

CASE STUDIES

Osprey Approach – Probate App Case Study



Pracctice Limited

Using Aspose Cells to create Estate Accounts

Craig Matthews, CEO, 11/06/2020

About Pracctice

Pracctice Limited is a UK based legal software house. Founded in 1988 we have provided legal software to the UK legal market for over 30 years. As a cloud pioneer back in 2004 we look towards driving innovative and first to market applications to assist drive efficiencies and returns for our customers.

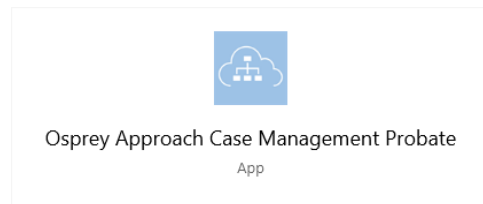
Problem

Operating primarily from Windows apps with a SQL 2019 database behind we needed a method of merging complex data from our database into Microsoft Excel for the creation of Estate Accounts used in the execution of a deceased estate. Whilst the vast majority of documents and forms produced in a Probate matter can be merged into Microsoft Word the Estate Accounts really require Microsoft Excel so complex formulae and calculations can be deployed to manipulate the data for various tax calculations. The successful completion of this product would enable us to provide our 500 plus customers and 5000 plus users with a facility that would save hours per Probate transaction. In addition, it would assist us attract and win new business in the probate specialist market sector.

Solution

After detailed research we decided to trial Aspose Cells. Our development team were able to put together a proof of concept within a couple of days and deployed a test candidate a few days later. Implementing a specific icon on our Probate app using the simple to follow examples provided by Aspose allowed us to provide the user with the simplest interface from which to generate their Estate Accounts. Data collation was provided through our questionnaire functionality that stores the information directly into the SQL database and that is then manipulated and presented in Excel using the Aspose Cells component.

Apps are download directly from the Windows Store



Data is entered and the user simply selects Estate Accounts to provide a full and detailed breakdown of the deceased estate

Client/Matter - WOO001/1 (Wood R Reginald/Estate of Sir Reginald Wood) FE: AEH WT: FW_PRO

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The data is exported to Microsoft Excel enabling further revision and manipulation

03300 604 940 https://www.ospreyapproach.com		
	WOO001.1	
Bank & Building Society Accounts	Assets	Value
		£5,000.00
		£15,000.00
		£6,000.00
		£2,350.00
National Savings Accounts		
Savings Account		£42,000.00
My Account		£5,640.00
Additional Savings		£6,660.00
Premium Bonds		
65467653		£23.00
45677678		£150.00
		£677.00
		£50.00
Total NS&I & Bank Accounts	Number of Shares	
Stocks & Shares		
Listed stocks, shares and UK Government and municipal securities		
UK Government and municipal securities		
Loan	450	£5,001.00
Stock 2	666	£6,650.00
Interest on UK Government and municipal securities		
Loan		£10.00
Stock 2		£50.00

Experience

Finding a solution: We considered a number of other products but having already had some experience of Aspose components when the development team learnt of Aspose Cells we were keen to try it out. We used the free trial to create the POC and were very soon convinced.

Implementation: From start to finish it took less than a week to implement the trial version into our Windows App. The speed of development was largely down to the simplicity of integrating the component with our product.

Outcome: The outcome was exactly what we wanted. Complex data could be exported to excel where it could be manipulated and calculated in any way we saw fit. It provided a solution and has elevated our product set. The simple deployment and updates mean we can consider implementing specific templates on a client by client basis giving our clients the ability to maintain their own unique business processes and procedures.

Next Steps

Now we've cracking the functionality we are consider our suite of legal apps and seeing whereas we can leverage this new functionality. We are already considering it's inclusion in our Debt Recovery and Conveyancing apps where we can see Aspose Cells will give our product an even great depth of functionality.

Summary

Working with Aspose has been simple from start to finish. Clear and concise advice and great products means we have no reservation in recommended Aspose to anyone.