# Project Report: Customer Success Platform Week2

## Project Overview

The Customer Success Platform Application aims to automate the process of notifying stakeholders about updates or changes within the system. It enhances communication and transparency, ensuring all stakeholders are promptly informed. The project involves understanding requirements, UX design, technical implementation, email notification system, import/export features, user interface development, testing, and documentation.

## Technical Specifications

1. **Login With Auth0**
   - Description: Integration of Auth0 authentication service for user login.
   - Purpose**:** Allows users to securely log in using their credentials stored in Auth0.
   - Implementation**:** Utilizes Auth0's authentication APIs to authenticate users with their credentials.
2. **Role Based Access Control**
   - Description: Implementation of role-based access control to manage user permissions.
   - Purpose: Ensures that users have appropriate access rights based on their roles.
   - Implementation: Assigns roles such as Admin, Auditor, Project Manager, etc.
3. **Email Notification**
   - Description: Integration of email notification functionality to notify stakeholders about updates.
   - Purpose: Ensures stakeholders are informed promptly about changes or updates within the system.
   - Implementation: Utilizes email service to send automated notifications to stakeholders when relevant updates occur.
4. **Export Document**
   - Description: Implementation of functionality to export project details as a document.
   - Purpose: Allows stakeholders to export project-related information for offline reference or documentation.

- Implementation: Converts project data into a predefined document format (e.g., PDF) for easy sharing and storage.

5. **CRUD operation**
   - Description: Development of all the crud mentioned in the document
   - Purpose: Enables users to create, view, edit, and delete project-related information.
   - Implementation: Provides user interfaces and backend logic to perform CRUD operations on project data stored in the database.

## Technical Stack

**Frontend Development:**

- Angular
- Material UI
- Auth0

**Backend Development:**

- ABPIO (dot net core web api framework)

**Database:**

- PostgreSQL

## Instruction Manual.

1. **Login**
   a. User must have registered in backend with password and role
   b. Admin/Auditor can add the Role and email and name while adding stakeholder from frontend
   c. Admin can add/ delete/Edit the stakeholders
   d. After registration user can login with auth0. If the email exists in database, then it will automatically login to the respective portal (e.g. Admin, Auditor, Manager, Client)

2. **Email Notification**
   a. Whenever the new project is created, the message is sent to the admin
   b. Whenever there is change in version history then the message will send to the respective stakeholder

c. Whenever there is new stakeholder is added then the message will send to the respective stakeholder

3. **Export PDF**

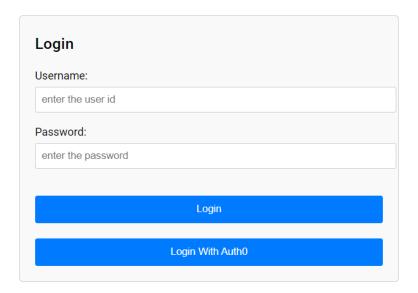   a. Navigate to the dashboard and click on export PDF

4. **Role Based Access Control**

   a. Users are assigned roles based on their responsibilities within the project.

   b. Admins have full access to create, update, read, and delete projects and their sections.

## ScreenShots

1. **Login Page**

   a. Simple Login page

   

   b. Auth0 Login page

# PROMACT

The fusion of Art & Technology
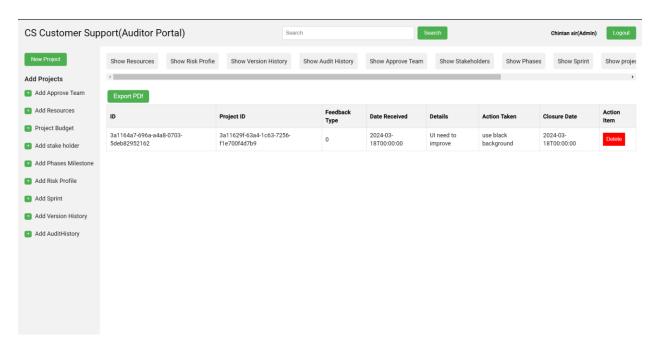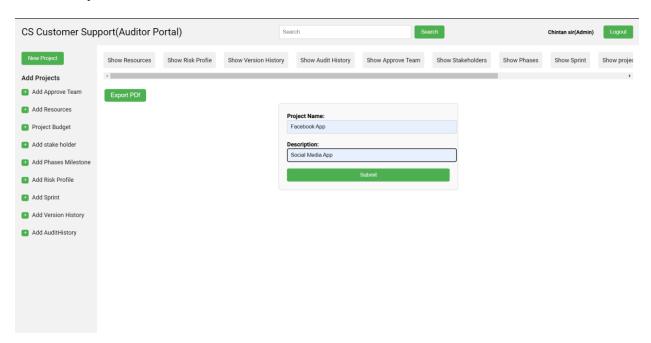
## Welcome

Log in to dev-ayjglpjmsuf7x6yw to continue to CustomerSucessPlateform.

**Email address**

Password 👁

**Forgot password?**

Continue

Don't have an account? **Sign up**

OR

G   Continue with Google

# 1 . Admin Dashboard

## Dashboard



## 2. Add Project

# Project Created Notification

External    Inbox

**R**    ranjayk693social@gmail.c...    12:54 pm
Dear Admin,Project name
CustomerSucess has been created

**R**    ranjayk693social...    10:33 pm

to me ∨

Dear Admin,Project name Facebook App has been
created please with desription Social Media App

↩ Reply    ≪ Reply all    ➔ Forward

No add-ons available for this email

## Add Resources



## Adding StakeHolder

← 📥 🗑 ✉ ⋮

## Project is Created `External`

⭐

Inbox

**R** ranjayk693social... 10:39 pm ↩ ⋮
to me ⌄

# Dear Ranjay kumar,

You are now a stakeholder of the assigned project. Please check out the dashboard of the Customer Success Platform.

**Thanks and Regards**

**Promact Infotech**

↩ Reply    ⪡ Reply all    → Forward

1 new message      Show

✉ 99+     💬     🎥

**Add Audit History**

Search | Search | Chintan sir(Admin) | Logout

New Project

Show Resources | Show Risk Profie | Show Version History | Show Audit History | Show Approve Team | Show Stakeholders | Show Phases | Show Sprint | Show prc

**Add Projects**

- ➕ Add Approve Team
- ➕ Add Resources
- ➕ Project Budget
- ➕ Add stake holder
- ➕ Add Phases Milestone
- ➕ Add Risk Profile
- ➕ Add Sprint
- ➕ Add Version History
- ➕ Add AuditHistory

Export PDf

**Project ID**

3a1164b1-567a-a147-7641-874dd41716cb

**Date of Audit**

18 - 03 - 2024   22 : 45

**Reviewed By**

Ranjay

**Status**

testing

**Reviewed Section**

Test

**Comment Queries**

Test Queries

**Action Item**

Action Item test

Submit

# Created Audit History Notification External Inbox

R  ranjayk693social...  10:42 pm

to me

Hello Ranjay kumar

Please note that audit has been completed and here is the audit summary:

[Audit History Table Row Updated]

Location : Click Here to redirent the page

Thanks and Regards

Promact Infotech Pvt Ltd

Reply    Reply all    Forward

## 2.Client Dashboard

### General Update for client

CS Customer Support(Client Portal)               Search          [Search]                                      [Logout]

Check Project Update      [Export PDf]

Check Meeting             | Project Date | General Update |
|---|---|
Give Feedback             | 2024-02-15T22:16:00 | General Update test |

Show Feedback

Setting

### Project Meeting for client

CS Customer Support(Client Portal)               Search          [Search]                                      [Logout]

Check Project Update      [Export PDf]

Check Meeting             Project ID: 3a11629f-63a4-1c63-7256-f1e700f4d7b9

Give Feedback             Meeting Date: 2024-03-18T22:24:00

                          MoM Link: https://meet/123.com

Show Feedback             Duration: 15 minute
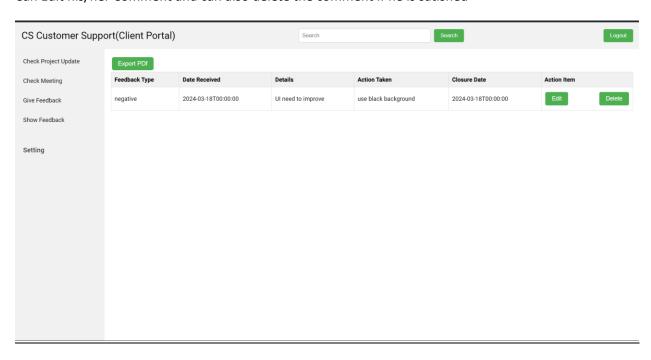
                          Comments: Meeting for Presentation

Setting
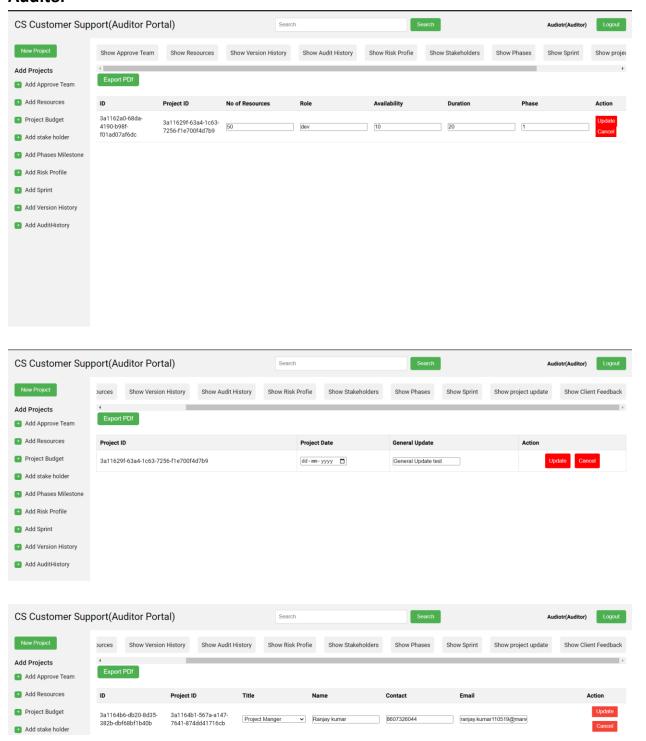
Client can give feedback based on the Presentation



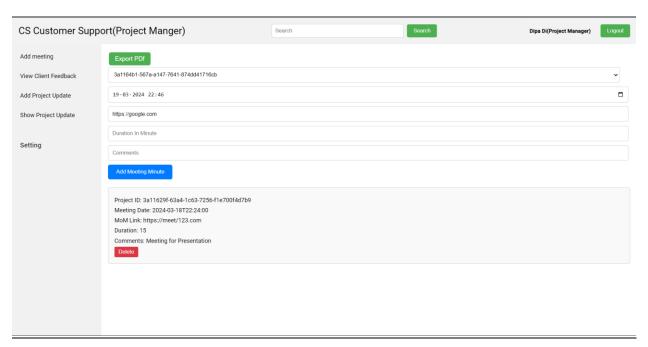Can Edit his/her Comment and can also delete the comment if he is satisfied

## 3. Auditor

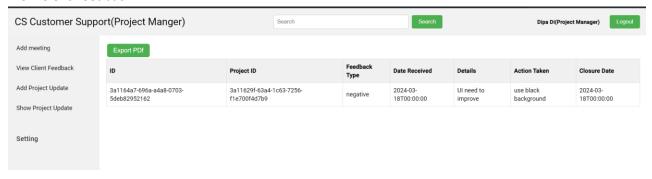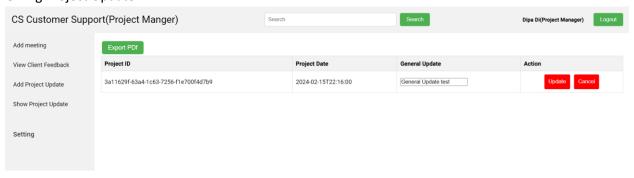# 4. Manager

## Meeting Minute



## View Cient Feedback



## Giving Project Update

# General Updates

CS Customer Support(Project Manger)

Search    Search

Dipa Di(Project Manager)   Logout

Add meeting

View Client Feedback

Add Project Update

Show Project Update

Setting

Export PDf

**Project ID:**

3a111a4a-6d38-002c-e882-18ee5c6c789e

**Date:**

12-03-2024 22:49

**General Updates:**

update

Submit