Types of User Profiles – Requirements

Module: Core Platform Identity
Feature: User Profiles & Types

Objective:
Define how user profiles function across the HVACAI platform, including account types, transitions, access control, and platform interactions. The goal is to provide a consistent, clear framework for managing user access.

User profile types on HVACAI fall into four distinct categories:
A. Individual Users
- Basic User: Default profile at signup, personal use only
- Verified Professional (VP): Includes all professionals with verified credentials

B. Verified Professional Subtypes
- Licensed Contractors: Verified users with licensing credentials
- Industry Experts: Verified users based on certification/licence in a field

C. Company-Affiliated Users
- Company Member: User who joins a Company Profile and operates under its permission system

D. Regular user with investor role
- Investor: Read-only observer with access to analytics and growth metrics dashboard

SECTION 1. USER PROFILE TYPES

1.1 Basic User Profile
- Created upon standard platform sign-up or upon signing up after getting invitation to the Company
- Limited platform access
- May create and manage personal projects (non-company owned)
- May request performing job from Verified Professionals and Companies
- May apply to become a Verified Professional
- Can receive invitations to join a Company and become Company member (separate account / profile switch logic)

  #### 1.1.1. Investor Profile
  - Available to verified 309 Technology shareholders
  - Grants access to a dedicated Investor tab (dashboard)
  - Access is strictly observational, with no editing rights
  - Investor Dashboard includes:
    - Platform Growth Metrics: Total companies, user count, active professionals, subscription counts
    - Engagement & Usage Stats: Project volume (weekly/monthly), report submissions, job activity, growth trends
    - Activity Feed: Recent feature releases, roadmap highlights, progress tracking
    - User Distribution Map: Geographic activity heatmap by ZIP, city, or state
    - Time Range Filters: Last 7 days, This Month, or custom range
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1.2 Verified Professional Profile
- Profile type transformed from regular user profile
- Available only after credential verification (certificate or license)
- Gains access to VP-specific tools and visibility

- Can be invited to Company-owned projects
- May be working on multiple projects, for multiple Companies simultaneously
- Cannot create projects for Company; can only be assigned to them
- Access to projects is revocable or time-limited
- Can create and manage own projects
- Coexists with the Company member identity (account switching enabled)

1.3 Company Member Profile
- Created when a user accepts an invite to join a Company
- Coexists with the Basic/VP identity (account switching logic)
- Access to internal company projects, dashboard, and roles
- Governed by Permission Matrix
- Can be marked inactive (upon departure)
- Certificate / license upload if holding

SECTION 2. PROFILE CREATION & TRANSITIONS

2.1 Account Creation
- A new user always begins with a Basic User Profile

2.2 Transition to Verified Professional
- Requires submission of credentials (e.g., license, certification)
- Approval triggers upgrade to Verified Professional Profile
- System logs verification metadata (status, approver, date)

2.3 Joining a Company

- Triggered by invite from a Company Owner/Manager (or request to join Company - TBD)
- Upon acceptance, a Company Member Profile is created
- User retains Basic/VP identity alongside Company context
- Profile switcher allows choosing between contexts

2.4 Leaving a Company
- Company Member Profile becomes inactive
- Access to company dashboard and projects is removed
- Basic/VP profile remains unaffected

SECTION 3. PROFILE STRUCTURE – basic setup (TBD)

3.1 Basic User Profile – standard fields (All Profiles)
- Full name
- Email address
- Phone number
- Profile photo (optional)

3.2 Verified Professional Fields
- Professional Category (e.g., Licensed Contractor, Engineer)
- License number (if applicable)
- Verification status
- Work region/service area
- Specializations (optional)

- Availability

3.3 Company Member Fields

- Assigned role(s)
- Status (active/inactive)
- Associated Company
- Project assignment history
- Internal performance labels (if enabled)
- Professional Category (e.g., Licensed Contractor, Engineer) and subtype

SECTION 4. VISIBILITY & ACCESS CONTROL

4.1 Public Profile View (VPs only)
- Verified Professionals have a public-facing profile
- Displays: name, category, verified badge, region, specialization
- Available / Booked badge
- Optional: portfolio, contact field (if enabled)

4.2 Company-Only Visibility
- Company Members are visible in detail within their company context
- Company Members are visible in limited capacity in Company Profile for outsiders (TBD)
- Roles and assignments are not visible outside the Company
- Inactive members do not appear in selection/search fields

4.3 Access Switching

- If user has multiple identities (e.g., VP + Company Member), UI allows profile switching
- Switching context affects dashboard, permissions, and visible projects

SECTION 5. INTEGRATION POINTS

Company Profile vs other platform features dependencies.

5.1 Permission Matrix Enforcement
All company-related actions (e.g., creating projects, assigning users, accessing dashboards) must follow access rules defined in the Company Permission Matrix

5.2 Assignment Engine
- VP Profiles must integrate with the assignment engine and get access to specific Company's profile
- Assignment eligibility determined by verification status, certification/licencing

5.3 Professionals/Company database
- All user profile types must support filters in project search, VP/Company database, and dashboard metrics
- Filterable by: status, category, Company, region, and role