Test Environments

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Overview

Below is an overview of how important it is for all SalesPad customers to create a test environment. Please note, the instructions below are not a step-by-step tutorial but an overview of the steps needed.

Purpose of a Test Environment

Each version of SalesPad contains between 20 and 50 changes. While these changes are to improve performance, usability, and to address issues, each change may introduce a new potential issue.

Before a version of SalesPad becomes available, we perform manual testing with quality assurance analysts, developers, and automatic testing. But SalesPad cannot emulate every environment. Some issues will still appear even after a thorough review.

To facilitate a smooth upgrade, SalesPad recommends any upgrades be placed in a test company database. Below is an overview for creating a test environment. If you have active configuration changes being made, please make sure you or your client consult SalesPad staff or IT professionals with questions regarding a new test database. This will allow mission critical functions to be tested and validated before entering the live environment.

Creating a Test Environment

For accurate testing, the test environment should be as close to a mirror image of the live environment as possible.

- Create a new company using GP Utilities
  - This will ensure the test company has a properly configured Comapny ID in GP
- If testing a different GP Dynamics configuration then the new company will need to be in a different SQL Server or Server Instance
- Restore a recent backup of the live company database over the test company
- Creating a fresh backup is recommended
- Create a new connection to the test database from the SalesPad login screen
- Run the database update from SalesPad
  - The connections are stored in the local registry by default. It is recommended to only create a connection to the test database for administrators or users who will need access. Be careful not to log into the live company with the test version of SalesPad or you could have an unplanned upgrade to the live company.