

Project Document



Actual Start Date:	01-01-2024
Project ID#:	6

EF+ Support Headers and Footers so every page looks professional!

Client Name: Quickbase
Project Name: Maron Residence

Status: In-Progress

Sample of Project and Related Tasks

Task	Assign To	Milestone	Start	Project Phase	Priority	# of Hours Allocating	# of Activities
Not Started							
<input type="radio"/> Review Meeting with Team	Chris Baker	<input checked="" type="checkbox"/>		Planning	High	10	1
<input type="radio"/> Post Webinar Review	Chris Baker	<input type="checkbox"/>		Planning	High	10	0
<input type="radio"/> Beta Testing	Chris Baker	<input type="checkbox"/>		Planning	Medium		0
<input type="radio"/> Regression Testing	Brian Boylan	<input type="checkbox"/>			Medium	15	1
<input type="radio"/> User Acceptance Testing	Brian Boylan	<input type="checkbox"/>			Medium	10	0
<input type="radio"/> Implementation	Brian Boylan	<input type="checkbox"/>			Medium	5	0
<input type="radio"/> Post Implementation Review	Brian Boylan	<input type="checkbox"/>			Medium	5	0
			TOTAL DAYS:			55	
In-Progress							
<input checked="" type="radio"/> Webinar	Chris Baker	<input type="checkbox"/>	01-08-2024	Post Project	High	10	3
<input checked="" type="radio"/> Email Recording	Christine Boylan	<input type="checkbox"/>	01-12-2024	Design	High	225	0

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	Task	Assign To	Milestone	Start	Project Phase	Priority	# of Hours Allocating	# of Activities
	Client Requirements Review	Christine Boylan	<input type="checkbox"/>	01-12-2024	Design	High	225	0
	Scheduling Calls	Christine Boylan	<input type="checkbox"/>	01-12-2024	Design	High	225	0
	Scheduling Calls 2	Christine Boylan	<input type="checkbox"/>	01-12-2024	Design	High	225	0
	Kick Off Meeting	Christine Boylan	<input type="checkbox"/>	01-12-2024	Design	High	225	0
	Scheduling Calls3	Christine Boylan	<input type="checkbox"/>	01-12-2024	Design	High	225	0
				TOTAL DAYS:			1,360	
Completed								
	Prepare Demo info	Chris Baker	<input type="checkbox"/>	01-01-2024	Planning	High	10	0
	Schedule Webinar	Chris Baker	<input type="checkbox"/>	01-01-2024	Planning	High	10	0
	Practice Session	Chris Baker	<input type="checkbox"/>	01-01-2024	Planning	High	10	2
	Requirements Gathering	Chris Baker	<input type="checkbox"/>	01-01-2024	Planning	High	10	0
	Project Design	Chris Baker	<input type="checkbox"/>	01-01-2024	Planning	High	10	0
	Project Quote	Chris Baker	<input type="checkbox"/>	01-02-2024	Planning	High	10	0

(Scan to view project record)

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Task	Assign To	Milestone	Start	Project Phase	Priority	# of Hours Allocating	# of Activities
Project Approval	Chris Baker	<input type="checkbox"/>	01-03-2024	Planning	High	10	0
			TOTAL DAYS:			70	
			GRAND TOTAL			1,485	

Approved By



Project Document

Date:	02/12/2007
Project ID#:	6

Project Name: Maron Residence

Create and Clear Sample

The 2 fields below should be cleared out after the pdf file was created. Go back to the Project record and see for yourself!

Field 1

Field 2



Feature Comparison

Exact Forms Plus!

PDF Stamper

Template File Type	doc, docx	PDF
Output File Type	doc, docx or PDF	PDF
Handles application tokens	✓	✓
Store output file in QuickBase	✓	✓
Handles images and barcodes	✓	✓
Captures creation date in QuickBase	✓	✓
Integrates with Courier for QuickBase	✓	✓
Integrates with DocuSign for QuickBase	✓	✓
Can include "Subtable" or "Related" data	✓	✗
Handles text fields with embedded HTML tags	✓	✗
Store output file in Amazon S3	✓	✗
Store output file in separate "Repository" table	✓	✗
Create password protected files	✓	✗
Create multiple DOC and PDF files with a single button click	✓*	✗**
Create merged PDF files from multiple record transaction	✓	✗
Merged additional PDF files into Output File	✓	✗



This is the first release for PDF Stamper so these features are not available at this time. The PDF Stamper will be enhanced to include this functionality in future releases.

* Exact Forms Plus can create up to 50 documents in a single transaction. If you have the need to create more than 50 documents in a single transaction you will have to subscribe to the **Exact Forms Plus Batch Processor**.

The PDF Stamper can only create 1 PDF file in a single button click. . If you have the need to stamp and create more than 1 PDF in a single transaction you will have to subscribe to the **PDF Stamper Batch Processor.