



AI-Powered B2B Event Matchmaking Platform

## Complete Product Reference

Every page, every field, every button, every stat, every flow.

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Live at: [b2pair.com](https://b2pair.com)

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# 1. Platform Overview & User Roles

B2Pair is an AI-powered B2B event matchmaking platform enabling organizers to create events, manage participants/sponsors/exhibitors, and provide AI-driven matchmaking, meeting scheduling, and real-time messaging.

Role	Description	Entry Point	Dashboard
Organizer	Creates/manages events, configures AI matching, manages participants & partners	Sign up → /onboarding	/dashboard/w/[workspaceId]
Participant	Attends events, gets AI matches, books meetings, messages	/events/[slug]/register	/dashboard/events/[id]
Sponsor	Company funding/brand visibility with tiered packages	Invite link → /events/[slug]/partners/onboard/[code]	/dashboard/company/[id]
Exhibitor	Company with booth for product showcase & lead capture	Invite link → /events/[slug]/partners/onboard/[code]	/dashboard/company/[id]

A company can be both Sponsor and Exhibitor simultaneously.

# 2. Landing Page (Public)

URL: / (b2pair.com)

Navigation Bar (fixed top)

Logo	"B2" icon + "B2Pair" text → links to /
Sign in	→ /auth/sign-in
Create your event →	→ /auth/sign-up

Hero Section

- Badge: "Now in beta" with animated green dot
- Headline: "Turn your events into high-value connections"
- Subtext: "The AI-powered matchmaking platform for event organizers..."
- Create your first event → → /auth/sign-up
- See how it works → scrolls to #how-it-works
- Note: "Free to start. No credit card required."

Social Proof Strip

10x	More relevant meetings
85%	Match satisfaction rate
2min	Event setup time

How It Works (3 steps)

1. **Create your event** — Set up event page, define participant types, configure matching rules
2. **Share the link** — Participants register, pick role, create profile
3. **AI does the matching** — Algorithm scores pairs, recommends connections, one-click meetings

For Organizers (6 feature cards)

Card	Description
Custom Event Pages	Beautiful registration pages with details, participant types, custom sections
Flexible Participant Types	Custom roles (Buyer, Seller, Speaker, Sponsor) with permissions
AI Matchmaking Engine	Multi-factor scoring: intent, industry, expertise, complementarity
Meeting Scheduling	Availability, one-click booking, auto-scheduling, reminders, conflict detection
Participant Management	Approve registrations, view profiles, track engagement
Event Analytics	Registrations, match rates, meetings, satisfaction, ROI

For Participants (3 feature cards)

Card	Description
Smart Recommendations	AI match suggestions with explanations, swipe/browse
In-app Messaging	Chat with matches, share files, exchange contacts
Privacy Controls	Control visible profile information

CTA Section

- Headline: "Ready to run smarter events?"
- [Create your first event →](#) → /auth/sign-up

Footer

Logo + "© 2026 B2Pair. All rights reserved."

### 3. Authentication

3.1 Sign Up — /auth/sign-up

Email *	Text input, placeholder: "name@example.com"
Password *	Text input with show/hide toggle, min 8 chars
Full Name *	Text input
<a href="#">Sign up</a>	Creates account → /onboarding
"Already have an account?"	Link → /auth/sign-in

3.2 Sign In — /auth/sign-in

Email *	Text input
Password *	Text input with show/hide toggle
<a href="#">Sign in</a>	→ /dashboard
"Forgot password?"	Link → /auth/forgot-password
"Don't have an account?"	Link → /auth/sign-up

3.3 Forgot Password — /auth/forgot-password

Email *	Text input
<a href="#">Send reset link</a>	Sends password reset email

## 4. Event Registration (Participant)

**URL:** /events/[slug]/register

Split-screen layout: left sidebar with event info + step indicators, right side with form.

### Left Sidebar

- Event banner image (or gradient placeholder)
- Event name (links to /events/[slug]) with →
- Date range (e.g., "February 15, 2026 – February 17, 2026")
- Step indicators: ① Create an account, ② Complete your profile
- "Cancel registration" link at bottom → /events/[slug]

### Step 1: Create Account

Email *	Text input, placeholder: "name@example.com"
Password *	Text input, show/hide eye toggle, placeholder: "At least 8 characters"
First name *	Text input (only in signup mode)
Last name *	Text input (only in signup mode)

### Social auth buttons:

- Continue with LinkedIn

 — OAuth via Supabase (linkedin\_oidc provider)
- Continue with Google

 — OAuth via Supabase (google provider)

### Checkboxes (signup only):

- ☐ "I want to receive email recommendations for similar events" (unchecked by default)
- ☒ "By signing up, I agree to B2Pair's terms of service and privacy policy" (checked by default, links to /terms and /privacy)

**Toggle:** "Don't have an account? Create one" / "or log in with your existing B2Pair account"

Continue →

 — Creates account or signs in → proceeds to Step 2

### Step 2: Complete Your Profile

Participant Type	If event has custom types: Radio-button cards with colored dot, name, and description. Click to select.
Job title	Text input, placeholder: "e.g. Product Manager"
Company	Text input, placeholder: "e.g. Acme Inc."
Intent selection	Grid of 6 cards (2 columns), select up to 3. Shows "Maximum 3 selections." when limit reached.
What are you looking for?	Text input, placeholder: "e.g. Packaging suppliers in Europe, AI solutions for HR..."
What do you offer?	Text input, placeholder: "e.g. Cloud-based logistics platform, B2B consulting..."

Intent Cards (6 options, max 3)

Key	Emoji	Label	Description
buying		Buy / Source	Find products or services
selling		Sell / Promote	Showcase your offerings
investing		Invest	Discover opportunities
partnering		Partner	Find strategic partners
learning		Learn	Gain knowledge & insights
networking		Network	Expand your connections

Card styling: Selected = blue border + ring + light blue background. Disabled when 3 selected = 40% opacity + not-allowed cursor.

[Continue →](#) — Saves profile, registers for event → /events/[slug]/registered

**Post-Registration** — /events/[slug]/registered

Shows status based on event settings:

- If requires\_approval = false: Green checkmark + "You're In!" + event details card
- If requires\_approval = true: Clock icon + "Registration Pending" + "awaiting organizer approval"

**Event Details Card:** Date, Location, Format, Participant Count

**What's Next cards (3):**

1. "Complete your profile" — Add more details for better matches → /dashboard/profile
2. "Discover matches" — AI-powered suggestions → /dashboard/events/[id]/matches
3. "Schedule meetings" — Book 1:1 meetings → /dashboard/events/[id]/meetings

[Go to Event Dashboard →](#) → /dashboard/events/[id]

## 5. Organizer Onboarding

**URL:** /onboarding

4-step wizard with progress dots. "B2" logo at top.

**Step 1: Role** — "Welcome to B2Pair"

Subtitle: "Let's set up your organizer profile so you can start creating events." (or participant copy if sponsor/exhibitor user)

Job title *	Text input, placeholder: "e.g. Product Manager, VP of Sales"
Short bio	Textarea, placeholder: "Tell others about yourself and what you do..." (max ~500 chars)
LinkedIn URL	Text input, placeholder: "https://linkedin.com/in/..."

Validation: title must be non-empty to proceed.

**Step 2: Company**

Company name *	Text input, placeholder: "Your company or organization"
Industry *	Select dropdown with 15 options: Technology, Healthcare, Finance, Manufacturing, Retail, Education, Real Estate, Energy, Consulting, Media, Logistics, Agriculture, Legal, Hospitality, Non-profit, Other
Company size	Radio buttons: 1-10, 11-50, 51-200, 201-1,000, 1,000+ employees
Website	Text input, placeholder: "https://..."

Validation: company name and industry must be filled.

Step 3: Interests

Expertise Areas *	Multi-select tag chips (click to toggle). 16 options: Software Development, Product Management, Sales & BD, Marketing, Design & UX, Data & Analytics, Operations, Finance & Accounting, Human Resources, Strategy, Supply Chain, Customer Success, Engineering, Research, Legal & Compliance, AI & Machine Learning
Interests	Same 16 options as above, independent selection

Validation: at least 1 expertise area selected.

Step 4: Complete — "Your profile is ready"

Subtitle: "Click 'Complete setup' to finish and start exploring."

Complete setup

 — Saves profile with onboarding\_completed=true, platform\_role="organizer" → /dashboard

Navigation

- [← Back](#) — Previous step (hidden on step 1)
- Continue →

 / 

Complete setup

6. Organizer Dashboard — Workspace

URL: /dashboard/w/[workspaceId]

Sidebar

Workspace switcher	Dropdown showing all workspaces, click to switch
Dashboard	Overview (current page)
Analytics	/dashboard/w/[id]/analytics (placeholder)
Agenda	/dashboard/w/[id]/agenda
Configure	/dashboard/w/[id]/configure
Page Editor	/editor/[eventId] (full-screen)
Participants	/dashboard/w/[id]/events/[eid]/participants
Participant Types	/dashboard/w/[id]/events/[eid]/participant-types
Matching Rules	/dashboard/w/[id]/events/[eid]/matching
Partners	/dashboard/w/[id]/events/[eid]/partners
Check-in	/dashboard/w/[id]/events/[eid]/check-in

Profile section at bottom: avatar/initials, name, email, Sign out button.

Create Workspace — /dashboard/w/new

Workspace name *	Text input
Description	Textarea
<div>Create workspace</div>	Creates organization → /dashboard/w/[newId]

7. Organizer — Event Control Panel

URL: /dashboard/w/[workspaceId]/events/[eventId]



Breadcrumb

"Workspace / Event Name"

Header

- Event name (large display text)
- Status badge: `draft` / `published` / `active` / `completed` / `cancelled`
- Date: "Sat, Feb 15, 2026" format with calendar icon
- Location: "Venue, City, Country" or "Virtual" with map pin icon

Action Buttons (top right)

<button>View page</button>	Opens /events/[slug] in new tab (hidden if draft)
<button>Duplicate</button>	Creates a copy of this event
<button>Publish</button>	Changes event status to "published" (or "Unpublish" if already published)

Stats Cards (5 columns)

Stat	Description	Highlight
Participants	Count of approved participants	—
Pending	Count of pending participants	Amber text if > 0
Types	Count of participant types defined	—
Matches	Count of generated matches	—
Meetings	Count of meetings scheduled	—

Registration Breakdown Card

Shows each participant type with colored dot + name + count. Includes "Unassigned" for participants without a type.

Registration Link Card

Shows the public event URL (e.g., /events/tech-conference-2026-xyz). Displayed only when event is not draft.

Management Cards (5 clickable cards in 3-column grid)

Card	Description	Badge	Links to
Participants	"View, approve, and manage registered participants."	"X pending" if any	.../participants
Participant Types	"Define roles like Buyer, Seller, Speaker for registration."	"X types"	.../participant-types
Matching Rules	"Configure the AI matching algorithm weights and filters."	—	.../matching
Configuration	"Event details, registration settings, meeting defaults."	—	.../configure
Page Editor	"Customize your event's public registration page."	—	/editor/[eventId]

8. Organizer — Event Configuration

URL: /dashboard/w/[wid]/events/[eid]/configure

Event Creation Fields (also used in configuration)

Event name *	Text input
Event type *	Select: Conference, Tradeshow, Summit, Networking, Workshop, Hybrid
Format *	Select: In-person, Virtual, Hybrid
Start date *	Date/time picker
End date *	Date/time picker
Timezone *	Timezone selector (default: UTC)
Venue name	Text input
Venue address	Text input
City	Text input
Country	Text input
Virtual URL	Text input (for virtual/hybrid events)
Max participants	Number input
Registration open	Toggle (default: on)
Requires approval	Toggle (default: off)
Meeting duration	Number input, minutes (default: 30)
Max meetings per participant	Number input (default: 20)
Break between meetings	Number input, minutes (default: 5)

## 9. Organizer — Page Editor

**URL:** `/editor/[eventId]` (full-screen)

Drag-and-drop page builder for the public event page. Left panel: block palette + properties. Center: WYSIWYG canvas. Top: theme picker + save/publish.

Available Block Types (13)

Block	Fields	Description
<b>Hero</b>	Title, subtitle, CTA label, CTA URL, background image URL, overlay (none/light/dark/gradient), alignment (left/center)	Full-width hero banner
<b>Rich Text</b>	HTML content (Tiptap WYSIWYG), optional right column content, alignment, layout (single/two-column), background (none/surface/accent), optional CTA (label, URL, style: primary/secondary/outline)	Formatted text with optional CTA
<b>Image</b>	Image URL, alt text, caption	Single image
<b>Gallery</b>	Array of image URLs, columns count	Multi-image grid
<b>Video</b>	Video URL (YouTube/Vimeo embed)	Embedded video player
<b>Stats</b>	Title, toggle: show participants/meetings/countries/messages	Live event statistics
<b>FAQ</b>	Array of {question, answer} pairs	Accordion Q&A
<b>CTA</b>	Title, subtitle, button label, button URL, style	Call-to-action section
<b>Divider</b>	Style (line/space/dots)	Visual separator
<b>Sponsor</b>	Auto-populated from sponsor tiers	Sponsor logos by tier
<b>Exhibitor Directory</b>	Auto-populated from live exhibitors	Exhibitor grid with search
<b>Featured Sponsor</b>	Company selection, display style	Highlighted sponsor card
<b>Sponsor Banner</b>	Layout options, tier selection	Banner-style sponsor display

Theme Picker (3 themes)

Theme	Description
Light Classic	Clean white background, standard typography
Dark Modern	Dark background, modern feel
Warm Elegant	Warm tones, elegant typography

Editor Actions

- Save draft

 — Saves without publishing
- Publish

 — Makes changes live on public page
- Drag blocks to reorder
- Click block to edit properties in side panel
- Delete block button on each block

## 10. Organizer — Participants Management

**URL:** /dashboard/w/[wid]/events/[eid]/participants

Features

- Full participant list with avatar, name, company, title, intent, type, status
- Search by name/email/company
- Filter by: status (all/pending/approved/rejected), participant type
- Status actions per participant: Approve (green), Reject (red), with optional rejection reason

- Bulk approve/reject selected participants
- Click participant → expanded profile view with all details
- Export participants (CSV)

Participant List Columns

Column	Data
Avatar	Photo or initials circle
Name	Full name
Company	Company name
Title	Job title
Type	Participant type badge (colored)
Intent	Intent badges (buying, selling, etc.)
Status	<span>pending</span> / <span>approved</span> / <span>rejected</span>
Registered	Date
Actions	Approve / Reject buttons

## 11. Organizer — Participant Types

URL: /dashboard/w/[wid]/events/[eid]/participant-types

Create/Edit Participant Type Fields

Name *	Text input (e.g., "Buyer", "Speaker", "VIP")
Description	Text input (shown during registration)
Color *	Color picker (used for badges/dots)
Sort order	Number (display order during registration)

Permission Toggles per Type

Permission	Default	What it controls
Requires approval	false	Registrations need organizer approval before access
Can view directory	true	See participant directory page
Can message	true	Send messages to other participants
Can book meetings	true	Request and schedule meetings
Can view matches	true	See AI match recommendations
Meeting priority weight	1.0	Higher = preferred in auto-scheduling
Max meetings	null	Cap on meetings (null = event default)

## 12. Organizer — AI Matching Rules

URL: /dashboard/w/[wid]/events/[eid]/matching

Weight Sliders (must normalize to ~1.0)

Intent weight	Slider 0.0–1.0 (default: 0.35) — Buyer↔seller, investor↔startup alignment
Industry weight	Slider 0.0–1.0 (default: 0.25) — Same/related industries
Interest weight	Slider 0.0–1.0 (default: 0.25) — Shared expertise & interests
Complementarity weight	Slider 0.0–1.0 (default: 0.15) — Semantic profile similarity via AI embeddings

Thresholds

Minimum score	Number 0–100 (default: 40) — Matches below this are discarded
Max recommendations	Number (default: 50) — Max matches per participant

Exclusion Rules

Exclude same company	Toggle (default: on) — Don't match people from same company
Exclude same role	Toggle (default: off) — Don't match people with same participant type

Priority Settings

Prioritize sponsors	Toggle (default: on) — Boost sponsor match scores
Prioritize VIP	Toggle (default: on) — Boost VIP participant scores

Actions

- Save Rules

 — Saves configuration
- Generate Matches

 — Runs AI matching algorithm for all participants. Shows progress. Generates embeddings if missing, then computes multi-factor scores.

### 13. Organizer — Partners Management

URL: `/dashboard/w/[wid]/events/[eid]/partners`

Tab Bar (4 tabs)

Tab	Icon	Badge
Sponsors	Crown	Count of sponsors
Exhibitors	Building	Count of exhibitors
Tiers	Chart	Count of tiers
Settings	Gear	—

Sponsors Tab

Pipeline View

Horizontal status pipeline showing count per status: Invited → Onboarding → Submitted → Approved → Live → Rejected

Add Sponsor Form

+ Add Sponsor

 opens inline form:

Company name *	Text input
Contact email *	Email input, placeholder: "contact@company.com"
Tier	Select dropdown showing all tiers with seat count: "Gold (10 seats)"
Team member limit	Number input, placeholder shows tier default. "Leave empty to use tier default"






Create & Send Invite

 — Creates company with status "invited", generates invite code, creates admin member record

### Company List

Each company card shows: Logo/initial, name, status badge, tier badge, member count, invite code copy button.

**Actions per company:**

-  Copy invite link — Copies /events/[slug]/partners/onboard/[code] to clipboard
- Click company → opens detail panel with sponsor profile, exhibitor profile, team members
-  Approve — Changes status to "approved"
-  Publish — Changes status to "live"
-  Reject — Opens modal for rejection reason, then changes status to "rejected"
-  Delete — Deletes company and all related data

### Exhibitors Tab

Same pipeline view and company list as Sponsors tab.

**Add Exhibitor Form**

Company name *	Text input
Contact email *	Email input
Booth type	Select: Standard, Premium, Island
Booth number	Text input, placeholder: "e.g. A12"
Team member limit	Number input, placeholder: "Default: 5"

### Tiers Tab

**Add Tier Form**

Tier name *	Text input (e.g., "Gold", "Silver", "Platinum")
Color	Color picker (default: #6366f1)
Rank	Number (display order, default: next available)
Seat limit	Number (default: 5) — Max team members per company on this tier

**Tier Perks (toggles)**

Perk	Description
Logo on event page	Company logo displayed on public event page
Banner placement	Banner ad on event page
Extra meeting slots	Additional meeting capacity
Featured listing	Highlighted in directories
Sessions included	Can have speaking sessions
Analytics access	View analytics dashboard

## 14. Organizer — Agenda

**URL:** /dashboard/w/[wid]/events/[eid]/agenda

Session management with schedule builder. Create sessions with: title, description, speaker(s), room, start/end time, session type. Drag to reorder or reschedule. Auto-schedule API available.

## 15. Organizer — Analytics

**URL:** `/dashboard/w/[wid]/events/[eid]/analytics`

Registration trends, participant demographics, match rates, meetings scheduled, engagement metrics, satisfaction ratings.

## 16. Organizer — Check-in

**URL:** `/dashboard/w/[wid]/events/[eid]/check-in`

- QR code scanner (camera-based)
- Manual search by name/email
- Check-in button per participant
- Real-time checked-in count display
- Timestamp recorded on participant.checked\_in\_at

## 17. Partner Onboarding Wizard (Sponsor/Exhibitor)

**URL:** `/events/[slug]/partners/onboard/[code]`

Multi-step wizard accessed via unique invite code. Progress bar at top.

### Step 1: Account

Email	Pre-filled from invite, editable
Password	Text input with show/hide toggle
Full name	Text input

Or sign in with existing account. Creates user → creates auth session.

### Step 2: Company Profile

Company name *	Pre-filled from invite
Website	Text input, placeholder: "https://..."
Industry	Select dropdown (same 15 options as organizer)
Headquarters	Text input
Short description	Textarea, ~150 chars for directory listings
Full description	Rich text editor (Tiptap WYSIWYG) for detailed company page

### Step 3: Brand Assets

Company logo	Image upload (drag & drop or click, stored in Supabase Storage)
Banner image	Image upload for company profile header
Brand color	Color picker

Step 4: Sponsor Setup (if company has sponsor capability)

Tagline	Text input — short promotional text
CTA buttons (up to 3)	Each: Label + URL + Style (primary/outline). Add/remove buttons.
Resources	File uploads (brochures, pitch decks). Each: name, file, type.
Promo video	URL input (YouTube/Vimeo)
Sessions	Add speaking sessions: title, description, speaker name

Step 5: Exhibitor Setup (if company has exhibitor capability)

Booth number	Text input (may be pre-filled by organizer)
Booth type	Display only (set by organizer): Standard/Premium/Island
Product categories	Multi-select tags for filtering
Products	Add products: name, description, image upload, price info. Can add multiple.
Resources	File uploads: name, file URL, type

Step 6: Team

Invite team members:

Email *	Text input
Name	Text input
Role	Select: Admin, Manager, Representative, Scanner, Speaker
<div>+ Add another</div>	Add more team members

Seat limit enforced (shows "X of Y seats available").

Step 7: Review & Submit

Summary of all entered information organized by section. Edit buttons to go back to specific steps.

Submit for Review

 — Changes company status to "submitted"

Done Screen

Checkmark animation + "You're all set!"

- View Event Page

 → /events/[slug]
- Go to Dashboard

 → /dashboard/company/[companyId]

18. Sponsor/Exhibitor Dashboard

18.1 Overview — /dashboard/company/[companyId]

Header

- Company logo (or initial avatar)
- Company name (large heading)
- Event name (small text below)
- Capability badges: 

sponsor

exhibitor

Status Banner



Status	Color	Icon	Description shown
Invited	Blue	Send	"Your invite is pending. Complete onboarding to submit for review."
Setting Up	Amber	Clock	"You're still setting up. Complete all steps and submit for review."
Under Review	Amber	Clock	"Your profile has been submitted and is awaiting organizer review."
Approved	Green	CheckCircle	"Your profile has been approved! It will be visible once published."
Live	Green	CheckCircle	"Your profile is live and visible to all event attendees."
Rejected	Red	XCircle	"Your profile was not approved. Contact the organizer for details."

If status is live/approved: View public profile ↗ link shown.

Stats Cards (5 columns)

Stat	Icon	Source
Profile Views	Eye	company_analytics.profile_views
Unique Visitors	Users	company_analytics.unique_visitors
Downloads	Download	company_analytics.resource_downloads
Meeting Requests	Calendar	company_analytics.meeting_requests_received
Leads	Target	company_analytics.leads_captured

Quick Links (3 cards)

Card	Icon/Color	Subtitle	Links to
Analytics	BarChart3 / Blue	"Views, downloads, CTAs"	/dashboard/company/[id]/analytics
Leads	Target / Amber	"X captured"	/dashboard/company/[id]/leads
Team	Users / Green	"X member(s)"	/dashboard/company/[id]/team

18.2 Analytics — /dashboard/company/[id]/analytics

← Back to overview. Title: "Analytics", subtitle: "Last 30 days performance"

Stats Cards (5, with colored icons)

Same 5 stats as overview but with colored icon backgrounds (blue, violet, green, amber, red).

Charts

- **Profile Views Over Time** — Bar chart, 30 bars (one per day). Hover shows count. Bars scale relative to max.
  - **Resource Downloads** — Bar chart, green bars, same 30-day period.
  - **CTA Performance** — Horizontal progress bars per CTA button. Sorted by clicks descending. Shows label + click count.
- Empty state: Chart icon + "No analytics data yet. Data will appear once your profile is live and receiving views."

18.3 Leads — /dashboard/company/[id]/leads

Title: "Leads" with total count.

Qualification Filter Cards (4, clickable to filter)

Filter	Color	Shows
Hot	Red dot	Count of hot leads
Warm	Amber dot	Count of warm leads
Cold	Blue dot	Count of cold leads
Unqualified	Gray dot	Count of leads without qualification

Click card to filter list. Click again to clear filter. Active filter shows ring around card.

Search Bar

Search icon + text input, placeholder: "Search leads..." Filters by participant name.

Lead Card (for each lead)

- Avatar (initials circle)
- Name, qualification badge (hot=destructive, warm=default, cold=secondary)
- Email (with mail icon), source (profile\_view, booth\_visit, resource\_download, meeting\_request, manual), resource accessed, date
- Notes (italic, quoted)
- Tags (outline badges)
- Qualification buttons: hot warm cold — Click to set, click again to unset. Active button has colored background.

18.4 Team — /dashboard/company/[id]/team

Title: "Team" with "Manage your team members and invitations".

Seat Usage Bar

Text: "X of Y used". Progress bar: Green (normal), Amber (>80%), Red (at limit).

At limit message: ⚠ "Seat limit reached. Contact the event organizer to increase your limit."

Invite Button & Form

+ Invite Member (hidden when at limit) opens:

Name *	Text input, placeholder: "Full name"
Email *	Email input, placeholder: "email@company.com"
Role *	Select: Admin, Manager, Representative, Scanner, Speaker

Send Invite / Cancel

Role Legend (5 cards in row)

Role	Icon	Description
Admin	Crown	Full access to everything
Manager	Shield	Edit profile, view leads & analytics
Representative	Users	View leads, capture leads, chat
Scanner	Users	QR scanning and lead capture only
Speaker	Users	View sessions and chat

Member List (per member)

- Avatar (colored if active, muted if pending)
- Name, role badge (outline), status badge: Active / Pending
- Email
- Copy invite link (pending only) — copies /partners/invite/[code]
- Remove — deletes member (can't remove last admin)

Mode Switcher (in sidebar)

Toggle: Participant | Company

Active mode is highlighted with shadow. If clicking Participant and onboarding\_completed=false → redirects to /onboarding/participant.

Company mode also shows: company logo/initial, company name, capability badges below the toggle.

Company nav: Overview, Analytics, Leads, Team (with active state highlighting).

Bottom: "↔ Switch to Participant" link.

## 19. Participant Dashboard — Home

**URL:** /dashboard/home

### Your Events Section

Latest event shown prominently with stats. Other events in compact list.

#### Latest event card:

- Event banner or gradient placeholder
- Event name (links to event dashboard)
- Date, location
- 3 stat pills: "X matches", "X meetings", "X messages"
- [View Event →](#) → /dashboard/events/[id]

**Other event cards:** Compact rows with name, status badge, date, location, arrow.

### Your Company Events Section

Shows events where user has company membership (sponsor/exhibitor). Each card shows: event name, company status badge, company name badge, date, location. Click → /dashboard/company/[companyId].

#### Empty State

Calendar icon + "No events yet" + "You haven't registered for any events. Look for an event invitation link from an organizer to get started."

## 20. Participant — Event Dashboard

**URL:** /dashboard/events/[id]

### Sidebar Navigation

Item	Icon	Path	Visibility
Dashboard	LayoutDashboard	/dashboard/events/[id]	Always
Agenda	CalendarDays	.../agenda	Always
Matches	Zap	.../matches	Always
Meetings	Users	.../meetings	Only if can_book_meetings
Messages	MessageSquare	.../messages	Only if can_message (+ unread badge)
Directory	Search	.../directory	Only if can_view_directory
Exhibitors	Building2	.../exhibitors	Always
Availability	Clock	.../availability	Only if can_book_meetings
My QR Code	QrCode	.../qr-code	Always

Sidebar header: event icon + event name. "← Back to events" link → /dashboard/home.

Profile at bottom: avatar, name, email, "Sign out" button.


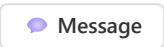


## 21. Participant — AI Matches

URL: /dashboard/events/[id]/matches

Match Card (for each recommended match)

- **Match score:** Percentage badge (e.g., "87%")
- **Score breakdown:** Intent score, Industry score, Interest score, Complementarity score — each as small bar
- **Match reasons:** Array of text explanations (e.g., "Complementary buyer/seller intent", "Both in Technology industry")
- **Profile info:** Avatar, full name, title, company, bio excerpt
- **Intent badges:** Colored pills showing their intents
- **Looking for / Offering:** Text displayed if present

Actions per match

-  — Opens meeting request flow
-  — Opens/creates conversation
-  — Saves match (status → "saved")
-  — Hides match (status → "dismissed")

Match status lifecycle: suggested → viewed → saved → connected or dismissed

Match Discovery — /dashboard/matches/discover

Swipe-style cards for quick accept/reject of match suggestions.

## 22. Participant — Meetings



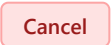
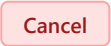
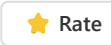
URL: /dashboard/events/[id]/meetings

Tabs: Upcoming | Pending | Past

Meeting Card

- Participant avatar + name + title + company
- Date/time, duration (e.g., "30 min")
- Location/room or virtual link
- Meeting type badge: "in-person" / "virtual"
- Status: pending / accepted / declined / cancelled / completed
- Agenda note (if present)

Actions

Status	Available actions
Pending (received)	  (with optional reason)
Pending (sent)	
Accepted	 , view details
Completed	 — 1-5 stars + text feedback

Calendar View — .../meetings/calendar

Visual calendar with meeting time blocks. Click meeting for details.

Meeting Request Flow

1. Click "Request Meeting" on match/profile
2. Optional: add agenda note text
3. Submit → meeting status = pending
4. Recipient gets notification
5. Accept → auto-schedule finds mutual slot
6. Both notified with time/location

## 23. Participant — Messages

---

**URL:** `/dashboard/events/[id]/messages`

### Left Panel: Conversation List

- Avatar + name + last message preview + timestamp
- Unread indicator (blue dot / bold text)
- Sorted by last\_message\_at descending

### Right Panel: Chat

- Message bubbles (sender right, recipient left)
- Timestamps
- Read receipts (read\_at)
- File attachments (uploaded via `/api/messages/upload`)
- System messages (meeting confirmations, etc.) in center
- Input bar: text field + send button + file attach button



### Safety Features

- Block user — `/api/users/block`
- Report user — `/api/users/report`

## 24. Participant — Directory

---

**URL:** `/dashboard/events/[id]/directory`

- Search bar (by name/company/title)
- Filter by: participant type, intent, industry, company
- Participant cards: avatar, name, title, company, intent badges
- Click → profile detail with all info
- Quick actions:  Message 

Visibility controlled by participant type permission: `can_view_directory`

## 25. Participant — Exhibitors

---


**URL:** `/dashboard/events/[id]/exhibitors`

Queries `/api/events/[eventId]/exhibitors` (companies with status="live" and exhibitor capability).

### Directory View

- Search input: "Search exhibitors..."
- Category filter dropdown (populated from exhibitor product\_categories)
- Grid of cards: logo, name, short description, industry badge, booth number badge

### Detail View (click exhibitor)

- "← Back to exhibitors" button
- Banner image, logo, company name
- Short description, industry badge, booth number, booth type
-  Website (if present)
- About section (long description, rendered HTML)
- Products & Services: grid of cards with image, name, description, price
- Resources: downloadable files with name, type
- Product category tags

## 26. Participant — Availability

---

**URL:** `/dashboard/events/[id]/availability`

Time slot selector for the event duration. Pick available time blocks for meetings. Saved as JSON in `participants.available_slots`. Used by auto-scheduling algorithm.

## 27. Participant — QR Code & Contact Exchange

---

**URL:** `/dashboard/events/[id]/qr-code`

- Personal QR code display (large, scannable)
- Encodes participant info for quick exchange
- Scan other participant's QR → `/api/contacts/exchange`

## 28. Participant — Profile & Settings

---

**Profile** — `/dashboard/profile`

Full name	Text input
Email	Display only (from auth)
Avatar	Image upload
Title	Text input
Bio	Textarea
Company name	Text input
Company size	Select
Company website	Text input
Industry	Select
Expertise areas	Multi-select tags
Interests	Multi-select tags
LinkedIn URL	Text input
Twitter URL	Text input
Website URL	Text input

**Settings** — `/dashboard/settings`

Account settings, notification preferences, privacy settings.

## 29. Notification System

URL: /dashboard/notifications

Type	Title example	Trigger	Links to
meeting_request	"New meeting request"	Someone requests a meeting	Meetings page
meeting_accepted	"Meeting accepted"	Your request was accepted	Meetings page
meeting_declined	"Meeting declined"	Your request was declined	Meetings page
meeting_reminder	"Meeting in 30 minutes"	Upcoming meeting	Meeting detail
meeting_cancelled	"Meeting cancelled"	Meeting was cancelled	Meetings page
new_match	"New match suggestion"	AI generated new match	Matches page
new_message	"New message from X"	Message received	Conversation
event_update	"Event update"	Organizer posted update	Event page
registration_approved	"Registration approved"	Approved for event	Event dashboard
registration_rejected	"Registration rejected"	Rejected from event	—
system	Varies	Platform notification	Varies

Each notification: title, body, link, read status, timestamp. Mark as read on view.

## 30. AI & Matching Engine (Technical)

### 30.1 Intent Engine

6 intents: buying, selling, investing, partnering, learning, networking. Max 3 per participant.

#### Intent Compatibility Matrix

	Buying	Selling	Investing	Partnering	Learning	Networking
Buying	Low	High	Low	Medium	Low	Medium
Selling	High	Low	Medium	Medium	Low	Medium
Investing	Low	Medium	Low	High	Low	Medium
Partnering	Medium	Medium	High	Medium	Medium	High
Learning	Low	Low	Low	Medium	Low	Medium
Networking	Medium	Medium	Medium	High	Medium	Medium

### 30.2 Embedding Generation

Model: OpenAI `text-embedding-3-small` (1536 dimensions). Input text constructed from: title, company, bio, intent, looking\_for, offering, expertise areas, interests. Stored in `profile_embeddings` table using pgvector.

### 30.3 Match Scoring Algorithm

For each participant pair (A, B):

- Intent Score** — Computed from compatibility matrix between A's intents and B's intents
- Industry Score** — 100 if same industry, partial for related industries
- Interest Score** — Jaccard similarity of expertise areas + interests
- Complementarity Score** — Cosine similarity of embedding vectors
- Final Score** = (intent × weight) + (industry × weight) + (interest × weight) + (complementarity × weight), normalized to 0–100

Pairs below minimum\_score are discarded. Max recommendations per participant capped. Sponsor/VIP boost applied if enabled.

### 31. Data Collection by Role

#### Organizer — Collected at onboarding

Full name *	From signup
Email *	From signup
Password *	From signup (hashed by Supabase Auth)
Job title *	Step 1 of onboarding
Short bio	Step 1
LinkedIn URL	Step 1
Company name *	Step 2
Industry *	Step 2 (select from 15 options)
Company size	Step 2 (radio: 5 options)
Website	Step 2
Expertise areas *	Step 3 (multi-select from 16 tags)
Interests	Step 3 (multi-select from 16 tags)

#### Participant — Collected at registration

Email *	Step 1
Password *	Step 1 (min 8 chars)
First name *	Step 1
Last name *	Step 1
— OR —	OAuth via LinkedIn / Google
Participant type	Step 2 (if event has custom types)
Job title	Step 2
Company	Step 2
Intents (max 3)	Step 2 (6 options)
What are you looking for?	Step 2
What do you offer?	Step 2

#### Participant (from sponsor onboarding) — Collected at mode switch

Job title	Pre-filled from profile
Company	Auto-filled from sponsor company (disabled)
Intents (max 3)	6 intent cards
What are you looking for?	Text input
What do you offer?	Text input



## Sponsor/Exhibitor — Collected during partner onboarding

Account (Step 1)	
Email	Pre-filled from invite
Password	For new accounts
Full name	Text input
Company Profile (Step 2)	
Company name	Pre-filled from invite
Website	URL
Industry	Select (15 options)
Headquarters	Text
Short description	~150 chars for listings
Full description	Rich text (Tiptap WYSIWYG)
Brand Assets (Step 3)	
Logo	Image upload
Banner	Image upload
Brand color	Color picker
Sponsor Setup (Step 4, if sponsor)	
Tagline	Text
CTA buttons	Up to 3: label + URL + style
Resources	File uploads: name + file + type
Promo video	URL (YouTube/Vimeo)
Sessions	Title + description + speaker name
Exhibitor Setup (Step 5, if exhibitor)	
Booth number	Text (may be pre-filled)
Product categories	Multi-select tags
Products	Name + description + image + price info (multiple)
Resources	Name + file URL + type (multiple)
Team (Step 6)	
Per member: email, name, role	Admin/Manager/Representative/Scanner/Speaker

## 32. Complete Data Model

22 core tables (excluding indexes, triggers, and RLS policies):

Table	Key Columns	Purpose
profiles	id, full_name, email, avatar_url, title, bio, company_name, company_size, company_website, industry, expertise_areas[], interests[], linkedin_url, twitter_url, website_url, onboarding_completed, platform_role	User profiles
organizations	id, name, slug, logo_url, website, description, created_by	Organizer workspaces
organization_members	organization_id, user_id, role (owner/admin/manager/member)	Workspace teams
events	id, organization_id, name, slug, description, event_type, format, status, start_date, end_date, timezone, venue_*, max_participants, registration_open, requires_approval, meeting_duration_minutes, max_meetings_per_participant, break_between_meetings, banner_url, logo_url, primary_color	Events
participants	id, event_id, user_id, role, status, intent, intents[], looking_for, offering, tags[], available_slots (jsonb), max_meetings, checked_in, checked_in_at, participant_type_id	Event registrations
event_participant_types	id, event_id, name, description, color, sort_order, requires_approval, can_view_directory, can_message, can_book_meetings, can_view_matches, meeting_priority_weight, max_meetings	Custom participant types
profile_embeddings	participant_id, embedding (vector 1536), embedding_text, model	AI vectors
matches	event_id, participant_a_id, participant_b_id, score, intent_score, industry_score, interest_score, complementarity_score, match_reasons (jsonb), status	AI match pairs
meetings	event_id, requester_id, recipient_id, status, start_time, end_time, duration_minutes, meeting_type, location, room, virtual_link, agenda_note, decline_reason, requester_rating, recipient_rating, requester_feedback, recipient_feedback	Meetings
conversations	event_id, participant_a_id, participant_b_id, last_message_at	Chat threads
messages	conversation_id, sender_id, content, content_type (text/file/system), file_url, file_name, read_at	Messages
notifications	user_id, event_id, type, title, body, link, read	Notifications
matching_rules	event_id, intent_weight, industry_weight, interest_weight, complementarity_weight, minimum_score, max_recommendations, exclude_same_company, exclude_same_role, prioritize_sponsors, prioritize_vip	AI config
event_pages	event_id, content (jsonb blocks), theme	Page builder
event_page_assets	event_id, file_url, file_name	Page images
companies	id, event_id, name, slug, capabilities[], status, website, industry, description_short, description_long, logo_url, banner_url, brand_color, team_limit	Partner companies
sponsor_profiles	company_id, tier_id, tagline, cta_buttons (jsonb), resources (jsonb), video_url, sessions (jsonb)	Sponsor data
exhibitor_profiles	company_id, booth_number, booth_type, product_categories[], products (jsonb), resources (jsonb), sort_order	Exhibitor data
sponsor_tiers	event_id, name, color, rank, seat_limit, perks (jsonb)	Tier config
company_members	company_id, user_id, email, name, role, invite_code, invite_status	Team members
company_leads	company_id, participant_id, source, qualification, notes, tags[], resource_accessed	Lead capture
company_analytics	company_id, date, profile_views, unique_visitors, resource_downloads, cta_clicks (jsonb), meeting_requests_received, leads_captured	Daily analytics

## 33. Full API Reference

Endpoint	Method	Auth	Description
/api/events/register	POST	Public	Register for event (signup/signin mode)
/api/events/register-participant	POST	Auth	Register authenticated user as participant
/api/events/update-participant	POST	Auth	Update participant profile/intents
/api/events/update-participant-type	POST	Auth	Change participant type
/api/events/upload-image	POST	Auth	Upload event images to storage
/api/events/duplicate	POST	Organizer	Duplicate an event
/api/embeddings/generate	POST	Organizer	Generate OpenAI profile embeddings
/api/intent/classify	POST	Auth	Classify participant intent
/api/intent/compute	POST	Auth	Compute intent compatibility scores
/api/matching/generate	POST	Organizer	Run full AI matching algorithm
/api/meetings	GET	Auth	List meetings for user
/api/meetings	POST	Auth	Create meeting request
/api/meetings/auto-schedule	POST	Auth	Auto-schedule based on availability
/api/meetings/reminders	POST	System	Send meeting reminders
/api/messages/upload	POST	Auth	Upload message attachments
/api/events/[eid]/companies	GET	Organizer	List partner companies
/api/events/[eid]/companies	POST	Organizer	Create partner company
/api/events/[eid]/companies/[cid]	GET	Organizer	Company detail
/api/events/[eid]/companies/[cid]/status	PATCH	Organizer	Change company status
/api/events/[eid]/sponsors	GET	Public	Public sponsor list
/api/events/[eid]/exhibitors	GET	Public	Public exhibitor list
/api/events/[eid]/sponsor-tiers	GET/POST	Organizer	Manage sponsor tiers
/api/events/[eid]/partners/onboard/[code]	GET	Auth	Get onboarding data
/api/events/[eid]/partners/onboard/[code]/submit	POST	Auth	Submit onboarding
/api/partners/invite/[code]	GET	Public	Team invite data
/api/companies/[cid]/members	GET	Company	List team members + seat limit
/api/companies/[cid]/members	POST	Admin/Mgr	Invite member (seat limit enforced)
/api/companies/[cid]/members	PATCH	Admin/Mgr	Update member role
/api/companies/[cid]/members	DELETE	Admin/Mgr	Remove member (last-admin protected)
/api/companies/[cid]/analytics	GET	Company	30-day analytics
/api/companies/[cid]/leads	GET	Company	Lead list
/api/companies/[cid]/leads	PATCH	Company	Update lead qualification
/api/user/companies	GET	Auth	Current user's company memberships
/api/agenda	GET/POST	Auth	Event agenda

/api/agenda/schedule	POST	Organizer	Auto-schedule sessions
/api/checkin	POST	Organizer	Check-in participant
/api/contacts/exchange	POST	Auth	QR contact exchange
/api/activity/track	POST	Auth	Track user activity
/api/email	POST	System	Send emails
/api/users/block	POST	Auth	Block user
/api/users/report	POST	Auth	Report user

## 34. Security & Access Control

Layer	Implementation
Database RLS	Row Level Security on all 22+ tables. Users can only read/write authorized rows.
Admin Client	Server-side admin client bypasses RLS for cross-user operations.
Org Scope	Organizers can only access events in their organizations.
Participant Permissions	Per-type control: directory, messaging, meetings, matches.
Company Roles	5 roles (admin/manager/representative/scanner/speaker) with granular permissions: edit_company, edit_sponsor, edit_exhibitor, invite_members, view_leads, capture_leads, view_analytics, chat, manage_billing, edit_sessions.
Middleware	Auth check on all /dashboard/* routes. Public paths: /, /auth/*, /events/*, /partners/*.
Seat Limits	Enforced per company: team_limit column → tier seat_limit → default 5.
Last Admin	Cannot remove the last admin from a company.
Safety	Block & report APIs for participant protection.
Password	Min 8 chars, hashed by Supabase Auth (bcrypt).

## 35. Event Lifecycle

1. **Organizer signs up** → Account created → Platform onboarding (4 steps)
2. **Creates workspace** → Organization record created
3. **Creates event** → Event details, type, format, dates, venue, settings
4. **Configures** → Matching rules, participant types with permissions
5. **Builds event page** → Drag-and-drop editor with 13 block types, 3 themes
6. **Adds partners** → Creates sponsor/exhibitor companies with invite codes
7. **Publishes event** → Status: published, registration link active
8. **Partners onboard** → Complete 7-step wizard, submit for review
9. **Organizer reviews** → Approve/reject partners (with reason)
10. **Participants register** → 2-step flow via public event page
11. **Organizer approves** → If requires\_approval, manually approve registrations
12. **AI generates embeddings** → OpenAI text-embedding-3-small vectors created
13. **AI generates matches** → 4-factor scoring algorithm runs on all pairs
14. **Participants discover** → View matches, save/dismiss, request meetings
15. **Meetings scheduled** → Auto-scheduling with mutual availability
16. **Pre-event messaging** → 1:1 chat with file sharing
17. **Event day** → QR check-in, meetings, live messaging, contact exchange

18. **Post-event** → Meeting ratings (1-5 stars + feedback), analytics review
19. **ROI review** → Sponsors/exhibitors check leads, analytics, team performance

### 36. Technical Stack

Component	Technology	Version/Detail
Frontend Framework	Next.js (App Router)	15
UI Library	React	19
Language	TypeScript	Strict mode
Styling	Tailwind CSS	Custom design system
UI Components	shadcn/ui + Radix UI	Card, Button, Input, Badge, Select, etc.
Database	PostgreSQL (Supabase)	+ pgvector extension
Auth	Supabase Auth	Email/password + OAuth (Google, LinkedIn)
Storage	Supabase Storage	Images, files, documents
Real-time	Supabase Realtime	Messages, notifications
AI Embeddings	OpenAI	text-embedding-3-small (1536 dimensions)
Hosting	Vercel	Hobby plan
Rich Text Editor	Tiptap	@tiptap/react + starter-kit + extensions
Drag & Drop	dnd-kit	Page editor, agenda
Icons	Lucide React	Consistent icon set
Vector Search	pgvector	Cosine similarity on 1536d embeddings