

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

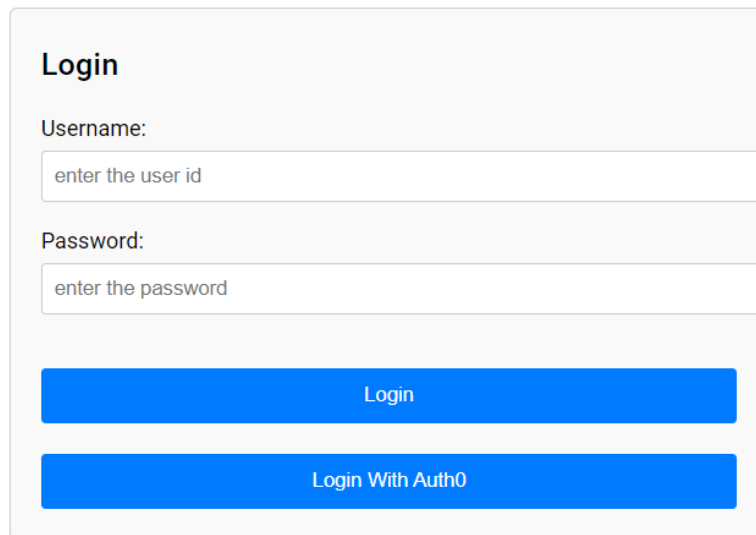
- a. Whenever the new project is created, the message is sent to the admin
- b. Whenever there is change in version history then the message will send to the respective stakeholder

- 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



The screenshot shows a login form with a light gray background. At the top, the word "Login" is displayed in bold. Below it, there are two input fields: one for "Username:" with the placeholder text "enter the user id", and one for "Password:" with the placeholder text "enter the password". At the bottom of the form, there are two blue buttons: "Login" and "Login With Auth0".

- b. Auth0 Login page



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



Continue with Google

1 . Admin Dashboard

Dashboard

CS Customer Support(Auditor Portal)

Search

Search

Chintan sir(Admin)

Logout

New Project

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

Show Resources

Show Risk Profile

Show Version History

Show Audit History

Show Approve Team

Show Stakeholders

Show Phases

Show Sprint

Show project

Export PDF

ID	Project ID	Feedback Type	Date Received	Details	Action Taken	Closure Date	Action Item
3a1164a7-696a-a4a8-0703-5deb82952162	3a11629f-63a4-1c63-7256-f1e700f4d7b9	0	2024-03-18T00:00:00	UI need to improve	use black background	2024-03-18T00:00:00	Delete

2. Add Project

CS Customer Support(Auditor Portal)

Search

Search

Chintan sir(Admin)

Logout

New Project

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

Show Resources

Show Risk Profile

Show Version History

Show Audit History

Show Approve Team

Show Stakeholders

Show Phases

Show Sprint

Show project

Export PDF

Project Name:

Facebook App

Description:

Social Media App




Submit



Project Created Notification

External Inbox

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

 **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

CS Customer Support(Auditor Portal)

Search

Search

Chintan sir(Admin)

Logout

New Project

Show Resources

Show Risk Profile

Show Version History

Show Audit History

Show Approve Team

Show Stakeholders

Show Phases

Show Sprint

Show project

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

Select the Project IDs

Resource Name

Enter the resource name

Role

Enter the role

Start Date

dd - mm - yyyy

End Date

dd - mm - yyyy

Comment

Enter the comment

Submit

Adding StakeHolder

CS Customer Support(Auditor Portal)

Search

Search

Chintan sir(Admin)

Logout

New Project

Show Resources

Show Risk Profile

Show Version History

Show Audit History

Show Approve Team

Show Stakeholders

Show Phases

Show Sprint

Show project

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

Title

Project Manger

Name

Ranjay kumar

contact number

8607326044

email

ranjay.kumar110519@marwadiuniversity.ac.in

Submit

10:39  1        4G  36



Project is Created External



Inbox



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

CS Customer Support(Auditor Portal)

Search

Search

Chintan sir(Admin)

Logout

New Project

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

Show Resources

Show Risk Profile

Show Version History

Show Audit History

Show Approve Team

Show Stakeholders

Show Phases

Show Sprint

Show pro

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



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

Check Meeting

Give Feedback

Show Feedback

Setting

Export PDF

Project Date	General Update
2024-02-15T22:16:00	General Update test

Project Meeting for client

CS Customer Support(Client Portal)

Search

Search

Logout

Check Project Update

Check Meeting

Give Feedback

Show Feedback

Setting

Export PDF

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

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

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

Duration: 15 minute

Comments: Meeting for Presentation

Client can give feedback based on the Presentation

CS Customer Support(Client Portal)

Search

Search

Logout

Check Project Update

Check Meeting

Give Feedback

Show Feedback

Setting

Export PDF

Project ID

3a11629f-63a4-1c63-7256-f1e700f4d7b9

Type:

Positive

Detailed Feedback:

Improve in UI

Action Taken:

use black background

Closure Date:

18-03-2024

Submit

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

CS Customer Support(Client Portal)

Search

Search

Logout

Check Project Update

Check Meeting

Give Feedback

Show Feedback

Setting

Export PDF

Feedback Type	Date Received	Details	Action Taken	Closure Date	Action Item	
negative	2024-03-18T00:00:00	UI need to improve	use black background	2024-03-18T00:00:00	Edit	Delete

3. Auditor

CS Customer Support(Auditor Portal)

Search

Search

Audiotr(Auditor)

Logout

New Project

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

Show Approve Team

Show Resources

Show Version History

Show Audit History

Show Risk Profile

Show Stakeholders

Show Phases

Show Sprint

Show project

Export PDF

ID	Project ID	No of Resources	Role	Availability	Duration	Phase	Action
3a1162a0-68da-4190-b98f-f01ad07af6dc	3a11629f-63a4-1c63-7256-f1e700f4d7b9	<input type="text" value="50"/>	<input type="text" value="dev"/>	<input type="text" value="10"/>	<input type="text" value="20"/>	<input type="text" value="1"/>	<div>Update</div> <div>Cancel</div>

CS Customer Support(Auditor Portal)

Search

Search

Audiotr(Auditor)

Logout

New Project

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

ources

Show Version History

Show Audit History

Show Risk Profile

Show Stakeholders

Show Phases

Show Sprint

Show project update

Show Client Feedback

Export PDF

Project ID	Project Date	General Update	Action
3a11629f-63a4-1c63-7256-f1e700f4d7b9	<input type="text" value="dd-mm-yyyy"/>	<input type="text" value="General Update test"/>	<div>Update</div> <div>Cancel</div>

CS Customer Support(Auditor Portal)

Search

Search

Audiotr(Auditor)

Logout

New Project

Add Projects

+ Add Approve Team

+ Add Resources

+ Project Budget

+ Add stake holder

ources

Show Version History

Show Audit History

Show Risk Profile

Show Stakeholders

Show Phases

Show Sprint

Show project update

Show Client Feedback

Export PDF

ID	Project ID	Title	Name	Contact	Email	Action
3a1164b6-db20-8d35-382b-db68bf1b40b	3a1164b1-567a-a147-7641-874dd41716cb	<input type="text" value="Project Manger"/>	<input type="text" value="Ranjay kumar"/>	<input type="text" value="8607326044"/>	<input type="text" value="ranjay.kumar110519@man"/>	<div>Update</div> <div>Cancel</div>

4. Manager

Meeting Minute

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

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

19-03-2024 22:46

https://google.com

Duration In Minute

Comments

Add Meeting Minute

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

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

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

Duration: 15

Comments: Meeting for Presentation

Delete

View Cient Feedback

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

ID	Project ID	Feedback Type	Date Received	Details	Action Taken	Closure Date
3a1164a7-696a-a4a8-0703-5deb82952162	3a11629f-63a4-1c63-7256-f1e700f4d7b9	negative	2024-03-18T00:00:00	UI need to improve	use black background	2024-03-18T00:00:00

Giving Project Update

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	Project Date	General Update	Action
3a11629f-63a4-1c63-7256-f1e700f4d7b9	2024-02-15T22:16:00	<div>General Update test</div>	<div>Update</div> <div>Cancel</div>

General Updates

CS Customer Support(Project Manger)

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