| **Field** | **Description** | **Uses** | **Requirement** |
| --- | --- | --- | --- |
| **contractor\_name** | **Legal name of the contractor** | **Used in the account creation of the account**  **Used to determine if the contractor is already in Cognibox** | **Mandatory** |
| **contact\_first\_name** | **Cognibox contact first name** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **Used to contact the contractor as part of the onboarding process** | **Mandatory** |
| **contact\_Last\_name** | **Cognibox contact last name** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **Used to contact the contractor as part of the onboarding process** | **Mandatory** |
| **Contact\_email** | **Cognibox contact email** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **Used to determine if the contractor in already in Cognibox**  **Used to send registration link email to new contractors**  **Used to contact the contractor by email as part of the onboarding process** | **Mandatory** |
| **contact\_phone** | **Cognibox contact phone** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **Used to contact the contractor by phone as part of the onboarding process**  **NOTE: THE SCRIPT WILL AUTOMATICALLY CLEAN ALL NONE DIGITS AND FILL PHONE AND EXTENSION FIELDS FROM CONTACT\_PHONE IF THEY ARE EMPTY. USES ‘EXT’, ‘X’, ‘POSTE’, ‘,’ and ‘P’ TO FIND THE EXTENSION** | **Mandatory** |
| **contact\_language** | **Cognibox contact language** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **Used to select the language used to send registration link email to new contractors** | **Optional**  **(will be deduced from country, province or based on project)** |
| **address** | **Contractor street address** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **Used to determine if the contractor in already in Cognibox** | **Mandatory** |
| **city** | **Contrator city** | **Used to configure the Cognibox contact for new contractors in Cognibox** | **Mandatory** |
| **province\_state\_io2** | **Contractor province (ISO2 format)** | **Used to configure the Cognibox contact for new contractors in Cognibox** | **Mandatory** |
| **country\_iso2** | **Contractor country (ISO2 format)** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **Used to determine if the contractor in already in Cognibox** | **Mandatory** |
| **postal\_code** | **Contractor postal code** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **Used to determine if the contractor in already in Cognibox** | **Mandatory** |
| **category** | **Contractor risk level** | **Used by the hiring client to specific the risk level/questionnaire to use when Cognibox completes the import list and to set the questionnaire\_name and questionnaire\_id)**  **Used to determine the fee to charge new contractors use when Cognibox completes the import list** | **Optional** |
| **description** | **Contractor description** | **Used to configure the relationship between the hiring client and the contractor (description) in Cognibox** | **Optional** |
| **Phone** | **Contractor phone number** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **NOTE: AUTOMATICALLY FILLED BY THE SCRIPT FROM CONTACT\_PHONE IF PHONE IS LEFT EMPTY** | **Optional [formula in the templated uses the contact\_phone by default]** |
| **Extension** | **Contractor phone extension** | **Used to configure the Cognibox contact for new contractors in Cognibox**  **NOTE: AUTOMATICALLY FILLED BY THE SCRIPT FROM CONTACT\_PHONE IF PHONE IS LEFT EMPTY** | **Optional** |
| **Fax** | **Contractor fax number** | **Used to configure the Cognibox contact for new contractors in Cognibox** | **Optional** |
| **website** | **Contractor web site** | **Used to configure the Cognibox contact for new contractors in Cognibox** | **Optional** |
| **is\_take\_over** | **Is the contractor a take over from an existing CMS system (true/false)** | **Not used at the moment, implicitly true if a qualification expiration, qualification status, renewal date is provided** | **Optional**  **Will be assumed based on the the presence of renewal date and qualification status** |
| **Qualification\_expiration\_date** | **The first expiration date between the insurance or qualification in the existing CMS** | **Used to configure the relationship between the hiring client and the contractor (Qualification expiration and & subscription renewal date, if a different renewal date is not provided).** | **Optional**  **(must be provided with qualification\_status)** |
| **qualification\_status** | **The contractor qualification status in the existing CMS** | **Used to configure the relationship between the hiring client and the contractor (Qualification status)** | **Optional**  **(must be provided with qualification\_expiration\_date)** |
| **batch** | **Contractor implementation phase number** | **Used to configure the relationship between the hiring client and the contractor (batch system metadata)**  **Used by the R&D team to manually configure the import batch, in the future will be used by the import script** | **Optional** |
| **questionnaire\_name** | **Name of the questionnaire (as defined in Cognibox)** | **Will be used in hubspot to set the Questionnaire associated with deals**  **Used by the R&D team to manually configure the import batch, in the future will be used by the import script** | **Mandatory** |
| **questionnaire\_id** | **Cognibox id of the questionnaire** | **Not used at the moment – In the future will be used to configure the relationship between the hiring client and the contractor (questionnaire)** | **Mandatory** |
| **pricing\_group\_id** | **Cognibox id of the pricing group** | **Not used at the moment – In the future will be used to configure the Cognibox contact for new contractors in Cognibox (account type)** | **Mandatory**  **Coordinated with pricing\_group\_code** |
| **pricing\_group\_code** | **Price group code as defined in Cognibox** | **Will be used in hubspot to set the account type associated with deals** | **Mandatory**  **Coordinated with pricing\_group\_id** |
| **hire\_client\_name** | **Company name of the hiring client (as defined in Cognibox)** | **Will be used in hubspot to set the hire client associated with deals** | **Mandatory** |
| **hiring\_client\_id** | **Cognibox id of the hiring client** | **Not used at the moment – In the future will be used to configure the relationship between the hiring client and the contractor (hire client)** | **Mandatory** |
| **is\_association\_fee** | **Is the hire client adds a association fee for contractor already in Cognibox (true/falase)** | **Will be used to decide to create an association fee deal in hubspot for existing contractors with an existing relationship with another hiring client** | **Mandatory** |
| **base\_subscription\_fee** | **The amount of the membership subscription (ex: standard: 803)** | **For existing contractors, used to decide if a subscription upgrade deal must be created in Hubspot and what is the prorated amount** | **Mandatory** |
| **Contact\_currency** | **Subscription currency** | **Used in hubspot to set the deal currency**  **Used to properly calculate the subscription price upgrade (in consistent currency)**  **Used to set the membership currency** | **Mandatory** |
| **agent\_in\_charge\_id** | **Cognibox id of the qualification agent** | **Used to configure the Cognibox agent for new contractors in Cognibox** | **Optional**  **If not provided “agent to be assigned”** |
| **take\_over\_follow\_up\_date** | **Date for the next follow-up** | **Not used at the moment – To be used by Cognibox import script in the futur** | **Optional** |
| **renewal\_date** | **Membership renewal date** | **Used in hubspot to set the renewal date**  **Used in Cognibox to set the membership renewal date** | **Optional** |
| **Information\_is\_shared** | **Contactor information sharing flag with Hiring client** | **Set the flag that contractor share information with the hiring client, used in takeover where the hiring client already has a relationship and data about the contractor.** | **Optional** |
| **contact\_timezone** | **Contractor timezone** | **Used to configure the Cognibox contact for new contractors in Cognibox** | **Mandatory** |
| **do\_not\_match** | **Command to tell the analysis script not to match this contractor (true)** | **Used by the the analysis script (itself) to force that it doesn’t match a specific contractor and will result in that contractor to be “force” created in Cognibox** | **Optional**  **Empty will be considered False** |
| **force\_cbx\_id** | **Command to tell the analysis script to match to a specific contractor Cognibox id** | **Used by the analysis script to force to match to a specific contractor** | **Optional**  **Empty will be normal matching** |
| **Ambiguous** | **Indicate a contractor match is ambiguous (true)** | **Used during manual analysis/review to decide to create to tag a deal as “ambiguous” deals requiring a manual processing**  **Indicate that the new contractor should not be part of the registration mass email (hubspot)** | **Optional**  **Empty will be considered False** |
| **Metadata[\_cm | \_gm | \_rm]\_<metadata\_name>** | **A meta data in a section** | **Not used at the moment – In the future will be used to configure the relationship between the hiring client and the contractor (metadata)** | **Optional**  **As many as necessary columns can be added** |

# Analysis

**Pre-processing**

1. Use redash to generate the cognibox contractor DB dump To contractor<year-month-day >.csv (Do not use excel format, it is unreliable given the size of the output)
2. Use the “standard” template excel to provide the hiring client data(Use a version to the filename <hc>v1.xlsx, since you will iterate on the file and keeping the history of changes)

**Processing**

1. Run the script: **docker run --rm -it -v ${pwd}:/home/script/data $(docker build -t icm -q**[**https://github.com/iguzu/icm.git**](https://github.com/iguzu/icm.git)**) contractor<year-month-day>.csv <hc>v1.xlsx <hc>v1.out.xlsx**

**Analysis**

1. Open the script output file <hc>v1.out.xlsx in Excel
2. Check manually in Cognibox for matches for all “blank” Cognibox\_id and generic\_domain TRUE. If match found add the cbx\_id to the column force\_cbx\_id
3. Clear filters, sort smallest to largest address\_ratio, and filter “out” all ambiguous, do\_not\_match, or force\_cbx\_id
   1. Check if low quality match are valid and if not, put TRUE in do\_not\_match
   2. If ambiguous, put TRUE in ambiguous
   3. If multiple match check the analysis what match is the best (and force the cbx\_id, if necessary)
4. Clear filters, sort smallest to largest company\_ratio, and filter “out” all ambiguous, do\_not\_match, or force\_cbx\_id
   1. Check if low quality match are valid and if not, put TRUE in do\_not\_match
   2. If ambiguous, put TRUE in ambiguous
   3. If multiple match check the analysis what match is the best (and force the cbx\_id, if necessary)
5. Clear filters and filter match\_count\_with\_relationship > 1
   1. Check if low quality match are valid and if not, put TRUE in do\_not\_match
   2. If ambiguous, put TRUE in ambiguous
   3. If multiple match check the analysis what match is the best (and force the cbx\_id, if necessary)
6. Clear all filters, filter by contact match FALSE
   1. Check ALL matches for obvious name matching error, if error set do not match to TRUE
7. Clear all filters and filter all already is\_in\_relationship and Is\_qualified
   1. For each one, check in Cognibox the questionnaire if the questionnaire is different, if it is different, ask the hiring client to confirm if the questionnaire must be changed. If it doesn’t need to change, remove it from the list
8. Clear filter, sort by index small to large

**Reprocessing**

1. If do\_not\_match, force\_cbx\_id or ambiguous have changed, proceed with the following
   1. Make a new copy of the hiring client list “<hc>v2.xlsx”
   2. Copy the 3 columns (data) do\_not\_match, force\_cbx\_id, ambiguous back into the hiring client file
2. redo to **Processing with:** : **docker run --rm -it -v ${pwd}:/home/script/data $(docker build -t icm -q**[**https://github.com/iguzu/icm.git**](https://github.com/iguzu/icm.git)**) contractor<year-month-day >.csv <hc>v2.xlsx <hc>v2.out.xlsx**