

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.

Revision #4

Created 2025-02-01 16:00:58 UTC by Jacob Cook

Updated 2025-02-25 20:39:24 UTC by Jacob Cook