicking the "Add New" button, highlighted in red, you will open a window to begin adding the data detailing your new submission. This window is visible below.
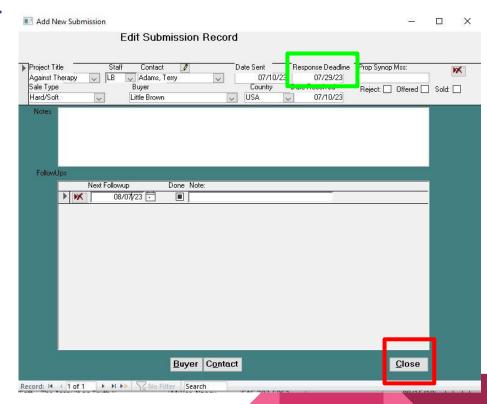
Creating New Submissions, 2

From the pop-up window, add the project title, staff on the project, and Editor contact. To create the most useful record, make sure the editor, and their publisher and email address, have been added before adding a new submission.

Once the editor is entered, the publisher will autofill.

Enter the date the project was sent and include a "Response Deadline" highlighted in green. This date will be key to the submission being displayed on the BAITS dashboard as a reminder, two weeks before and after the "tickle" date.

Once the data is filled, click the "Close" button, highlighted in red.

The submission will now be visible from the Client center when the "Submissions" tab is selected from the dropdown screen.
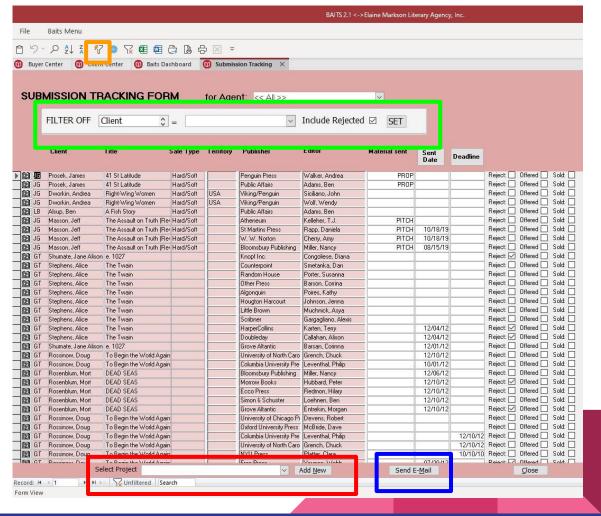
Submission Tracking Menu

The Submission Tracking menu, selectable from the BAITS Menu, allows you to track, monitor, and sort the status of all submissions at once.
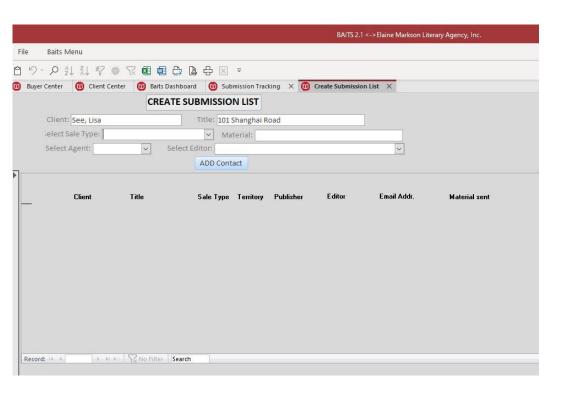
Highlighted in green, you can find the filter, which allows you to sort submissions by client, project, and specify searches based on rejection status. To clear the filters, click the button highlighted in orange.

In red at the bottom of the view is an option to add new submissions by the selected project from a drop-down men

In blue is a button that will generate emails in Outlook to send to editors.

Making A Submission List

When you select a project from the dropdown, you will open the "Create Submission List" window, where you can specify sale type, Material, Agent, and Editor,

Once these fields are filled, click "ADD Contact" to add the new submission. You can now click "Close" found at the bottom of the window to return to the submission tracker.

From the submission tracker, you can select a submission, and click the "Send Email" button to open the email window.
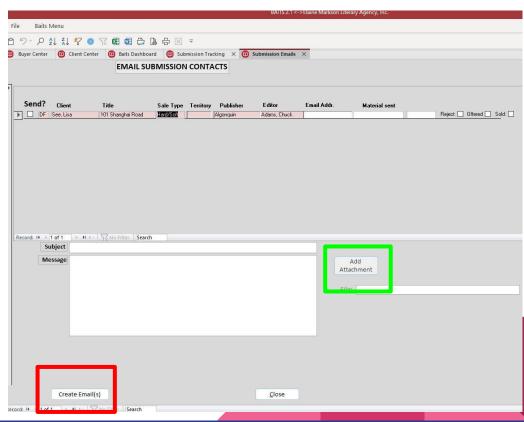
Sending a Submission Email

From the "Email Submissions Contacts" page, you will have the opportunity to email the relevant editors on a submission

Each separate email entered in BAITS for each separate editor contact will generate a discreet email, preventing a group email even when sending the same message or submission to a group of editors.

In green, find the "Add Attachment" button. After completing the email and adding a subject line, click this button to attach any relevant files to the email.

When the message is ready, click "Create Email" highlighted in red, which will open the email(s) in individual outlook windows for review and sending.

Contract Tracking

From the Contract Center, Selectable from the top BAITS menu, you can sort through your existing contracts and utilize the search filters, highlighted in green, to filter by Project title, Contract number, Check Number of a given payment, and or Client name.

You can see any selected Contract's important dates, highlighted here in red, by selecting it. This gives you a bird's eye view of both its creation and its reversion

To track the reversion of foreign contracts, ensure that the reversion date (or reverted date if expired) field is filled in.

Two weeks from the reversion date, you will see the given contract listed on the BAITS dashboard on the Contract Tracking window, alerting agents to follow-up if a reversion or other change is desired.