FORTUNE 500

Fortune 500 financial services companies utilize Applitools to save hours of time on manual PDF checks

> "
>
> *Committing less labor to achieve the same result...this [Applitools] solution has been a big win for Financial Service technology providers. But, in many ways, it is only the beginning.*
>
> **Dave Harrison**
> **Software Testing Practice Lead in the financial services industry**

Highlights

Leading financial services technology providers are looking to sidestep the time and effort spent on manual PDF checks for documents.

Many software professionals in the financial services industry believe Applitools is the perfect tool to help them create automation for checking PDF agreements.

Using Applitools for automating PDF checks is able to save hundreds of hours in labor time for QA teams, achieve their ROI faster and help their testers take their testing knowledge to the next level.

Real-World Challenge

Applitools serves multiple Fortune 500 companies that provide financial services (FinServ) technology solutions in areas such as account processing and digital banking solutions, e-commerce and card issuer processing and network services. Headquartered all across the world, FinServ tech providers serve clients such as banks, credit unions and securities broker dealers. Each provides solutions for thousands of financial institutions and millions of businesses in over 100 countries.

With such a heavy flow of business traffic happening daily, agreement-related documents are essential to establishing the business relationship between FinServ technology providers and their clients. In order to keep these documents up to date and seamless for their clients, these companies traditionally have to manually check each one of their PDF documents. The manual PDF checks require hardware investment, new test case infrastructure and a lot of time, as each merchant typically receives around six documents as large as 50 pages each.

Per Dave Harrison, Software Testing Practice Lead in the financial services industry,

> " *"I questioned, how can companies grow their base of merchants and how can they get them up and running, quicker? One answer here is to request to drive improvements in how companies use PDF documents and how to process them for growing business channels of merchants. The delay for manual tests and checks is unacceptable due to time constraints. Most companies would be looking at a cycle time of days, possibly, for some of these changes, and time in the market is crucial."*

The Solution

Any financial services company listed in the Fortune 500 must maintain such successful business practices and keep growing as a company in order to remain on the list. Creating solutions to automate manual PDF testing issues is one way to automate mundane and error-prone processes.

An initial solution to the PDF testing problem for technology providers–a single generated PDF– creates the need for very little customization and manual checks for a small number of content details where changes are relatively infrequent. But, a new issue sprouts from this solution. Technology needs to respond to this issue with something that allows for dynamically generated PDFs for the onboarding of new business.

> 66 *"Paper documents need to become dynamically generated by a microservice and then picked up by a visual validation service like Applitools,"* says Christopher Kane, Software Test Engineer in the financial services industry. *"One of the first steps in creating the solution to this problem is finding the perfect tool that would allow testing teams to create automation for checking PDF agreements. People are identifying Applitools as the main piece in the solution that would allow companies to accomplish its goal, and pretty soon it's off to the races."*

More and more, a tech stack is emerging for FinServ technology provider solutions:

1. Leverage a web services automated test created in Postman, run via the Newman CLI in Jenkins.

2. The Postman test generates the PDF's by sending the response raw data from the requests to a custom built internal microservice running on a Nodejs server that writes the PDF files to a folder.

3. From there, the Applitools ImageTester sends the PDF's to the Applitools Eyes Platform for Visual AI analysis, which instantly detects and alerts the team of any variations from a previously agreed upon baseline PDF file.

> 66 *"Companies like Applitools have done a nice job with the integration overhead being kept to a minimum, so companies are not really burning a lot of dollars on getting things up and running, and therefore, teams can achieve the ROI more quickly"* says Dave.

The Result

Applitools is able to swiftly solve FinServ companies manual PDF checking issues, saving any provider hundreds of hours of time and effort, and enabling a solution that allows for their PDF documents to be checked via automated tests that are more thorough and accurate.

> 66 *"Committing less labor to achieve the same result, with scale, is always a win for any company, and especially the Fortune 500,"* says Dave.

This use case is not the only usage of the Applitools software, however. FinServ technology providers continue to utilize Applitools to assist with cross browser test tool integration for visual validation that is being collaborated on with the developers inside their cross functional team.

> **"** *"Because of this kind of solution, quality assurance and testing is better, and testers get better. Introducing a cutting edge visual validation testing solution to a FinServ company would be a big win, and in many ways, it is only the beginning of realizing the potential value of AI technology for the brand,"* says Dave.

About Applitools

Applitools delivers a Next Generation Test Automation Platform through Visual AI and Ultrafast Test Cloud. We enable engineering teams to release high quality web and mobile apps at incredible speed and at a reduced cost.

Applitools Visual AI modernizes important test automation use cases — Functional Testing, Visual Testing, Web and Mobile UI/UX Testing, Cross Browser Testing, Responsive Web Design Testing, Cross Device Testing, PDF Testing, Accessibility Testing and Compliance Testing — to transform the way organizations deliver innovation at the speed of CI/CD at a significantly lower Total Cost of Ownership (TCO).

Hundreds of companies from verticals such as Tech, Banking, Insurance, Retail, Pharma, and Publishing — including 50 of the Fortune 100 — use Applitools to deliver the best possible digital experiences to millions of customers on any device and browser, and across every screen size and operating system.

Applitools is headquartered in San Mateo, California, with an R&D center in Tel Aviv, Israel. For more information, please visit **applitools.com**.