ProvarPress

Ironclad Salesforce Data Security Through Test Automation

Here are the Features Your Test Automation Solution Should Have to Keep Your Salesforce Safe

As we have transitioned to housing our most sensitive data on cloud-based platforms, and within the digital landscape at large, data security has become more important than ever — particularly when it comes to Salesforce.

Initially, data security in Salesforce was focused on basic access controls and permission settings. However, with the escalation of cyber threats, the definition of data security expanded to encompass encryption and proactive monitoring to ensure comprehensive protection against potential breaches.

In heavily regulated industries such as government/public sector, financial, insurance, and healthcare, compliances and mandates must also be taken into account.

Rigorous testing methodologies, particularly a strong automated testing strategy, are the best defense in keeping your Salesforce environment strong. Automated testing helps to identify vulnerabilities and loopholes within the Salesforce infrastructure, both on a regular cadence and after updates and new app customizations. It allows for continuous assessments without expending too much time and exorbitant resources, ensuring that security measures remain robust in the face of emerging threats.

Here are some features your test automation solution should have to keep your Salesforce data safe, listed by industry (though these concerns apply across the board in similar capacities!):

Government/Public Sector:
- High-level encryption and a secure testing environment
- Precise user access controls
- Continuous vulnerability assessment and threat detection capabilities
- Regulatory compliance validation
- Thorough integration security testing capabilities
- Seamless adaptation to Salesforce updates
- Comprehensive testing coverage

Financial:
- Robust security testing capabilities
- Compliance validation tools
- Data masking and privacy measures
- Role-based access control testing
- Support for complex integrations
- Compliance reporting and audit trail capabilities
- Flexibility and customization
- Continuous monitoring and alerting

Insurance:
- Encryption and secure testing capabilities
- Granular user access controls
- Vulnerability assessment and threat detection capabilities
- Regulatory compliance validation
- Integration security testing capabilities
- Alignment with Salesforce updates
- Comprehensive test coverage

Healthcare:
- Encryption and secure testing capabilities
- Comprehensive access controls
- Vulnerability assessment and threat detection capabilities
- Regulatory compliance validation
- Integration security testing
- Regular updates and alignment with Salesforce changes
- Comprehensive test coverage

Remember, it's not just these heavily mandated industries that should have a strong data security strategy in place. Whether you're a sales professional, a marketer, or a customer service representative, understanding data security is pivotal in safeguarding customer trust, ensuring regulatory compliance, and protecting your organization's reputation. Every Salesforce user contributes to the collective responsibility of maintaining the integrity and confidentiality of sensitive data.

Want to learn more about how Provar Automation helps keep your data safe?

Talk with an expert today!

Are Robotic Tests Putting Your Salesforce at Risk?

Salesforce Users, Here's What You Need to Know

If you're using Salesforce, you need to be testing your Salesforce environment to mitigate risk. The goal of testing is to prevent errors and ensure that all components of the workflow function as intended, from data entry to report generation.

But choosing how to test is just as vital of a decision as deciding what to test. Today, two primary automated testing approaches stand out: test automation solutions with robotic test building capabilities (also known as Robotic Process Automation, or RPA), and those with metadata-driven test building capabilities.

If you're relying on robots, you may be putting your Salesforce at risk.

Why Robots are Prone to Rust
Many robotic testing tools depend heavily on the UI to perform tasks, making them highly susceptible to changes in UI elements or layouts within Salesforce and causing tests to break.

Designing and maintaining robotic tests can also be daunting, as the complex nature of such applications requires coding knowledge. As Salesforce evolves, robotic automation scripts must be consistently updated to ensure they align. For organizations with limited resources, this maintenance overhead is a considerable drawback.

Given that RPA robots interact directly with sensitive Salesforce data, any breaches or vulnerabilities in the automation process can also expose sensitive data, putting organizations at risk. While robotic testing inherently offers scalability, managing a substantial number of robots can also introduce complexities which must be carefully addressed to maintain a smooth testing process.

The Power of Metadata
Metadata-driven test building capabilities alleviate these challenges. They employ stable locators for elements found by leveraging Salesforce's metadata model. The solution then understands the location of elements and automatically updates its locators when Salesforce's metadata changes, leaving tests with fewer opportunities to break.

Here's why they are more resilient than robotic tests:

Change Management: As Salesforce environments are subject to frequent updates, these tools can automatically adjust and update test cases accordingly.

Ease of Use: These tools are designed to be user-friendly and accessible to Salesforce administrators and testers with minimal coding experience.

Reusability: The reusable components within these tools make it easier to maintain and scale the test suite as the Salesforce instance evolves.

Time to Value: The combination of change management, ease of use, and reusability leads to a rapid time to value, enabling faster delivery of high-quality applications.

Native Integration: These tools are designed to work directly within the Salesforce ecosystem, allowing organizations to leverage Salesforce-specific features and components during testing.

Native Reporting: Many of these tools offer built-in reporting and analytics features, providing insights, highlighting areas for improvement, and offering a comprehensive view.

If you are looking for a strong test automation solution for your Salesforce environment that will rise alongside innovation, choose Provar Automation. Unlike other solutions that rely on robots, Provar Automation takes a metadata-centric approach, making it the industry's most resilient, reliable choice for Salesforce testing.

Want to learn more?
Talk to an expert today!

Still Not Convinced?

Here's a brief side-by-side comparison between Provar Automation and tools using robotic capabilities. For the full comparison, follow the QR code!


CAPABILITY	TEST AUTOMATION TOOL USING ROBOTIC TESTING (RPA) CAPABILITIES	PROVAR AUTOMATION
Setup and maintenance	The tool is maintained by the vendor as it is a cloud-based service. There is no additional maintainability required in terms of tool setup connection and configuration.	Test authoring and debugging is performed using a desktop application available for Windows and Mac OS. Test execution can be done on-premise (e.g., local server running Jenkins), in the customers' private cloud (e.g., AWS EC2 running Docker), or in Provar's managed cloud environment (Provar Grid). Once set up, maintenance and feature releases are aligned to Salesforce releases, with occasional (optional) releases in between.
Test script maintenance	Maintainability of automated test scripts is high as common resources can only be accessed from the individual suite level and cannot be communicated with other suites. This is a major drawback for enterprise level projects.	Test cases are modular and reusable so changes only need to be performed in a minimal number of places. The same test case can be run as different profiles, and in multiple environments and languages. New releases include updates that prevent test cases from breaking due to changes introduced by Salesforce, reducing maintenance work. Provar uses Salesforce's metadata, which enables test cases to adapt to changes during execution so they are more resilient.
Production functionality testing	Very useful for UI testing (good penetration level) with efficient interactive and live UI testing.	Setup and teardown test cases allow testers to create test data and clean up afterward, leaving orgs as they were before testing. Test cases can also automatically clean up any records created during execution. End-to-end test cases can span across multiple systems to test complex user journeys.
Data selection	Can be achieved by using basic SOQL or Excel-based manual load.	Provar can interact with and utilize data from database queries, SOQL queries (pre-built using declarative interface or custom SOQL), Excel/spreadsheets, CSV, JSON, and any data being pulled from an external REST or SOAP-based API.
Data refresh	Not supported	Provar does not natively support data refresh for sandboxes, but you can utilize Provar's Apex Bulk feature to populate data in any org as part of a setup or callable test case and either schedule it to run post-refresh, or trigger it manually.
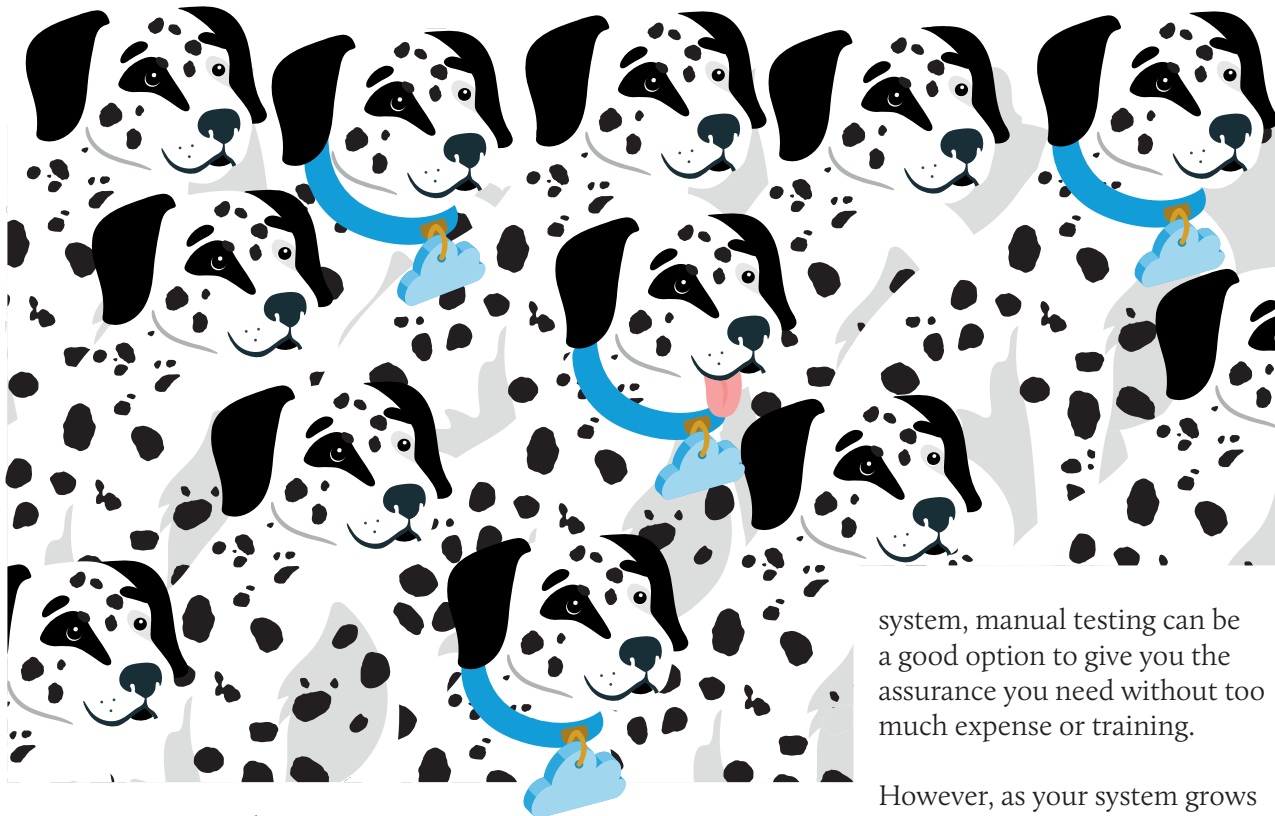
Salesforce Testing 101

Why Test and Where to Start?

Salesforce is crucial for managing our mission-critical apps and keeping our businesses running smoothly. With its constant updates and extensive array of features, it's not difficult to stay ahead of the curve, but only if you have a strong plan in place to protect your assets to ensure the best end user experience.

Testing your Salesforce from end to end is the best way to catch issues before they become big problems, and also to simulate the customer journey so you can adequately plan for your own future innovations.

But what exactly does Salesforce testing mean? Think of it as giving your entire Salesforce workflow a thorough health check. The goal is to ensure that all components are working together seamlessly, from the initial data entry to the final report generation — or from feature creation to the end user experience, if you want to look at it that way instead.

Testing shields your Salesforce environment against potential bugs or errors lurking in your system. And with Salesforce's regular updates, it's more crucial than ever to make sure that all your apps continue to work perfectly with each new release. Testing is the proactive approach in catching issues before they disrupt your workflow. Now, here's the real dilemma — manual or automated testing? If you're just starting or dealing with a smaller, less complex system, manual testing can be a good option to give you the assurance you need without too much expense or training.

However, as your system grows and evolves, automated testing can help you level up your testing, offering speed, efficiency, and a lot less room for human error.

Want to know where to start testing? Begin by identifying the most critical processes within your Salesforce workflow. These are the key functionalities that, if compromised, could significantly impact your business. Focus your initial testing efforts on these processes to ensure a robust foundation.

Secondly, if you're new to testing and encounter hurdles (budget restraints, a small QA team, etc.), don't hesitate to start with manual testing. Remember, it's better to test manually than not test at all! It allows you to gain a deep understanding of your system, identify potential issues, and establish a baseline for future automation. Use spreadsheets or other manual tracking methods to record and analyze your testing results. Once your business begins to grow, you can start to evaluate what testing tool is the right fit for your team.

Remember, testing is a journey, not a sprint. As you get comfortable and your system matures, you can gradually introduce automated testing to boost efficiency and scalability. The key is to start somewhere and evolve your testing strategy as your organization grows.

Want to discuss the best strategy for your team's unique Salesforce needs?

Connect with a Provar expert today!

How Mysolution Streamlined 90 Pages of Manual, Time-Consuming Regression Tests to 80 Automated Test Cases

A Provar Automation Case Study

Mysolution, a staffing software solution, aims to help their users navigate the struggles of HR and staffing, alleviating negative experiences and empowering them to fill roles with ease. But when it came to testing their own Salesforce environment, their situation was anything but — and the team knew they had to search for an automated testing solution to keep their software running strong.

Before, the Mysolution team primarily conducted testing manually, which posed a significant challenge in the form of a large and time-consuming regression test spanning approximately 90 pages. The repetitive nature of tasks within this test suite posed an operational hurdle, impacting efficiency and consuming substantial resources.

Mysolution needed a solution that would help their three scrum teams with their QA responsibilities. Their existing Salesforce setup included various applications and platforms that catered to numerous functionalities and user requirements, as well as additional integrations for business efficiency.

The Mysolution team reached out to Provar and engaged in a trial version of Provar Automation for a month. During this time, the team compared Provar against several other tools. Among the key features that set Provar apart and influenced their decision-making process was its intuitive test building capabilities using a point-and-click interface specifically tailored for Salesforce.

Since integrating Provar Automation into their testing strategy, Mysolution has experienced notable successes and improvements across their pipeline, making for a more efficient, consistent experience within their Salesforce-centric environment

Now, 50% of their regression test suite is handled by Provar Automation, encompassing 70-80 test cases. This integration has ensured a more consistent and reliable testing process, allowing for easy comparisons between current and past test runs.

The Mysolution team is committed to continuous enhancement, actively engaging with Provar's full-service support team and their dedicated customer service test architect from Provar, Jatin Sukhija, to address any concerns. With this collaborative partnership, Mysolution and Provar will be well-prepared to overcome hurdles if they arise and will lay a strong foundation to ensure roadblocks are minimal, if at all.

"Since Jatin has been assigned to our company, he has been a great help. He provides a lot of tips and customized improvements. Jatin is very smart, and he helps a lot. It is greatly appreciated."
– DEMI LISSENBERG, SOFTWARE TESTER, MYSOLUTION

Want to learn more about how Provar's solutions can meet your team at all stages of their testing journey? Connect with us today!

Customer Service and Continued Education: What Sets a Test Automation Solution Apart

Learn Why Your Chosen Solution Should Go Beyond the Technology Itself

A good test automation solution isn't measured on its technology alone. There are many solutions on the market today, but what truly sets an industry leader apart is — of course, strong tech — but also a focus on exceptional customer service and a commitment to ongoing education.

One of the key differentiators for a test automation solution is the level of support the company offers. How often is a live agent available to assist? What individualized support is offered? Provar, for example, offers 24/5 support, ensuring that users have assistance when they need it most. This commitment to customer success is further highlighted by the provision of weekly stand-ups with dedicated Customer Success managers. This personalized approach ensures that clients not only use the tool effectively but also have a direct line for addressing any challenges they encounter.

Customers should also be able to find quick answers on their own through a variety of resources. Does your solution offer easily accessible FAQs? Is there an online community to lean on for advice? The Provar community forum gives customers the chance to seek assistance from experts while engaging in valuable networking with other Salesforce users. It is a space for shared insights, best practices, and collaborative problem-solving.

Additionally, continued education should be a cornerstone of any test automation solution's offerings. What free resources does your solution offer? Do they make it a point to support customers on their educational journeys, beyond using their product? The University of Provar offers free courses and certification programs for those hoping to brush up on their Salesforce and testing skills. Provar also extends its reach to courses on Salesforce Trailhead, ensuring a seamless integration of learning resources for a comprehensive skill development journey.

Many other test automation solutions fall short in terms of available resources and continuing education. Users often face challenges navigating through documentation buried on websites, leading to frustration and delays in problem resolution. Many solutions struggle with limited resources and prolonged response times, which can result in time spent and accumulated costs for the customer. Provar's approach flips this narrative by empowering customers to maintain their own scripting once the regression is built. After all, autonomy is the sign of successful onboarding and a reliable, intuitive product.

Selecting a test automation solution is not just a technical decision, but a strategic one. When evaluating your options, be sure to ask the right questions so you can ensure the most powerful solution possible.

Want to learn more? Connect with a Provar expert today!

What is True Self-Healing?

A Look Inside One of Provar Automation's Most Powerful Features

When testing your dynamic Salesforce environment, one of the trickiest areas to navigate is keeping up with regular updates and new app customizations. Any time there is a change, static locators for web elements are prone to modifications, which can hamper the efficiency and reliability of your automated testing strategy.

What is needed is true self-healing, a way that your test automation solution can keep up with frequent changes and maintain its tests so they do not break. Provar Automation's Adaptive Locators offer true self-healing to your test automation, giving your team a practical approach to ensure seamless adaptability, increased efficiency, and enhanced reliability.

Provar Automation's Adaptive Locators seamlessly adapt to changes in web page structures and heal without human maintenance. They intelligently capture a range of web element attributes, including IDs, classes, and other relevant parameters, enabling them to automatically adjust to dynamic shifts in the webpage. This means you no longer need to spend valuable time manually updating scripts each time an element undergoes a change.

This feature takes the maintenance and rework cycle off the plates of developers and testers, allowing them to focus on what truly matters: more creativity and technical advancement.

One of the critical aspects of any automation process is script reliability. Automation's Adaptive Locators significantly reduce the risk of false positives and negatives, ensuring that your automation scripts consistently locate the correct elements.

Not all automation needs are created equal, and there is no one-size-fits-all approach to test automation. Recognizing this, Automation allows users to customize their Adaptive Locators to suit specific environments or scenarios. Users can ensure their automation efforts seamlessly adapt to any situation by tailoring the parameters according to different use cases.

How Does It Work?

Provar Automation's Adaptive Locators utilize intelligent capabilities that analyze a web page's HTML structure and employ predefined rules to identify and locate elements. Whether you're automating tests, scraping data, or interacting with web applications, Adaptive Locators ensure a smooth and reliable experience, regardless of the dynamic nature of the web page.

By default, the Adaptive Locator is selected in Provar Automation's Test Builder Field Details section, streamlining the integration process. Additionally, users can further customize their experience by toggling Adaptive Locators on or off and can choose to input a relative ProvarX locator when necessary, providing the flexibility needed for more complex automation tasks.

Want to learn more about Provar Automation, a notable efficiency enhancement to your test automation strategy? Talk to an expert today!

UNJUMBLING

THE JARGON: A Provar Word Scramble

Put Your Industry Knowledge to the Test!

1. STTE MTAOUOATNI   1. _____
2. EEFSORSCAL   2. _____
3. STTREE   3. _____
4. VPSOED   4. _____
5. TYAILUQ   5. _____
6. PORRVA OUITANMATO   6. _____
7. AEADMTTA   7. _____
8. NDE TO EDN   8. _____
9. EUVTTINII   9. _____
10. RVRPOA RDGI   10. _____
11. NIELERSTI   11. _____
12. PRVROA MENGARA   12. _____
13. AATD USEICTRY   13. _____
14. TIERLEADVAC   14. _____
15. LOW DOEC   15. _____

Find your answers here: