

CASE STUDIES

Recall CRM Case Study



CASH srl

Cash srl uses Aspose.Words.Net to generate documents in its software Recall CRM

11/12/2012

About CASH srl

Cash Srl is a company founded and operating from in Vicenza since 1983 and provides solutions that are best suited to the problems concerning the computerization of global companies in terms of design and application development software, CRM and ERP systems, and design and implementation of information technology, security and training networks. CASH has developed its business with a particular interest in the CRM software and our product, **Recall CRM**, is capable of generating documents using the potential of the Aspose.Words for .Net to store any kind of files and photos. You can find out more about us, and how we are using Aspose.Words by visiting our website and blog at: www.recall-crm.it

Problem

Some years ago we had developed in our CRM software a procedure with Microsoft Word automation to generate word documents on the client computer, starting from a word template and then converting to PDF format to send via email. The procedure needed ActiveX interaction and therefore only worked with Internet Explorer web browser.

Now Internet Explorer is not the most popular web browser and a lot of users use other application like Firefox, Chrome, Safari, etc. For this reason we decided to create the possibility to generate Word documents from those browsers that don't use ActiveX interaction.

For this scenario, we had to find a product that could generate the word document on the server. The solution also required that our Recall CRM customers are not forced to buy a Microsoft Word license for each server.

Solution

In the long search for a solution to our problem, we evaluated and compared different products, their advantages and disadvantages, both in terms of quality and easy to set up and licensing fees.

After several trials of different solutions we have found the answer in Aspose.Words for .NET

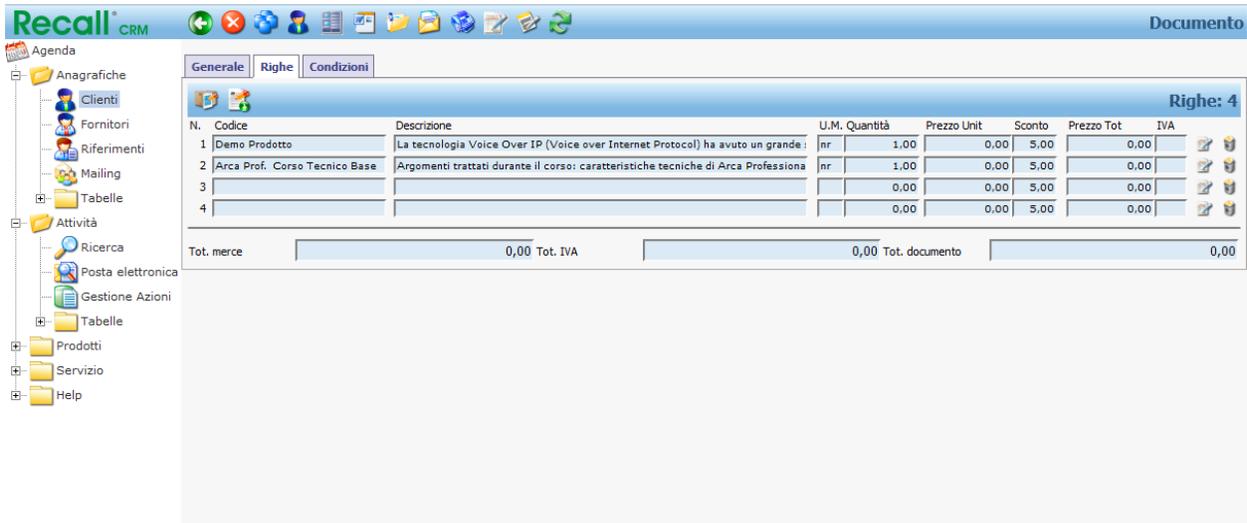
We have performed very extensive testing with hundreds of Word documents and only Aspose.Words gave the best results by providing fuller compatibility than Microsoft Word

The choice of Aspose.Words with simplified work has allowed us to:

- Generate word documents from our database records
- Easily manage custom templates of documents
- Automatically convert Word documents to PDF as an attachment to the e-mail

We also used our Aspose.Words for Net to develop our procedure:

- Simple Mail merge using a Word template
- Merge with regions
- Convert word document to PDF



The screenshot shows the Recall CRM interface. On the left is a navigation tree with folders like 'Anagrafiche', 'Attività', 'Prodotti', and 'Servizio'. The main window displays a document creation screen with tabs for 'Generale', 'Righe', and 'Condizioni'. The 'Righe' tab is active, showing a table with columns: N., Codice, Descrizione, U.M., Quantità, Prezzo Unit, Sconto, Prezzo Tot, and IVA. The table contains four rows of data, with the first two rows having descriptions. At the bottom, there are summary fields for 'Tot. merce', 'Tot. IVA', 'Tot. documento', and 'IVA'.

N.	Codice	Descrizione	U.M.	Quantità	Prezzo Unit	Sconto	Prezzo Tot	IVA
1	Demo Prodotto	La tecnologia Voice Over IP (Voice over Internet Protocol) ha avuto un grande	nr	1,00	0,00	5,00	0,00	
2	Arca Prof. Corso Tecnico Base	Argomenti trattati durante il corso: caratteristiche tecniche di Arca Professiona	nr	1,00	0,00	5,00	0,00	
3				0,00	0,00	5,00	0,00	
4				0,00	0,00	5,00	0,00	

Tot. merce: 0,00 Tot. IVA: Tot. documento: 0,00 IVA: 0,00

Figure 1: Document creation on Recall CRM



Figure 2: Document result created with Aspose.Words

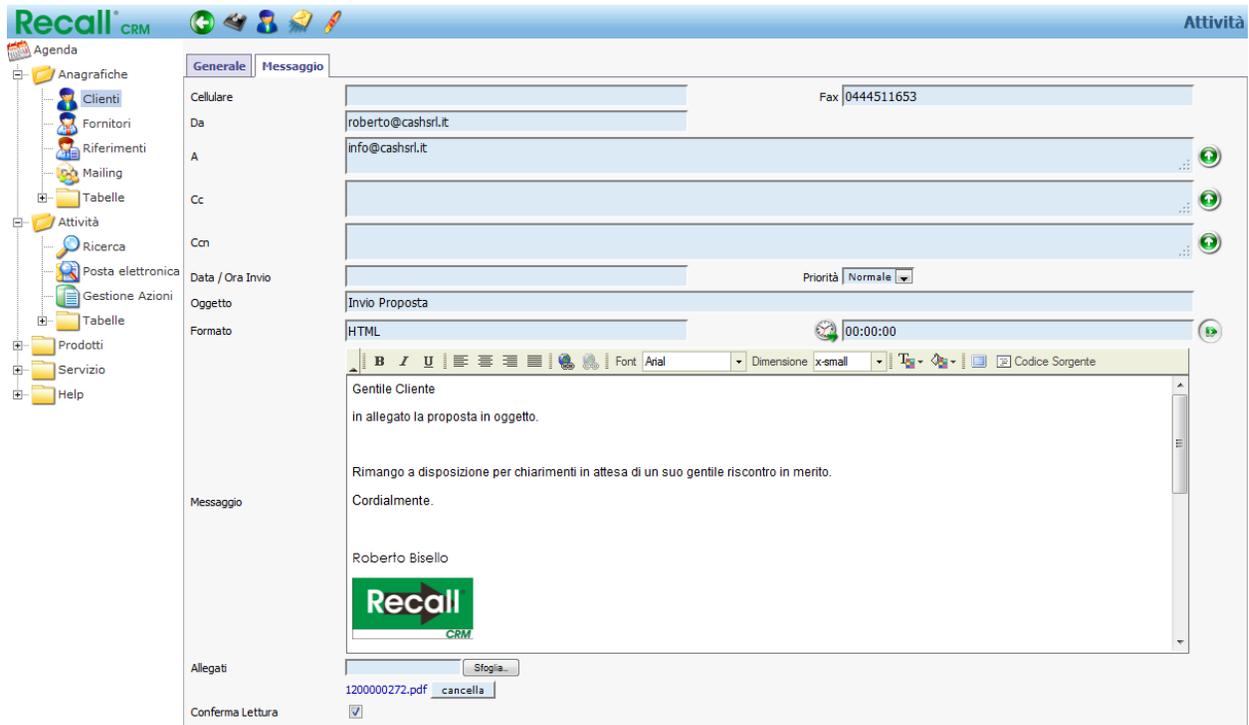


Figure 3: Auto generated email with a PDF attachment

Experience

During the development of Recall, the greatest difficulty was to find a solution that would allow the creation of documents without Microsoft Word. In the wide range of products and components on the market we came across Aspose.Words.

Aspose.Words was the only tested component which met all our needs and requirements. Additionally the Aspose support team answered our implementation questions prompt and to our full satisfaction, so Aspose.Words was an easy choice.

We were also able to evaluate the full functionality of it by requesting a temporary licenc

It was a good surprise to find that there existed a product that simply with a little line of code met our requirements. Aspose.Words was the correct solution

Next Steps

It was so simple to develop the solution with Aspose.Words for .Net, then we are evaluating the possibility of extending the use of other Aspose components for our upcoming projects.

Summary

Our experience of Aspose as a business, and their Aspose.Words for .Net solution, has to date been very positive. Aspose.Words was the product that has allowed us to solve our problem with efficiency and simplicity, saving us a lot of time of development. In our future implementations will use Aspose certainly other components. In conclusion, we believe that the solution of Aspose is the best on the market and we would like to recommend it to any developer who, like us, want to better optimize their product.

Conclusion

We hope to build further our partnership with Aspose for our future requirements and work with them in further developing how we utilize their solution for the benefit of our members and community as it grows.