

Section 15 - Forms/Contracts

This section contains forms, contracts and agreements. All may be viewed and printed blank. In addition, if you are using this program through **HT Business Plus, Gold or Deluxe**, you may fill in the blanks using your database of Clients and Horses prior to printing.

After selecting the <Forms/Contracts> button, you will advance to the <Browse Forms> screen. Click <insert>

Samples and Print Only Forms

This folder allows you to view and print all forms and contracts with the blanks empty. By clicking on the <insert> tab, you may select any of the forms to preview and print without inserting specific data into the fields.

Now Lets Get Started.....

To Create a New Contract/Form

First Name	Last Name	Business	Phone
Megan	Clarke	Software Inc	
Buck	Walters	HorseTrak Software	570-823-1157

Whether “stand alone” or as part of Business Plus/Gold/Deluxe form, **HT Forms 2003**, you can click on <Resources – Names And Addresses> and build an address book where you will be able select individuals to insert into your contracts and forms. For the “stand alone” version, any horse names you will require for your contract will need to be typed into the <Enter Data into Blanks ...> fields on a contract by contract basis.

If you are using **HT Forms 2003** from within the **HT Business Plus, HT Gold or HT Deluxe** programs, you will be able to click on tabs from the screen below to select from your client and horse databases. The following two screen shots show first the included, and then the “stand alone” versions of the contract data selection screens.

If choosing from your data base in **HT Business Plus, Gold or Deluxe**, you will choose the client/horse from your databases by clicking on **<Select Database Data For Contract>**. If you are using HT Forms 2003 alone. Click **<Select From Names & Addresses>** (shown in figure 2) to get into your address book. If you don't have anything inserted in your address book, this action will bring you to a blank database screen

The screenshot shows a software window titled "Update the User Entered Contract File (PURCHASE AND SALE AGREEMENT)". It features three tabs: "Set Contract Type and Date", "Enter Data Into Blanks on the Contract", and "Select Database Data for Contract". The "Select Database Data for Contract" tab is selected. The interface includes five rows of input fields, each with a corresponding "Pick" button: "Client id" (Pick Client), "Horse 1 Name" (Pick Horse 1), "Horse 2 Name" (Pick Horse 2), "Buyer Name" (Pick Buyer), and "Seller Name" (Pick Seller). A large "Put entered info into contract" button is positioned below these fields. At the bottom right, there are "OK" and "Cancel" buttons.

Figure 1 - Database Selection When in Business Plus, Gold, or Deluxe

Note: There are 2 fields and tabs for horses. The first tab **<Pick horse 1 >** would be the main horse referenced in your contract. For most contracts, that will be the only horse you will need. However, the **<Pick Horse 2>** tab is present for the purpose of naming a second horse for a contract such as a breeding contract. In the case of the **<Breeding Contract>**, Horse 1 will be the mare. When you click on the **<Pick Horse 2>**, the second horse will be appropriately designated as the **<stallion>** in the contract.

Owner and Horse may be filled in using your database or you may simply type in a name.

After you have selected the data from your database that you want on the contract, click the **<Put entered info into contract>** button to have the program populate the appropriate fields.

In the "stand alone" version of forms, the name and address selection screen is shown in the following image:

Update the User Entered Contract File (PURCHASE AND SALE AGREEMENT)

Set Contract Type and Date | Enter Data Into Blanks on the Contract | Select From Name and Address

Buyer Name: Pick Buyer

Seller Name: Pick Seller

Put selected data into contract

OK Cancel

Figure 2 - Data Selection Screen in the "Stand Alone" version of Forms

After selecting the buyer and seller for the contract you are working on, click the **<Put selected data into contract>** button to populate the respective fields.

Now click on the tab: <Enter Data into Blanks on the Contract> tab to fill in the rest of the blanks. Initially, you are brought to a browse as shown below in Figure 3.

Contract id	Field	User Input
1	1	Buyer's Name
1	2	Buyer's Street, State, Zip
1	3	Seller's Name
1	4	Seller's Street, State, Zip
1	5	Name of Horse
1	6	Horse's Gender
1	7	Horse's Age
1	8	Color
1	9	Markings
1	10	Breed
1	11	Registration No.
1	12	Total Sum
1	13	Buyer's Deposit Amt \$
1	14	Deposit Due Date
1	15	Balance of \$
1	16	Balance Due Date

Figure 3 - Form Blank Data Browse

Fill-in-Blank Fields

Each form presents a template for you to fill in the blanks. Once you fill in the blanks, the program will compile the data and present it to you on the form for print preview/printing. You may move from field to field by either clicking on a field with your mouse, or utilizing your arrow keys.

We recommend filling in all of the blanks whenever appropriate. If you do not complete all fields, you may still print the incomplete form. If you do not have all of the data at this time, complete as much as possible and save the document. You may choose that document at any time in the future to make changes and/or fill in the remaining blanks.

To change the information that will be placed in a blank, either double click the field of interest in the browse, or click one on the field of interest and then click the <Change> button. Either way you will be brought to the following screen shown in Figure 4.

The image shows a Windows-style dialog box titled "Changing a HCon_det Record". It has a "General" tab selected. The dialog contains the following fields and controls:

- Contract id:** A text box containing the number "1".
- Field Name:** A text box containing the text "Registration No.". Above this field is a smaller text box containing the number "11".
- User Input:** An empty text box.
- Buttons:** "OK" and "Cancel" buttons are located at the bottom right of the dialog.

Figure 4 - User Blank Data Update Screen

Leave the first three fields of this form alone. Click in the **<User Input>** field to put your cursor there and type in the data that you wish to appear on the contract. When you have finished typing the data, click the **<OK>** button to save your entry, or click the **<Cancel>** button to discard your changes. Either "OK", or "Cancel" will return you to the blank browse.

Once you have completed entering the data for the blanks in the document, click **<OK>** on the blank data browse screen shown in figure 3 above, and you will now be in the Browse Forms/Contracts Window with your completed document highlighted.

To view and/or print click on the **<Print/Preview Document>**. You may zoom the document, print or cancel.

Dates and Description

Enter the date of the contract. The date will be used as a sort order on the Forms/Contract Browse screen..

Enter your description. The more detailed the description, the easier it will be for you to locate this document in the future. You may enter up to 50 characters for this description.

Your completed document is saved until you choose to delete it from your program.

To exit this section of the program, click <**Close**>.