Project overview

Our customer

Elevate Digital is a digital agency offering innovative marketing and web design solutions. They use custom strategies, eye-catching visuals, and data-driven optimization to make online experiences that are fun and increase the visibility of a company's brand.

Elevate Digital's most important services are managing social media, making content, SEO, PPC advertising, web design, and email marketing. By leveraging social media, they showcase their expertise and build brand awareness. They show their skills and credibility by sharing success stories, industry trends, and testimonials from clients in posts that are interesting and fun to read. They also use social media advertising to reach their target audiences. To get new clients, they offer free consultations or special deals. By taking part in online conversations and working with influential people, Elevate Digital builds trust, shows off its thought leadership, and grows a community of customers who promote its services.

Background

Elevate Digital organizes its sales and project management with a simple CRM platform. There are 3 main business processes that are supported by the CRM:

- Collection of potential customers from different marketing channels and organising the marketing activities.
- Preparing offers, negotiating terms with potential customers and signing contracts.
- Managing projects with the signed contracts and tracking the progress of projects.

The marketing and sales teams at Elevate Digital currently use the CRM system on a daily basis. Because the number of manual tasks is continuously going up, our customer wants to start automating some parts of the processes and integrating them with other systems used in the company.

The main goal of this project is to make an API that covers all of the main functions of the CRM platform. The CRM platform lets our customers manage their work and different sales processes, like getting new customers, handling customer requests, making proposals, and closing them. The CRM platform is also used as a database of all customers and their data. The first step for this initiative is to build a comprehensive API for the CRM, that will allow for integrations and implementation automation procedures. All of the system's main tasks must be able to be done through the web services, which means that the API must allow this.

Project goal

The goal of this project is to build a stable and well-tested API for the following functionalities of the CRM system:

- Leads management (creation and management of the customer’s database);
- Invitation of new users;
- Funnels management (creation and management of CRM funnels);
- Deals management (creation and management of deals in different funnels.

All the APIs must be tested via Postman, and it is important to create Postman collections, that will help customers test APIs in the future independently.

Considering, that APIs are always used for some integration or automation of a more complicated process, it is important to test them as part of the more complicated user flows. This is why the customer requested to create and execute a number of end-to-end tests, that will help to ensure the proper working of APIs and functionalities in those scenarios.

Expected project outcomes

1. Tested and stable API for the following functionalities:

    a. Leads management (creation and management of the customer’s database);
    b. Invitation of new users;
    c. Funnels management (creation and management of CRM funnels);
    d. Deals management (creation and management of deals in different funnels.
2. Testing documentation in a form of test cases and end-to-end test cases.
3. Postman collections for testing of API.

Learning goals/outcomes

- API fundamentals and API testing
- End-to-end testing
- Database and SQL fundamentals
- Browser testing
- Exploratory Testing
- Defect management, Bug/Defect Lifecycle, REPORTING OF BUGS (C), Jira, Confluence -
- Time-tracking and reporting
- Self-management
- Efficient communication
- Critical thinking and problem-solving