Customer Success Platform

Features

1. Role based Access

* Requirement Analysis
* Roles: The platform consists of four distinct roles: Client, Auditor, Project-Manager, and Admin.
* Auditor: Responsible for adding or deleting projects, assigning project managers, and viewing project-related details and metrics in a read-only mode. They can edit or add audit history based on project updates and invite clients.
* Project Manager: Has the ability to edit or add project-related details, including metrics, and has view-only access to audit history.
* Admin: Holds complete power over both auditor and platform administration.
* Client: Has view-only access to all platform features.
* API Endpoint Designs
  + Project Budget = It refers to the details related to type like Fixed or Monthly along with duration and Budgeted Hours.
  + Endpoint URL = /add/project-budget
  + HTTP methods = GET
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 404 (Not Found)
  + Endpoint URL = /add/project-budget
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = Added Record
  + Error Code and Messages = 500 (Some Error Occurred)
  + Version History = It refers to the details related to version of Project including details like version, changes in version, approved\_date, approved\_by etc.
  + Endpoint URL = /add/version-history
  + HTTP methods = GET
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 404 (Not Found)
  + Endpoint URL = /add/version-history
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = Added Record
  + Error Code and Messages = 500 (Some Error Occurred)
  + Audit History = It refers to the details of audit created by auditor. It includes details like date of audit, reviewed by, status, comments etc.
  + Endpoint URL = /add/audit-history
  + HTTP methods = GET
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 404 (Not Found)
  + Endpoint URL = /add/audit-history
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = Updated/Added Record
  + Error Code and Messages = 500 (Some Error Occurred)
  + Project Description = It refers to the details related to Project like Scope, Project Stack.
  + Endpoint URL = /add/project-description
  + HTTP methods = GET
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 404 (Not Found)
  + Endpoint URL = /add/project-description
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = Updated/Added Description
  + Error Code and Messages = 500 (Some Error Occurred)
  + Escalation Metrics = It refers to the different metrics like Operational, Financial, Technical.
  + Endpoint URL = /add/escalation-metrics
  + HTTP methods = GET
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 404 (Not Found)
  + Endpoint URL = /add/escalation-metrics
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = Type of Escalation Metrics(Financial ,Operational ,Technical) and respective change in Record
  + Error Code and Messages = 500 (Some Error Occurred)
  + Stakeholders = It refers to the details of stakeholders including their title, name, and contact
  + Endpoint URL = /add/stakeholders
  + HTTP methods = GET
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 404 (Not Found)
  + Endpoint URL = /add/stakeholders
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = Added/Updated Record of stakeholders
  + Error Code and Messages = 500 (Some Error Occurred)
  + Risk Profiling = It refers to the different types of risk involved the project like Financial, Operational, Technical, HR, External along with their severity and impact.
  + Endpoint URL = /add/risk-profiling
  + HTTP methods = GET
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 404 (Not Found)
  + Endpoint URL = /add/risk-profiling
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = Added/Updated Record of Risk
  + Error Code and Messages = 500 (Some Error Occurred)
  + Phases = It refers to the details of phases with detail of each phase like start date, status, completion date.
  + Endpoint URL = /add/phases
  + HTTP methods = GET
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 404 (Not Found)
  + Endpoint URL = /add/phase
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = Added/Updated Phase details
  + Error Code and Messages = 500 (Some Error Occurred)
  + Sprint = It refers to the details of sprint with detail of each sprint like start date, status, end date and comments.
  + Endpoint URL = /add/sprint
  + HTTP methods = GET
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 404 (Not Found)
  + Endpoint URL = /add/sprint
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = Added/Updated Phase details
  + Error Code and Messages = 500 (Some Error Occurred)

1. EMAIL

* Requirement Analysis
  + Send Mail to Stakeholders when Audit history table is updated.
* API Endpoints
  + Endpoint URL = /sendMail
  + HTTP methods = POST
  + Request Parameter = Project ID
  + Request Body = None
  + Error Code and Messages = 500 (Some Error Occurred)
* Pseudo Code

FUNCTION sendMail() {

project\_id = Request\_Params

stakeholders = Database\_Instance.get(project\_id)

Send\_Mail(stakeholders)

}