ASPOSE ®
The .NET & Java Component Publisher ™

Aspose.Words For .NET

The Karis Group

SalesForce document Management

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Product Background / Overview

The Karis group provides patient advocacy services to individuals who have exhausted their medical benefits and are now receiving care on a self pay basis. Our team mediates directly between patients and providers, allowing patients to focus on their health while we focus on solutions for their bills.

Our negotiations generate large numbers of documents and to streamline our processes we built a custom SalesForce.com solution that generates custom merge templates from our data and sends those documents out via a number of routes including faxing and e-signature.

Requirements Scenario

In the original incarnation of the solution, A server side copy of Microsoft Word was scripted through COM automation to open a file, merge data in and then either print or save the document. As COM automation is not thread safe, if multiple team members opened the application at the same time, Word would freeze and the web application would be in an unrecoverable state until a full server reboot.

Our requirements for the new solution were:

- All code server side and multi-user safe
- Use native Word document formats
- Replicate Mail Merge functionality
- Ability to print to a network printer

We also had a couple nice to have requirements including:

- Output to PDF
- Ability to insert items into the document dynamically

Solution Implementation

Before we found Aspose, we spent a fair amount of time struggling with RTF documents as a possible alternative to using Word documents. After that effort became bogged down, we took another look at Aspose and took advantage of the free trial. Within hours we had the library integrated and documents being produced and printed without issue.

When integrating Aspose, we made extensive use of the mail merge features as well as the print system. The online documentation made the entire process very simple and our code ended up substantially easier to maintain and understand compared to the COM automation solution we had in place before.
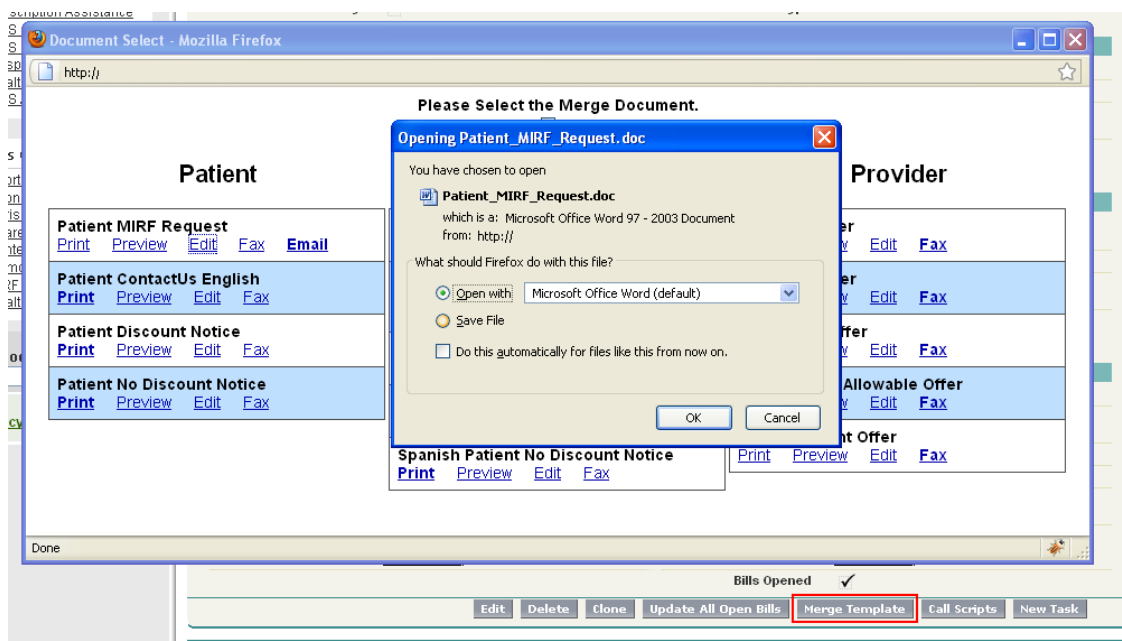
Benefits

The old system was less stable, but since integrating Aspose.Words we have not had any downtime and our documents look the same as they did when we had Microsoft Word rendering our documents. Our system is more maintainable than it was before and we're not concerned about our ability to handle new documents as they're created.

Conclusion

If we had not found Aspose, our solution could not have become as robust and easy to maintain as it is now. We were hesitant at first because of the price, but we have already more than made up for it with increased productivity on the development side and decreased downtime for our workers. Any developers who have to programmatically work with Word documents and are considering an approach through scripting Microsoft Word owe it to themselves to try the Aspose library first.

Screenshots

The user can select to merge a template from a bill and then chooses from a number of pre-built documents and can choose to immediately send that to a printer, view it in HTML, download it for local editing, fax it via RightFax or email it via EchoSign.

The completed document has all the relevant data from our SalesForce.com database in it and is ready for immediate release to a provider or patient.