

# Proposals Sidebar Navigation Update

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## Overview

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

## Changes Made

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### 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

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

## User Experience Improvements

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### 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

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### 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

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

## Next Steps

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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

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- 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
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**Status:**  Complete and deployed

**Checkpoint:** “Added Proposals sidebar menu”