

Proposals Sidebar Navigation Update

Overview

Added a dedicated sidebar menu item for the Proposals feature to provide intuitive access for admin and employee users in the dashboard.

Changes Made

1. Dashboard Layout Component

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

Added Import

- Added `FileText` icon from lucide-react for the Proposals menu item

Added Navigation Item

```
{
  name: "Proposals",
  href: "/dashboard/proposals",
  icon: FileText,
  enabled: user?.role?.toUpperCase() === "ADMIN" || user?.role?.toUpperCase() === "EMPLOYEE",
  badge: null,
}
```

2. Navigation Structure

The Proposals menu item is now positioned logically within the CRM section:

1. **Dashboard** (All users)
2. **Services** (All users)
3. **Lead CRM** (Admin/Employee)
4. **Sequences** (Admin/Employee)
5. **Proposals** (Admin/Employee) ← **NEW**
6. **Website Audits** (All users)
7. **Projects** (Starter+ tiers)
8. **AI Builder** (Growth+ tiers)
9. **Analytics** (Growth+ tiers)
10. **Affiliate** (All users)
11. **Billing** (All users)
12. **Settings** (All users)

Access Control

- **Enabled for:** Admin and Employee roles only
- **URL:** /dashboard/proposals
- **Icon:** FileText (document icon)

User Experience Improvements

Before

- Proposals were only accessible via direct URL `/dashboard/proposals` or through the CRM page
- No visible navigation option for employees
- Had to remember the URL or navigate through multiple pages

After

- Proposals have a dedicated sidebar menu item
- Clear visual indication with a document icon
- Consistent with other CRM features (Leads, Sequences)
- Single-click access from any dashboard page

Technical Details

Menu Item Properties

- **Name:** “Proposals”
- **Route:** `/dashboard/proposals`
- **Icon:** FileText from lucide-react
- **Visibility:** Role-based (ADMIN or EMPLOYEE)
- **Badge:** None
- **Active State:** Auto-highlights when on proposals page

Mobile Responsive

- Sidebar collapses to hamburger menu on mobile
- Proposals item accessible in mobile menu
- Maintains same access control on all devices

Testing

- TypeScript compilation successful
- Next.js build successful
- Navigation menu renders correctly
- Role-based access control working
- Active state highlighting functional

Next Steps

Users can now:

1. Click “Proposals” in the sidebar to access the proposals feature
2. Create, view, and manage proposals from the dedicated page
3. Navigate back to other features using the sidebar

Notes

- The Proposals feature was previously created and functional
- This update only adds the navigation menu item for easier access

- All existing proposal functionality remains unchanged
 - Perfect complement to the Lead CRM and Sequences features
-

Status:  Complete and deployed

Checkpoint: "Added Proposals sidebar menu"