



BAITS Projects and Contracts

Introduction to Projects

A project is the basis for a contract and serves as the title for the work in question. To see and edit projects, navigate to the client center and go to the drop down below the clients details. From this drop down, select projects.

A project contains all of the foundational data for contracts they are assigned to, including the relevant agent, any data on outside payments, and splits between multiple clients if relevant.

The screenshot displays the BATS 2.1 software interface, titled "BATS 2.1 <-> Elaine Markson Literary Agency, Inc." with a "Sign in" button in the top right corner. The main window is divided into several sections. At the top, there's a "Bats Dashboard" and a "Money Menu" tab. Below these, there are fields for "Title:", "Name: John", "Suffix:", "Client Start:", "Client End:", "Staff: EM", and buttons for "Add New" and "Delete". A "DOB/Death:" field shows "1099/1042". The "Address" section is expanded, showing "Payee Information" with fields for "Name: John Smith", "c/o:", "Street 1: 1234 Street Street", "Street 2:", "City: New York NY 11011", "Country:", and "Salut:". There are also checkboxes for "Legal" and "Add'l Statement", and fields for "Phone List:", "Holiday:", and "Newsletter:". Below the address section, there are fields for "M:", "Fax:", "Email:", "Relate:", "Date Start:", and "End:". A "Copy" button and an "Add Assoc" button are also present. At the bottom, there's a "View: Contracts" dropdown menu, which is highlighted with a red box. Below this, there's a table with columns for "Contract #", "Buyer", "Project Title", "Language", "Contract #", and "Date". The table is currently empty.

Projects 2

To add a new project, go to the projects tab from the dropdown menu, then click “Add New”

Baits Dashboard Money Menu

Title: Name: John Smith Suffix: Staff: EM Add New Delete

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

Active/Hold 1099/1042

Address Payee Information

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

Name: John Smith

*c/o:

Street 1: 1234 Street Street M: Fax:

Street 2:

City: New York NY 11011 Email:

Country: Relate:

Salut: Date Start: End:

Copy Add Assoc

View: Projects

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

Project Title Project Type View Add New NewContract

Creating a Project

Start in the top field, “Current Title.” Enter the title of the project and hit the Enter key.

Assign the lead client, which will be autofilled from the client record the project was created in. Hit Enter again and the project will auto-fill the assigned agent. If necessary, allocate additional agents and their percentages.

The client and payee names will also be autofilled from the client’s profile data. Again, you may add additional clients here.

From here, the contracts, submissions, recoverables and delete buttons at the bottom of the page will be active. To add a new contract from here, click “Contracts” highlighted in green.

Buyer Center Client Center Baits Dashboard Money Menu Project

Current Title: Lead Client: Smith, John

Submission End:

Project Information Rights Money Management Copyright

Comm: Standard: 15.00% Foreign: 20.00% Film: 15.00% Agency Agreement: Matter: Outside Agt:

Pseudonym: Staff %

PropSynopMss: Add Staff

Recv'd: Accept: Done: Add Staff

Prior Publication: Photograph Number: Add Staff

Category: Type: Add Staff

Client Name Share Payees %

Add Client Add Payee

Book Fairs Book Fair First Year: Headline: Pub Stage:

Project Description:

Form View

Contracts Submissions Recoverables Search Add New Delete Close

The Buyer Center

Before we create a new contract from the project, we will make sure that the relevant Buyer/ Publisher has been added to the Buyer Center.

Navigate to the Buyer Center tab, highlighted in green. To add a new buyer, click Add New in the top right corner, highlighted in red.

The screenshot displays the 'Buyer Center' tab in a software application. The 'Buyer Center' tab is highlighted with a green box. The 'Add New' button in the top right corner is highlighted with a red box. The 'Buyer Details' form is visible, containing fields for 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, Report as Foreign, Pay Royalties, and Enter Royalty Data. A list of buyers is shown on the left, including 20th Century Fox, 4th Estate, 7 World Trade LLP, A GIFT FOR LAUGHTER, A Machado Libros S.A., A Public Space, A. Nurnberg Assoc, A/S Fremad, Abner Stein, Abrams, abu dhabi, Academy Chicago Publisher, Ace Berkely Books/Penguin Putna, Actes Sud, Actors Theater of Louisvl, Actors Theater of Louisville, Adams McMeel, Adams Media Corp, Addison Wesley, Adriano Salani Editore, Advantica, Agencia Literaria, and Agencia Literaria RIFF. The 'Contacts' section at the bottom shows a table with columns for Contact, Position, Phone #, and Email, with buttons for View, Add New, and Submissions.

Buyer Center Client Center Baits Dashboard Money Menu

Enter text to filter

Name: Clear Filter

20th Century Fox
4th Estate
7 World Trade LLP
A GIFT FOR LAUGHTER
A Machado Libros S.A.
A Public Space
A. Nurnberg Assoc
A/S Fremad
Abner Stein
Abrams
abu dhabi
Academy Chicago Publisher
Ace Berkely Books/Penguin Putna
Actes Sud
Actors Theater of Louisvl
Actors Theater of Louisville
Adams McMeel
Adams Media Corp
Addison Wesley
Adriano Salani Editore
Advantica
Agencia Literaria
Agencia Literaria RIFF

Buyer Details

Name:
Address:
City:
Country:
History of Name Change Date
Claimant Type:
Buyer Type:
Parent: This is a Parent Company ☐
Head of Corp.:
Distributor:
Acct. Number:
Book Order Phone:
eMail Address:
Switchboard:
Fax:
Report as Foreign: ☐
Pay Royalties
Enter Royalty Data

Period: Period Pays:
Record: 1 of 1

Contacts: View Add New Submissions

Contact	Position	Phone #	Email
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Adding a Buyer

After clicking “Add New,” the Buyer detail screen will pop up. Start in the “Name” field, highlighted in green.

Type in the name of the buyer, add the period of statements and payments if known in the righthand box, and

IMPORTANT: check the foreign box if the buyer is foreign, highlighted in red.

Fill in as many details as is useful for your operations. After this, you can click “Close” on the bottom.

Now the buyer will be available to add to contracts.

The screenshot shows a software interface with a top navigation bar containing tabs: Buyer Center (active), Client Center, Baits Dashboard, Money Menu, and Buyer. The main form is titled "Buyer Center" and contains several sections:

- Name Field:** A text input field for the buyer's name, highlighted with a green box.
- Address:** A text input field for the buyer's address.
- City:** A text input field for the buyer's city.
- Country:** A dropdown menu for the buyer's country.
- History of Name:** A table with columns "History of Name" and "Change Date".
- Parent:** A dropdown menu for the parent company.
- Head of Corp:** A text input field for the head of the corporation.
- Distributor:** A text input field for the distributor.
- Acct. Number:** A text input field for the account number.
- Book Order Phone:** A text input field for the book order phone number.
- eMail Address:** A text input field for the email address.
- Switchboard:** A text input field for the switchboard number.
- Fax:** A text input field for the fax number.
- Report as Foreign:** A checkbox labeled "Report as Foreign", highlighted with a red box.
- Claimant Type:** A dropdown menu with "Buyer" selected.
- Buyer Type:** A dropdown menu with "Publisher" selected.
- PeriodClose:** A text input field for the period close date.
- PeriodPays:** A text input field for the period pays date.
- Record:** A section showing "Record: 1 of 1" and a list of records.

Creating a Contract

Contracts for Project

New Book

Click on column title to change the order

Client	Buyer	Project Title	Language	Contract #	Date
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of 0

View All Add New Close

Adding a new contract on a new project will take you to this screen where there are no active contracts to list.

If you are adding a contract on a project with existing deals, they will all be listed here.

From here, click Add new at the bottom

Creating a Contract 2

To start, assign a buyer/ publisher to the project in the dropdown at the top. If the publisher is not already in the dropdown, it can be added from the buyer center.

Next, hit enter, taking you to the date field, highlighted in green. Here, enter the date from the contract, **not** the date of the contract's creation in BAITs.

Hit enter.

The screenshot shows the BAITs software interface for creating a contract. The 'Contract' tab is active, and the 'Date' field is highlighted in green. The 'Buyer Center' tab is also visible. The interface includes various fields for client information, payee information, and a table for total earnings. The 'Date' field is highlighted in green, and the 'Buyer Center' tab is also visible.

Project	Sale Type	Territory	Language	Excl	FThru	Claim	Client	Buyer
							100.0%	0.0%

Creating a Contract 3

Select the relevant commission percentage from the dropdown, then hit enter.

Select the relevant currency from the dropdown, highlighted green, then hit enter, then enter the relevant advance. Hit enter.

The contract will now autofill with the relevant clients and payees from the project data. These can be adjusted at any time.

Buyer Center Client Center Bait's Dashboard Money Menu Contract

Date: 09/19/22 Client: Penguin Commission: 15.00% Advance: Complete Cancel # NEW

Projects: Jointly Separately

Client Name Share

Payees: %

Add Project Add Client Add Payee

Due/Post	Pmt. Type	Amount	Note	NTG
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Total Earnings:

If the contract is for a multi-book deal, multiple projects can be placed on one contract by clicking the “Add Project” button, highlighted orange.

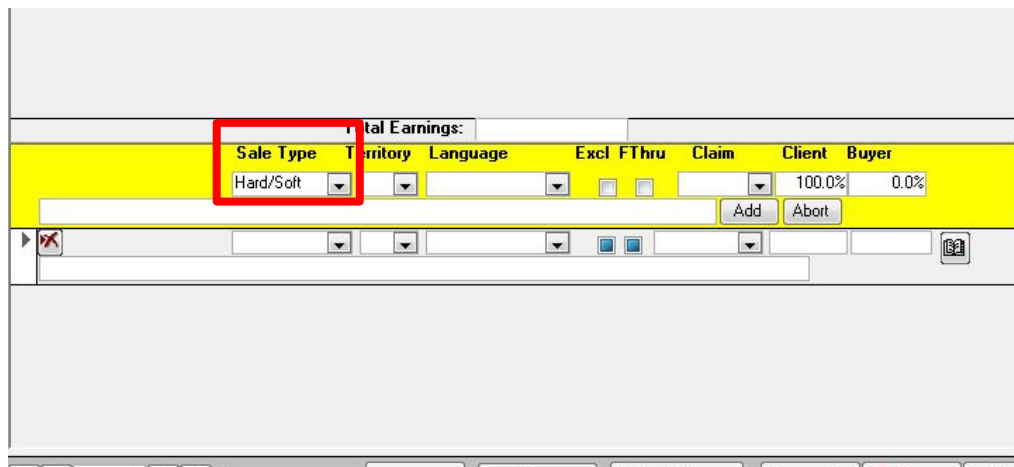
Creating a Contract 4

Now the contract needs its rights listed. In the yellow strip, enter what rights have been sold. Most conventional deals will fall under “Hard/ Soft” for hardcover and paperback publishing. Once the right is selected, hit enter.

Enter the relevant territory from the dropdown. WO is for world rights. Hit enter

Enter the relevant language sold. Hit enter twice to arrive at the claim field. Select “Sold” from the dropdown.

Click “Add”



The screenshot shows a software interface for creating a contract. A yellow horizontal strip contains the following fields and controls: 'Sale Type' (a dropdown menu with 'Hard/Soft' selected and highlighted by a red box), 'Territory' (a dropdown menu), 'Language' (a dropdown menu), 'Excl' (a checkbox), 'FThru' (a checkbox), 'Claim' (a dropdown menu), 'Client' (a text field showing '100.0%'), and 'Buyer' (a text field showing '0.0%'). Below these fields are 'Add' and 'Abort' buttons. The rest of the form is greyed out.

Contract Detail

Once you click “Add,” a contract detail window will pop up. Here, it’s useful to enter the payment schedule by entering dates into the royalty statements section in the top right, highlighted in red.

Additionally, adding the License Term is essential for foreign contracts, so you can keep tracking what is available to be sold again. This is highlighted in green.

The screenshot shows a software window titled "Hard/Soft Detail". It contains several sections for entering contract information:

- Top Section:** Includes fields for "Terms 1", "Terms 2", "MSS Length", and "Imprint".
- Table Section:** A table with columns: "To Whom We or They Sent", "In or Out", "Sent Date", "Tackle Date", and "Received Date".
- Royalty Statements Section (highlighted in red):** A table with columns: "Closes" and "Pays".
- License Term Section (highlighted in green):** Includes fields for "License Term Years" (with a value of "0"), "Contract or Publish" (with a value of "C"), "Reversion Date", and "Reverted Date".
- Bottom Section:** Includes fields for "Edition", "Price", "Exp. Date", "Roy. Rates", and "ISBN".
- Important Dates Section (highlighted in blue):** Includes fields for "Delivery Date", "Hard Pub Date", "Soft Pub Date", "Bound Books Date", "Cover Date", "Hard First Print", and "Soft First Print".
- Footer:** Includes a status bar with "1 of 1 (Filtered)" and buttons for "Add New", "Delete", and "Close".

At the bottom of the page, enter the relevant dates detailed on the contract for delivery and publication, highlighted in blue. When you’re done, click close in the bottom right.

Adding Anticipated Advance Payments

Back at the contract, we will add the expected advances and their schedule so that money can easily be monitored and chased after if the anticipated date passes without payment.

Go to the first blank field within the middle of the contract to enter payments. From here, select a date in the “Due Post” field highlighted in blue. This date should be the deliver by date for the fee in the contract.

Next, from the payment type dropdown, select “Signing,” highlighted in red.

Next, in the field to the right labeled “Amount” enter the amount of money due on Signing. For our example contract, we are displaying a 10k advance paid in quarters with \$2,500 due on signing.

Due Post	Pmt. Type	Amount	Note	NTG
	Signing	\$2,500.00		

Total Earnings:									
Sale Type	Territory	Language	Excl	FThru	Claim	Client	Buyer		
						50.0%	50.0%		
						Add	Abort		
Hard/Soft	W/O	English			Sold	100.0%	0.0%		

Do the same for the Delivery and Acceptance payment (called “D&A in the payment type dropdown,) and the Publication and Paperback Publication payments with their corresponding dates.

Conclusion

The contract can now be closed as well as the project screen that will display after it. Back on the client screen, you will now be able to see the new contract and new project on their respective screens within the client's profile. If you click the View dropdown on the left, you can see the contract payments are visible in the Anticipated Money section of the client screen.

View: Contracts ▼						
Contracts: Click a header to sort or enter criteria to filter						
Buyer ▼	Project Title ✕	Language ✕	Contract #	Date	Report View View All	
► Penguin	New Book	Hard/Soft	English	20220919-01	09/19/22	