



DENTALXPAND LEARNING CENTER / NAVIGATION

Navigate Sections and Pin Frequent Tools

A complete guide to role-aware navigation, active-page cues, expandable sections, personal pinned shortcuts, browser-local preferences, collapsed desktop mode, the mobile drawer, focused provider and platform menus, and the authorization boundary behind every link.

VERSION	1.0	AUDIENCE	All DentalXpand users
FORMAT	Website + PDF	UPDATED	July 2026

All product states in this guide are fictional. Never use live patient, provider, practice, employee, credential, token, API key, or unredacted third-party data in training material.

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01 / NAVIGATION MODELS

Map the three navigation models

DentalXpand builds the menu from the current authorized context instead of showing one universal sidebar to everyone.

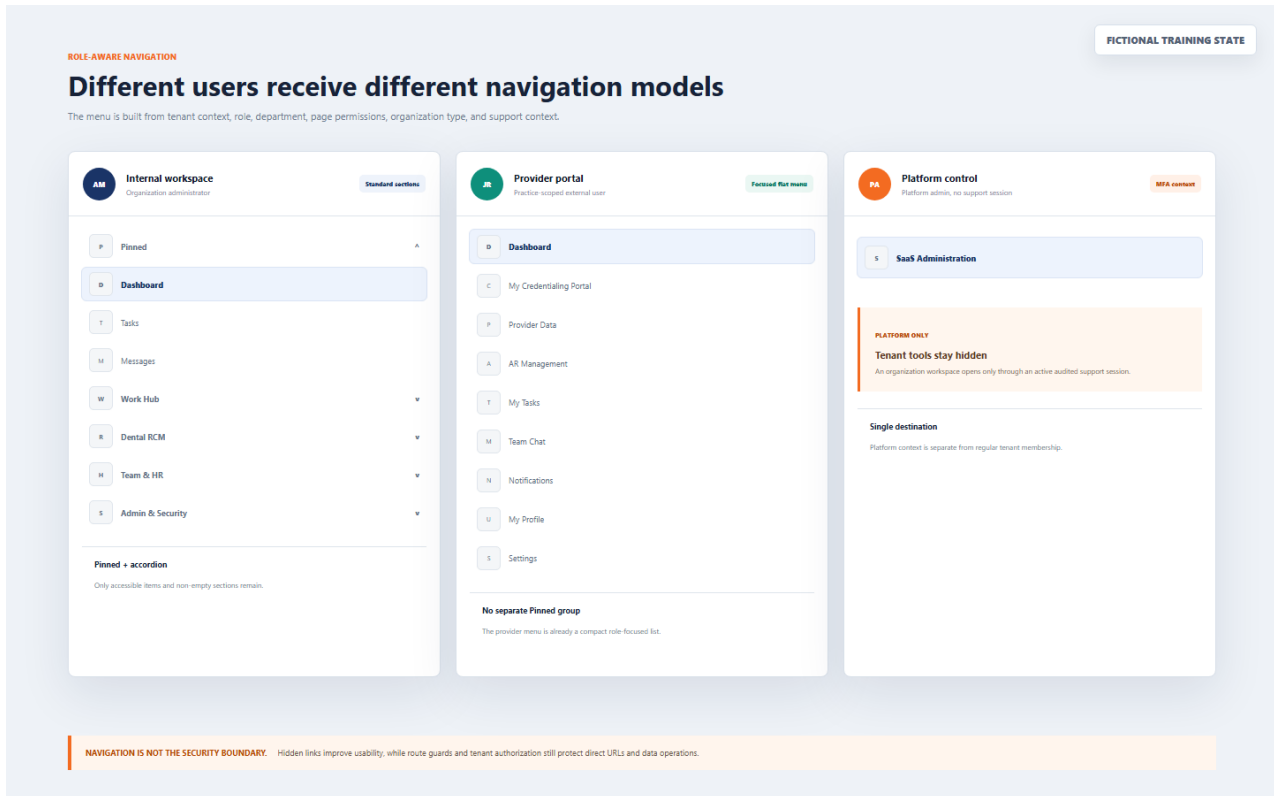


Figure 1. Fictional comparison of the standard internal workspace, focused provider portal, and platform-only navigation.

Use the model assigned to your context

Pinned and accordion instructions apply to the standard internal workspace. Provider and platform users should follow their focused flat menu.

01A / MODEL DETAILS

Know what each user context receives

Context	Navigation model	Expected behavior
Internal organization	Pinned plus expandable sections	Accessible, non-empty sections; active section opens automatically
Provider/client/external	Focused flat portal menu	Role-specific destinations; no separate Pinned group
Platform, no support context	Platform-only flat menu	SaaS Administration; tenant tools stay hidden

Navigation is not authorization
A visible link does not grant unrestricted data access, and a hidden link is not permission to guess a direct URL.
Route, action, record, and tenant controls still apply.

02 / ORIENTATION

Orient yourself after sign-in or a context change

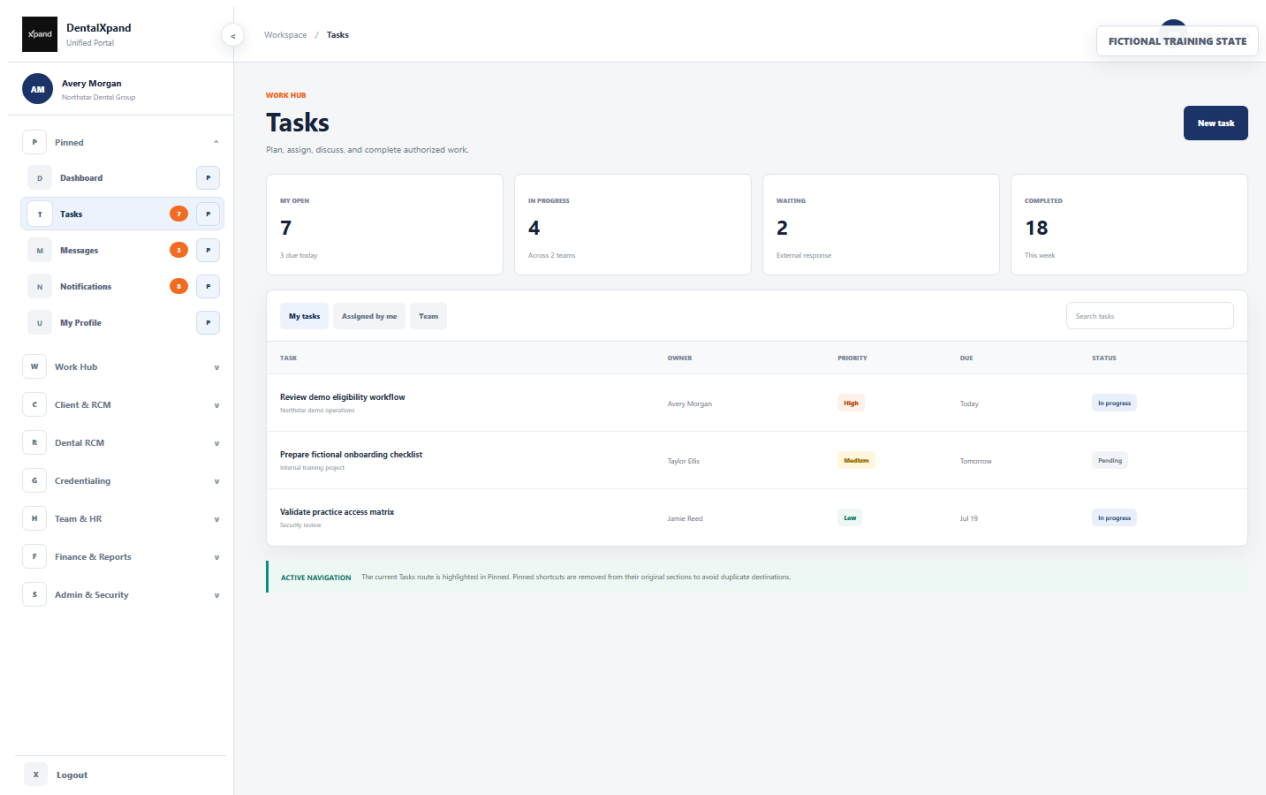


Figure 2. Fictional expanded sidebar showing user and organization identity, Pinned shortcuts, active Tasks state, badges, and standard sections.

Stop on an unexpected context

If the organization, practice, providers, clients, employees, counts, or records are unexpected, do not continue. Sign out and report the mismatch without disclosing sensitive data.

02A / ORIENTATION CHECK

Complete the five-point orientation check

- 1 Read the signed-in user's name or initials and use only your own account.
- 2 Confirm the organization name before opening work, files, reports, exports, or AI tools.
- 3 Read the header path: Workspace and current page, or Platform in platform context.
- 4 Find the blue-tinted active destination and its active parent-section cue.
- 5 Read badges as workload or feature-state cues, then verify filters and record scope on the destination page.

Review organization and practice context

03 / INTERNAL SECTIONS

Understand the standard internal sidebar sections

Section	Typical purpose
Work Hub	Dashboard, tasks, meetings, chat, documents, notifications, and profile
Client & RCM	Client, practice, provider, billing, and shared RCM workflows
Dental RCM	Eligibility, VOB, Auto Verify, AR, claims, and payer work
Credentialing	Provider data, cases, documents, submissions, follow-up, and reports
Marketing & Growth	Lead research, scraper jobs, outreach, calling, and pipeline
Team & HR	Teams, employees, attendance, leave, loans, recruitment, and notices
Finance & Reports	Expenses, revenue, invoices, analytics, and exports
Admin & Security	Users, roles, practices, settings, audits, and system controls
AI & Automation	Xpand AI and approved automation helpers
System	Available system and desktop operations

Only authorized, non-empty sections remain

Role, department, page permission, organization type, and feature-specific rules filter the destination list.

03A / ADAPTIVE LABELS

Read practice labels in organization context

Organization model	Navigation label
Single practice	Practice
DSO	Practices / Locations
Billing company	Clients / Practices

The wording adapts for orientation. The organization and practice identifiers remain the actual security-relevant context.

A shorter menu can be correct

Do not broaden a role merely to imitate an administrator menu. Missing sections can reflect valid role, department, permission, organization, or portal rules.

04 / ACCORDION

Expand and collapse sections

- 1 Select a standard section heading to open its authorized destinations.
- 2 Select another standard section; it opens and the previous standard section closes.
- 3 Select the currently open standard heading to close it.
- 4 When the active route belongs to a section, DentalXpand opens that section automatically.
- 5 Pinned remains at the top and does not collapse like a standard section.
- 6 Use sidebar scrolling for long navigation; Team & HR also has a bounded internal scroll.

One standard section at a time

This keeps a large feature set scannable while preserving an always-available Pinned group.

05 / ACTIVE CUES

Read active-page state and badges

Cue	Meaning
Active row	Blue-tinted destination and emphasized icon chip
Active section	Parent-section marker; remains visible in collapsed mode
Nested route	Most parent destinations stay active for child routes; Dashboard is exact
Numeric badge	Expanded counts display up to 99+
Collapsed badge	Small orange dot; value or label appears in tooltip context

Tasks may show pending/in-progress work; Messages and Notifications show unread counts; Leaves may show pending work; Xpand AI can show a Beta feature label.

A badge is not a complete decision

Open the page and confirm organization, practice, filters, owner, due date, and status before acting.

06 / PINNED DEFAULTS

Start with five common shortcuts

Order	Default shortcut	Purpose
1	Dashboard	Authorized workspace overview
2	Tasks	Assigned and team work queues
3	Messages	Team conversations and unread messages
4	Notifications	Relevant alerts and linked actions
5	My Profile	Signed-in user's own profile and personal context

No duplicate destination
Pinned destinations are removed from their original sections. Unpinning returns an accessible destination to its normal section.

07 / PIN WORKFLOW

Pin a frequent destination

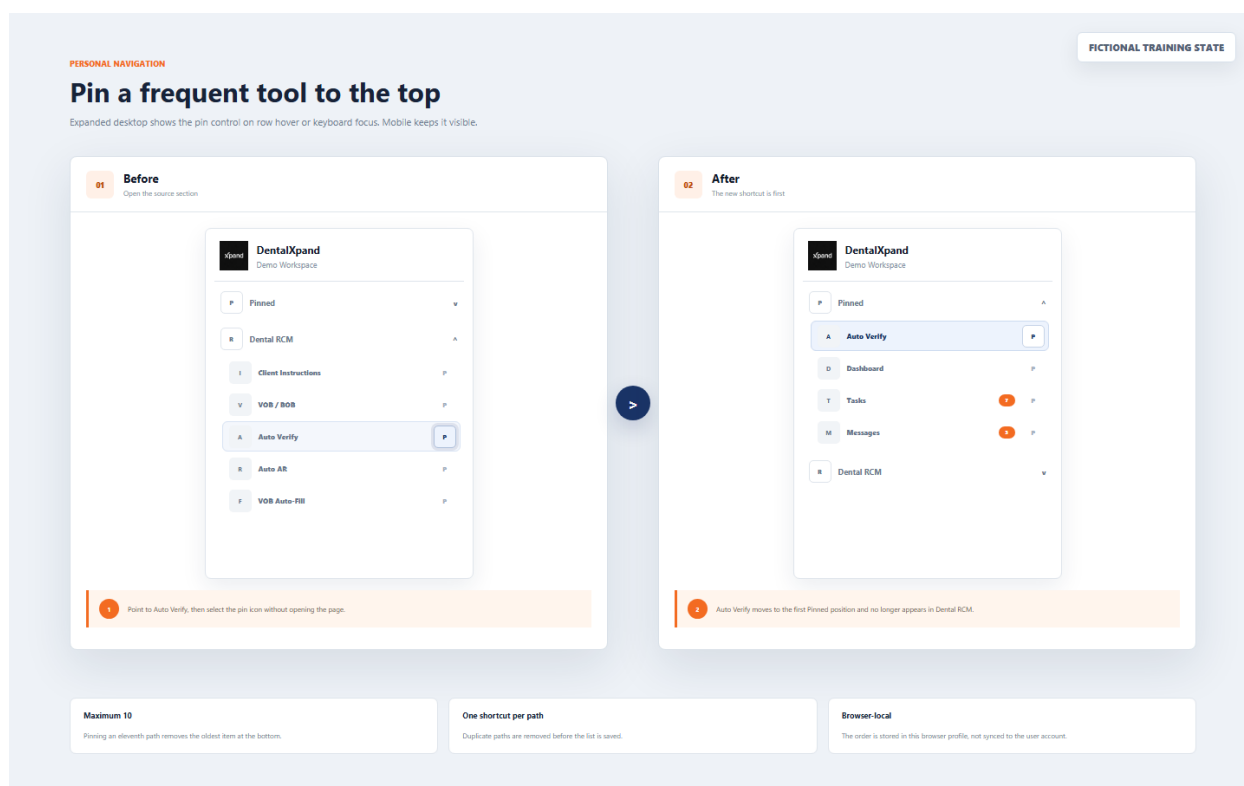


Figure 3. Fictional before-and-after state showing Auto Verify moving from Dental RCM to the first Pinned position.

Convenience only

Pinning does not change assignment, ownership, role, department, organization, practice scope, page permission, or action permission.

07A / PIN STEPS

Pin and unpin safely

- 1 Expand the desktop sidebar; pin controls are hidden in the 64px desktop rail.
- 2 Open the source section and locate the authorized destination.
- 3 On expanded desktop, hover over the row or move keyboard focus into it. On mobile, the pin control remains visible.
- 4 Select the pin control without opening the destination.
- 5 Verify that the destination is first under Pinned and absent from the source section.
- 6 To unpin, select its filled pin control; the accessible destination returns to its normal section.

08 / PIN RULES

Control order, limits, duplicates, and access changes

Rule	Exact behavior	User response
Maximum	10 saved paths	Keep only frequent destinations
New pin	Placed first	Newest shortcut appears at the top
Eleventh pin	Oldest bottom item is removed	Review the bottom shortcut first
Duplicate path	Removed before saving	Expect one shortcut per destination
Permission removed	Inaccessible path is hidden	Request review only for a valid business need
Permission restored	Saved path may become visible again	Reconfirm context and need

A stored path cannot preserve access
DentalXpand filters Pinned against destinations available in the current authorized menu.

09 / PERSISTENCE

Understand browser-local preferences

Preference	What happens	Important limit
Pinned paths and order	Remembered in this browser profile	Not synchronized to the user account
Desktop collapsed state	Remembered in this browser profile	Not guaranteed on another device
Site data cleared	Preferences reset	Account authorization does not change
Shared browser profile	A later user may inherit ordering	Permission filtering still hides inaccessible paths

Use separate profiles on shared devices
The shortcut order is not user-specific inside one browser profile. Sign out and use separate operating-system or browser profiles.

10 / COLLAPSED DESKTOP

Use the 64px icon rail

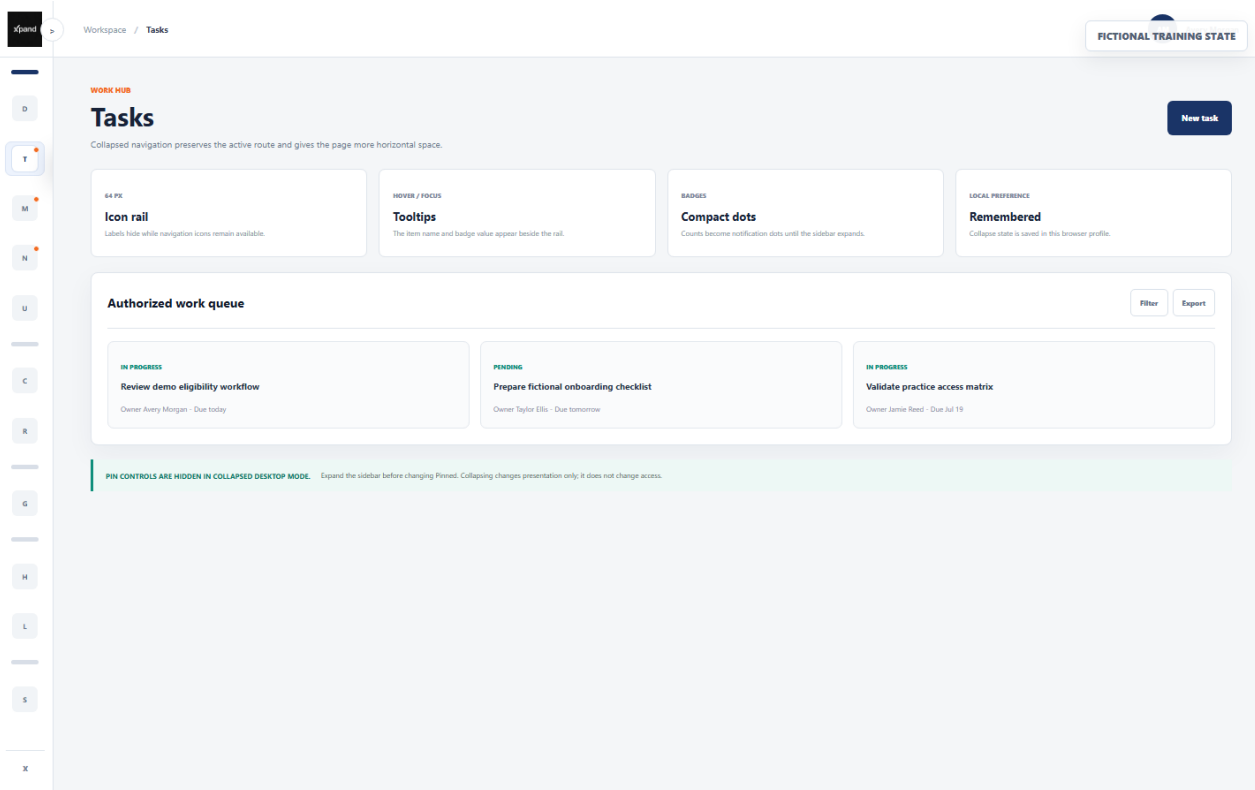


Figure 4. Fictional collapsed desktop sidebar with active task icon, compact badge dots, section separators, and tooltip behavior.

Expand before editing Pinned

Pin controls are hidden in collapsed desktop mode. Collapsing changes presentation only; it does not change access.

10A / COLLAPSED BEHAVIOR

Work confidently with icon-only navigation

Element	Collapsed behavior
Expanded width	256px text-and-icon sidebar
Collapsed width	64px stable icon rail
Section headings	Become separators; accessible destination icons remain
Tooltips	Hover or focus reveals label and badge context
Active state	Current icon and parent separator remain emphasized
Badge state	Counts and labels become compact orange dots

When in doubt, expand
Use the labeled 256px sidebar before selecting an unfamiliar icon or changing shortcut preferences.

11 / MOBILE DRAWER

Use responsive navigation below 1024px

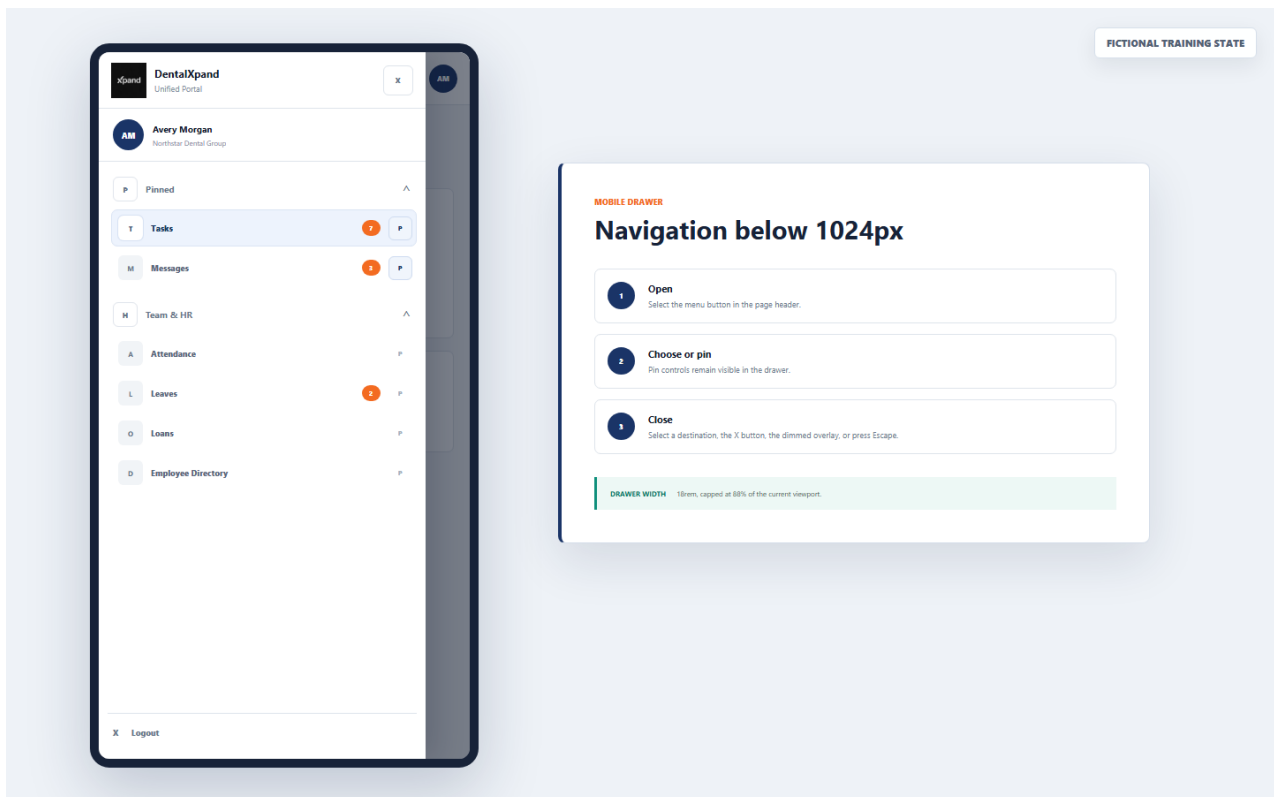


Figure 5. Fictional mobile drawer with expanded labels, visible pin controls, active Tasks row, dimmed overlay, and closing methods.

Mobile uses a drawer, not the desktop rail

The drawer is 18rem wide and capped at 88% of the viewport, leaving a visible overlay target.

11A / MOBILE WORKFLOW

Open, use, and close the mobile drawer

- 1 Select the navigation button in the page header.
- 2 Confirm user, organization, active destination, and section labels.
- 3 Open one section at a time and select the intended destination.
- 4 Use visible mobile pin controls when a shortcut is appropriate.
- 5 Selecting a destination closes the drawer automatically.
- 6 Close without navigating by selecting X, the dimmed overlay, or pressing Escape.
- 7 Resizing back to desktop closes an open mobile drawer.

12 / FOCUSED MENUS

Use provider and platform navigation as designed

Context	Expected destinations	Do not assume
Provider/client/external	Dashboard, Credentialing Portal, Provider Data, AR Management, My Tasks, Team Chat, Xpand AI, Notifications, Profile, Settings when authorized	No separate Pinned group
Platform, no support session	SaaS Administration	No tenant menu or tenant records
Platform, approved support	Tenant tools permitted through explicit support context	Not normal account switching or impersonation

Compact can be correct

Do not broaden a role to make its navigation look like an administrator's menu.

13 / KEYBOARD AND FOCUS

Navigate without relying on hover

- 1 Use Tab and Shift+Tab to move through header, section, destination, and available pin controls.
- 2 Use Enter or Space according to the focused link or button's standard browser behavior.
- 3 Focus a collapsed icon to reveal its tooltip label and badge context.
- 4 Move focus into an expanded desktop row to reveal its pin action.
- 5 Press Escape to close the mobile drawer.
- 6 Expand the sidebar when icon-only navigation is unclear.

Do not depend on color alone

Read labels, tooltips, header path, section position, and destination text together.

14 / AUTHORIZATION

Respect the boundary behind the menu

Layer	What it protects
Tenant context	Expected active organization or authorized platform support context
Role and department	Responsibilities that narrow applicable workflows
Page permission	Navigation and route guard decision for a protected page
Action permission	Separate view, create, update, approve, delete, export, or admin decision
Record scope	Organization, practice, provider, client, employee, and ownership boundaries

Never bypass a missing link
Do not guess URLs, borrow an administrator login, alter browser storage, or broaden a role merely to reveal navigation.

Continue to roles, permissions, and access boundaries

15 / TROUBLESHOOT

Troubleshoot navigation without bypassing controls

What you see	Likely reason	Correct action
Section/page missing	Role, department, permission, organization, or focused menu	Confirm need; ask authorized admin
Pinned reset	Site data cleared or different browser profile/device	Re-pin required accessible tools
Another user's order	Shared browser profile	Use separate profiles and sign out
Pinned item disappeared	Current menu no longer exposes the path	Verify approved access and context
New pin replaced one	10-item maximum	Maintain a smaller shortcut list
Pin icons missing	Collapsed desktop or no row hover/focus	Expand, then hover or focus
Only icons visible	Collapsed desktop mode	Use tooltip or expand
Mobile menu covers page	Drawer remains open	Select destination, X, overlay, or Escape
Provider has no Pinned	Focused flat portal menu	Use the compact role menu
Only platform tool	No active support context	Use approved support workflow
Unexpected organization	Wrong or unsafe context	Stop, sign out, report

16 / VERIFY

Verify that navigation is understood

- I can identify my user, organization, header path, active row, and active section.
- I understand why only authorized, non-empty sections and destinations appear.
- I can use the one-section accordion and the always-open Pinned group.
- I can pin and unpin without creating a duplicate destination.
- I know the five defaults, 10-item maximum, newest-first order, and oldest-item removal rule.
- I understand that pin and collapse preferences are local to this browser profile.
- I can use tooltips and compact badge dots in collapsed desktop mode.
- I can open and close mobile navigation through every supported method.
- I know why provider and platform menus differ from internal navigation.
- I understand that menu visibility never replaces tenant, route, action, or record authorization.

PREVIOUS	NEXT	CURRICULUM
Organization and practice context	Roles, permissions, and boundaries	All resources

Website guide: Navigation and pinned items
Account help: Sign-in guide
Support: support@xpand.dental