

# 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.

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## 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.

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## 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).

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# 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.

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# 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.

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## 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.
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