Employee Dashboard & Navigation Update

Overview

Created a clean, intuitive employee dashboard similar to Zoho Invoice’s interface, with organized sidebar navigation that clearly separates work management from service fulfillment areas.

Changes Implemented

1. New Employee Dashboard (`/dashboard`)

File: `components/dashboard/employee-dashboard.tsx`

The employee dashboard provides a comprehensive overview with:

Quick Stats Cards (Top Row)

- **Total Leads**: Shows total count with new leads in last 7 days
- **Proposals**: Displays total proposals with draft count highlight
- **Pipeline Value**: Shows total value of active proposals with conversion rate
- **Active Sequences**: Count of running automated sequences

Lead Pipeline Overview (Main Section)

- Visual progress bar showing qualified/total leads ratio
- Breakdown cards for:
- Total leads
- New leads (last 7 days)
- Contacted leads
- Qualified leads
- Quick action buttons to view all leads and proposals

Proposals at a Glance (Side Panel)

- Draft proposals count with link
- Sent proposals count with link
- Accepted proposals count with link
- Conversion rate percentage with visual indicator

Recent Activities Feed

- Last 10 activities from Lead CRM
- Shows activity type with emoji icons
- Lead name and activity description
- Time since activity (relative time format)
- Empty state with call-to-action

2. Employee Stats API

File: `app/api/dashboard/employee-stats/route.ts`

Provides real-time data for the dashboard:
- **Lead metrics**: Total, new, contacted, qualified

- **Proposal metrics**: Total, draft, sent, accepted, value, conversion rate
- **Sequence metrics**: Active sequences count
- **Recent activities**: Last 10 activities with lead information
- **Role-based filtering**: Employees see only their assigned leads (admins see all)

3. Reorganized Sidebar Navigation

File: `components/dashboard/dashboard-layout.tsx`

The sidebar now has clear sections:

For Employees/Admins:

Work Management Section (Primary work area)
- Dashboard
- Lead CRM
- Proposals
- Sequences
- Website Audits

Service Fulfillment Section (Client deliverables)
- Projects
- Services
- AI Builder
- Analytics

Account Section (Personal settings)
- Affiliate
- Billing
- Settings

For Regular Clients:

- Simplified flat navigation (no sections)
- Only shows enabled features based on tier

4. Dashboard Page Logic

File: `app/dashboard/page.tsx`

Updated to show:
- **Employee Dashboard**: For admin and employee roles
- **Tier-based Dashboard**: For regular clients (free, starter, growth, etc.)

Key Features

Clean & Intuitive Design

- **Card-based layout**: Similar to Zoho Invoice
- **Color-coded metrics**: Blue (leads), purple (proposals), green (value), orange (sequences)
- **Visual indicators**: Progress bars, badges, status colors
- **Responsive design**: Works on all screen sizes

Real-time Data

- Live stats fetched from database

- Automatic refresh on page load
- Loading states and error handling

Quick Actions

- Direct links to filtered views
- "View All" buttons for each section
- Quick access to create new items

Role-based Access

- Admins see all data across the organization
- Employees see only their assigned leads
- Clients see their own service dashboard

Navigation Improvements

Clear Hierarchy

- **Section headers**: Clearly labeled groups (uppercase, gray, small text)
- **Visual separation**: Spacing between sections
- **Consistent styling**: All items follow same design pattern

Better Organization

- **Work items grouped together**: Leads, proposals, sequences in one section
- **Service delivery items grouped**: Projects, services, builder in another section
- **Account items separated**: Billing, settings, affiliate in dedicated section

Improved UX

- **Badge indicators**: "Upgrade" badges for locked features
- **Active state highlighting**: Blue background for current page
- **Disabled state**: Grayed out for unavailable features
- **Mobile responsive**: Collapsible sidebar with backdrop

Technical Implementation

Database Queries

- Efficient Promise.all() for parallel queries
- Proper status filtering (lowercase: "draft", "sent", etc.)
- Relation includes for lead information
- Aggregation for proposal totals

TypeScript Types

- Proper typing for navigation items
- Type-safe API responses
- Interface definitions for stats data

Performance

- Server-side data fetching
- Cached queries where appropriate

- Minimal client-side processing

Testing

- ✅ TypeScript compilation successful
- ✅ Build process completed
- ✅ Navigation renders correctly
- ✅ Dashboard displays for admin/employee roles
- ✅ Stats API returns data correctly
- ✅ Mobile responsive sidebar works

User Benefits

For Employees

1. **At-a-glance overview**: See all important metrics immediately
2. **Quick navigation**: Jump to any work area in one click
3. **Clear organization**: Know exactly where to find things
4. **Activity tracking**: See recent team activities

For Admins

1. **Team performance**: Monitor overall metrics
2. **Pipeline visibility**: Track proposals and conversions
3. **Activity monitoring**: See what the team is working on
4. **Quick insights**: Make data-driven decisions

For Regular Clients

1. **Simplified interface**: Only see what they need
2. **Focus on services**: Service fulfillment takes priority
3. **Clear upgrade paths**: See what features are available

Future Enhancements

Potential Additions

- Date range filters for metrics
- Export functionality for reports
- Notifications for important activities
- Goal tracking and progress indicators
- Team member leaderboards
- Custom dashboard widgets
- Advanced filtering options
- Performance charts and graphs

Integration Opportunities

- Email integration for sequences
- Calendar integration for meetings
- SMS integration for communications

- CRM system integrations
- Payment gateway insights

Deployment

- Deployed to: `cdmsuite.abacusai.app`
- Build: Successful
- Status: Production ready
- Checkpoint: “Employee dashboard with organized sidebar”

Conclusion

The employee dashboard provides a professional, clean interface for managing leads, proposals, and sequences. The reorganized sidebar makes it easy to distinguish between work management and service fulfillment areas, improving overall user experience and productivity.