

# CASE STUDY



<https://www.advyzon.com>

Using Aspose.Words for C++ to generate mail merge documents.

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# About Advyzon

Advyzon is an intuitive all-in-one platform for financial advisory firms, providing tools and services including portfolio management, client reporting, client management, billing, trading and client portal.

## Problem

Advisors need to use mail merge capabilities to mail the reports and documents to their end clients. Here is the list of challenges we face:

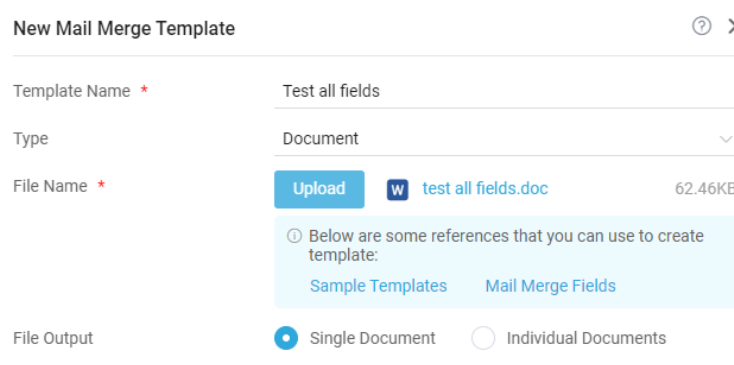
- With newer versions of Microsoft Word, the docx format is a better choice as it is smaller and easier to read and transfer. Since it is based on the Office Open XML standard, almost all Word applications support the docx format and some even stop supporting the doc format. However, our users are using the doc format, so we need a library that can support both formats.
- We also need to create, modify, and convert Word documents without installing Microsoft Office.
- We also need to merge data from our CRM system into a Word template which can be printed and distributed.

## Solution

Advyzon has evaluated a large number of libraries, including Open Source libraries, but most of them have performance issues, and are not stable and robust. Microsoft Office does not meet our needs either, as it needs to be installed.

Aspose.Words for C++ exactly meets our needs with core APIs:

- Support both doc format and docx format.



The screenshot shows a web form titled "New Mail Merge Template" with a help icon and a close button in the top right. The form has several fields and options:

- Template Name \***: A text input field containing "Test all fields".
- Type**: A dropdown menu set to "Document".
- File Name \***: A section containing an "Upload" button, a Word document icon, the filename "test all fields.doc", and the file size "62.46KB".
- Help/Instructions**: A light blue box with a question mark icon and the text "Below are some references that you can use to create template:", followed by two links: "Sample Templates" and "Mail Merge Fields".
- File Output**: Two radio button options: "Single Document" (which is selected) and "Individual Documents".

New Mail Merge Template

Template Name \* Test all fields

Type Document

File Name \* Upload W test all fields.docx 37.79KB

Below are some references that you can use to create template:  
[Sample Templates](#) [Mail Merge Fields](#)

File Output ☒ Single Document ☐ Individual Documents

- No need to install any Microsoft Word components.
- We tried the library that works perfectly and is written in pure C++ and based on Open XML without any dependency on Microsoft Word. It also seems scalable in a server environment. In comparison, the competitive libraries require additional components and licenses for those components.

## Experience

Aspose provides a free trial version, which is very friendly, and allows us to further understand the library and APIs.

Also, we were pleasantly surprised by the Aspose's robust programming APIs. Our developers have experience with Microsoft Word Automation APIs, which makes it very easy for us to use Aspose, and feel that Aspose is very easy-to-code along with its documentation and examples without any further questions. They built our product using the APIs that worked in the first try, saving their valuable time so they can focus on the core business needs instead of trial and error on using the APIs.

```
1 # mail merge data
2 data = [
3     {name: "sample1", email: "sample1@example.com"},
4     {name: "sample2", email: "sample2@example.com"},
5     {name: "sample3", email: "sample3@example.com"},
6 ]
7
8 # open a document
9 doc = AsposeWords::Document.open("./sample.doc")
10
11 # execute mail merge and save new document
12 doc.mail_merge.execute data
13 doc.save("./sample_merged.docx")
```

## Next Steps

We will continue exploring the APIs and make better use of the APIs and may consider using other libraries from Aspose.

## Summary

Aspose.Words for C++ is a very powerful library that allows users to perform various document processing tasks in their applications without spending so much time, including document generation, modification, rendering, printing, document format conversion and mail merge. All in all, Aspose.Words is definitely the best choice when it comes to meeting our needs of ease of development, security, stability and scalability.