

CASE STUDY

Aspose.Words Case Study



EndGame Limited

Using Aspose.Words to produce loan statements

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About EndGame

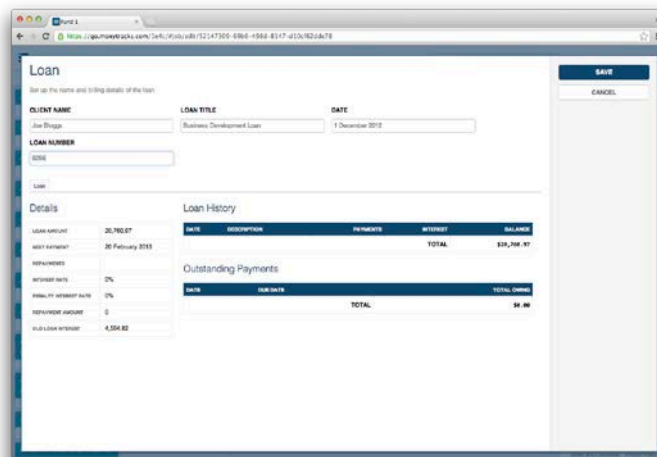
EndGame is a software business development house specializing in cloud applications. We love designing, planning and building great products leveraging our skills in rapid productization, business architecture and Software as a Service (SaaS) operations.

Our DNA is to design well, build well, and invest well. To our customers this looks like beautiful products which are outstanding to use, elegantly engineered, and empower them to achieve what they thought was impossible. To us, it looks like fun.

In such a fast paced industry we need to be working as smartly and efficiently as possible. Perpetually in front of us is the challenge to be scalable and responsive, providing the best ways to exceed our customers' needs.

Problem

A recent project required us to build an application to manage loan portfolios. Part of the challenge was to automatically email loan statements as PDFs each month to borrowers, based on a .docx template that could be modified by our customer. This meant we needed the ability to substitute fields and hide/show sections in the template depending on the status of the loan.



The screenshot shows a web application interface for managing loans. It features a form for adding loan details, a table for loan history, and a section for outstanding payments. The interface is clean and modern, with a blue header and a white body. The form includes fields for Client Name, Loan Title, Date, and Loan Number. The loan history table has columns for Date, Description, Amount, and Status. The outstanding payments section shows a table with columns for Date, Amount, and Total.

Client Name	Loan Title	Date
Joe Shagan	Business Development Loan	1 December 2012

Date	Description	Amount	Status
20 February 2013			

Date	Amount	Total
		\$50,000.00

Figure 1: Loan details and payment information are added via a modal. Loan history and important information are displayed for the customer

Solution

Aspose.Words has the ability to manipulate static data and tables in a Word document. We were able to automate and simplify the process of inserting the data pertinent to the loan statement into a Word document and exporting as a PDF. Users then see a polished PDF of their loan statement and our customer can use a product (Microsoft Word) that they are familiar and comfortable with to do their own customising.



LOAN ACCOUNT STATEMENT

KIWA MEDIA
 Attention: Rhonda Kite
 24 Fleet Street
 Eden Terrace
 Auckland

Statement Date
 31 October 2012

Account Number
 9331

Date	Activity	Interest	Payments	Balance
01 Oct 12	Opening Balance			50,000.00
15 Oct 12	Payment received - thank you		2,128.24	
29 Oct 12	Payment received - thank you		5,128.24	
31 Oct 12	Interest at 5%	208.33		
31 Oct 12	Penalty interest at 7%	248.76		
31 Oct 12	Closing Balance			47,201.61

Your next payment of \$2,128.24 is due on 15 Nov 2012.

Please deposit your payments in to BNZ account 02-555776-67456-00 with your name and account number as reference.

Your account is overdue. Please pay \$1,128.24 immediately.

If you are behind in your loan repayments please contact our office to work through a plan.

Figure 2: Aspose.Words generated PDF from a customized .docx template

Experience

Finding a solution: Before selecting Aspose.Words, we looked at using other solutions to produce PDFs. We have used PDF creation components in the past, but these did not work with Word templates. We explored the Microsoft OpenXML SDK, but it didn't have the same level of flexibility as Aspose.Words and couldn't export to PDF.

Implementation: We were able to implement Aspose.Words in less than a week and found the online help to be very good. Our junior staff were raving about how great it was to use.

Outcome: Using Aspose.Words, we were able to produce loan statements in a very flexible way using Word templates. Our users can now customise their own loan statements or add seasonal messages to the loan statement. We're looking forward to working with Aspose.Words on more projects.

Next Steps

After the success of this use case, we are going to use the same solution for producing invoices, purchase orders, quotes and other documents. As an interesting upcoming

development we will use Aspose and DocuSign to produce a document containing information submitted by the user and allow the user to digitally sign it.

Summary

We are very pleased with the success of our Aspose.Words implementation. Aspose.Words is a very powerful development tool that is well documented and fast to learn. Using it helped us to automatically produce PDFs in a way that is flexible and customisable to our customers instead of locking us into one PDF design and layout. We would happily recommend Aspose to our customers and to other developers.