Project Documentation

1. Introduction

The Customer Success Platform (CSP) is a comprehensive application designed to automate communication processes, enhance transparency, and streamline stakeholder engagement. Developed by [Your Company Name], this platform serves as a centralized hub for managing project details, facilitating communication, and ensuring timely updates for all stakeholders involved.

2. Functionality Overview

User Authentication:

Implemented user authentication and registration functionalities from scratch.
Users can register for an account either by providing basic registration information or by logging in using their Microsoft accounts via Auth0.
Authentication process ensures secure storage of user information and seamless login experience.

CRUD Operations:

Implemented Create, Read, Update, and Delete operations for each section of the CSP, totaling 15 sections.
Enables efficient management and maintenance of project details, including Project Budget, Version History, Project Description, Scope, etc.
Key Components of Customer Success Platform

- Project Description: Provides an overview of the project's purpose, goals, and objectives.
- Scope: Defines the boundaries of the project to ensure clarity.
- Project Stack (Tech): Outlines the technological framework
- Escalation Matrix: Establishes a structured hierarchy for issue escalation within the project team.
- Stakeholders: Identifies key individuals or groups with vested interests in the project.
- Risk Profiling: Assesses potential risks and devises mitigation strategies.
- Phases/Milestones: Breaks down the project into manageable phases with specific timelines.
- Sprint-wise Detail: Provides insights into each sprint for efficient project tracking.
- Approved Team: Lists project team members, roles, and availability.
- Resources: Identifies requisite resources for smooth project execution.
- Client Feedback: Documents client feedback for continuous improvement.
- Minutes of Meetings: Records key discussion points from client meetings.

Role-Based Access Management:

Role-based access control system ensures appropriate permissions and access levels for different user roles.

Admin Role:
Full access to create, update, read, and delete all projects within the CSP.
Complete control over all sections of each project.
Ability to manage user accounts, including creation, update, read, and delete operations.

Auditor Role:
Access to view and manage projects.
Ability to assign project managers and add stakeholders to projects.
Permission to view the CSP for all projects and add comments in the Audit History table.

Project Manager Role:
Access to add, edit, and delete content for assigned projects.
Capability to save and submit updated CSP for assigned projects.

Other Stakeholders' Role:
Access to view CSP for assigned projects.

Email Notification System:

Integrated email notification functionality to notify stakeholders about updates and changes within the platform.
Triggers email notifications to all stakeholders when the Audit History table is updated.
Email content includes pertinent information and a link to access the CSP.

Export as a Document:

Implemented feature to export project details as a document in a predefined format.
Supports export of the first 10 CRUD operations' data to provide insights into project details and updates.

3. Technology Stack
The Customer Success Platform is built using a combination of cutting-edge technologies to ensure robustness, scalability, and security. The tech stack comprises the following key components:

- Frontend Framework: ReactJs
- Backend Framework: Node.js with Express.js
- Database: MongoDB
- Authentication: Auth0 for Microsoft account integration
- Email Notification: Nodemailer for email functionality
- Document Export: HTML to PDF conversion using Puppeteer
- Version Control: Git for code management

This technology stack has been meticulously chosen to deliver a seamless user experience, ensure data integrity, and provide robust security measures. The combination of frontend and backend frameworks, along with the database and authentication systems, forms the foundation of the platform, while additional tools and services enhance its functionality and performance.

4. Conclusion

The Customer Success Platform developed by [Your Company Name] offers a robust solution for automating communication, enhancing transparency, and ensuring stakeholder engagement. With its comprehensive set of features, including user authentication, role-based access management, CRUD operations, email notification system, and document export functionality, the CSP serves as a valuable tool for project management and collaboration. Moving forward, ongoing maintenance and updates will further optimize the platform's performance and usability, ensuring continued success in meeting project objectives and stakeholder needs.