



EBOOK

Speed Up nCino Bank OS Development with Salesforce DevOps

Optimizing Velocity + Quality

INTRODUCTION

Financial institutions have a lot to consider when viewing their operating system—functionality, regulatory compliance, data security, and more. nCino was designed especially for banks and their unique requirements.

Salesforce development is an important aspect of the nCino platform. Introducing new products, software, and updates is an essential means of properly serving the needs of your customers. And while Salesforce might be powerful and popular, there are still areas in which it can be improved upon.

AutoRABIT provides scalable tools that provide everything a bank needs to optimize their DevSecOps pipeline.

The results can be seen almost immediately—stronger code, successful deployments, increased velocity, and assistance with regulatory compliance.

But what specific challenges face the banking industry? Why are these considerations especially important for financial institutions to address?

Banks provide an essential service to their clients. The gravity of this responsibility needs to be reflected in the services it provides. The process by which these services are offered will directly impact the success of both the development releases, as well as the bank itself.

Let's look deeper into the challenges facing the financial industry, and how AutoRABIT complements the nCino Operating System to directly serve banks.



“Fantastic tool, addresses every major pain point commonly encountered with multiple environments and development streams on Salesforce.”

ERNESTO VALDES

Timely Releases Keep You Competitive



The development pipeline culminates in the deployment of the update. This is where every line of code, every quality check, and every security consideration comes together.

How can you guarantee this deployment will be successful? And what happens if it's not?

It's essential to get it right the first time. Going back over your work to solve problems not only costs your company time and money, it delays the release of the update.

Faster releases provide a greater benefit to your banking customers and position you at the forefront of the industry.

Are you doing everything you can to ensure these deployments are as quick as they are successful?

THE AUTORABIT DEVSECOPS ADVANTAGE

AutoRABIT Automated Release Management (ARM) provides user-friendly options to tailor the release process to your needs.

The fastest way to speed along the nCino development process is to institute one-click deployments. That's all it takes. Initial deployments and updates can be released without the risks inherent in manual deployments with the help of automation.

Continuous Delivery and Continuous Deployment offer more potential solutions that assist banks maintain quality as they streamline the development and release processes.

The power of nCino can be made even more useful with these essential tools. Your end-users will notice the difference, and so will the industry around you.

Immediate Access to New nCino Features



nCino continues to push the banking industry to optimize their customer interactions by introducing new features. These offerings expand the capabilities of the platform while also allowing users to innovate in ways they couldn't before.

Finding, installing, and configuring these new features into a current development pipeline can be difficult.

It takes a lot of attention, knowledgeable team members, and awareness of the platform offerings as a whole.

Deployment and speed of development are constant challenges, even with the assistance of a quality platform like Salesforce. Every new feature and update is aimed at increasing ease of use, but the initial set up can present its own unique challenges.

THE AUTORABIT DEVSECOPS ADVANTAGE

AutoRABIT provides a workable platform that integrates with your nCino environment. This means you have access to essential tools like Version Control, auditing, and a single automated pipeline for data and features to enhance nCino customization.

It also means that you'll have immediate access to every new nCino feature as they're rolled out.

These essential updates become immediately available through the AutoRABIT platform to assist you with the integration of new features. From there, you can configure them to best fit your nCino environment and company needs before deploying them into your system.

“Fantastic tool to implement CI/CD concept in Salesforce. The best part is end-to-end automated process for building, packaging, and test execution for Salesforce applications.”

JASVINDER SINGH

Compliance Considerations Must Be a Focus



Banks and other financial institutions deal with sensitive information and data every day. It's inherent to the industry. This is why banks are subjected to certain government regulations relating to their treatment of this sensitive data.

The personally identifiable information (PII) of customers must be protected and handled with care.

nCino assists financial institutions process this sensitive information, and can even store regulated data on the platform itself.

How your bank handles this information will directly impact your standing in relation to these regulations.

THE BENEFITS OF DEVSECOPS

AutoRABIT understands how important these regulations are for the financial institution, as well as the customers themselves. Any mishandling of sensitive data can result in sizable fines for the bank and can create giant headaches and loss of funds for customers.

AutoRABIT ARM for nCino supports system audits to ensure compliance with these important regulations. Beyond that, ARM helps financial institutions build out risk management frameworks that comply with government stipulations.

Critical certifications and capabilities enable banks to protect sensitive data. This includes certifications for:

- > ISO 27001
- > SOC2
- > HIPAA

These considerations are made possible with dedicated and powerful tools including RBAC, encryption, data sovereignty support, audit logs & reports, and more.

Reduced Complexity Streamlines Processes



There are a lot of considerations that go into a successful DevSecOps pipeline.

Not only do you need a powerful development platform on which to build your updates and software releases, but you need to keep security concerns in mind throughout the entire process.

This can lead financial institutions to piece together various tools in order to meet all the demands of a secure development process. And while these tools might individually be powerful and intuitive, stringing them together can create problems.

You don't want to spread your attention across various platforms and interfaces in order to address all the concerns of a DevSecOps pipeline.

THE AUTORABIT DEVSECOPS ADVANTAGE

AutoRABIT ARM combines seamlessly with AutoRABIT Vault to support the nCino Operating System in all its DevSecOps needs.

A shared platform allows these services to reduce the complexity of developing, deploying, and managing updates in the nCino environment.

Streamlining these essential services saves nCino users from spreading their efforts throughout various locations. Managing development projects while maintaining a focus on compliance considerations within a singular platform enables team members to concentrate on the quality of work being completed instead of chasing around tools in order to accomplish singular tasks.

“AutoRABIT is a rock-solid product for release management of Salesforce Applications. Helped us to reach our goal of continuous deployments from Dev to Prod.”

NAVEEN REDDY

Save on Salesforce Data Charges



Financial institutions have large repositories of information to control and protect. This can include everything from Salesforce system data and metadata, to customer PII, to nCino operational data, to the development projects themselves.

This creates a need for a large amount of storage, which can become expensive as the data sets continue to grow.

Government regulations will require the deletion of a particular type of data over time, but for the most part, a bank's system of data will need to be kept on-hand for the sake of continuity, accountability, and functionality.

THE AUTORABIT DEVSECOPS ADVANTAGE

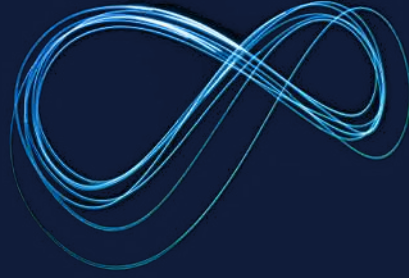
AutoRABIT Vault provides a series of options for how a financial institution can maintain control of its Salesforce data while remaining compliant with government regulations. Storing system documents and data in the cloud can be more cost-effective than storing them directly on Salesforce itself.

Another option is to archive system data instead of outright deleting it or storing it directly on

the platform. This service moves any selected data or files to a secure, off-platform location for long-term storage. This data can be retrieved at any time and reinstated without any degradation or lost information.

Minimizing the amount of data stored within a platform reduces storage costs, increases system capacity, makes it easier to backup essential system data, and support productivity.

Increased Velocity Improves User Experience



The goal of every development project is to improve the experience of the end user of the service. This could mean introducing new services altogether or releasing updates to existing offerings.

Failing to deploy advantageous releases at a fast pace runs the potential for negating the benefits of the project.

Many issues experienced by banking customers need to be addressed quickly. Any inability to access their account, for instance, has the potential to impact their capacity for performing basic functions necessary to their daily life.

Timeliness is essential. The tools utilized throughout the development process will have an impact on both the quality and speed of upcoming releases.

THE AUTORABIT DEVSECOPS ADVANTAGE

Continuous Integration and Delivery are essential tools to speed along the release process. Quality checks and pipeline flow can be automated to free up team members to focus on writing the best functionality possible to promote productive use of the nCino platform.

Quickly seeding development and QA environments with anonymized data sets greatly helps to accelerate feature development.

Customers of financial institutions will enjoy updated software functions and a minimization of bugs, positioning the institution itself as a leader in the industry.

“We have been using AutoRABIT since 2015, and it has transformed the way we deliver Salesforce applications.”

DANIEL MUCHUMARRI

Code Quality Impacts Functionality and Security



Data security is a major consideration for financial institutions. The services rendered necessitate access to sensitive information such as account numbers, social security numbers, and other personally identifiable information.

It is essential for banks to take every possible precaution when it comes to data security.

The quality of code used to build updates and applications will affect much more than the functionality of the software. It will also impact the stability of the product and its ability to protect this sensitive information.

Salesforce data and metadata can be put at risk when substandard code creates security vulnerabilities.

THE AUTORABIT DEVSECOPS ADVANTAGE

DevSecOps imbues each step of the development pipeline with security considerations. CodeScan by AutoRABIT provides static code analysis to provide a real-time view into the health of your update.

Development projects can involve massive amounts of code. Waiting until the final quality

tests to verify the stability of this code can lead to mistakes and complicated fixes.

Speed, security, and quality are all improved when developers are immediately alerted to issues in the coding structure. CodeScan keeps nCino development secure while also benefiting the overall quality of the development project.

Reliable Data Backups Are Essential



You can't talk about Salesforce DevSecOps without mentioning the necessity of backing up your system data. Not only are security concerns such as this required for banks through government regulations, but they are essential to the continued operations of a successful business.

Accidents happen. Hardware is liable to fail for a variety of reasons. And financial institutions are one of the main industries targeted by cybercriminals.

Financial institutions need to operate under the assumption that they will experience a data loss event at one point or another. Losing access to nCino system data can create massive problems and interrupt service until it is able to be restored. And without a reliable backup, this can take some time.

THE AUTORABIT DEVSECOPS ADVANTAGE

AutoRABIT Vault Data Backup & Recovery provides comprehensive data protection for nCino, along with the ability to quickly restore essential system data in the case of an outage.

This fully compliant solution allows banks to automate system backups, so they always have a contemporary data pool from which to draw. Out-of-date backups will still require the time

and efforts of your team members to get the system back to operations.

Automatically backup and restore your complete nCino environment—including features and objects. Banks don't need to rely on manual, error-prone processes with a powerful tool like Vault on hand.

“I work as a senior developer for my company and I had awesome experience using this tool. In particular, I liked the features related to easy commit, Dataloader Pro, and CI Jobs.”

JETHA RAM

CONCLUSION

The challenges facing the financial industry are always evolving. This is what makes a streamlined DevSecOps pipeline so essential—you're never going to be able to keep up with the changing landscape if you aren't able to quickly and efficiently introduce updates and services.

DevSecOps requires the efforts of various teams working together toward a common goal.

Providing these teams with the tools they need to best fulfill these roles enables everyone to perform their duties to their full potential. Utilizing automation as much as possible streamlines these efforts and frees team members up to devote their attention to more pressing matters.

AutoRABIT is especially suited to work alongside nCino to improve the Salesforce development environment. Accuracy, quality, and security are important for every industry, but they are essential for banks.



**Ready to accelerate your
Salesforce Continuous Delivery
Journey with AutoRABIT?**

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ABOUT

autorabit

AutoRABIT is a Continuous Delivery suite for SaaS platforms. We automate and accelerate the entire application development and release process. This enables continuous integration and delivery by providing fast, simple, and secure end-to-end automation across all Salesforce implementations. We help enterprises achieve higher release velocity and faster time-to-market.

AutoRABIT provides automated Metadata Deployment, Version Controlling, Advanced Data Loading, Orgs and Sandbox management, Test Automation, Static Code Analysis, and Reporting. Our services complement and extend Salesforce DX. AutoRABIT Vault—our backup and recovery solution—streamlines Salesforce data, simplifies data backup challenges, offers disaster recovery and endpoint data protection on Cloud.

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