

Customer Success platform

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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 notification 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 Auth0 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

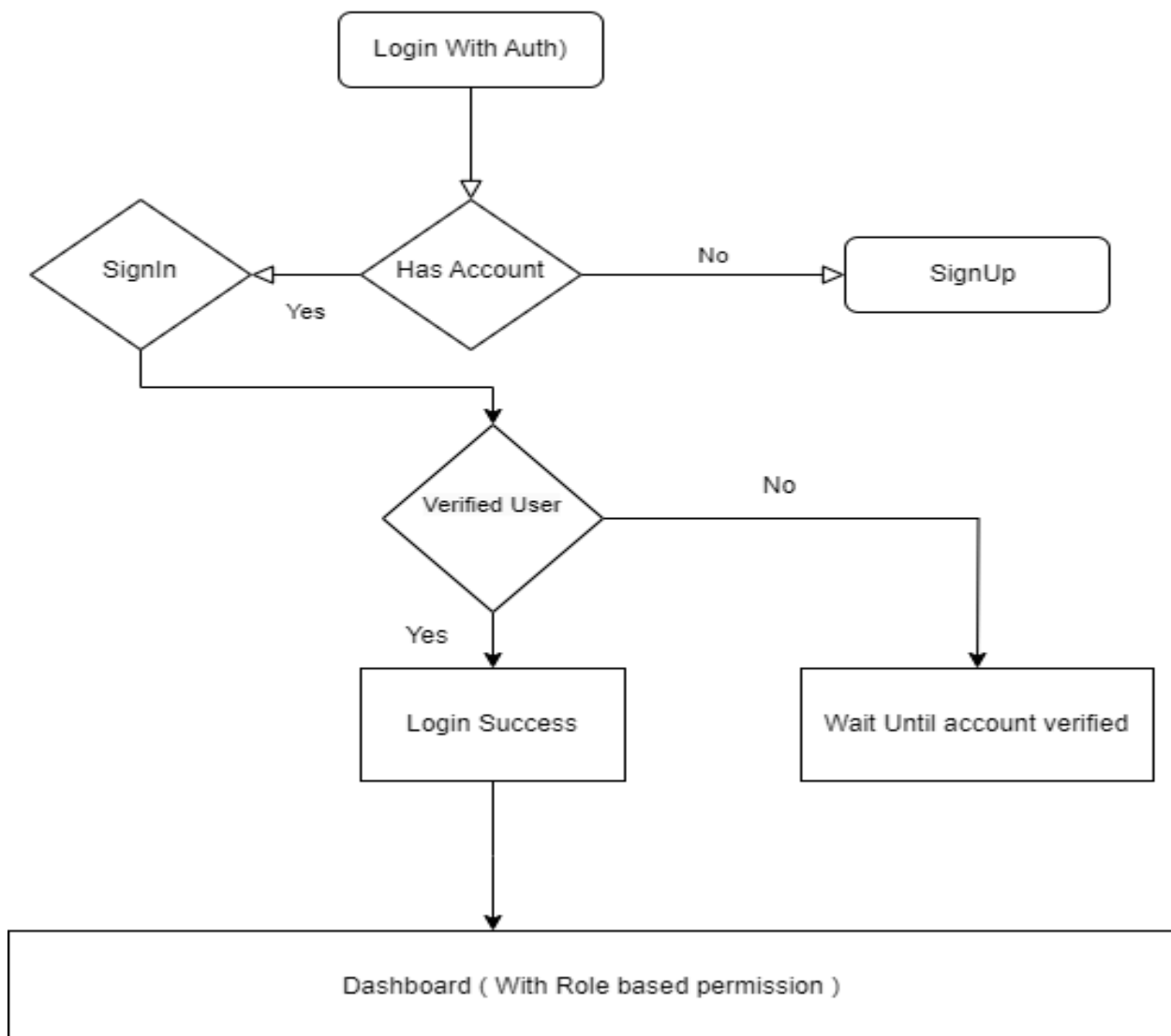
Customer Success platform

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 Authentication and Authorization flow

Authentication and Authorization Diagram



Customer Success platform

Tech Stack:

Frontend Developemetrn

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.csproj
```

Customer Success platform

Angular Installation

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

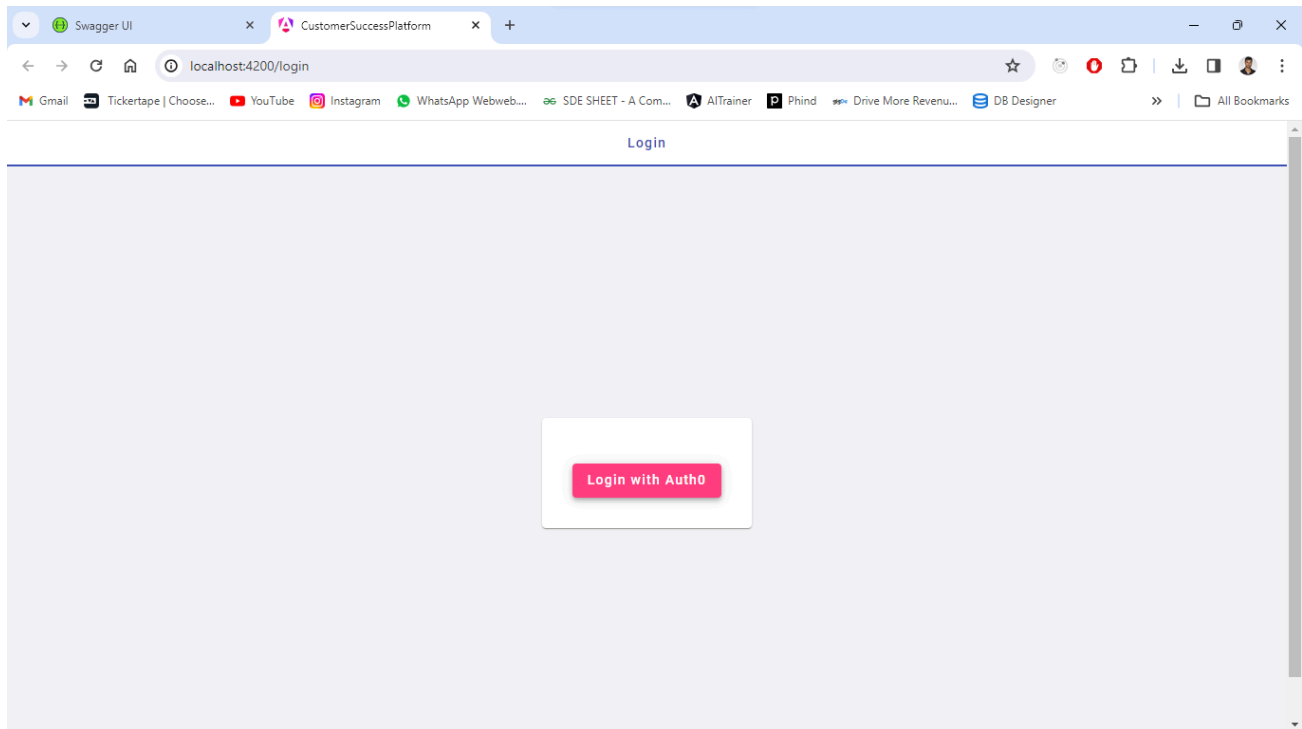
Auth0 Credentail

Email :admin1@gmail.com

Password :Admin@123

Project UI

Login Page(Home Page)



Customer Success platform

Swagger UI

Log in | CustomerSuccessPlatform

dev-w2cpuspyl8y04bzh.us.auth0.com/u/login?state=hKFo25B8NXNqVMOUI0TE5Id3PZXBaazN2Mjl3eFV3YWdtRaFur3VuaXZlcn...

Gmail Ticktape | Choose... YouTube Instagram WhatsApp Webweb... SDE SHEET - A Com... AITrainer Phind Drive More Revenu... DB Designer All Bookmarks

Welcome

Log in to dev-w2cpuspyl8y04bzh to continue to CustomerSuccessPlatform.

Email address
auditor@gmail.com

Password

Forgot password?

Continue

Don't have an account? [Sign up](#)

OR

Admin Dashboard

Swagger UI

CustomerSuccessPlatform

localhost:4200/dashboard/project

Gmail Ticktape | Choose... YouTube Instagram WhatsApp Webweb... SDE SHEET - A Com... AITrainer Phind Drive More Revenu... DB Designer All Bookmarks

CSP Search...

AD admin1 Admin

Project

User Management




Role Management

Name*

Description*

Project Manager*

Submit

Name	Description	Action
CSP	CSP Description	  

User successfully logged in [Close](#)

Customer Success platform

Dashboard for another role

Swagger UI

CustomerSuccessPlatform

+

localhost:4200/dashboard/project

Gmail Ticktape | Choose... YouTube Instagram WhatsApp Webweb... SDE SHEET - A Com... AITrainer Phind Drive More Revenu... DB Designer

CSP Search...

auditor Auditor







Project

Name*

Description*

Project Manager*

Submit

Name	Description	Action
CSP	CSP Description	  
Shadi	Shade desc	  

User successfully logged in Close

UI for individual project

Swagger UI

CustomerSuccessPlatform

+

localhost:4200/dashboard/audit-history

Gmail Ticktape | Choose... YouTube Instagram WhatsApp Webweb... SDE SHEET - A Com... AITrainer Phind Drive More Revenu... DB Designer

CSP Search...

auditor Auditor

Project

Toggle

Export PDF

Audit History

Sprint

Stakeholder

Version History

Project Budget

Escalation Matrix

Risk Profiling

Phase Milestone

Resources

Client Feedback

Approved Team

Date of Audit*

Reviewed By*





Status*

Reviewed Section*

Comment or Queries*

Action Item*

Submit

Date Of Audit	Reviewed By	Status	Reviewed Section	Comment Or Queries	Action Item	Actions
Mar 20, 2024	3a115e5d-4bd6-b9f6-da31-841e96129b4f	Delayed	Test	Test	esfd	 
Mar 28, 2024	3a115e5d-4bd6-b9f6-da31-841e96129b4f	SignOffPending	Test	test	test	 

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