Users

Managing Users

From the "Users" drop down at the top, you can choose a specific group of users you wish to view.

To create a new user, go to any user screen and click "Create User".

Fill out all the required information.

Once all the information is entered, click "Create".

The user should now appear under the group you assigned them to, and under "All Users"

You can click on the user to pull up a new menu showing all of their information. From here, you may edit or delete the user. You can also add entities, reminders, addresses, phone numbers, meetings, ecosystem roles, or an entrepreneur profile.

Importing Users

> "Users" include entrepreneurs and staff members.

Open the Import Users screen

From **Users**, choose **Import**. You land on the import screen for users, where you pick the import type, file format, and file, then **Import**. Use **Download Templates** on the right when you need the correct column headers.

Create a user manually

1. Go to **Users** and open **Create user** (or use the same action from your role's dashboard if it appears there).
2. Complete the form: legal name fields, **Display name**, optional email and 10-digit phone, **Application role**, and **Ecosystem role** (or use the ecosystem-role picker elsewhere on the page if your site is set up that way).
3. Optional sections: demographics, marketing opt-in, preferred contact method, profile image.
4. Save. The system creates the account and assigns the role you chose.

If the new user's application role is **Entrepreneur**, you stay on the create screen for the next step. For other roles, you are sent to that user's profile page.

Add or fill in an entrepreneur profile (manual)

Right after creating an Entrepreneur

- After the user is created, the **entrepreneur profile** form appears on the same page. Fill it in and save.

For an existing user

1. Open **Users**, then open that person's profile.
2. If they are an Entrepreneur (or already tied to entrepreneur data), you'll see the entrepreneur profile card or a form to **create** the profile if one does not exist yet.
3. Save when finished.

Typical fields: **Assigned navigator**, **Client status** (active/inactive), **Lead source**, **SBDC client**, **Income sufficiency**, **Self-employment status**, **Traditional employment status** (outside self-employment). Use the same option *keys* as in the app (for imports, those keys must match exactly—see below).

Import users only (one sheet) — CSV or Excel

Use this when you only need **user accounts** (no entrepreneur profile rows in the file).

1. On the Import Users screen, set **Import type** to **Users**.
2. Set **Format** to **CSV** or **Excel** (`.csv` / `.xlsx`).
3. Download the **Users** template (CSV or Excel) so your file uses the correct headers.
4. Fill the sheet and upload it, then click **Import**.

Important columns (users import)

- **Required:** `first_name`, `last_name`, `application_role`, `import_context`
  - `application_role` must be the **exact** role name configured in RISE (same as in the role list when creating a user).
  - `import_context` is required on this import (any short label you use to remember this import is fine).
- **Strongly recommended:** `email` — rows are matched/updated by email; without a unique email, behavior is unreliable.
- **Optional:** `name` (otherwise display name is built from first + last), `middle_name`, `password` (if omitted, a random password is set), `phone_number` (digits, 10-digit US-style number as stored), `account_status` (e.g. active/true/enabled/`1` for active), `ecosystem_roles` (comma-separated role tags).

Extra columns in the **Users** export template (e.g. demographics) may be present in the template file; the importer only processes the fields its validation accepts.

Import users and entrepreneur profiles together (two worksheets) — Excel

Use this when one workbook should create/update **both** users and their **entrepreneur profiles**.

1. Download **Users and Entrepreneur Profiles (Multiple Sheets)** — this is an **Excel** workbook with **two worksheets in a fixed order**:
    - **Worksheet 1:** Users (same columns/rules as the single-sheet **Users** import).
    - **Worksheet 2:** Entrepreneur profiles (one row per profile; links to an existing user from the first sheet or one already in RISE).
2. On the Import Users screen, set **Import type** to **Users and Entrepreneur Profiles (Multiple Sheet)**.
3. Set **Format** to **Excel** and upload the `.xlsx` file, then **Import**.

Worksheet 2 — match each row to a user

Each row is one entrepreneur profile for **one existing user**. Identify that user using the **first** of these that you fill in:

1. **`user_id`**
2. **`user_email`** (if no `user_id`)
3. **`first_name`** **+** **`last_name`** (if neither above)—risky if names duplicate.

Navigator (optional): use **`navigator_id`** or **`navigator_name`** (exact display name).

Other entrepreneur columns

- `client_status` — optional in the file; if missing, it defaults to **inactive**.
- `sbdc_client` — `0` or `1`.
- `lead_source`, `self_employment_status`, `traditional_employment_status`, `income_sufficiency` — if present, values must be the **internal keys** (not the long labels), for example:
    - Lead source: `word_of_mouth`, `rise-website`, `facebook`, `linkedin`, `instagram`, `event`, `referral`, `other`
    - Employment (self or traditional): `full_time`, `part_time`, `seasonal`, `side`
    - Income sufficiency: `more_than_meets`, `meets`, `struggle`, `barely_meet`, `unable_to_meet`, `not_drawing_income_from_business`
- `import_context` — optional on this sheet.

Import **users first** on worksheet 1, then profiles on worksheet 2, so every profile row can resolve a user.

Errors and related imports

- If the import fails, the screen can list **failed rows** and messages; fix those cells and try again. No records are created unless all pass the validation checks.
- To import **only** entrepreneur profiles (users already exist), the Import Users page includes a shortcut to the **Entrepreneur Profiles** import flow, with its own templates.

Ecosystem Roles

Ecosystem roles are roles you can grant accounts that define what they are. For example, you can give a navigator the "Navigator" ecosystem role within their profile. The buttons for this are down towards the bottom of the page, right above reminders. A user can be given any amount of ecosystem roles at once.

Entrepreneur Profiles

For new users:

At the top of the screen, click "Users", select any group, then click "Create User".

Fill out the user's information. Only first name, last name, display name, and role are required. Make sure to select "Entrepreneur". Click "Create" at the bottom of the page.

On the next screen, you may create an entrepreneur profile. This is optional. If you wish to create one, fill out their assigned navigator, client status, lead source, whether they're an SBDC client or not, whether or not they're drawing income, their income sufficiency, self employment status, and traditional employment status. Then click "Create". **Note: Only client status is required here.**

Once the entrepreneur profile has been created, you may then view it, edit it, delete it, or view activity logs.

For existing users:

At the top of the screen, click "Users", select the group the user would be under, then click the user you're looking for.

On the next page, scroll down slightly to see the "Create Entrepreneur Profile" box.

Fill out their assigned navigator, client status, lead source, whether they're an SBDC client or not, whether or not they're drawing income, their income sufficiency, self employment status, and traditional employment status. Then click "Create". **Note: Only client status is required here.**

Once the entrepreneur profile has been created, you may then view it, edit it, delete it, or view activity logs.