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B2Pair

AI-Powered B2B Event Matchmaking Platform

Complete Product Map — Every feature, flow, page, and capability documented.

Live at: b2pair.com

Version: 1.0 (Phase 3)

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Classification: Confidential

Table of Contents

1. User Roles

B2Pair serves four primary user roles, each with a distinct experience and entry point:

Role	Description	Entry Point
Organizer	Creates and manages events, configures AI matching, reviews participants and partners	Sign up → onboarding → create workspace & event
Participant	Attends events, receives AI matches, books meetings, messages other participants	Registers via public event page
Sponsor	Company providing event funding and brand visibility with tiered packages	Invited by organizer → unique onboarding link
Exhibitor	Company with booth presence for product showcase and lead capture	Invited by organizer → unique onboarding link

A single company can hold both Sponsor and Exhibitor capabilities simultaneously.

2. Public Pages

2.1 Landing Page

Platform overview with feature highlights, "Create your event" CTA, and sign-in. Showcases: AI Matching, Smart Scheduling, Real-time Messaging, Analytics, Privacy controls, and Scalability.

2.2 Authentication

- **Sign In** — Email/password login
- **Sign Up** — Account creation for organizers
- **Forgot Password** — Password reset flow

2.3 Public Event Page

Drag-and-Drop Page Builder

Every event gets a fully customizable landing page built with the visual editor. Supported blocks:

- **Hero** — Title, subtitle, CTA, background, overlay
- **Rich Text** — WYSIWYG, single/two-column, CTA
- **Image** — Single image with caption
- **Gallery** — Multi-image grid
- **Video** — Embedded video
- **Stats** — Live event stats
- **FAQ** — Accordion Q&A
- **CTA** — Call-to-action section
- **Divider** — Visual separator
- **Sponsor Logos** — Organized by tier
- **Exhibitor Directory** — Inline grid
- **Featured Sponsor / Banner**

3 built-in themes: Light Classic, Dark Modern, Warm Elegant. Custom branding supported.

2.4 Event Registration Flow

1. **Account:** Email, Password, Full Name (create account or sign in)
2. **Profile:** Job Title, Company, Intent selection (6 options, pick up to 3: Buy/Source, Sell/Promote, Invest, Partner, Learn, Network), "What are you looking for?", "What do you offer?"
3. **Confirmation:** Registration status, event details, next steps, link to dashboard

Supports custom participant types with per-type approval settings.

2.5 Public Sponsor & Exhibitor Directories

- **Sponsor Directory** — Grid of live sponsors organized by tier. Click → full profile with CTAs, resources, video, sessions.
- **Exhibitor Directory** — Searchable grid with category filtering. Click → full profile with products, resources, booth info.

2.6 Partner Onboarding Wizard

Accessed via unique invite code generated when organizer adds a sponsor/exhibitor:

1. **Account** — Sign up or sign in
2. **Company Profile** — Name, website, industry, HQ, descriptions
3. **Brand Assets** — Logo, banner, brand colors
4. **Sponsor Setup** (if sponsor) — Tagline, CTA buttons (up to 3), downloadables, promo video, sessions
5. **Exhibitor Setup** (if exhibitor) — Booth number, product categories, products, resources
6. **Team** — Invite members by email with role selection
7. **Review & Submit** — Summary, submit for organizer review

3. Organizer Dashboard

3.1 Platform Onboarding

1. Job title, short bio, LinkedIn URL
2. Company name, industry, company size, website
3. Expertise areas, interests (tag selection)
4. Complete setup → creates workspace

3.2 Workspace Management

- Multiple workspaces per organizer (organizations)
- Workspace members with roles: Owner, Admin, Manager, Member
- Event list per workspace with "Create Event" action
- Workspace switcher in sidebar

3.3 Event Creation

Field	Options
Event Name	Free text
Event Type	Conference, Tradeshow, Summit, Networking, Workshop, Hybrid
Format	In-person, Virtual, Hybrid
Dates	Start date, end date, timezone
Venue	Name, address, city, country (or virtual URL)
Capacity	Max participants
Registration	Open/closed toggle, requires approval toggle
Meetings	Duration (default 30min), max per participant (20), break time (5min)

3.4 Organizer Sidebar Navigation

Page	Description
Dashboard	Event overview with key metrics
Analytics	Registration trends, demographics, engagement
Agenda	Session schedule builder with drag-and-drop
Configure	Edit all event settings
Page Editor	Full-screen drag-and-drop page builder
Participants	List, approve/reject, search, filter, export
Participant Types	Custom categories with per-type permissions
Matching Rules	AI weight configuration, thresholds, exclusions
Partners	Sponsor/exhibitor management (see 3.6)
Check-in	QR scanner, manual check-in

3.5 Participant Types

Organizers can create custom participant categories (e.g., VIP, Speaker, General) with per-type permissions:

Permission	Description
Requires Approval	Registration needs organizer approval
Can View Directory	See other participants
Can Message	Send messages to matches
Can Book Meetings	Schedule meetings
Can View Matches	See AI match suggestions
Meeting Priority	Weight for scheduling priority
Max Meetings	Cap on meetings allowed

## 3.6 Partners Management

4 Tabs: Sponsors | Exhibitors | Tiers | Settings

Sponsors & Exhibitors: Pipeline view by status, add form (name, email, tier/booth, team limit), company list with actions (view details, copy invite link, change status, reject with reason, delete).

Tiers: Custom names (not hardcoded Gold/Silver), color, rank (display order), seat limit, perks (logo placement, banner, extra meetings, featured listing, sessions, analytics access).

Add forms include: Team member limit (per-company override, falls back to tier default, then 5).

Company Status Flow

Invited → Onboarding → Submitted → Approved → Live

Or: Submitted → Rejected (with reason)
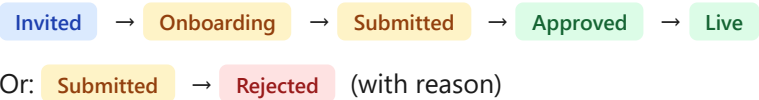
4. Participant Dashboard

4.1 Home / Event List

- **Your Events** — All registered events with stats (matches, meetings, messages)
- **Company Events** — Events where user has sponsor/exhibitor membership (links to company dashboard)

4.2 Participant Sidebar Navigation

Page	Description
Dashboard	Event overview, personal stats, quick actions
Agenda	Event schedule with sessions, rooms, speakers
Matches	AI-generated match recommendations with scoring
Meetings	Upcoming/pending/past meetings, accept/decline
Messages	Real-time 1:1 chat with unread indicators
Directory	Searchable participant directory
Exhibitors	Exhibitor directory with product/category search
Availability	Set meeting time slots
My QR Code	Personal QR for contact exchange

4.3 AI Matches

Each match displays:

- Overall match score (percentage)
- Score breakdown: Intent, Industry, Interest, Complementarity
- Match reasons (e.g., "Complementary buyer/seller", "Shared industry focus")
- Profile: name, title, company, bio, intent badges
- Actions: Save, Dismiss, Request Meeting, Send Message

Status lifecycle: `suggested → viewed → saved → connected` or `dismissed`

4.4 Meetings

- Tabbed view: Upcoming, Pending, Past
- Meeting details: participant info, time, location/room, agenda notes
- Accept/decline requests, cancel meetings, add notes
- Post-meeting: rate 1–5 stars with text feedback
- Calendar view with visual time blocks

4.5 Messages

- Real-time 1:1 messaging between matched participants
- Text + file attachments, system messages, read receipts
- Unread badge count in sidebar
- Block/report functionality for safety

5. Sponsor / Exhibitor Dashboard

5.1 Mode Switcher

Users with company memberships see a **Participant ↔ Company toggle** in the sidebar. Switching to participant mode requires completing participant onboarding (intent, looking for, offering).

5.2 Overview

> **Status Banner**
>
> Prominent banner showing current status with description:
>
> Invited   Setting Up   Under Review   Approved   Live   Rejected

Stats cards: Profile Views, Unique Visitors, Downloads, Meeting Requests, Leads. Quick links to Analytics, Leads, Team pages.

5.3 Analytics

- 30-day performance: Profile views chart, resource downloads chart
- CTA performance with click counts and progress bars
- All metrics with daily granularity

5.4 Leads

- Qualification pipeline: Hot / Warm / Cold / Unqualified with counts
- Search and filter, qualification toggle buttons
- Lead details: name, email, source, resource accessed, date, tags, notes
- Auto-captured from: profile views, resource downloads, meeting requests

5.5 Team Management

Feature	Detail
Seat Limit	Visual progress bar ("X of Y used"), enforced on invite
Invite Form	Name, email, role selection
Remove Member	Protected: can't remove last admin
Invite Link	Copy link for pending members

Team Roles & Permissions

Role	Permissions
Admin	Full access: edit company, edit profiles, invite members, view leads, capture leads, view analytics, chat, manage billing
Manager	Edit company/profiles, invite members, view/capture leads, view analytics, chat
Representative	View leads, capture leads, chat
Scanner	View leads, capture leads (QR scanning at booth)
Speaker	Chat, edit their sessions

6. AI & Matching Engine

6.1 Intent Engine

6 intent types with multi-select (up to 3): **Buying, Selling, Investing, Partnering, Learning, Networking**. Intent classification API computes compatibility (e.g., buyer↔seller, investor↔startup).

6.2 Profile Embeddings

OpenAI `text-embedding-3-small` generates 1536-dimensional vectors from: title, company, bio, intent, looking_for, offering, expertise, interests. Stored in Supabase with `pgvector` extension for cosine similarity search.

6.3 Multi-Factor Matching Algorithm

Factor	Default Weight	What it measures
Intent Complementarity	35%	Buyer↔seller, investor↔startup alignment
Industry Alignment	25%	Same or related industries
Interest Overlap	25%	Shared expertise areas and interests
Embedding Similarity	15%	Semantic profile similarity via AI

Configurable per event: All weights, minimum score threshold, max recommendations, exclusion rules (same company, same role), priority boost for sponsors and VIPs.

7. Meeting System

7.1 Meeting Request Flow

1. Participant A views match → clicks "Request Meeting" → adds optional agenda note
2. Meeting created with status `pending`
3. Participant B receives notification → accepts or declines (with optional reason)
4. If accepted: auto-scheduled based on mutual availability
5. Both parties notified with meeting details (time, location, room)
6. Post-meeting: both can rate (1–5 stars) and leave feedback

7.2 Meeting States

`pending → accepted → completed` (with ratings)

`pending → declined` | `accepted → cancelled` | `completed → no_show`

7.3 Auto-Scheduling

Finds mutual available time slots, respects meeting duration, break time, and per-participant meeting caps. Supports room/location assignment.

8. Messaging System

- Real-time 1:1 conversations (Supabase Realtime)
- Text messages + file attachments
- System messages for meeting confirmations
- Read receipts, unread badge counts
- Scoped per event (conversations belong to events)
- Safety: block user, report user

9. Contact Exchange & Check-in

9.1 Contact Exchange

Each participant gets a personal QR code. Scan → instant contact exchange at physical events.

9.2 Check-in System

QR scanner at event entrance, manual search check-in, real-time status tracking with timestamps.

10. Notification System

Type	Trigger
Meeting Request	Someone requests a meeting
Meeting Accepted	Your request was accepted
Meeting Declined	Your request was declined
Meeting Reminder	Upcoming meeting
Meeting Cancelled	Meeting was cancelled
New Match	New AI match suggestion
New Message	Message received
Event Update	Organizer posted update
Registration Approved	Registration approved
Registration Rejected	Registration rejected
System	Platform notification

11. Data Model

Table	Purpose
profiles	User profiles (extends Supabase auth)
organizations	Organizer workspaces
organization_members	Workspace team roles
events	Event configuration, settings, branding
participants	Event registrations with intent, availability
profile_embeddings	AI vectors (pgvector, 1536 dimensions)
matches	AI-generated pairs with multi-factor scores
meetings	Scheduled meetings with full lifecycle
conversations	1:1 chat threads per event
messages	Chat messages with file support
notifications	All notification types with read status
matching_rules	Per-event AI matching configuration
event_pages	Page builder content (block JSONB)
event_page_assets	Uploaded images for page builder
companies	Sponsor/exhibitor entities
sponsor_profiles	Sponsor-specific (tier, CTAs, resources)
exhibitor_profiles	Exhibitor-specific (booth, products)
sponsor_tiers	Organizer-defined tiers with perks & seat limits
company_members	Team members with roles & invite system
company_leads	Auto-captured lead data
company_analytics	Daily analytics per company

12. API Reference

Authentication & Users

Endpoint	Method	Description
`/api/events/register`	POST	Register for event (signup + signin)
`/api/events/register-participant`	POST	Register authenticated user as participant
`/api/events/update-participant`	POST	Update participant profile
`/api/events/update-participant-type`	POST	Change participant type
`/api/users/block`	POST	Block a user
`/api/users/report`	POST	Report a user

AI & Matching

Endpoint	Method	Description
`/api/embeddings/generate`	POST	Generate profile embeddings (OpenAI)
`/api/intent/classify`	POST	Classify participant intent
`/api/intent/compute`	POST	Compute intent compatibility scores
`/api/matching/generate`	POST	Run AI matching algorithm

Meetings & Messages

Endpoint	Method	Description
`/api/meetings`	GET/POST	List/create meetings
`/api/meetings/auto-schedule`	POST	Auto-schedule meetings
`/api/meetings/reminders`	POST	Send reminders
`/api/messages/upload`	POST	Upload attachments

Partners & Companies

Endpoint	Method	Description
`/api/events/[id]/companies`	GET/POST	List/create partner companies
`/api/events/[id]/companies/[cid]`	GET	Company detail
`/api/events/[id]/companies/[cid]/status`	PATCH	Change status
`/api/events/[id]/sponsors`	GET	Public sponsor list
`/api/events/[id]/exhibitors`	GET	Public exhibitor list
`/api/events/[id]/sponsor-tiers`	GET/POST	Manage tiers
`/api/companies/[cid]/members`	GET/POST/PATCH/DELETE	Team management
`/api/companies/[cid]/analytics`	GET	Company analytics
`/api/companies/[cid]/leads`	GET/PATCH	Lead management
`/api/user/companies`	GET	Current user's memberships

Other

Endpoint	Method	Description
`/api/agenda`	GET/POST	Event agenda management
`/api/checkin`	POST	Check-in participant
`/api/contacts/exchange`	POST	Contact exchange
`/api/events/upload-image`	POST	Upload event images
`/api/events/duplicate`	POST	Duplicate an event
`/api/activity/track`	POST	Track user activity
`/api/email`	POST	Send emails

13. Security & Access Control

- **Row Level Security (RLS)** on all Supabase tables
- **Admin client** for server-side operations bypassing RLS
- **Organization-scoped access** — organizers only manage their events
- **Participant type permissions** — per-type control over features
- **Company role permissions** — 5 roles with granular access control
- **Middleware** — route protection, auth redirects
- **Seat limits** — enforced per company (organizer-set or tier-based, default 5)
- **Last admin protection** — can't remove last admin from company

- **Block & report** — participant safety tools

14. Complete Event Lifecycle

1. **Setup:** Organizer signs up → onboarding → creates workspace → creates event
2. **Configure:** Event settings, matching rules, participant types
3. **Build:** Event page with drag-and-drop page editor
4. **Partners:** Add sponsors/exhibitors → invite links generated
5. **Publish:** Event goes live, registration opens
6. **Partner Onboarding:** Sponsors/exhibitors complete wizard, submit for review
7. **Review:** Organizer approves/rejects partners
8. **Registration:** Participants register via public event page
9. **Approval:** Organizer approves participants (if required)
10. **AI Processing:** Profile embeddings generated → matching algorithm runs
11. **Networking:** Participants discover matches, request meetings, message
12. **Scheduling:** Auto-scheduling with availability, calendar view
13. **Event Day:** QR check-in, meetings, live messaging, contact exchange
14. **Post-Event:** Meeting ratings/feedback, analytics review
15. **ROI:** Sponsors/exhibitors review leads, analytics, team performance

15. Technical Infrastructure

Component	Technology
Frontend	Next.js 15 (App Router), React 19, TypeScript
Styling	Tailwind CSS, shadcn/ui, Radix UI
Database	Supabase (PostgreSQL) + pgvector
Auth	Supabase Auth (email/password)
Storage	Supabase Storage (images, files)
AI / Embeddings	OpenAI text-embedding-3-small (1536d)
Hosting	Vercel
Rich Text Editor	Tiptap (WYSIWYG)
Drag & Drop	dnd-kit
Icons	Lucide React
Real-time	Supabase Realtime (messages, notifications)