

What is Salesforce?

Salesforce is a Software as a Service (SaaS) company that provides cloud based technology solutions in the area of Customer relationship management (CRM).

Founded in 1999. Salesforce has grown into the fifth-largest software company in the world.

Salesforce is one of the first global companies to successfully employ a cloud-based CRM software. Salesforce has been able to leverage cloud technology and build a variety of applications for businesses to better connect to their customers and help give them key insights into their services through analytics and apps.

Salesforce.com is based on multi-tenant architecture. This means that multiple customers share common technology and all run on the latest release. You don't have to worry about the application or infrastructure upgrades – they happen automatically. **This helps your organization focus on innovation rather than managing technology**

What Made Salesforce An Instant Hit?

The answer to this is very simple, it was Cloud Computing.

Earlier CRM solutions were hosted on company's own server. It used to be costly & time taking affairs in set up. And if company server is down the everything is down for the company.

What is Salesforce Used For?

Companies use Salesforce to understand their customers, connect with them on a variety of levels and help grow their customer base.

The cloud-based software allows companies to track (in real time) analytics, customer success and support, customer complaints and a variety of other CRM functions with the ease of cloud storage and access wherever the users are.

Because of its diverse selection of clouds and applications, Salesforce is also used by companies to assist with marketing, tracking sales and spending and analyzing performance. A variety of different clouds allow users to analyze various data, maintain communication forums with customers, implement sales strategies and more.

How Does Salesforce Work?

So, how does Salesforce practically work?

The company is a [service as a software \(SaaS\)](#) - which means it uses a cloud-computing, software distribution model that hosts applications and makes them available online.

As of 2020, Salesforce has multiple different cloud platforms – 1. sales cloud, 2. service cloud, 3. marketing cloud, 4. health cloud, 5. app cloud, 6. community cloud, 7. analytics cloud, 8. IoT cloud, 9. Chatter cloud, 10. commerce cloud, 11. Heroku engagement cloud and more.

- [According to the company](#), Salesforce's **sales cloud** gives companies the ability to track contacts, opportunities and manage a team to increase sales.
- The **service cloud** allows companies to connect with customers and deliver premium customer service through showing customer activity and resolving issues. (**customer service and support team**)
- With their **marketing cloud**, Salesforce helps companies track customer journeys while providing multichannel marketing campaigns, (**provides digital marketing platforms**)
- while their **community cloud** allows companies to directly interact with their employees, partners & customers and allows their customers to interact with each other. (**You can use this platform to exchange data and images in real time.**)
- **Salesforce Analytics Cloud** – The Analytics Cloud provides a business intelligence platform for your organization to work with large data files, create graphs, charts and other pictorial representations of data. It is optimized for mobile access and data visualization and can be integrated with other Salesforce clouds.
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- **Salesforce IoT Cloud** – When your organization needs to store and process Internet of Things (IoT) data, you can utilize the service of Salesforce IoT cloud. The platform is built to take in massive volumes of data generated by devices, sensors, websites, applications, customers and partners. On receiving this data, the platform initiates actions to give you real time responses.
- **Salesforce Health Cloud** – If you are a Health IT organization and require a CRM system that incorporates doctor-patient relationship and record management, then Health Cloud is what you need. Through the patient profile you can support one-to-one relationship by integrating information from multiple data sources.

Purpose of Salesforce/ (CRM)

Customer Relationship Management (CRM) is "a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: **Improve business relationships.** A CRM system helps companies stay connected to customers, streamline processes, and improve profitability," according to Salesforce.

On a basic level, CRM helps companies understand customer needs and data and facilitates deeper customer development and retention

Notes:

Allows create application with clicks instead of code.

no need to worry about infrastructure & tools for deployment & support.

it's deployed on cloud instead of on premise servers/dataservers.

-SFDC(Sales Force Dot Com)

-Fastest growing software company.

-5th largest software company.

-cloud king

-3 things made salesforce successful:

Salesforce is:

1. **Industry agnostic:** regardless of industry you can build solutions. healthcare, retail, automobile industry.

2. **cutting edge:** most innovative company, overcame the traditional on premise data center problems.

competitors are having hard in keeping up.

3. **Emerging Technologies:** many new cloud based solutions. eg marketing cloud.

analytics cloud

IOT cloud

career path:

1.Salesforce administrator:

provisioning user accounts.

2. data analyst: creating analytic graph s, using SQL etc, reports, dashboards.

3. SF consultant: help the company using sf in implementation.

4. project manager: one who can keep track of budget , schedule, resources, aware of project management tool.

5. sales mgr, marketing mgr
6. sf developer

Salesforce Testing:

The challenge is to ensure that a tester is checking the code which has been customized in place of testing built-in salesforce functionality.

SalesForce CRM is built on a platform development language called APEX.

Salesforce testing is validation the configuration and customization performed in vanilla SFDC.

Salesforce Testing Process:

The testing process of Salesforce is same as any normal web-based application. The tester should have a clear perspective of the customizable features which are built during the test process. It helps them to focus on that customized code instead of the built-in Salesforce features.

Developer and tester should use the Sandbox environment (Test Environment) for each of their purposes. Tested code in Sandbox environment is deployed to production from the Sandbox environment. It is assumed that the QA tester has the basic knowledge and understanding of the terms used in the Salesforce.

Best practice for Salesforce testing

1. Test Data should be prepared for validating the reports functionality.
2. The dynamic nature of visual force pages should be paid special attention as all the elements of a webpage may not be loaded simultaneously

Roles of a Salesforce Tester:

1. Should be able to conduct Smoke Testing to make sure all the major functionalities are functioning as per requirement.
2. Able to perform equivalence Partitioning and Boundary Value Analysis.
3. He should understand the customizable features which can be built for the Salesforce app.
4. knowledge of apex. force.com IDE(eclipse based)

Performing automated functional testing in Salesforce is a challenging task as most of the test web pages are dynamic.

Sample Salesforce Test Scenarios:

1. You can capture the contact information of the lead/client
2. Contacts can be marked active/inactive
3. Any company can be marked as Customer or Prospect
4. Leads can be captured with the help of web forms
5. Price in Quotation cannot be zero
6. Email should be sent once the deal is closed. Bounced emails if any should be handled
7. Integration with third party software should be working properly
8. Billing services should work as expected
9. No duplication of records in contact, opportunity, and lead management.
10. Mobile workflow works as expected
11. Unauthorized users must not have access to Files.