

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

Tax classification (`tax_classification`)

Key	Label
<code>disregarded-entity</code>	Disregarded Entity
<code>partnership</code>	Partnership
<code>c-corp</code>	C-Corporation

Key	Label
s-corp	S-Corporation
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 (<code>locality</code>)	Import/display label	Typical kind
<code>halifax</code>	Halifax County	County
<code>mecklenburg</code>	Mecklenburg County	County
<code>brunswick</code>	Brunswick County	County
<code>lunenburg</code>	Lunenburg County	County
<code>charlotte</code>	Charlotte County	County
<code>prince_edward</code>	Prince Edward County	County
<code>cumberland</code>	Cumberland County	County
<code>buckingham</code>	Buckingham County	County
<code>nottoway</code>	Nottoway County	County
<code>amelia</code>	Amelia County	County
<code>pittsylvania</code>	Pittsylvania County	County
<code>henry</code>	Henry County	County
<code>patrick</code>	Patrick County	County
<code>fairfax</code>	Fairfax County	County
<code>danville_city</code>	City of Danville	City
<code>martinsville_city</code>	City of Martinsville	City
<code>charlottesville</code>	Charlottesville	City
<code>centreville</code>	Centreville	Place
<code>dumfries</code>	Dumfries	Town

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

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

Import behavior (short)

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

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