

pivotal retention

2022

The Basics

Pivotal Retention is a workflow automation tool that helps tracking companies keep their drivers, from the role developer and designer, and aligned with architecture, UI, UX, product spec, and implementation plans and process for the platform.

TLDR:

100+ Features | 100+ Unique Screens | 60+ Custom REST APIs

Tech Stack

Production Environment

Heroku Dyno (8 Threads)

PM2 Cluster (NodeJS)

Application Server
Express JS

Database
Mongo DB
Mongoose

Email
Twilio SendGrid

Scheduled Tasks
Task-Crew

Security Tools
Bcrypt JS
JSON Web Tokens

Development Environment

Heroku CLI deploys via Git repository

Fully Deployable to Additional Environments

Application Stack

JavaScript

REST APIs | SSR (Express JS) | Scheduled Tasks (Task-Crew)

NodeJS | Express JS

Mongoose | MongoDB

PM2 Cluster (Multi-thread & Load Balance)

Heroku (Compile & Compute)

Support Systems

Git (Virtual Repository)

Godaddy (DNS)

Twilio SendGrid (Email)

Google Analytics (Site Analytics)

Amplitude (App Analytics)

Cockroach (Cookie Compliance)

Adobe TypeKit (Fonts)

Papa Parse (CSV/JSON)

Conversion

COGS (NPM)

Cookier-Parser (NPM)

Compression (NPM)

No Other External Integrations

Planned Stack Modifications

• Separate Heroku Dynos or PM2 threads for Scheduled Tasks, REST APIs, and front-end service

Key Product Requirements

- A tool to design to match customer personas
- A simple, low-clutter interface for easy adoption
- An adaptable product capable of meeting new scope quickly
- Build path and toolchain for complete based on business strategy
- Smooth rollout to live beta client and support offer
- Marketing and sales tools to live with business needs

The Landing Page



Customization

Is Pivotal Right For You?

Every fleet has different needs. The Pivotal system offers robust customization that lets you take the best of your current practices and deliver them consistently across your fleet.

Once you get started, you can use Pivotal's data insights to continuously improve the system and adapt to changing conditions in real-time.

From inside your own fleet, you have unique needs. It may be a dedicated service that you are providing, a specific training track, or a specialized process. Any unique message can easily be added and delivered consistently.

The Pivotal Difference

Voices of the Industry

Feature List

Workflow & Task Creation and Editing System

- Workflow folder system with user data driven nested tasks
- Workflow options system for driving dynamic task interfaces
- Template, duplication, and "cloning" system
 - Duplicate workflow for variant creation
 - Mapping system to quickly reassign tasks to meet needs
- Task creation and quick edit system
 - Dynamic, data-driven fields and format
 - Validation of created task
- Execution settings system for failed/dropped tasks

Workflow Task Instance System

- All changes to workflow & task pushed live immediately to all future and current workflow
- Can schedule timing tasks, late notices, late feedback request notices, task overdue follow-up & escalation system
- Dynamic email (SendGrid) notices for all key events
- Validation of task and workflow instance creation and assignment
- Multi-threaded Crew checkout system

Workflow Task Completion

- Dynamic rendering of task guidelines and completion items
- Active task completion system
- Notes and personal reminder system
- Feedback request instance system (driven by task completion)
- User-submitted feedback forms

Reporting Tools

- Org-wide activity and status visualization system (Open table, late table, completed table & feedback, etc.)
- Data aggregation and summary visualization (tasks complete, failed, feedback requests complete, failed, etc.)
- Rapid data processing and display system (log, time worked, percent active, task/feedback match rate, most common task notes, etc.)

Organizational Accounts

- Org workflow and data settings creation and validation
- Active/retired status driving front screen and restriction of all organizational activity on the platform
- Secure data on shared server
- Ability to create standalone environment for large enterprises
- Permissions templates for variable account types

User Accounts

- Account Creation
- Password hashing & storage (bcrypt)
- JWT Authentication
- Secure password reset
- UI for password process (key for adoption)
- Individual and template permissions
- Empty accounts for email/unsubstantiated only users
- Fast, secure access to all data, both failed and S&B
- Redirect to prior page after forced login

Profiles

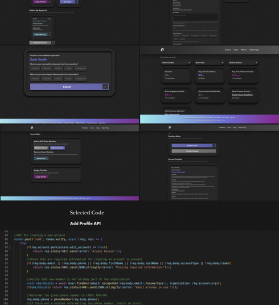
- Relational profile system and related error handling
- Dynamic profile editing system
- Profile search and uniquely identifiable profile display cards (key for enterprise)
- Bulk profile creation from CSV
 - Error handling from failed upload
 - Relational logic errors upload
- Data validation for all information
- Organization settings drives validation and UI
- Dynamic user settings drives information + change history
- Profile display, including account history (past current and future scheduled activity)
- Team overview display, showing all team members' current scheduled activity

Marketing

- SEO formatting and machine-readable map template (and finished pages)
- Complaint email subscription system optimized for conversion
- Social media sharing system
- Landing page
- Data registration system (Calendly)
- Email subscription self-guided tour
 - Email subscription form
 - Dynamic, user-submitted email
 - Internal style data product walkthrough
- Google and Amplitude Analytics

GUI & Misc

- UI kit for consistent design and rapid front-end development
 - Card design, custom dropdown, custom search, custom overlay cards, templated error response and error handling, color use, custom input boxes, etc.
- 404 page and custom error handling
- PWA: Multi-threaded load balancing
- Policy pages
- Beta beta environment



Selected Code

Add Profile API

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Thanks!

Want more information?

Head to <https://www.pivotalretention.com>

Or...

Let's chat, you can email us at chat@pivotalretention.com