

Customer Success Platform

Project Objective:

This project's objective is to develop a Customer Success Platform that automates the process of notifying stakeholders about any updates or changes within the system. The application aims to enhance communication and transparency by ensuring that all stakeholders are promptly informed whenever there is a relevant update.

Before we begin, let's delve into what a Customer Success Platform is.

A Customer success platform is a formal document that outlines the objectives, scope, stakeholders, and key deliverables of a project. It serves as a foundational document that provides clarity and direction to all project stakeholders, including team members, sponsors, and clients.

The Customer Success Platform typically includes the following components:

- 1. Project Description:** A brief overview of the project, including its purpose, goals, and objectives.
- 2. Scope:** Defines the project's boundaries, including what is included and excluded from the project scope.
- 3. Project Stack (Tech):** Describes the technologies and tools that will be used in the project, including backend, frontend, mobile app, database, and infrastructure.
- 4. Escalation Matrix:** Outlines the hierarchy and process for escalating issues or concerns within the project team.
- 5. Stakeholders:** Identifies the individuals or groups who have an interest or stake in the project, such as the project manager, client, and account manager.
- 6. Risk Profiling:** Assesses potential risks to the project and outlines steps for managing and mitigating these risks.
- 7. Phases/Milestones:** Breaks down the project into manageable phases or milestones with specific start and completion dates.
- 8. Sprint wise detail:** Provides details of each sprint, including start and end dates, status, and comments.
- 9. Approved Team:** Lists the members of the project team, their roles, and their availability.

10. Resources: Identifies the resources required for the project, including human resources, equipment, and materials.

11. Client Feedback: Documents feedback received from the client, including complaints, appreciation, and action taken.

12. MoMs of client meetings: Records minutes of meetings with the client, including dates, duration, and key discussion points.

Overall, the Customer Success Platform serves as a guiding document that provides a clear understanding of the project's objectives, scope, and key stakeholders, helping to ensure that the project stays on track and delivers the intended outcomes.

Tasks for completing the project:

1. Registration and Login with Microsoft using Auth0

Login and Registration from Scratch, followed by Login with Microsoft, and Role-Based Management:

Description: This task involves implementing user authentication and registration functionalities from scratch, allowing users to create new accounts independently. Additionally, it includes integrating Microsoft authentication via Auth0, enabling stakeholders to log in using their Microsoft accounts.

Responsibilities:

- Implement login and registration functionalities from scratch, allowing users to create new accounts and authenticate.
- Integrate Microsoft authentication via Auth0 to allow users to log in using their Microsoft accounts.

Functionality:

- Admin can add Auditors, Project Managers and Clients.
- Users can register for an account on the platform by providing basic registration information or by logging in using their Microsoft accounts via Auth0.
- Upon registration, users' information is securely stored and linked to their platform profiles.
- The login functionality allows users to authenticate themselves using either their platform credentials or their Microsoft accounts.
- Integration with Microsoft accounts eliminates the need for users to create and manage separate credentials for the platform, enhancing user experience.
- On register using Microsoft accounts the user's default role will be Client.

2. CRUD for each section of Project Charter:

- i. 15 Section CRUD: There are total 15 section of Customer Success platform (Project Budget, Version History, Project Description, Scope, Project Tech Stack, Escalation Matrix, Stakeholders, Risk Profiling, Phases/Milestones, Sprint Wise Details, Audit History, Approved Team, Resources, Client Feedback, MoM of client meetings).
- ii. Develop Create/Read/Update/Delete functionality for each of the 15 sections. Except Sprint-wise detail, Client feedback and Moms of client meetings as they are append-only tables, which should not be changed once details are added. These tables should have only add and delete functionality.
- iii. **Project Charter View as different section:** All the tables in project charter (template provided in the end of the project requirement document) would be separate sections in the customer section platform.

3. Role Based Management:

a. Admin Role

- I. Create static credentials for Admin Role. Mention the credentials in the readme file.
- II. Admin should be able to have full access to create/update/read/delete all projects in customer success platform.
- III. Admin should be able to have full create/update/read/delete access of all sections of each project in customer success platform.
- IV. Admin should be able to Create/Read/Update/Delete users (all stakeholders).

b. Auditor Role

- I. Should have access to create/select existing project
- II. Should have access to assign a project manager to the project so that Project manager while login in should be able to go to the project for which he/she needs to update customer success platform.
- III. Should have the ability to add stakeholders of the project that should automatically display in Stakeholders table in customer success platform for current project
- IV. Should have access to view the customer success platform for all projects.
- V. Should have access to add comments in the 'Audit History' table.

c. Project Manager Role

- I. Project Manager should be able to access add/edit/delete existing content of the customer success platform for assigned project/s
- II. Project Manager should be able to save and submit the updated customer success platform for his/her assigned project/s

d. All other stakeholders' Role

- I. All stakeholders should be able to view the customer success platform for assigned projects to him/her.

4. Email Notification System: Description:

Building a system to send email notifications to stakeholders for updates and changes within the platform.

a. Responsibilities:

- I. Integrating email notification functionality into the platform to notify stakeholders in real-time.
- II. Develop email notification triggers for project audit history updates.

b. Send email notification to all stakeholders when Audit History table is updated in customer success platform. The content of the email should be

Hello [Stakeholder Name],

Please note that audit has been completed and here is the audit summary:
[Audit History Table Row Updated]

Location : [Link to the customer success platform]

Thanks and Regards,
Promact Infotech Pvt Ltd

5. Export as a Document:

Description:

Implementing the functionality to export project details as a document in a predefined format. Additionally, working on the 15 CRUD operations (Project Budget, Version History, Project Description, Scope, Project Tech Stack, Escalation Matrix, Stakeholders, Risk Profiling, Phases/Milestones, Sprint Wise Details, Audit History, Approved Team, Resources, Client Feedback, MoM of client meetings) from the provided template to understand the type of operations to be exported as PDF.

Technologies Used

Backend: ASP.NET Core with ABP.IO framework Frontend: Angular Database: PostgreSQL ORM: Entity Framework Core Authentication: Auth0 with Microsoft login

Setup Instructions

1. Clone Repository:

`git clone https://github.com/Priyanshu-Koley/Customer_success_platform.git`

2. Backend Setup:

I. Navigate to the backend directory[dotnet].

II. Update the connection string in appsettings.json to the PostgreSQL database[username and password].

III. Run migrations to create the database and schema:

`dotnet ef database update`

IV. Start the backend server:

`dotnet run`

3. Frontend Setup:

I. Navigate to the frontend directory[angular]. ii. Install dependencies:

`npm install`

III. My backend was running on `https://localhost:44347/` i.e. PORT = 44347. If your backend is running on another port then change the PORT variable in

a. `angular\src\app\services\projects.service.ts`

b. `angular\src\app\components\project-details\project-details.component.ts`

IV. Start the Angular development server:

`ng serve -o`

4. Database Setup:

I. Ensure PostgreSQL is installed and running. ii. Create a new database for the project.[Can also skip this step, then database will of the name given in the connection string will be created]

Admin Credentials

Email Id:

admin@example.com


Password:

Admin@123

UI Screen-shots:

1. Dashboard:

I. Project Manager, Client

 Customer Support

US

User
Project Manager
Log out

Projects

3
All Projects


1
In Progress

1
Completed

1
Hold

Project Start	Project Name	Status	Project Manager	Members
Mar 15, 2024	Project Name	Completed	Priyanshu Koley	69
Mar 11, 2024	Project Name2l	Hold	Project manager1	50
Mar 1, 2024	Project Name 1	In Progress	Amandeep Rewani	43

II. Admin

 Customer Support

PR

Priyanshu Koley
Admin
Log out

+ New Project

+ Create User

Projects

Users

Project Managers

3
All Projects

1
In Progress

1
Completed

1
Hold

Project Start	Project Name	Status	Project Manager	Members	Actions
Mar 15, 2024	Project Name	Completed	Priyanshu Koley	69	Edit Delete
Mar 11, 2024	Project Name2l	Hold	Project manager1	50	Edit Delete
Mar 1, 2024	Project Name 1	In Progress	Amandeep Rewani	43	Edit Delete

III. Auditor

CS

Customer Support

AU

Auditor Auditor

Log out

+ New Project

Projects

3

All Projects

1

In Progress

1

Completed

1

Hold

Project Start	Project Name	Status	Project Manager	Members	Actions
Mar 15, 2024	Project Name	Completed	Priyanshu Koley	69	Edit Delete
Mar 11, 2024	Project Name21	Hold	Project manager1	50	Edit Delete
Mar 1, 2024	Project Name 1	In Progress	Amandeep Rewani	43	Edit Delete

2. Project Details:

I. Auditor

CS

Customer Support

AU

Auditor Auditor

Log out

+ New Project

Projects

Projects > Project Name > Audit History

Project Name

Audit History

Version History

Project Budget

Project Overview

Project Stack

Escalation Matrix

Stakeholders

Risk Profile

Phases / MI

Audit History

Download Audit History

Add new audit

Reviewed By

Status

Reviewed Section

Comments / Queries

Action Item

Add Audit

Date of audit	Reviewed By	Status	Reviewed Section	Comment/Queries	Action Item	Delete
Mar 14, 2024	b	b	b	b	b	

II. Project manager, Client

CS

Customer Support

Search

Q

US

User
Project Manager

Log out

Projects

Projects > Project Name > Audit History

Project Name

Audit History

Version History

Project Budget

Project Overview

Project Stack

Escalation Matrix

Stakeholders

Risk Profile

Phases / Milestones

Audit History

Download Audit History

Date of audit	Reviewed By	Status	Reviewed Section	Comment/Queries	Action Item
Mar 14, 2024	b	b	b	b	b
Mar 14, 2024	b	b	b	b	b
Mar 14, 2024	b	b	b	b	b
Mar 14, 2024	a	a	a	a	a
Mar 14, 2024	a	a	a	a	a

3. Update data (Project manager and Admin)

Projects

Projects > Project Name > Risk Profile

Project Name

Audit History

Version History

Project Budget

Project Overview

Project Stack

Escalation Matrix

Stakeholders

Risk Profile

Phases / Milestones

Update Risk Profile

Update risk profile

Operational

a

Low

Low

Remedial Steps

a

2024-03-05

Update risk profile

Cancel

Operational	a	Low	Low	a	a	Mar 5, 2024	
Technical	b	High	Low	b	b	Mar 15, 2024	

4. Create Project (Admin)

+ New Project

+ Create User

Projects

Users

Project Managers

Project details

Project name

Sample project

Invite client

Client name

Client name

Client email

example@work.com

Select project manager

Project manager

Project manager name

Members

No. of associated members

Create Project

Cancel

5. Create User (Admin)

CS Customer Support

Search

PR Priyanshu Koley
Admin
Log out

+ New Project

+ Create User

Projects

Users

Project Managers

Create User

Name

user@gmail.com

Select role of the user

Create User

6. Users Table (Admin)

CS

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Priyanshu Koley

Admin

Log out

+ New Project

+ Create User

Projects

Users

Project Managers

Users

Id	Name	Email
auth0 65f4112a481e4536ead59d49	Priyanshu Koley	priyanshukoley0@gmail.com
auth0 3e7d144f-e905-4631-b8a7-ec1421d67784	User	user@gmail.com
auth0 65f7d96d481e4536ead8792a	Auditor	auditor@example.com
google-oauth2 102252105084480832289	Priyanshu Koley	priyanshukoley0@gmail.com
auth0 65f73b4489230d83907a3969	Priyanshu Koley	admin@example.com

7. Project Managers Table (Admin)

CS

Customer Support

PR

Priyanshu Koley

Admin

Log out

+ New Project

+ Create User

Projects

Users

Project Managers

Project Managers

Id	Name	Email
auth0 3e7d144f-e905-4631-b8a7-ec1421d67784	User	user@gmail.com

Conclusion

In conclusion, the Customer Success Platform project aims to revolutionize communication and transparency within the system by automating the notification process for stakeholders. This comprehensive documentation provides a detailed insight into the project's objectives, technologies used, setup instructions, and testing procedures.

Throughout the documentation, we have outlined the steps required to set up and run the application, including backend and frontend configurations, database setup, and third-party integrations such as Auth0 for authentication. Additionally, we have provided admin credentials and testing steps to facilitate ease of use for stakeholders.

The project leverages a robust technology stack, including ASP.NET Core, Angular, PostgreSQL, and Entity Framework Core, ensuring scalability, reliability, and security. Role-based management enhances access control, allowing different stakeholders to perform specific actions based on their roles.

Moreover, the documentation emphasizes the importance of adhering to best practices for coding, testing, and deployment to maintain project quality and reliability. Regular updates and collaboration with the team are essential to ensure the project's success and meet stakeholders' evolving needs.

In essence, this documentation serves as a guiding resource, providing clarity, direction, and comprehensive instructions for effectively utilizing the Customer Success Platform. With its implementation, we aim to enhance communication, efficiency, and stakeholder engagement, ultimately delivering superior service and maintaining a competitive edge in the market.