Customer Success platform

Title **Page No.**
1.Introduction……..2
2.Project Overview ……2
3.Objectives……2
4.Implementation Detail ……...3
5 Authentication flow ……4
4.Tech stack…….. ……4
4. Installation ……..4
5.Credentials……...4
6 UI Screenshots ……...5

Customer Success platform

1.Introduction

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

2.Project Overview

This project has following main components: user authentication and registration,Authentication and authorization ,Email notifitication system . and export project data as PDF ,

3.Objective

1. Develop a user-friendly interface for stakeholders to access project information.
2. Implement user authentication and role-based access control for security.
3. Enable CRUD operations for managing project charter sections.
4. Integrate an email notification system to alert stakeholders about updates.
5. Provide functionality to export project details as documents.

4.Implementation Details

1. **Registration and Login with Microsoft using Auth0 Description:**
   Implemented Auth0 in frontend using Autho Angular SDK , and implemented user registration system ,using auth0.

2. **CRUD for each section of Project Charter Description:**
   Developed CRUD functionality for all sections of the Customer Success Platform, enabling users to manage project charter details effectively.

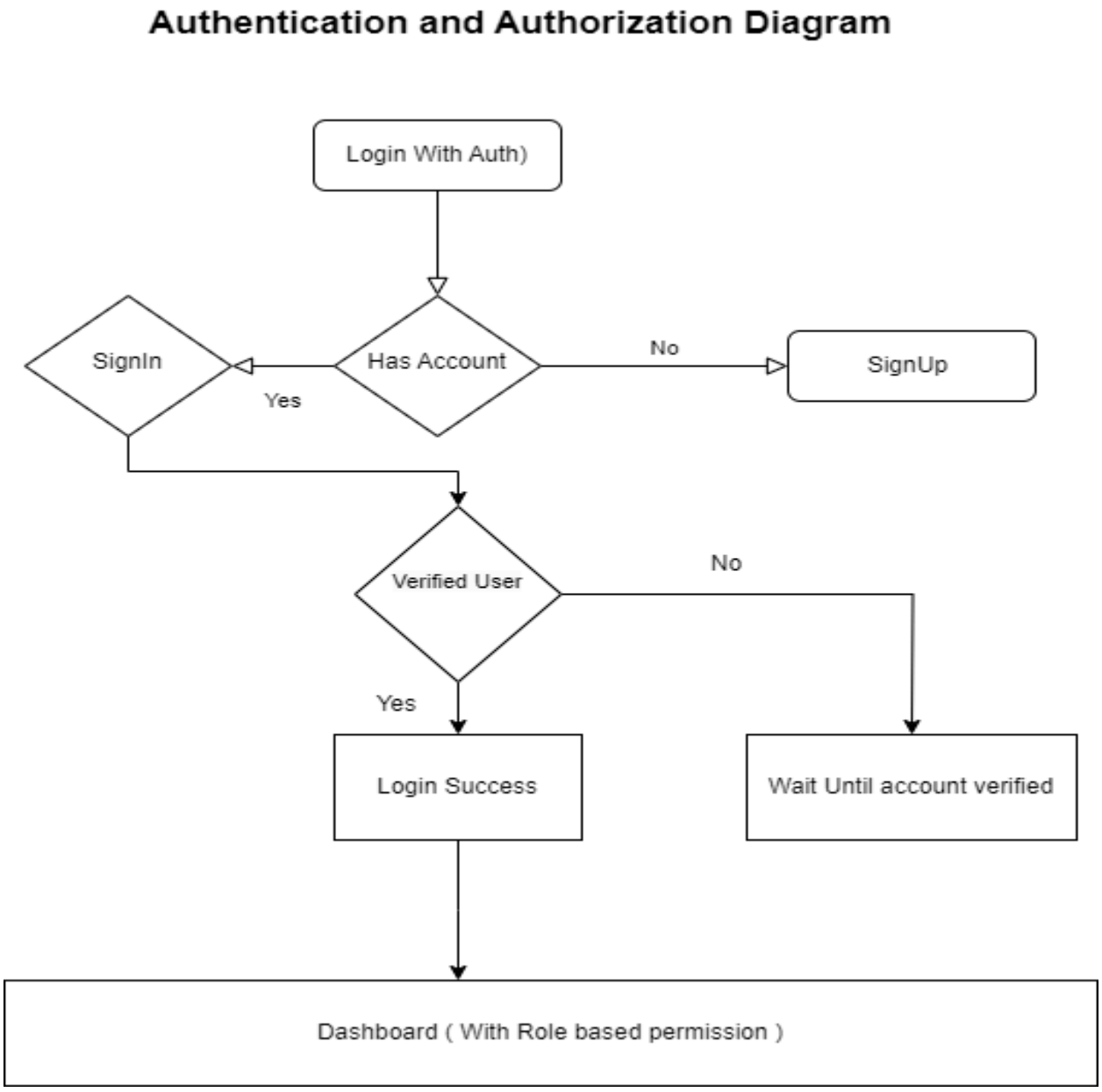
3. **Role-Based Management Description**:
   Defined distinct roles for Admin, Auditor, Project Manager, and other stakeholders to manage access permissions effectively.

4. **Email Notification System Description:**
   Integrated email notification functionality to inform stakeholders about updates and changes within the platform in real-time

Customer Success platform

5. **Export as a Document Description:**
   Implemented functionality to export project details in a predefined format, facilitating easy documentation and sharing of project information.

5. User Athentication and Authorization fllow



Customer Success platform

Tech Stack:
Frontend Developemetn

1. Angular ,
2. Angular Material ,
3. Tailwind Css
4. Auth0

Backend development

1. Abp.io
2. Mailkit
3. PostgreSql

Installation
To install and run backend on your local machine, follow these steps:

1.Clone the repository:
git clone https://github.com/pankaj7464/CustomerSuccessPlatform.git

2.Update the PostgreSQL connection string in appsettings.json file

"ConnectionStrings": {
"Default":"Host=localhost;Port=5432;Database={DatabaseName};Username={Usern
ane};Password={database password}"
}
3.Run Entity Framework Core migrations to create the database schema:

dotnet ef migrations add "comment"
dotnet ef database update

4.For data seeding
dotnet run --migrate-database

5.Run the project:
dotnet run --project CustomerSuccessPlatform.cspros

Customer Success platform

Angular Installation

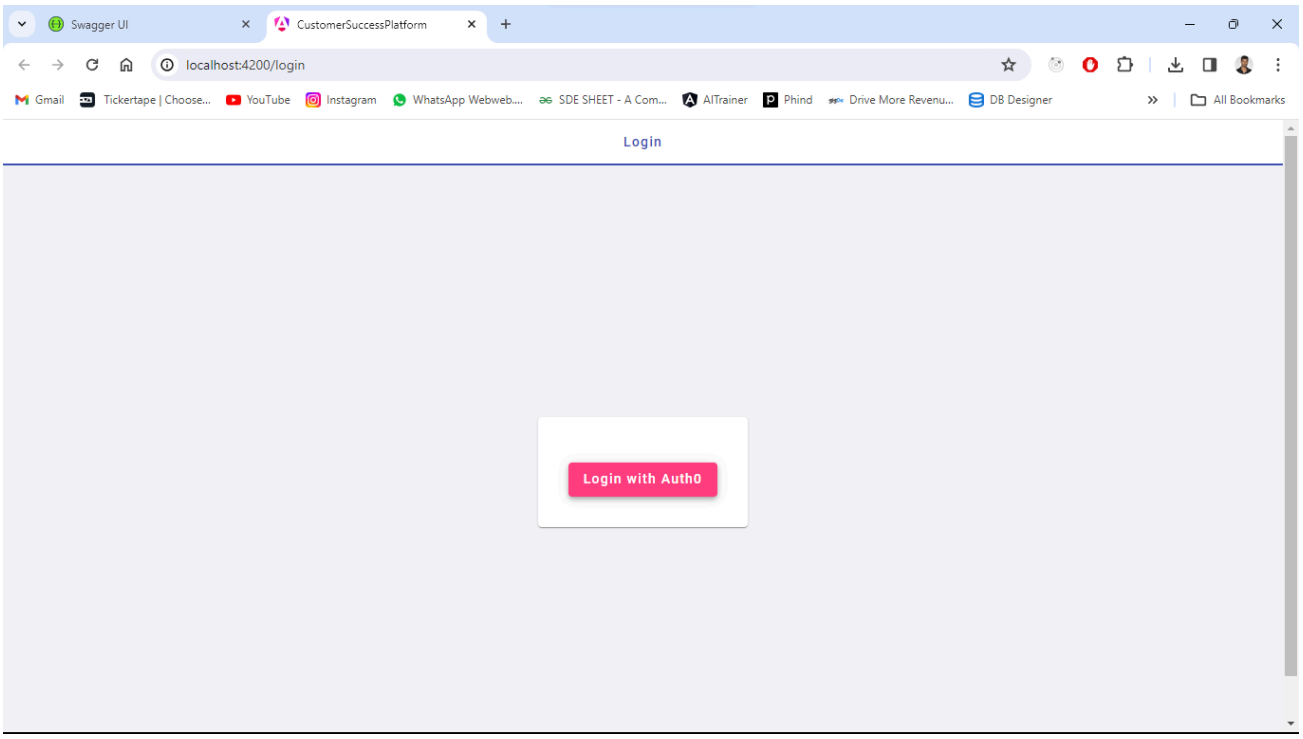
1. Navigate to CustomerSuccessPlatformClient Folder
2. npm install
3. Open angular application

Auth0 Credentail

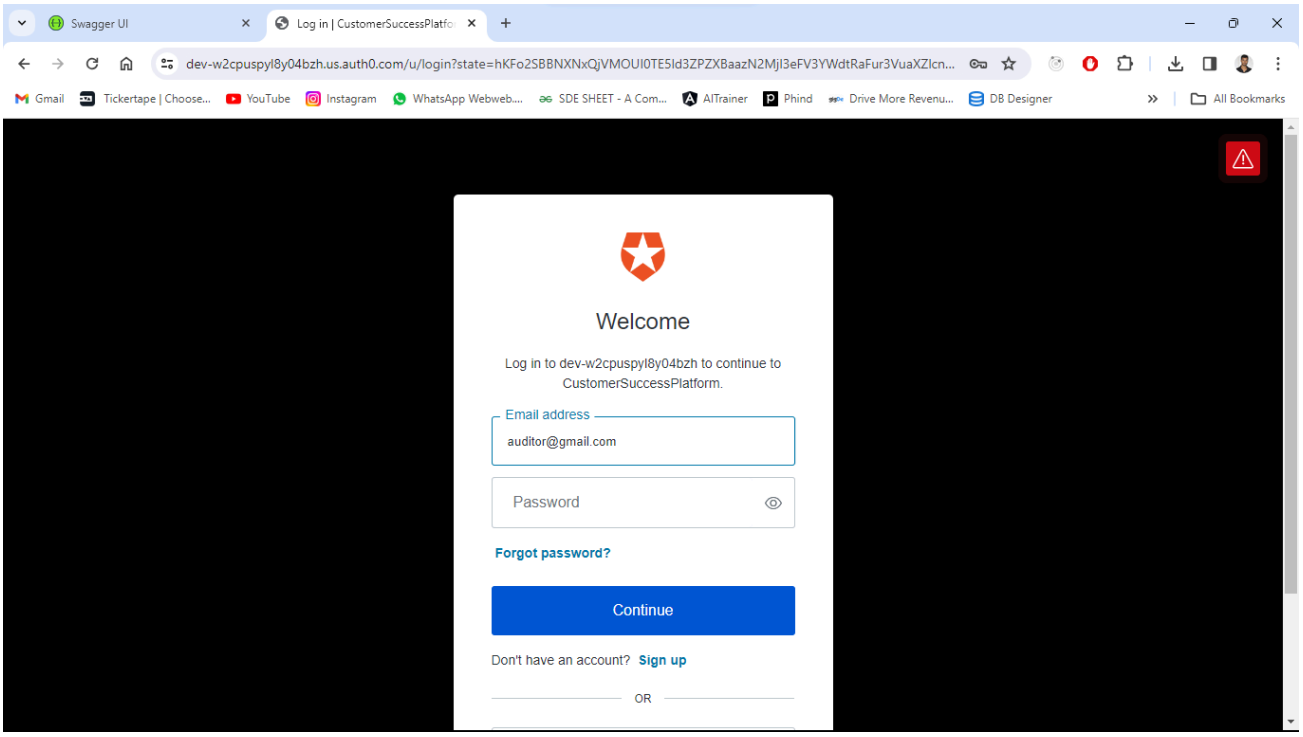
Email :admin1@gmail.com
Password :Admin@123

Project UI

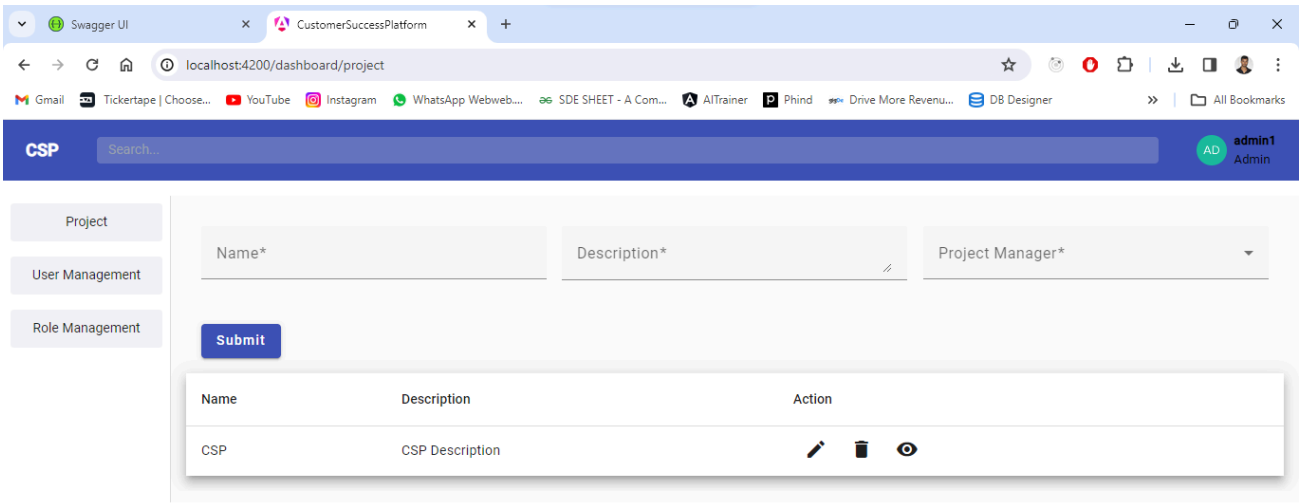
Login Page(Home Page)

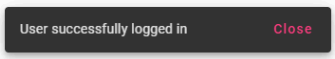


Customer Success platform



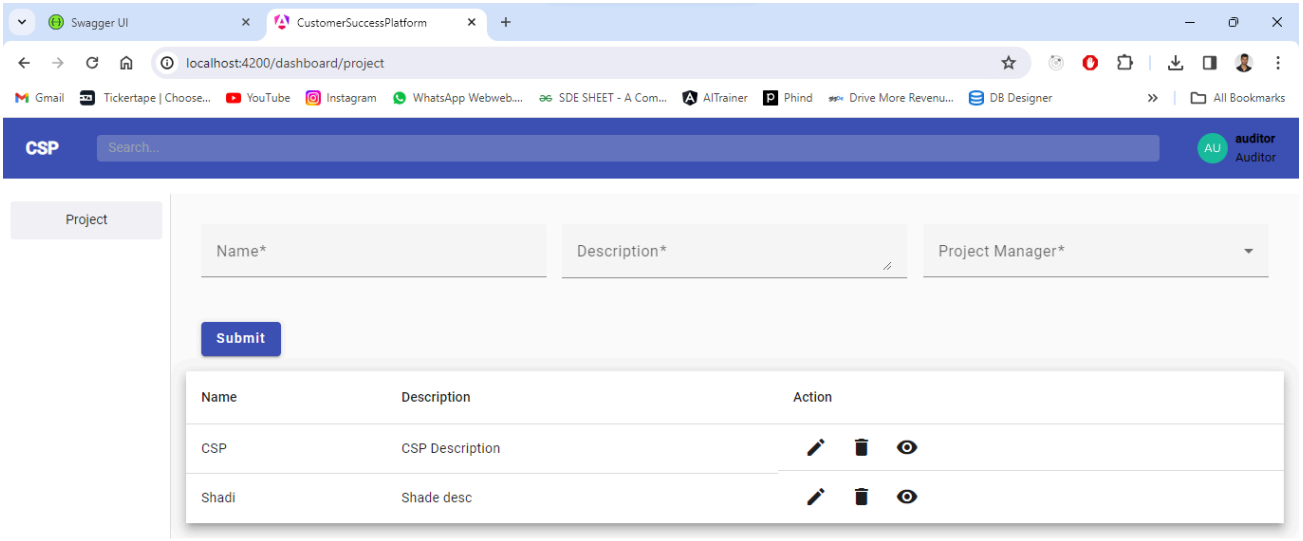
Admin Dashboard

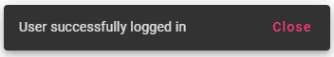




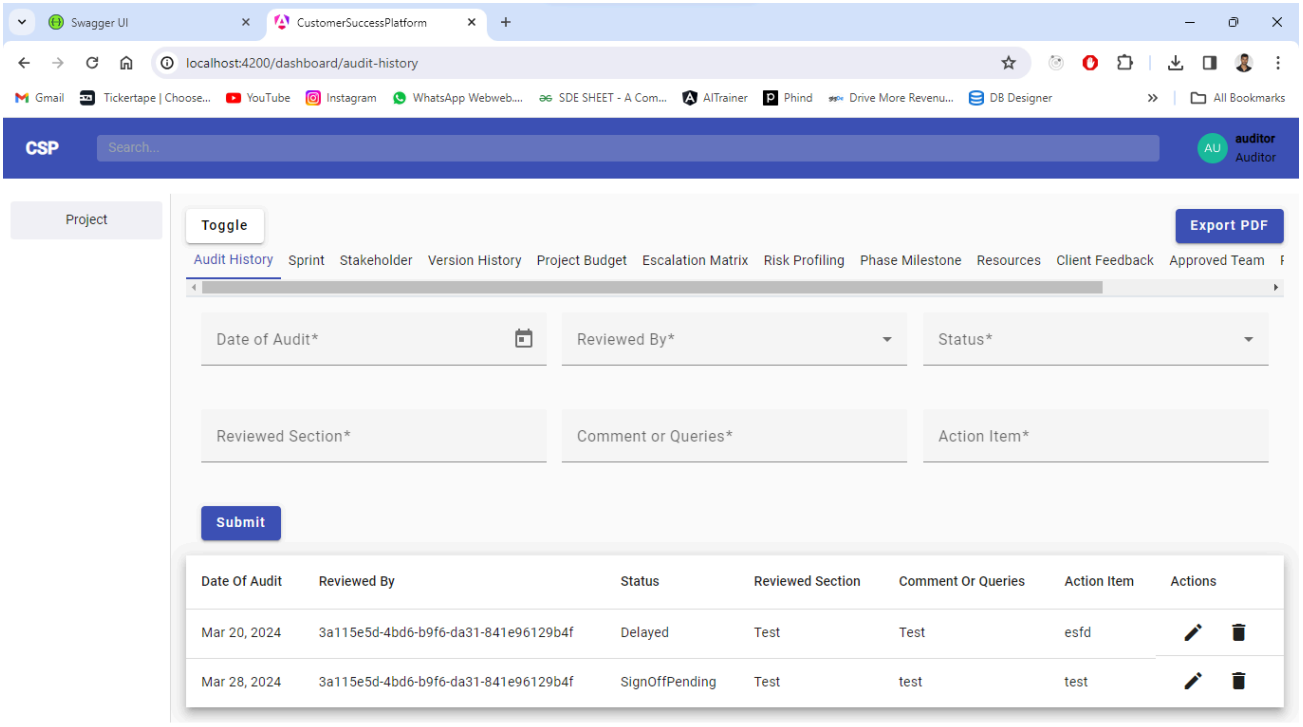
Customer Success platform

Dashboard for another role





UI for individual project



Customer Success platform