

# THE ART OF TESTING

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## GOAL/MOTIVATION

Learning the basis of what makes a consulting tech company successful. Emphasis on quality assurance testing, delving into Fiduciary Tech's expertise and clients, and communication among different positions that assist the developers' resources and an agenda

How does Fiduciary Tech use their Salesforce expertise to maintain and create products according to their clients' requests and deadlines?

Why is testing important? What makes good testing?

### SALESFORCE QUICK FACTS

- Salesforce was founded in March 1999
- Salesforce is best known for its cloud-based Customer Relationship Management (CRM) software, which helps businesses manage their customer relationships, sales, marketing, and service operations.
- Salesforce offers a powerful platform for building custom applications and solutions.
  - Salesforce App Cloud for creating apps using low-code tools
  - Salesforce Lightning for building modern, responsive user interfaces
  - Apex for backend development for customized functionality

## ROLES

### QUALITY ASSURANCE TESTER

In SIT, QAs are testing that the interactions and integration between different components and modules work as intended

In UAT, Users or representatives from the user community are requested to test to meet user expectations and minimizing the risk of errors

In production, users are encouraged to use the newly updated product during soft launch to ensure that hard launch is ready

Testing ensures that the product meets business requirements and user expectations

- Test Case Creation
- Functional Testing
- Integration Testing
- Performance Testing

### PROJECT MANAGER

Conduct meetings everyday with internal team to discuss action items in progress, deadlines, new action items, and facilitate decision making

- Resource management
- Project timeline planning
- Risk Management

Other roles at Fiduciary Tech:

Scrum Master  
Developer  
Product Manager  
Business Analyst  
Salesforce Administrator



## DEVELOPMENT CYCLE

User stories from the sprint backlog are aimed to be completed within 2 weeks and go through the following environments before they are complete

1. Development environment
2. SIT Environment
3. UAT Environment
4. Production
  - a. Soft Launch
  - b. Hard Launch

Salesforce sandbox is a copy of a Salesforce organization, including its configuration (such as customizations, workflows, and settings) and data, that is used for development, testing, and training purposes.



It is important to test and resolve all defects before moving onto the next environment

Ceremonies, consistent communication with clients, splitting of user stories, are also necessities that assist developers and guarantee that business requirements are met

## FIDUCIARY TECH

Many companies choose to work with freelance Salesforce developers or consulting firms like Fiduciary Tech that specialize in Salesforce development. These professionals have expertise in the platform and can be hired on a project basis to create custom solutions, integrations, or applications tailored to the client's needs.



For example,

**Consultation and Strategy:** Design solutions, create implementation roadmaps, and provide strategic recommendations to optimize processes.

**Customization:** Custom functionality or customizing existing Salesforce features and workflows to align with the client's unique requirements.

**Integration:** Design and implement integrations using APIs, middleware, and other tools to ensure smooth data flow and process automation.

**Data Migration:** Assist in data mapping, cleansing, and migration to ensure data accuracy and completeness

**User Training and Support:** Provide user training to help clients' employees effectively use and adopt Salesforce features

**Performance Optimization:** Analyze and optimize the performance of custom code and configurations to ensure the platform runs efficiently and meets performance expectations

**Security and Compliance:** Implement security measures, set up user permissions, and ensure compliance with data protection regulations to maintain the security and privacy of sensitive information.

**User Experience (UX) Design:** Create user-friendly interfaces and experiences within Salesforce to enhance usability and user adoption.