

Tips for Using

California Construction Forms and Contracts

Version 3.0 / PDF format

These instructions cover the files ending with the “.pdf” file extension on the CD-ROM.

IMPORTANT

The forms, text and design of *California Construction Forms and Contracts* are © 2006 by Builder’s Book, Inc. All rights reserved. With your purchase of this product, you are entitled to a non-exclusive limited license to use these files to produce printed forms for use in your contracting business; all other uses are prohibited. The files may not be sold, distributed, or otherwise transferred to any third party without advance written permission from Builder's Book, Inc., the publisher.

!!! CAUTION: California law requires specific language and sometimes even specific formatting or type sizes for legal documents used by licensed contractors. As much as possible, we have tried to meet these requirements in presenting these forms. For that reason, we would discourage you from making more than minor changes in the design, wording or presentation of these forms. !!!

These forms are provided to you "as is", without warranty or guarantee of any kind. You should always consult a knowledgeable legal professional before using any contract or form in your business; the sample language provided in the *California Construction Forms and Contracts* may or may not be appropriate for your use, and they may or may not provide you with all of the legal protections you or your clients may need or desire. The contract language and forms in *California Construction Forms and Contracts* are provided only as a starting-point.

The PDF version of *California Construction Forms and Contracts* is designed to work with recent, standard configurations of the free Adobe Reader and the paid Adobe Acrobat (Standard and Professional). Because of the wide variety of hardware/software combinations that are possible, we cannot guarantee that these files will work on outdated or unusual personal computer setups.

BEYOND THESE INSTRUCTIONS, WE CANNOT PROVIDE SUPPORT FOR HOW TO USE ADOBE READER or ADOBE ACROBAT... Always refer to that software's Help and Documentation for the most appropriate help and instructions.

USER'S GUIDE

Contents

First Things First

Basics of Using the forms

Keeping Your Forms Organized, Keeping Track of Forms

FIRST THINGS FIRST

1. Copy the PDF files from the CD-ROM onto your personal computer's hard disk drive.
2. Remove the *California Construction Forms and Contracts* disc from your CD-ROM drive, and place it in a safe place. From here on, you will be working with the file saved in # 1 above.
 - The PDF forms are provided in two main versions... *company.pdf* and *companycustomer.pdf*. The *company.pdf* version allows you to fill in your basic company information, but provides blanks for customer and/or subcontractor information. This version is intended to give you a professional looking form that you can complete in the field. The *companycustomer.pdf* version lets you fill in just about every piece of information on the form (with the exception of signatures, of course), and so it makes a better choice when you will have a computer handy when filling out the form.
 - In addition to these two basic PDF files, you will also find some other PDF files that you may want to use, located in the "extras" folder inside the PDF folder on the CD-ROM. The Checklists for Homeowners (home improvement and swimming pool versions) and Information About Commercial General Liability Insurance forms (home improvement and single family home versions) were recently incorporated into the basic home improvement and swimming pool forms; however, some contractors still prefer to use a standalone form, and so they are provided here as extras.

BASICS OF USING THE FORMS

The files you have saved in #1 above are a special type of Adobe Acrobat file, known as "forms." Their filenames and extensions are just the same as other Acrobat files; only their internal information and the way it works is different.

- Forms include checkboxes and text entry areas that you can fill in.
- Much of a form's text and layout are "secured"; they cannot be changed unless you have the appropriate software and password(s) to "unlock" the form. **We do not provide these capabilities with the PDF forms; if you are looking for greater flexibility, we suggest you explore the RTF forms that are also included on the disc. Many of the RTF forms allow you to insert your own logo, for example; the PDF forms do not.**
 - **If there are changes you would like to make to the forms, and you feel confident of your abilities to do so, call us at (818) 887-7828 with information about when and how you purchased your copy of California Construction Forms**

and Contracts Version 3 (online or in our Canoga Park store), and we'll provide the password. Have your store receipt or online invoice handy. For example, you can delete unused pages and trim files down to just the form pages used for a specific project (see below).

- Once you have the password we'll provide, you'll need to remove the password security on the PDF document. We do not provide support for this or for making changes to the forms; please refer to your Adobe Acrobat or CutePDF Professional help and documentation for information how to do this.
- Recent versions of Adobe Reader and Adobe Acrobat (versions 6 and above, in most cases) allow you to turn highlighting for form fields "on" and "off," to make them easier to find when you are filling in the form. (After you have opened a form, you will see a checkbox for "Highlight form fields" in the upper right-hand portion of the Adobe Reader or Adobe Acrobat screen. Check or uncheck this box to turn highlighting on or off.)
- In order to save completed forms, you will need either the *paid* Adobe Acrobat software (www.adobe.com) or a *low-cost* add-in to the free Adobe Reader (such as the CutePDF Form Filler, available from www.cutepdf.com).

Once you have either of these set up, you can save completed forms. This means you can save individual forms that you fill in for specific projects or customers. This also means that you can partially fill in a form with your company information, and save it as a "master." Then, when you need to complete a form for a specific project or customer, open your customized master and save time.

Can I trim a form file down to just the pages/forms I need, for a specific customer?

- If you have Adobe Acrobat or CutePDF Professional (but not CutePDF FormFiller), and you'd like to delete pages from saved forms (e.g., delete all but the pages that are applicable to a specific project), you'll need the password we've used to secure/lock the PDF file.
- Call us at (818) 887-7828 with information about when and how you purchased your copy of California Construction Forms and Contracts Version 3 (online or in our Canoga Park store), and we'll provide the password. Have your store receipt or online invoice handy.
- Once you have the password we'll provide, you'll need to remove the password security on the PDF document: refer to your Adobe Acrobat or CutePDF Professional help and documentation for information how to do this.
- And after you've trimmed the form down to size by deleting pages before and after the pages you want to keep, you'll want to put security back on your document. If you're sending the completed file to a customer, you may want to select a security setting that locks the form field content, as well.
- **NAVIGATING THE FORMS:** It is always best to use the TAB key to move from field to field. Depending on the kind of field your cursor is in, the Enter key may or may not operate like a TAB key. For consistent results, just use the TAB key.
- **TAB ORDER:** As much as possible we have tried to set the field tabbing order to the order most people would expect and want, usually left-to-right and top-to-bottom. In some cases, fields are entered in groups (e.g., name, address and phone for one party to the contract) before moving on to the next group.

To change tab order in one of the PDF files provided, you will need the paid Adobe Acrobat software and the security password we have used to lock the forms. Call us for the password if you are interested in doing this.

- **LIST OF PROJECTS**: Print out and refer to the "List of Projects" provided at the beginning of each PDF file for a complete list of all the forms included in that version. It gives you some hints on printing, who should receive copies of the completed forms, etc.
- **ADDITIONAL FILES**: In addition to the PDF forms provided, you may also want to try the Microsoft Excel (.xls) files provided on the disc.

Keeping Forms Organized / Keeping Track of Forms

One of the extras on the disc is a file named "LOG Contract Form Journal.xls" This is a Microsoft® Excel® spreadsheet file designed to help you keep track of the forms and contracts you create. If you have Microsoft Excel, Microsoft Works, or a compatible program, give this file a try.

TIP: If you have either the paid Adobe Acrobat or a low-cost add-in like CutePDF Form Filler, make a "master" version of each form you want to use, that already has your basic company information filled out. Save this master, and make a backup copy somewhere it will be safe. If you ever accidentally overwrite or delete your working "master," you'll be able to quickly retrieve your backup "master."

TIP: Again, if you have Adobe Acrobat or CutePDF Form Filler, save filled-in forms using customer or project names (ABC_Building.rtf or Johnson_David_Spa.rtf) , dates (2006_Jan_15.rtf), or a combination of the two (Johnson_Spa_2006_Jan_15.rtf). This will automatically organize your completed forms, and make them easier to find.

Thank you for using
California Construction Forms and Contracts
Version 3.0 / PDF format

Builder's Book, Inc.

www.buildersbook.com