

BAITS 2.0 Getting Started

- Basic BAITS Tour
- Information on New Features

On Opening

The screenshot shows the BAITs2.0 application window titled "BAITS2.0<->G Agency LLC" with a user "Jeff Gerecke". The interface features a "File" menu and a "Baits Menu" tab. Below the menu is a navigation bar with "Buyer Center", "Client Center", "Baits Dashboard" (highlighted), and "Contract". The main content area is titled "G Agency LLC" and displays three sections:

Anticipated Money:

Expected Date	Agt	Client	Buyer	Project Title	Type	Amount	Contract #	View
11/01/20	JG	Mustafa	St. Martin's Press	Reopening the Muslim Mind	Publication			

Record: 14 of 1 | No Filter | Search

Submission Follow-ups:

Agent	Client	Project Title	Report	View List	View Group	Edit	Add New	Buyer	Contact	Phone	eMail	Sent Date	Rejected?
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Record: 14 of 1 | No Filter | Search

Contract Tracking:

Agent	Client	Buyer	Country	Title	Sent	Due Back
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Form View | Num Lock

The **Baits Main Menu** is gone. The new interface will rely on tabs, enabling you to keep many parts of Baits open at the same time so you can keep a client record open while editing a contract on a different tab.

On open, Baits will display the **BAITS Dashboard** screen with reminders for money, submissions and contracts being tracked.

BAITS Menu

Selecting the “BAITS Menu” button at the top left will display the menu bar. Double-clicking “BAITS Menu” will let the bar stay up even if you click away to another window or program

All of the screens available in the program can be accessed from this toolbar. When the program opens you’ll see the dashboard that includes reminders of things that are due within a 4 week window around today’s date (2 weeks before & 2 after).

You’ll also see the Buyer and Client Centers which are the two primary screens you’ll use for accessing information in Baits.

The screenshot displays the BAITS software interface. At the top, a red menu bar contains various icons and the text "BAITS Menu", which is circled in yellow. Below the menu bar is a toolbar with icons for Dashboard, Money Menu, Reports Menu, Reprint Statements, Client Center, Buyer Center, Contact List, Project Dashboard, Contract Center, Submission Tracking, Contract Tracking, Set Calendar Options, Utilities, Print, Preview, Close, BaitsSupport, and Exit System. The main window shows the "G Agency LLC" dashboard. It includes a section for "Anticipated Money:" with a table of data and a "View" button. Below this is a "Submission Follow-ups:" section with a table of data and a "Report" button. The interface is designed for managing agency projects and submissions.

Expected Date	Agnt	Client	Buyer	Project Title	Type	Amount	Contract #
11/01/20	JG	Mustafa	St. Martin's Press	Reopening the Muslim Mind	Publication		

Agent	Client	Project Title	Buyer	Contact	Phone	eMail	Sent Date	Rejected?
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Dashboard

The first thing to check: if **Anticipated Money** is present, this is a reminder to follow up with the publisher.

If the expected date has changed, click “View” on the right-hand side to enter the revised date on the contract screen.

You can search for information in the grid from the search window

The screenshot displays the BAITSS2.0 application interface for G Agency LLC. The top navigation bar includes tabs for Buyer Center, Client Center, Baitis Dashboard (active), Contract, Money Menu, and Contact List. The main content area is titled "Anticipated Money:" and contains a table with the following columns: Expected Date, Agt, Client, Buyer, Project Title, Type, Amount, and Contract #. A yellow circle highlights the "Expected Date" column, and another yellow circle highlights the "View" button in the "Contract #" column. A yellow line connects the two circles. Below the table, there is a "Submission Follow-ups:" section with a search bar and a "View List" button. At the bottom, there is a "Contract Tracking:" section with a search bar and a "View List" button. The status bar at the bottom indicates "Form View" and "Num Lock".

Expected Date	Agt	Client	Buyer	Project Title	Type	Amount	Contract #
11/01/20	JG	Mustata	St. Martin's Press	Reopening the Muslim Mind	Publication		View

Record: 1 of 1 | No Filter | Search

Submission Follow-ups:

Agent: [dropdown] Client: [dropdown] Project Title: [input] Report: [button] View List: [button] View Group: [button] Edit: [button] Add New: [button]

Buyer: [input] Contact: [input] Phone: [input] eMail: [input] Sent Date: [input] Rejected?: [input]

Contract Tracking:

Agent: Client: Buyer: Country: Title: Sent: Due Back:

Client Center Overview

The **Client Center** enables the user to have a list of clients open while still looking at individual client information. Note the filter options at the top where you can search by client name.

It also includes a detail view at the bottom of all matters relating to a client - Projects, Contracts, Anticipated Money, Submissions etc, and from that menu you can open any of the relevant detail screens.

The screenshot displays the BATS2.0 Client Center interface. The top menu bar includes 'File', 'Baits Menu', and 'BAITS2.0 <-> Elaine Markson Literary Agency, Inc.'. The main window is divided into several sections:

- Client List (Left):** A list of clients with a search filter at the top. The filter options are 'Staff', 'Last Name', 'First Name', and 'Project'. The list includes names like 'A Room of My Own, LLC', 'Abbott, Lee K.', 'Abou-Saif, Laila', 'Abrams, Douglas', 'Ackerman, Diane', 'Ackroyd, Peter', 'Acocella Marchetto, Marisa', 'Adler, William', 'Africano, Lillian', 'Albanese, Andrew', 'Alison Shumate, Jane', 'Allen, Preston L.', 'Allitt, Patrick', 'Alsop, Ben', 'Al-Tahawy, Miral', 'Ambar, Saladin M.', 'Amburn, Ellis', 'American University in Cairo Press', 'Anderson, Bonnie', 'Anderson, Jessica', 'Applewhite, Ashton', 'Armanno, Venero', 'Aronson, Ron', 'Arthur B. Greene CPA P.C.', and 'Artist Agency, Creative'.
- Client Details (Right):** A detailed view of a client's information. It includes fields for 'Title', 'Name', 'Suffix', 'DOB', 'Death', 'Client Start', 'Client End', 'Staff', 'Active/Hold', 'Address', 'Payee Information', 'Pay To Order', 'Check Alert', 'No Tax Frm', 'EIN/SSN', 'Pmt Method', 'Bank Name', 'Bank Address', 'Bank Route Num', 'Bank Account Num', 'For Benefit', 'Benefit Account Num', 'Commissions', 'Standard', 'Foreign', 'Film', 'NCC', 'Indiv, Corp., Estate, or Trust - I, C, E or T', and 'W8BEN'. There is an 'Add Payee' button at the bottom.
- Projects (Bottom):** A section for viewing projects. It includes a 'View' button and a 'New Contract' button. The table has columns for 'Project Title' and 'Project Type'.

The bottom status bar shows 'Form View' and 'Num Lock'.

Client Center Detail

On the left side, there is a filter that allows for searching by first & last name, agent, and or the project title. Clients are anyone outside the agency being paid. Including the SSN or EIN number is essential so that Baits can be used for tax reporting. Also it's important to enter the payment method preferred by the client and any bank information if the payment will be electronic.

Client Center Detail

Title: Name: Nicholas Nicaastro Suffix: Client Start: Client End: Staff: JG

DOB Birth: DOB Death: Active/Hold: 1099/1042

Address **Payee Information**

Pay To Order: Nicholas Nicaastro Bank Name:
Check Alert: Bank Address:
No Tax Frm ☐ EIN# / SSN Pmt Method Check Bank Route Num:
Bank Account Num:
For Benefit:
Benefit Account Num:

Payees

Payee	Percentage
<input checked="" type="checkbox"/> Nicaastro, Nicholas	100%

Commissions

Standard	Foreign	Film
15.00%	20.00%	15.00%

Indiv., Corp., Estate: ☐ WBBEN ☐
or Trust - I, C, E or T

View: Contracts

Contracts:

Buyer	Project Title	Language	Contract #	Date
Bella Rosa Books		Hard/Soft	English	01/11/07
St. Martin's Press		Hard/Soft	English	09/19/06
HarperCollins		Electronic	English	12/01/15
HarperCollins		Hard/Soft	English	12/01/15
Bella Rosa Books		Hard/Soft	English	01/11/07
HarperCollins		Hard/Soft	English	03/28/18

Record: 1 of 1 | 1 of 6 | No Filter | Search

Client Center Detail 2

In the highlighted red box, you will see a drop-down menu that, once a client is selected through the left-hand search, will allow you to display and view Contracts (as seen here) or Projects

Anticipated Money
Gross Revenue
Submissions
Recoverables

File BATS Menu

Buyer Center Client Center BATS Dashboard Contract Money Menu Contact List Contract Center

Enter text to filter: Clear Filter

Staff: Last Name: First Name: Project: Filtered: Client Last Name nicas= 1 record

Nicastro, Nicholas

Client Details

Title: Name: Nicholas Nicastro Suffix: Client Start: Client End: Staff: JG Add New Delete

DOB Birth: DOB Death: Active/Hold 1099/1042

Address Payee Information

Pay To Order: Nicholas Nicastro Bank Name: Bank Address: Bank Route Num: Bank Account Num: For Benefit: Benefit Account Num: NCC: NICA

Check Alert: No Tax Frm EIN# / SSN Pmt Method Check

Payees

Payee	%
Nicastro, Nicholas	100%

Add Payee

Commissions Standard Foreign Film 15.00% 20.00% 15.00%

Indiv., Corp., Estate: or Trust - I, C, E or T WBBEN

View: Contracts

Contracts: Click a header to sort or enter criteria to filter

Buyer	Project Title	Language	Contract #	Date
Bella Rosa Books		Hard/Soft		01/11/07
St. Martin's Press		Hard/Soft		09/19/06
HarperCollins		Electronic		12/01/15
HarperCollins		Hard/Soft	2	12/01/15
Bella Rosa Books		Hard/Soft	2	01/11/07
HarperCollins		Hard/Soft		03/28/18

Record: 1 of 1 No Filter Search

Record: 1 of 6 No Filter Search

Form View Num Lock

Buyer Center Overview

The **Buyer Center**, also accessed by clicking on BAITs menu, works like the **Client Center** but includes all the publishers & contacts you are working with on your clients' books.

From this screen you can view all contracts associated with this Buyer and also use the Pay Royalties button to enter details from royalty statement batches.

File Baits Menu

Buyer Center Client Center Baits Dashboard Contract Money Menu Contact List

Enter text to filter:

Name: Clear Filter

Alfred A. Knopf
 Algonquin Books
 AMACOM
 Amazon
 Audible Inc.
 Bananafish
 Basic Books
 Beacon Press
 Bella Rosa Books
 Berkley Publishing Group
 Bloody Brilliant Prods.
 Bloomsbury, USA
 Bob Jones University
 Brevier Uitgeverij
 Business Weekly
 Cambridge Univ. Press
 Chelsea Green Publishing
 China Citic Press
 Columbia Univ. Press
 Crooked Lane
 Crown Books
 Customs House
 Diana Finch Lit. Agy.
 Diversion Books
 Doubleday
 Dramatists Play Service
 Edel
 Farrar Straus & Giroux
 Gale Group
 Globe Pequot Press
 Greystone
 Hachette Book Group
 Hanover Square Press
 Harlequin
 HarperCollins
 HarperCollins UK
 Harvard University Press

Buyer Details

This is a Parent Company

Name:

Address:

City:

Country:

History of Name

Claimant Type:

Buyer Type:

Parent:

Head of Corp:

Distributor:

Acct. Number:

Book Order Phone:

eMail Address:

Switchboard:

Fax:

PeriodClose: PeriodPays:

Records: 1 of 1

Report as Foreign: ☐

View:

Contact	Position	Phone #	Email

Notes:

Form View

Contracts Center Overview

The **Contracts Center** is a single screen for viewing all contracts. You can filter by Contract #, Project, or Check Reference so you can see only a certain subset of contracts while going easily from one to another. The various sections of this screen will now pop out when you click on the title button so that you can see all the information from them at once rather than having to scroll down all the time.

The screenshot displays the 'Contracts Center' window in the BATS2.0 software. The window title is 'BAITS2.0-->G Agency LLC' and the user is 'Jeff Gerecke'. The interface is divided into several sections:

- Filter Section:** Includes 'Enter text to filter:', 'Contract#', 'Check Number:', 'Project', and 'Client' fields. A 'Filter Cleared' button is also present.
- Contract List:** A table listing contracts with columns for Contract#, Project, and Client. The first contract is 20200922-01, Alfred A. Knopf, Mozart And Leadbelly, English.
- Contract Details:** For the selected contract, it shows 'Date: 01/01/03', 'Alfred A. Knopf', 'Jointly Separately', 'CLIENTS: Gaines, Ernest J.', 'PAYEES FOR: Gaines, Ernest J.', 'STAFF: JG', 'Staff %: 100%', and 'OUTSIDE PMTS: Payee Name Share'.
- MONEY Section:** Includes 'Due/Post Pmt. Type', 'Amount', 'Note', and 'NTG'.
- RIGHTS GRANTED Section:** Includes 'Sale Type', 'Territory', 'Language', 'Claim', 'Client / Buyer Split', and 'Edit Rights'.
- IMPORTANT DATES Section:** Includes 'License Term Year', 'Title', 'Reversion Date', 'Reverted Date', 'Delivered', 'Accepted', 'Published', 'Delivery Date', 'Bound Gallery Date', 'Hard Pub Date', 'Soft Pub Date', 'Cover Date', 'Bound Books Date', 'Hard First Print', and 'Soft First Print'.

The bottom of the window shows a 'Form View' status, a 'Record 1 of 149' indicator, and buttons for 'Amendments', 'Print', 'Search', 'Delete', and 'Close'.

Reports Menu

On the **Reports Menu**, third from the left on the Baits Menu tab, you can pull up reports on all of the data in the program including client info, contracts, and money both anticipated and already received..

The **Date Range** and **Client drop-downs** will also help narrow down what report info you want to print or download.

The screenshot displays the BAITS2.0 software interface for G Agency LLC, with user Jeff Gerecke logged in. The top menu bar includes File, Baits Menu, and several open tabs: Buyer Center, Client Center, Baits Dashboard, Contract, Money Menu, Contact List, Contract Center, and the active Report Selection Screen. The Report Selection Screen is divided into several sections:

- Last Run Reports:** A list of reports including Posted Outside Payments, Submissions Report for Client, Projects by Client, Gross & Commission by Lead Client, Check Deposit History, Buyer Payments by Client by Book, Client Payables, Client Earnings and Expenses, Anticipated Money by Date - All Agency, and Contracts Publications List by Client.
- Report Categories:** A grid of radio buttons for selecting report categories: Clients, Projects, Buyers, Contracts, Contacts, Money, Last Run (selected), and Financial.
- Date Range:** A dropdown menu currently set to 'All'.
- Client:** A dropdown menu currently set to '<< All >>'.
- Report Description:** A text box containing the description: 'Date range listing of all outside payments made'.

At the bottom of the screen, there are buttons for 'Export', 'Print Preview' (selected), 'Print', and 'Close'. The status bar at the very bottom shows 'Form View' and 'Num Lock'.

Contract Tracking

On the **Reports Menu**, also on the Baits Menu tab, you will be able to access the so-called **Tickle reports** reminding you about the status of contracts sent out that have not been returned and might warrant further action or reminding.

BAITS2.0<->G Agency LLC

Jeff Gerecke

File Baits Menu

Buyer Center Client Center Baits Dashboard Contract Money Menu Contact List Contract Center Report Selection Screen Contract Tracking

MATERIAL TRACKING FORM

FILTER OFF Agent = Include Received ☐ SET

	Client	Buyer	Title	Sale Type	Sub-Agent	To Whom We or They Sent	T'n or 'n'out	Sent Date	Tickle Date	Received Date
▶ JG	Nicastro, Nicholas	Bella Rosa Books	Antigone's Wake	Hard/Soft		contract to author	0	10/01/20	11/01/20	
JG	Gaines, Ernest J.	Alfred A. Knopf	A Gathering of Old Men	Hard/Soft		ebook amendment to author	0	06/01/13	10/01/16	
*										

Select Contract Add New

Record: 1 of 2 No Filter Search

Form View

CLOSE



Instructions for Client Records

Client Payment Data

Note the **Legal last Name** field is the **Last Name** field in the address window for the record that is checked in the **Legal box** (circled).

You can have multiple addresses for one client but only one can have the **Legal box checked**. That address is the one that will be reported to the IRS so it should match what is on the client's W9, regardless of where the check is being sent.

Clicking the “Address” tab, next to the “Payee Information” tab on the Client Details will get you to a screen like this. The “Pay to the Order of” and “Legal Last Name” fields should be **IDENTICAL**.

The screenshot shows the BAITS2.0 software interface. The top menu bar includes File, Baits Menu, and various tabs like Buyer Center, Client Center, Baits Dashboard, Contract, Money Menu, Contact List, and Contract Center. The Client Center tab is active, displaying the Client Details window for Nicholas Nicaastro.

The Client Details window has several tabs: Address, Payee Information, and Legal. The Legal tab is selected, and the 'Legal' checkbox is circled in orange. The 'Legal Last Name' field is also circled in orange. An arrow points from the 'Legal Last Name' field in the Legal tab to the 'Last Name' field in the Address tab, indicating that these fields should be identical.

The Address tab shows the following information:

- Name: Nicholas Nicaastro
- DOB: 1099/1042
- Active/Hold: 1099/1042
- Address: [Empty]
- City: [Empty]
- Country: [Empty]
- State: [Empty]
- Zip: [Empty]
- Phone: [Empty]
- Fax: [Empty]
- Email: [Empty]
- Relate: [Empty]
- Date Start: [Empty]
- Date End: [Empty]

The Payee Information tab shows the following information:

- Name: Nicholas Nicaastro
- Legal: [Checked]
- Pay to the Order of: [Empty]
- Legal Last Name: [Empty]

The Legal tab shows the following information:

- Name: Nicholas Nicaastro
- Legal: [Checked]
- Legal Last Name: [Empty]

The bottom of the window displays a table of contracts with columns for Buyer, Project Title, Language, Contract #, and Date.

Buyer	Project Title	Language	Contract #	Date
Bella Rosa Books		Hard/Soft		01/11/07
St. Martin's Press		Hard/Soft		09/19/06
HarperCollins		Electronic		12/01/15
HarperCollins		Hard/Soft		12/01/15
Bella Rosa Books		Hard/Soft		01/11/07
HarperCollins		Hard/Soft		03/28/18

Client Payment Data 2

The **two exceptions** to the rule about having all three client names be the same on each record are: **a)** if the check is going directly to a bank and needs to have specific info about the bank account include, or **b)** if a client gets married and now has a married name then it is okay to change the **Pay To The Order Of** and **Legal Last Name** fields to match her current status.

The screenshot shows the BAITs2.0 software interface. The top menu bar includes File, Bait Menu, and various tabs like Buyer Center, Client Center, Bait Dashboard, Contract, Money Menu, Contact List, and Contract Center. The main window is titled 'Client Details' and shows information for a client named Nicholas Nicastro. The 'Legal' checkbox is checked, and the 'Payee Information' section is visible. The 'Contracts' table at the bottom lists several records.

Buyer	Project Title	Language	Contract #	Date
Bella Rosa Books		Hard/Soft	English	01/11/07
St. Martin's Press		Hard/Soft	English	09/19/06
HarperCollins		Electronic	English	12/01/15
HarperCollins		Hard/Soft	English	12/01/15
Bella Rosa Books		Hard/Soft	English	01/11/07
HarperCollins		Hard/Soft	English	03/28/18

Client Payee Corporations

If a Client has a corporation to be paid, it should have its own, separate record, accessible through the drop-down button under the Payee Information tab.

This is important because the corporation will have a separate tax ID from the client's personal one and income for that entity will be separate from any money received by the client. If the client eliminates the corp. later then you can switch the Payee back to the Client record.

When entering info for the corporation don't forget to click on the label that says EIN (Employer Identification Number) which indicates the different formatting necessary for those numbers.

The screenshot displays the BAIT52.0 software interface for G Agency LLC, showing the 'Client Details' and 'Payee Information' tabs. The 'Client Details' tab is active, showing information for Nicholas Nicastro, including his title, suffix, client start/end dates, and active/hold status. The 'Payee Information' tab is also visible, showing a list of payees with a red box highlighting the 'Payee' label and a dropdown menu. The 'Payee Information' tab includes fields for 'Pay To Order', 'Check Alert', 'No Tax Frm', 'EIN/SSN', 'Pmt Method', 'Bank Name', 'Bank Address', 'Bank Route Num', 'Bank Account Num', 'For Benefit', 'Benefit Account Num', 'Commissions', 'Standard', 'Foreign', 'Film', 'Indiv., Corp., Estate', 'or Trust - I, C, E or T', and 'W8BEN'. The 'Payees' list shows 'Nicastro, Nicholas' with a 100% percentage. The 'Projects' tab is also visible, showing a list of projects with columns for 'Project Title' and 'Project Type'.

Project Title	Project Type
Antigone's Wake	
Circumference	
Empire of Ashes	
I Will Be Reckoned With	
The Isle of Stone	
City of God	
The Eighteenth Captain	
Hells Half Acre	

Client Tax ID - A Quick Note

NEVER CHANGE the SSN. If there is a new payee entity with a new SS#, then a new client record should be created. I've put a warning message on the field now so that if someone tries to change it, they will be discouraged.

EINs are used for corporations.



Foreign Clients

If a client is from a foreign country, ie. does not pay taxes in the US, then they should be marked as a 1042 by clicking on that label at the top center of the client screen. If that is the case then they should provide you with a W8-BEN in lieu of the normal W-9. They must provide you with a tax ID # whether it is in the form of a US ITIN or a foreign #.

Client Details Close

Title: Name: Nicholas Nicaastro Suffix: Staff: JG Add New Delete

DOB Birth: DOB Death: Client Start: Client End:

☒ Active / ☐ Hold **1099/1042**

Address Payee Information

Check ☒ Legal ☒ Add'l Statement ☐ Phone List: ☐ Holiday: ☐ Newsletter: ☐

Name: Nicholas Nicaastro

*c/o:

Street 1: M: Fax:

Street 2:

City: Email:

Country: Relate:

Salut: Date Start: End:

☒ 1 of 1 Copy Add Assoc

Foreign Clients 2

You must enter the country of foreign residence in the dropdown at the top right of the client screen and below it is a field for a foreign tax ID # if they provide one. Note that when you click on the 1042 label the section above the Payee dropdown at the bottom right will change and open up a field where you must indicate what kind of entity the foreign payee is: I for individual, C for corporation, E for Estate, and T for Trust.

If the foreign client is represented by a literary agency, then make sure the literary agency has its own client record and is indicated as the payee on the foreign client's record.

Client Details Close

Title: Name: Nicholas Nicaastro Suffix: Staff: JG Add New Delete

DOB: Birth: DOB: Death: Client Start: Client End:

Active/Hold 1099/1042 Tax Resd For Tax ID

Address Payee Information

Check ☒ Legal ☒ Add'l Statement ☐ Phone List: Holiday: Newsletter:

Name: Nicholas Nicaastro

*c/o:

Street 1:

Street 2:

City:

Country:

Salut:

M: Fax:

Email:

Relate:

Date Start: End:

☒ ☐ ☐ ☐ 1 of 1 Copy Add Assoc

View: Projects

Foreign Clients 3

When making contracts for foreign clients, please note that the client/payee section of the Contracts screen has a box filled with a P that must be changed to a C. This indicates that the tax liability on this contract is associated with the client and not with the agency. This is only true of foreign clients. Domestic clients repped by another agency will still have a P as their tax liability goes to the agency.

Client Details

Title: Name: Suffix: Staff:

DOB Birth: DO Death: Client Start: Client End:

☒ Active / ☐ Hold 1099 / Tax Resd For Tax ID

Pay To Order:

Check Alert:

No Tax Frm ☐

EIN# / SSN# Pmt Method:

Payees

		%
<input checked="" type="checkbox"/>	Nicastro, Nicholas	100%

Bank Name:

Bank Address:

Bank Route Num:

Bank Account Num:

For Benefit:

Benefit Account Num:

Commissions

Standard	Foreign	Film
15.00%	20.00%	15.00%

Indiv., Corp., Estate: ☐ W8BEN ☐

or Trust - I, C, E or T

NCC:

View: