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Project Document

Actual Start Date:	09-12-2019
Project ID#:	3

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

Client Name: ABC Corp
Project Name: Test Project ABC **Status:** In-Progress

Sample of Project and Related Tasks

	Task	Assign To	Milestone	Start	Project Phase	Priority	# of Hours Allocating	# of Activities
Not Started								
	TEST	Keith Jusas	☐	12-01-2021	Design	Medium		1
				TOTAL DAYS:				
In-Progress								
	Sep Example #3	Dev Juiced	☐	09-12-2019	Design	Medium	3	2
	Sep example #2	Keith Jusas	☐	09-12-2019	Planning	Medium	2	1
	Test	Brian Boylan	☐	01-29-2023	Design	Medium	32	0
				TOTAL DAYS:			**37**	
				GRAND TOTAL			**37**	

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Project Document

Actual Start Date:	09-12-2019
Project ID#:	3

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Client Name: ABC Corp
Project Name: Test Project ABC **Status:** In-Progress

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Project Document

Actual Start Date:	06-29-2022
Project ID#:	5

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Client Name: XYZ LLC
Project Name: Test Project XYZ **Status:** In-Progress

Sample of Project and Related Tasks

	Task	Assign To	Milestone	Start	Project Phase	Priority	# of Hours Allocating	# of Activities
Not Started								
	Test Task	Keith Jusas	☐	06-29-2022		Medium		0
	Test	Christine Boylan	☐		Post Project	Medium		0
				TOTAL DAYS:				
				GRAND TOTAL				

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Project Document

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

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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								
	Review Meeting with Team	Chris Baker	☒		Planning	High	10	1
	Post Webinar Review	Chris Baker	☐		Planning	High	10	0
	Beta Testing	Chris Baker	☐		Planning	Medium		0
	Regression Testing	Brian Boylan	☐			Medium	15	1
	User Acceptance Testing	Brian Boylan	☐			Medium	10	0
	Implementation	Brian Boylan	☐			Medium	5	0
	Post Implementation Review	Brian Boylan	☐			Medium	5	0
				TOTAL DAYS:			**55**	
In-Progress								
	Webinar	Chris Baker	☐	01-08-2024	Post Project	High	10	3
	Email Recording	Christine Boylan	☐	01-12-2024	Design	High	225	0

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Project Document

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

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Client Name: Quickbase
Project Name: Maron Residence **Status:** In-Progress

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

(Scan to view project record)

Project Document

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

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Client Name: Quickbase
Project Name: Maron Residence **Status:** In-Progress

	Task	Assign To	Milestone	Start	Project Phase	Priority	# of Hours Allocating	# of Activities
	Project Approval	Chris Baker	☐	01-03-2024	Planning	High	10	0
				TOTAL DAYS:			**70**	
				GRAND TOTAL			**1,485**	

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Project Document

Actual Start Date:	
Project ID#:	10

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Client Name: **Quickbase**
Project Name: **test** **Status:** **Not Started**

Sample of Project and Related Tasks

NO TASKS

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Exact Forms Plus!

Generate Microsoft Word or PDF documents from your Quick Base applications.

New for 2020/2021 – Exact Forms Plus Batch Processor is included in Exact Forms Plus!

Highlights of Exact Forms Plus!

- ✓ Create **as many templates as needed** on as many table(s) as needed – Proposals, Invoices, Contracts, Mailing labels…
- ✓ Use our "**Configurator**" to help collect all of the info needed for creating your documents (also helps configure sub tables)
- ✓ Insert **images** from file attachments or from anywhere on the internet and control the size of those images as well
- ✓ Include **headers and footers** so that every page looks consistent and professional
- ✓ **Total control** of how sub tables appear - i.e. fonts, column widths, borders, alignment, grouping and colorization
- ✓ Create **Password protected** documents and/or include **watermarks**
- ✓ Display **embedded html** from Quick Base rich text fields
- ✓ Save the generated document directly into a **file attachment** field
- ✓ Append additional pdf file(s) to the generated pdf document
- ✓ Save the generated document in a separate table in your application - i.e. Document Repository
- ✓ Use a **MAC or Windows PC** to configure your document template - **No macro embedded templates!**
- ✓ Create **multiple documents** with the click of a single button (limit 50 per click) – ***see last page for more info***
- ✓ **Email** the generated document as an attachment using Courier for Quick Base (additional Add-On required)
- ✓ **Store** the generated document on Amazon S3 or Dropbox (additional Add-On required)
- ✓ **Route** documents for electronic signature using DocuSign for Quick Base (additional Add-On required)
- ✓ **Online help** at http://qbtools.helpdocsonline.com/#exact-forms-plus-overview

For more information contact:
info@juicedtech.com
Or call us at **631-617-5060**
Visit us on the web at:
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Exact Forms Plus!

Create customized documents from Quick Base with **ease**.

Exact Forms Plus is the most powerful way to create sophisticated, professional looking documents and reports from your application.

Any Table

Output

Your Document
Your format

What are some of the many ways customers use Exact Forms Plus?

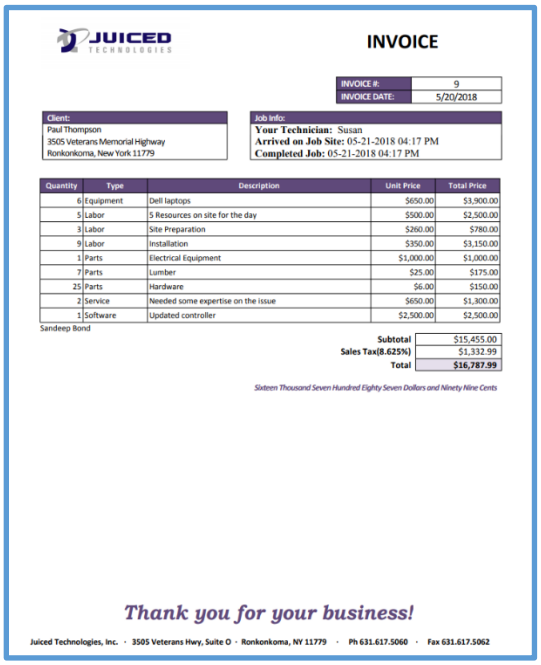
Quotes

Proposals

Invoices/POs

Contracts

Reports



JUICED TECHNOLOGIES

INVOICE

INVOICE #:	9
INVOICE DATE:	5/20/2018

Client:
Paul Thompson
3505 Veterans Memorial Highway
Ronkonkoma, New York 11779

Job Info:
Your Technician: Susan
Arrived on Job Site: 05-21-2018 04:17 PM
Completed Job: 05-21-2018 04:17 PM

Quantity	Type	Description	Unit Price	Total Price
6	Equipment	Dell laptops	$650.00	$3,900.00
5	Labor	5 Resources on site for the day	$500.00	$2,500.00
3	Labor	Site Preparation	$260.00	$780.00
9	Labor	Installation	$350.00	$3,150.00
1	Parts	Electrical Equipment	$1,000.00	$1,000.00
7	Parts	Lumber	$25.00	$175.00
25	Parts	Hardware	$6.00	$150.00
2	Service	Needed some expertise on the issue	$650.00	$1,300.00
1	Software	Updated controller	$2,500.00	$2,500.00

Sandeep Bond

Subtotal	$15,455.00
Sales Tax(8.625%)	$1,332.99
Total	**$16,787.99**

Sixteen Thousand Seven Hundred Eighty Seven Dollars and Ninety Nine Cents

Thank you for your business!

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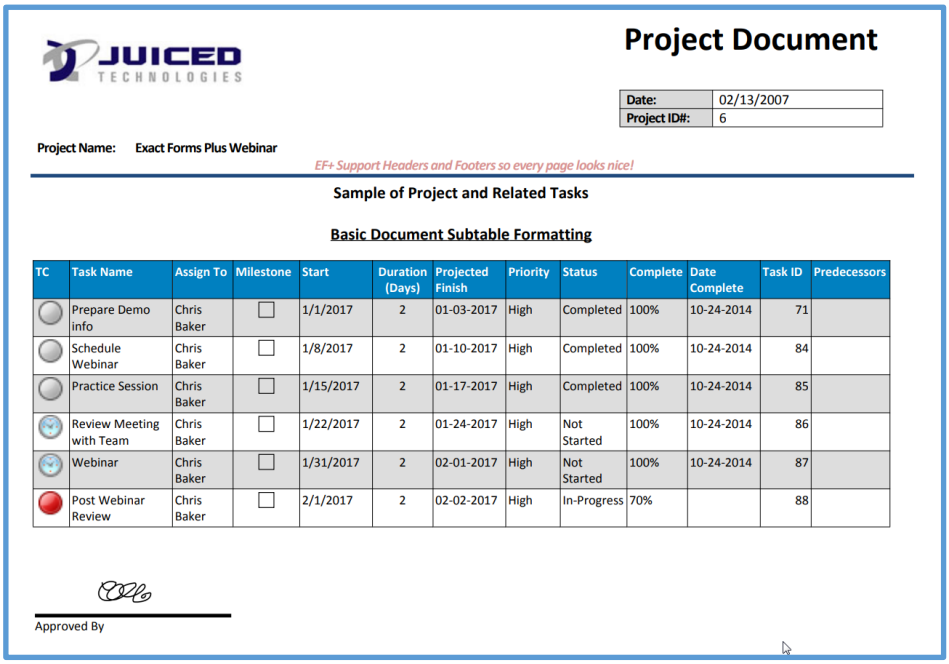

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Project Document

Date:	02/13/2007
Project ID#:	6

Project Name: Exact Forms Plus Webinar

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

Sample of Project and Related Tasks

Basic Document Subtable Formatting

TC	Task Name	Assign To	Milestone	Start	Duration (Days)	Projected Finish	Priority	Status	Complete	Date Complete	Task ID	Predecessors
	Prepare Demo info	Chris Baker	☐	1/1/2017	2	01-03-2017	High	Completed	100%	10-24-2014	71	
	Schedule Webinar	Chris Baker	☐	1/8/2017	2	01-10-2017	High	Completed	100%	10-24-2014	84	
	Practice Session	Chris Baker	☐	1/15/2017	2	01-17-2017	High	Completed	100%	10-24-2014	85	
	Review Meeting with Team	Chris Baker	☐	1/22/2017	2	01-24-2017	High	Not Started	100%	10-24-2014	86	
	Webinar	Chris Baker	☐	1/31/2017	2	02-01-2017	High	Not Started	100%	10-24-2014	87	
	Post Webinar Review	Chris Baker	☐	2/1/2017	2	02-02-2017	High	In-Progress	70%		88	

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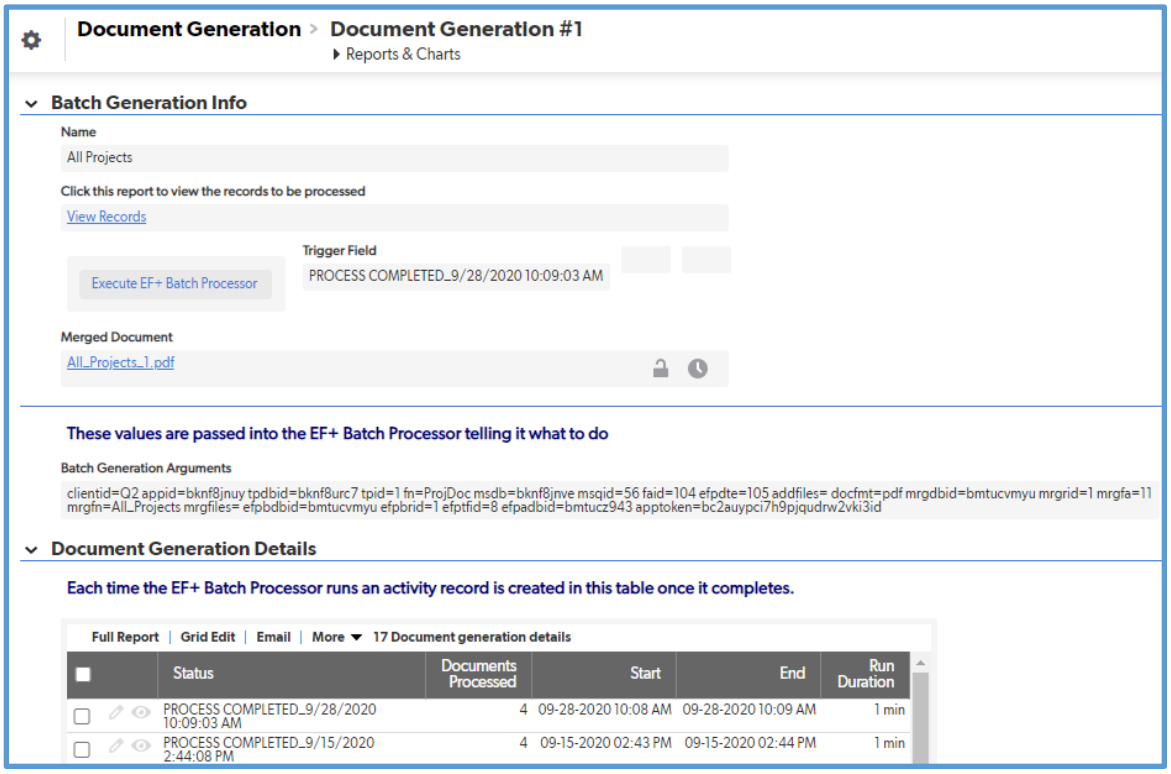
Exact Forms Plus!

Exact Forms Plus Batch Processor

Highlights of Exact Forms Plus Batch Processor!

- ✓ Generate **more than 50** documents in a single button click
- ✓ Great for generating documents in batches such as Lease Agreements, Monthly Invoices, Annual Renewal Contracts etc.
- ✓ Instead of clicking a button to create a document, **"Trigger"** a document to be created when something happens in your application, i.e. when a record is added, modified, or saved.
- ✓ Edit records while in **grid edit** and have documents automatically created for those records that were just modified.
- ✓ Use a **control table** in your application to manage your batch generation configurations and activity logs
- ✓ **Email notifications** in Quick Base are used to execute the Exact Forms Plus Batch Processor for both batch document creation requests and "triggered" document creation requests.



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