Rise CRM User Manual

Dashboards

Dashboards

Navigator Dashboard

Admin Dashboard

The admin dashboard contains a myriad of useful information and functionality.

At the top of the dashboard, you will notice several buttons (view reminders, create user and create entity). Just below the aforementioned buttons you will see some information blocks that will tell you how many users, entrepeneurs, and entities are in the system as well as a block with referrals and they're overall status.

Once past the more basic info section you will find a list of your past and future meetings (though you may hide them if you wish).

Default Dashboard

image.png

Meetings

New Meeting

While on your main page (dashboard), scroll down to the meetings section and hit new.

Select the appropriate grant.

Enter a title and description of what the meeting is meant to accomplish.

Select the entity involved in the meeting or N/A as well as the location in which the meeting will take place. If choosing a custom location, be sure to note the mileage traveled.

Enter the assumed start and end date/times.

Click create and your new meeting will now appear on your dashboard.

Import Meetings

While on your main page (dashboard), scroll down to the meetings section and hit import.

Choose if you want to just import meetings, or both meetings and attendees.

Choose if you're importing from a CSV file or an Excel file.

Click "Browse...", and select the CSV or Excel file you wish to import.

Click "Import".

The meetings should then appear at the bottom of the dashboard page.

Note: Within the import menu, there are examples on the right you can download.

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.

Grants

New Grant

While on your main page (dashboard), navigate to the top of the screen and click "Grants".

Click "Create Grant"

Fill out the appropriate information.

- Name of the grant.
- A description of the grant.
- The grant's status.
- The grant's start date and end date.
- The amount the grant provided.
- Who the funder is.
- The grant code.
  Note: All fields must be filled in.

Click "Save".

On the next screen, you can edit the grant information, delete the entry, add filters for reporting, or download metrics.

Entities

Managing Entities

While on your main page (dashboard), navigate to the top of the screen and click "Entities".

From this page, you can search for entities that have already been created, or you can create or import new ones.

To create a new entity, click on "Add".

Fill out each field. This includes:

- Entity Name
- NAICS Code
- Owners
- Entity Type
- Tax Classification
- Entity Description
- Entity Email
- Entity Website URL
- DBAs
- Comments
- State
- Locality

You may also add a profile icon and any social links.

Choose if you want to add business details or not.

Regardless of choice, click "Save".

If you chose to add business details, on the next screen, fill out the fields

These are:

- Entity Stage
- Month and Year
- Target Market
- Chamber Link

Click "Save".

On the next screen, you can edit the entity, delete it, add tags, add phone numbers, add addresses, add a meeting, add comments/notes, create referrals, add provided services, add milestones, add staff positions, or add accessed capital.

Entities

Business Profiles

Referrals

At the top of the screen, click "Entities", and then the entity you wish to add referrals for.

Scroll down to the bottom of the screen, click "Create Referral".

On the next screen, fill out the provider, status, and notes.

Provided Services

At the top of the screen, click "Entities", and then the entity you wish to add services for.

Scroll down to the bottom of the screen, click "Add Service".

On the next screen, fill out the entity, the name of the service, and the description of the service.

Click "Add Service".

On the next screen, you may edit the service or delete it.

Importing Businesses (Entities)

Open the import screen

From **Entities**, choose **Import**. Select the import type, **CSV** or **Excel**, choose your file, then **Import**. Use **Download Templates** for the correct column headers.

Create an entity manually

- Go to **Entities** → **Add entity** (or from a user's profile, **Add entity** to tie an owner).
- Fill in the form and save.

Use a file import when you have many rows or spreadsheet data already prepared.

Import entities only (one sheet)

For **entity** rows only (no separate business-profile sheet).

- Import type: **Entities**
- Format: **CSV** or **Excel**
- Download the **Entities** template, fill it, upload, then **Import**

Matching: Each row matches on `name`. The same name as an existing entity **updates** that record.

Columns

- `name` — required
- `owner_first_name`, `owner_last_name` — optional; both must match an existing user's first and last name to attach that user as **owner**
- `description`, `dbas`, `email`, `website_url`, `import_context` — optional text
- `phone_number` — optional; numeric (10-digit style)
- `type`, `tax_classification` — optional; use **enum keys** from Allowed enum values (not the display labels)
- `naics_code` — optional; must be a code that **already exists** in RISE (see note under that section)

- `state`, `locality`, `town` — optional; see **State, locality, and town** under Allowed enum values
- **Social URLs** — optional; one column each: `facebook_url`, `twitter_url`, `instagram_url`, `linkedin_url`, `youtube_url`, `meetup_url` (valid URLs)
- `comments` — optional; creates a comment on the entity

Import entities and business profiles (two worksheets, Excel)

One workbook for **entities** plus **business profiles**.

- Download **Entities and Profiles (Multiple Sheets)**
- Import type: **Entities and Profiles (Multiple Sheet)**
- Format: **Excel** (`.xlsx`), upload, then **Import**

Worksheet 1 — same columns and behavior as **Import entities only**.

Worksheet 2 — one business profile per row.

- `entity_id` — optional; RISE entity ID (used first if present)
- `entity_name` — optional; exact entity name if `entity_id` is not used (must match sheet 1 or an entity already in RISE)
- `entity_stage` — optional; enum **key** (see Entity stage)
- `registered_on_va_scc` — optional; `0` or `1`
- `chamber_link` — optional; URL
- `target_market` — optional; text
- `import_context` — optional; text

If neither `entity_id` nor `entity_name` resolves to an entity, that row does not create a profile.

Business profiles only

If entities already exist, use the **Business Profiles** shortcut on the entity import page and its single-sheet templates.

Errors

Failed rows may list on the screen with a short message; fix the file and import again.

Allowed enum values for imports

Imports expect the **key** (left column). Labels are for reference when reading the UI or exports.

Entity type (`type`)

Key	Label
`sole-proprietorship`	Sole Proprietorship
`s-corp`	S-Corporation
`c-corp`	C-Corporation
`b-corp`	B-Corporation
`corporation-type-unknown`	Corporation (Type Unknown)
`llc`	Limited Liability Company (LLC)
`partnership`	Partnership
`pllc`	Professional Limited Liability Company (PLLC)
`llp`	Limited Liability Partnership (LLP)
`pc`	Professional Corporation (PC)
`cooperative`	Cooperative
`501c3`	Nonprofit - 501(c)(3)
`nonprofit-other`	Nonprofit - Other
`not-yet-formed`	Not yet formed
`government`	Government
`other`	Other

Tax classification (`tax_classification`)

Key	Label
`disregarded-entity`	Disregarded Entity
`partnership`	Partnership
`c-corp`	C-Corporation
`s-corp`	S-Corporation

Key	Label
`501c3`	Nonprofit - 501(c)(3)
`llc`	Limited Liability Company (LLC)
`trust`	Trust
`estate`	Estate
`exempt`	Exempt
`not-applicable`	N/A

Entity stage (`entity_stage`, worksheet 2)

Key	Label
`ideation`	Ideation
`startup`	Startup
`growth`	Growth
`expansion`	Expansion
`mature`	Mature

NAICS code (`naics_code`)

Not a fixed list in this manual: the value must match a **NAICS code already stored** in RISE. If import fails on `naics_code`, use a code from the app's NAICS list or leave the column empty.

State, locality, and town (`state`, `locality`, `town`)

These follow **RISE region configuration** (states such as **VA** and **NC**, with **locality** and **town** keys under each—for example county keys like `halifax`, `mecklenburg`, and town keys nested under the locality). The importer may normalize some **human-readable** county or town names to the correct keys when `state` is set. When in doubt, use the same **keys** as on an exported entity or as shown when editing an entity in the UI.

In this project, **entities import** does not use a separate "county" column. The spreadsheet column **`locality`** is validated and normalized against `config('enums.region_localities')` for the given **`state`** (`EntitiesImport` maps either the **enum key** or the **display label** case-insensitively to the stored key). Counties, cities, and other places all live in that same **`region_localities`** list.

Below are markdown tables you can paste into docs or a PR.

Virginia — `locality` enum (`state` = `VA`)

Stored enum key (`locality`)	Import/display label	Typical kind
`halifax`	Halifax County	County
`mecklenburg`	Mecklenburg County	County
`brunswick`	Brunswick County	County
`lunenburg`	Lunenburg County	County
`charlotte`	Charlotte County	County
`prince_edward`	Prince Edward County	County
`cumberland`	Cumberland County	County
`buckingham`	Buckingham County	County
`nottoway`	Nottoway County	County
`amelia`	Amelia County	County
`pittsylvania`	Pittsylvania County	County
`henry`	Henry County	County
`patrick`	Patrick County	County
`fairfax`	Fairfax County	County
`danville_city`	City of Danville	City
`martinsville_city`	City of Martinsville	City
`charlottesville`	Charlottesville	City
`centreville`	Centreville	Place
`dumfries`	Dumfries	Town

North Carolina — `locality` enum (`state` = `NC`)

Stored enum key (`locality`)	Import/display label	Typical kind
`durham`	Durham	City / locality
`garner`	Garner	Town
`greensboro`	Greensboro	City
`chatham`	Chatham	Locality (label as in config)

Import behavior (short)

Column	Role
`state`	Must match a key in `region_localities` (e.g. `VA`, `NC`).
`locality`	Use the **stored enum key** (e.g. `halifax`) **or** the **display label** (e.g. `Halifax County`); import lowercases and resolves labels to keys when they match that state's map.

Events

Creating Events

Overview

Events represent interactions with entrepreneurs such as skill workshops, grapevine monthly meetings, lunch and learns, and expos. You can create events one by one in the app on the Events page or import events in bulk. Each event is associated to one or more grants, which allows participants to be tracked in grant reporting metrics such as entrepreneurs served. Events can be backdated so they count for metrics after the event has occurred.

Create One Event

1. Click **Interactions > Events** on the top navigation bar
2. Click **Create new event**
3. Ensure that the auto-selected grant is correct or select a different grant
4. Fill out the required fields denoted by an asterisk and optional fields as needed
    1. **Title**
    2. **Description**
    3. **Host:** business or entity hosting the event
    4. **Start date**
    5. **End date**
    6. **Guest attendees:** these attendees are counted toward all grant metrics (e.g., entrepreneurs engaged and businesses served)
    7. **Staff:** These attendees are only counted toward the entrepreneurs served metric. Use this option for situations like a guest speaker or volunteer at an event. They are counted as an entrepreneur engaged, however, their business wasn't directly served.
5. Click **Create**

Import Multiple Events

Use this method if you want to plan out multiple future events more efficiently than entering them one by one. This only includes the event information, not the attendee registration information. When importing grants, you can only associate an event to a single grant. After the import, you can associate events to multiple grants if needed by editing the events.

1. Click **Interactions > Events** on the top navigation bar

2. Click **Import**
3. You can import events in several ways covered below

Import Events and Attendees

Use this method if you are entering events that already occurred or upcoming events for which you have attendee registration information.

1. Click the dropdown button named **Hosted Events and Attendees (Multiple Sheets)** to download an Excel workbook containing 2 worksheets
2. Fill out information for the events in the **Hosted Events** worksheet
    1. First associated grant
        1. One of the following fields must be entered
        2. first_grant_id: the system ID of the first grant this event is associated with
        3. first_grant_name: the exact name of the first associated grant
    2. title
    3. description
    4. Entity (business) information
        1. One of the following fields must be entered
        2. entity_id
        3. entity_name: the exact name of the entity that is hosting the event
    5. Dates
        1. Date format can by yyyy-mm-dd, mm/dd/yyyy, and several other options. If the date format is incorrect, the system will notify you. Then try changing the format and re-import the data. Be aware of issues with Excel and CSV files having different formats, especially if you are working between different operating systems (e.g., from Windows to macOS)
        2. start_date
        3. end_date
    6. location: location that an event was held. No specific format is required and it doesn't link to an address in the system.
    7. import_context: A note added to the imported record for traceability later on. This is helpful for large amounts of imported data in which you may need to verify the import results.
3. Fill out information for attendees in the **Hosted Event Attendees** worksheet
    1. Event information to associated attendees to events
        1. One of these fields must be filled out
            1. hosted_event_id: system ID of the event (only relevant when adding attendees to an existing event)
            2. hosted_event_title: exact title of the event already in the system or in the other worksheet
    2. Attendee (user) information
        1. One of these fields must be filled out
            1. user_id: system ID of the attendee if they already exist
            2. first_name: first name of the attendee
            3. last_name: last name of the attendee

4. email: unique email address of the attendee
5. event_role
    1. One of these exact values must be used to denote the type of attendee. Currently, there are 2 only 2 options, however, this could be expanded later.
    2. **guest:** these attendees are counted toward all grant metrics (e.g., entrepreneurs engaged and businesses served)
    3. **staff:** These attendees are only counted toward the entrepreneurs served metric. Use this option for situations like a guest speaker or volunteer at an event. They are counted as an entrepreneur engaged, however, their business wasn't directly served.
6. phone: 10-digit phone number for the attendee. Only enter the numeric digits and no spaces, hyphens, parentheses, etc.
7. import_context

Import Events Only

1. Click the dropdown **Hosted events**
2. Click **CSV** or **Excel** to download a template
3. Fill out the template based on the information above
4. Select the format, upload the file, and click **Import**
5. Correct any errors as necessary

Import Attendees Only

1. Click the dropdown button named **Hosted Events and Attendees (Multiple Sheets)** to download an Excel workbook containing 2 worksheets
2. Skip the **Hosted Events** worksheet as this is only for new events
3. Fill out information for attendees in the **Hosted Event Attendees** worksheet
    1. Event information to associated attendees to events
        1. One of these fields must be filled out
            1. hosted_event_id: system ID of the existing event
            2. hosted_event_title: exact title of the existing event
    2. Attendee (user) information
        1. One of these fields must be filled out
            1. user_id: system ID of the attendee if they already exist
            2. first_name: first name of the attendee
            3. last_name: last name of the attendee
            4. email: unique email address of the attendee
            5. event_role
                1. One of these exact values must be used to denote the type of attendee. Currently, there are 2 only 2 options, however, this could be expanded later.
                2. **guest:** these attendees are counted toward all grant metrics (e.g., entrepreneurs engaged and businesses served)

    3. **staff:** These attendees are only counted toward the entrepreneurs served metric. Use this option for situations like a guest speaker or volunteer at an event. They are counted as an entrepreneur engaged, however, their business wasn't directly served.
6. phone: 10-digit phone number for the attendee. Only enter the numeric digits and no spaces, hyphens, parentheses, etc.
7. import_context

Programs

New Program

Whilst on your main page (dashboard), navigate to the top of the screen and click "Interactions". This opens a drop down menu, from which you click "Programs".

Click "New Program".

Select the associated grants.

Fill out the appropriate information.

- Name of the program.
- A description of the program.
  Note: All fields must be filled in.

Click "Create".

You should be taken back to the main Programs screen and the program you created should be there. From here you may edit or delete the program, or add enrollments.

New Program Enrollments

Whilst on your main page (dashboard), navigate to the top of the screen and click "Interactions". This opens a drop down menu, from which you click "Programs".

Find the program you wish to add enrollments for. If you don't see one, click "New Program" and create it.

Click "Enrollments" within the program you wish to add to.

Click "Add to". Fill out the user information.

- The user who is being added to enrollment.
- The effective date.
- Their role.
  Note: All fields must be filled in.

Click "Save".

The enrollment should now appear. You may edit or delete the enrollment from here.

User Profile

Managing Your Profile

From any page, in the top right there should be your name with an arrow pointing down next to it. Click this, and then click "Profile".

From here, you may edit your account name, email address, password, or delete your account.

To change your password, enter your current password, new password, and repeat the new password, then click "Save".

To delete your account, simply scroll down and click "Delete Account". **Back up any data you wish to retain first. This action is irreversible.**

Settings

Managing Settings

From any page, in the top right there should be your name with an arrow pointing down next to it. Click this, and then click "Manage Settings".

From here, you may import results, create and manage referral statuses, view NAICS code groups, as well as create and manage milestones.

Managing Referral Statuses and Milestones

From any page, in the top right there should be your name with an arrow pointing down next to it. Click this, and then click "Manage Settings".

Referral Statuses

At the top of the settings page, you will find "Referral Statuses". On the right, you can enter the title of the referral and then click "Create". It will then appear towards the left. You can then click on the three red lines next to it wherein you may edit the title or delete the status.

Milestones

At the bottom of the settings page, you will find "Milestones". From here, you can click "Create new milestone". You can then enter the milestone name, the slug (which is a unique identifier for grant reporting. and a description of the milestone. Then, click "Add". It will then appear to the right. From there, you may delete or edit it.

Comments

Reminders

Addresses

Phone Numbers

Tags