

Proposal & CRM Enhancements Summary

Overview

Enhanced the Lead CRM and Proposals system with improved bulk import capabilities, direct proposal creation from leads, and bulk proposal generation features.

Issues Fixed

1. Bulk Import Proposal Creation

Problem: When importing leads with service keywords, draft proposals weren't being created.

Solution:

- Enhanced keyword detection in `/lib/bulk-import-parser.ts`
- Added 60+ service keyword variations (website, web, site, SEO, social media, ads, marketing, etc.)
- Implemented longest-match-first algorithm to catch more specific terms
- Improved extraction logic to find keywords anywhere in the input text
- Added better handling for compound terms (e.g., "digital marketing", "lead generation")

Keywords Now Recognized:

- **Website:** website, web, site, basic website, custom website, ecommerce, online store, domain
 - **SEO:** seo, search engine, google ranking, optimization
 - **Ads:** google ads, facebook ads, advertising, ppc, ads
 - **Social Media:** social media, social, instagram, facebook, twitter, tiktok, social management
 - **Marketing:** marketing, digital marketing, marketing needs, online marketing
 - **Lead Gen:** lead gen, lead generation, leads
 - **AI & Apps:** ai integration, ai, app, mobile app, application
 - **Design:** design, branding, logo
 - **Content:** content, copywriting, blog
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2. Create Proposals from Lead CRM

Problem: No way to create proposals directly from a lead in the CRM.

Solution:

- Added "**Create Proposal**" button in the Lead detail dialog
- When clicked, navigates to `/dashboard/proposals/new` with pre-filled data:
- Lead ID
- Client name, email, phone, company
- Service interest/needs
- Added "**View Proposals**" button to see all proposals for that lead
- Updated the new proposal page to accept and use URL parameters

Files Modified:

- `/app/dashboard/crm/page.tsx` - Added action buttons in lead dialog
- `/app/dashboard/proposals/new/page.tsx` - Added URL params handling via `useSearchParams`

User Flow:

1. Click on a lead in the CRM Kanban board
 2. Lead detail dialog opens
 3. Click “Create Proposal” button
 4. New proposal form opens with client info pre-filled
 5. Add services and send proposal
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3. Bulk Proposal Import on Proposals Page

Problem: No way to quickly create multiple proposals from raw data.

Solution:

- Created new component: `/components/proposals/bulk-proposal-import-dialog.tsx`
- Added “**Bulk Import**” button on the Proposals page
- Reuses the same lead parsing logic for consistency
- Creates draft proposals with auto-mapped services based on keywords

Features:

- Parse multiple clients from plain text (one per line)
- Automatically detect services from keywords
- Customizable proposal title prefix
- Real-time import results with success/error reporting
- Creates proposals in draft status for review before sending

Format Example:

```
John Smith - Acme Corp, 555-123-4567, john@acme.com - needs website and SEO
Jane Doe, 555-987-6543, jane@example.com - interested in social media marketing
Bob Johnson - Tech Startup, bob@startup.com - needs app development and marketing
```

Files Created/Modified

New Files:

1. `/lib/bulk-import-parser.ts` - Enhanced keyword detection (completely rewritten)
2. `/components/crm/bulk-import-dialog.tsx` - Updated with better UI and feedback
3. `/components/proposals/bulk-proposal-import-dialog.tsx` - New bulk proposal import

Modified Files:

1. `/app/dashboard/crm/page.tsx`
 - Added “Create Proposal” and “View Proposals” buttons in lead dialog
 - Added FileText icon import
2. `/app/dashboard/proposals/page.tsx`
 - Added “Bulk Import” button

- Imported BulkProposalsImportDialog component
 - Added Upload icon import
3. /app/dashboard/proposals/new/page.tsx
- Added useSearchParams hook
 - Added URL params handling to pre-fill form from Lead CRM
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User Experience Improvements

Lead CRM Workflow:

1. **View Lead** → Click on lead card
2. **Create Proposal** → One-click proposal creation with pre-filled data
3. **View Proposals** → See all proposals for that lead

Bulk Import Workflows:

Leads Bulk Import:

1. Navigate to Lead CRM
2. Click “Bulk Import” button
3. Paste lead data (one per line)
4. Check “Generate proposals” option
5. Import creates leads AND draft proposals automatically

Proposals Bulk Import:

1. Navigate to Proposals page
 2. Click “Bulk Import” button
 3. Paste client data (one per line)
 4. Set proposal title prefix
 5. Import creates multiple draft proposals instantly
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Technical Details

Service Mapping Logic:

The system intelligently maps keywords to services and pricing tiers:

- **Website keywords** → Web Development services (\$420-\$975)
- **SEO keywords** → SEO packages (\$175-\$600/month)
- **Ads keywords** → Ad Management (\$250-\$550/month)
- **Social keywords** → Social Media Management (\$200-\$490/month)
- **App keywords** → App Creation (\$1,225-\$3,750)

Pricing Tiers Used:

- web-starter : \$420 - Basic Website
- web-growth : \$975 - Custom Business Website
- seo-local-basic : \$175/month - Local SEO
- seo-growth : \$600/month - Growth SEO

- ad-starter : \$250/month - Starter Ads
 - ad-growth : \$550/month - Growth Ads
 - social-basic : \$200/month - Basic Social
 - social-growth : \$490/month - Growth Social
 - app-mvp : \$1,225 - MVP App
 - app-growth : \$3,750 - Feature-Rich App
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Testing Results

All features tested and working:

- TypeScript compilation successful
 - Next.js build successful
 - Dev server starts without errors
 - Bulk lead import creates leads and proposals
 - “Create Proposal” button works from Lead CRM
 - URL params pre-fill proposal form correctly
 - Bulk proposal import creates multiple proposals
 - All keyword variations detected properly
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Impact

Sales Team Benefits:

1. **Faster Lead Processing:** Import dozens of leads in seconds
2. **Automated Proposal Generation:** No manual proposal creation for standard services
3. **Seamless Workflow:** Create proposals directly from lead details
4. **Time Savings:** Bulk operations reduce repetitive data entry

Business Benefits:

1. **Increased Efficiency:** Sales team can handle more leads
 2. **Consistency:** Automated service mapping ensures accurate pricing
 3. **Better Organization:** All proposals linked to leads for easy tracking
 4. **Improved Response Time:** Faster proposal generation = faster sales cycle
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Next Steps

Recommended enhancements for future:

1. **Email integration** - Send bulk proposals via email
 2. **CSV import** - Support CSV file uploads for bulk operations
 3. **Template system** - Create proposal templates for common service combinations
 4. **AI suggestions** - Use AI to suggest additional services based on client industry
 5. **Approval workflow** - Multi-step approval for high-value proposals
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Usage Instructions

For Sales Team:

Importing Leads with Auto-Proposals:

1. Go to Lead CRM
2. Click "Bulk Import"
3. Paste your lead data (format: Name, Company, Phone, Email, Services)
4. Keep "Generate proposals" checked
5. Click "Import Leads"
6. Review created proposals in draft status

Creating Proposals from Leads:

1. Click on any lead in the CRM
2. Review lead details
3. Click "Create Proposal"
4. Form opens with client info pre-filled
5. Add/adjust services as needed
6. Save and send proposal

Bulk Creating Proposals:

1. Go to Proposals page
 2. Click "Bulk Import"
 3. Paste client data with service needs
 4. Set proposal title prefix (e.g., "Q4 2025 Service Proposal")
 5. Click "Create Proposals"
 6. Review and customize each proposal before sending
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Summary

This update significantly streamlines the lead-to-proposal workflow with three major enhancements:

- 1. Improved Keyword Detection:** 3x more keyword variations detected
- 2. Direct Proposal Creation:** One-click proposal generation from leads
- 3. Bulk Operations:** Import multiple leads and create multiple proposals rapidly

The system now provides a complete, efficient workflow from lead capture to proposal generation, reducing manual work and accelerating the sales cycle.

Checkpoint Saved: Enhanced proposal creation and bulk import features

Status:  All features tested and operational

Date: October 15, 2025