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**
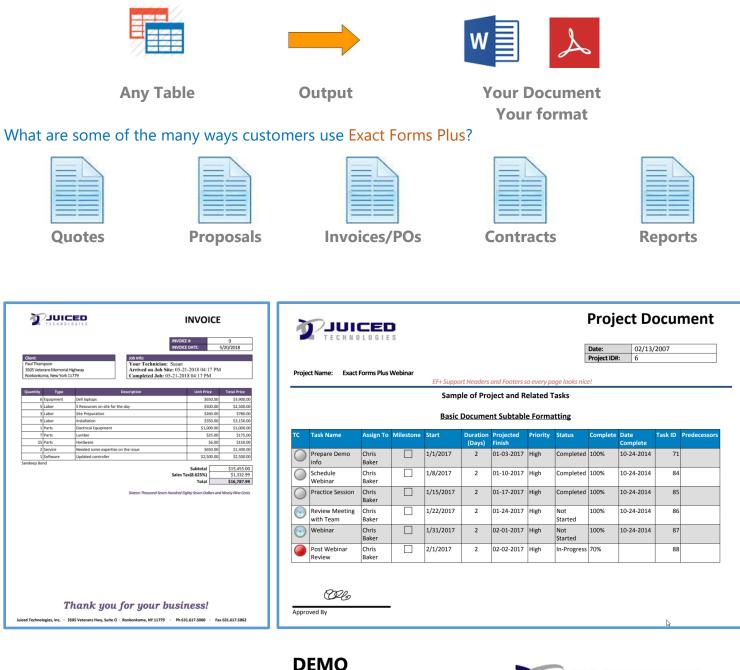Visit us on the web at:
www.juicedtech.com

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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**

Invoice sample

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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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Project Document sample

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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	

Approved By

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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.