## Total Channel Partners in V1 - **954**

Analytics

Total Indian CP : 939 ( [list](https://drive.google.com/file/d/1lCHeDDdp_SaO78doee55_sjPQnFr9I8Q/view))

Total Indian CPs After Removing Invalid CPs (As marked by [krishna@hbits.co](mailto:krishna@hbits.co)) : 923

Tottal NRI CPs After Removing Invalid CPs (As marked by [krishna@hbits.co](mailto:krishna@hbits.co)): 13

Users With Invalid Mob No.: 4 ([list](https://drive.google.com/file/d/1TFHUJhSSHQYR8aUA9gk5fBoAXc2QYZcA/view?usp=share_link))

Total Duplicates CPs : 3

Total CPs to be Migrated from V1 to V2 : **933** ([JSON File Drive Link](https://drive.google.com/file/d/17VOaGhNQbSGw8ahTTp6Ul_Wwpq5M6gG9/view?usp=share_link)) ([CSV File Drive Link](https://drive.google.com/file/d/1KO4awDSxllwWxIOiTwyVA7ScmUgwXYRe/view?usp=share_link))

V1 Channe Partner Schema

{

"\_id": {

"$oid": "5fbcf098a54b6a78bc88c5ad"

},

"products\_dealing\_in": [],

"first\_name": "MONEYMONK",

"last\_name": "FINANCIAL",

"company\_name": "MoneyMonk Financial",

"primary\_phone\_number": "+919920622215",

"primary\_email": "samir.shah@moneymonk.co.in",

"prefered\_business\_location": [

{

"country": "India",

"state": "Maharashtra",

"city": "Mumbai"

}

],

"product": [

{

"category": "COMMERCIAL\_REAL\_ESTATE",

"subcategory": "FRACTIONAL\_OWNERSHIP"

},

{

"category": "COMMERCIAL\_REAL\_ESTATE",

"subcategory": "COMPLETE\_OWNERSHIP"

}

],

"registration\_number": "4005",

"\_\_v": 0,

"lms\_id": "f08b54dd-669f-4648-a6c8-f8723541a0b5",

"email\_verified": true,

"last\_login": {

"$date": {

"$numberLong": "1668572627534"

}

},

"address": {

"country": "India",

"state": "Maharashtra",

"city": "MUMBAI",

"street": "A17 5TH FLOOR MILAN APARTMENTS 87 TARDEO ROAD OPP AC MARKET",

"pincode": "400034"

},

"pan": {

"pan\_document\_id": "63661d8b7ac0d500119906bc",

"pan\_number": "AVQPS4676K",

"name": "SAMIR CHANDULAL SHAH"

},

"bank": {

"cheque\_id": "63661d7f7ac0d500119906b0",

"name": "BANK OF BARODA",

"account\_number": {

"$numberLong": "70080200003081"

},

"ifsc\_code": "BARB0DBBMMO"

},

"additional\_info": {

"doc\_type": "AMFI"

},

"gst": {

"gst\_document\_id": "63661f187ac0d50011990a81",

"gst\_number": "27AVQPS4676K1ZJ"

},

"msme": {

"msme\_document\_id": "63661ec87ac0d50011990a27",

"msme\_number": "NA"

}

}

This is maxed key present (in any other Channel partner will have these keys or less).

## V1 to V2 Data Migration Plan

1. The field "*first\_name*" in V1 will be mapped to "*firstName*" in V2.
2. The field "*last\_name*" in V1 will be mapped to "*lastName*" in V2.
3. The field "*company\_name*" in V1 will be mapped to "*companyName*" in V2. If the field is not present in V1, it will be set to an empty string in V2.
4. The field "*primary\_phone\_number*" in V1 will be mapped to "*mobileNumber*" in V2 and the mobile country code will be removed.
5. The field *"primary\_email"* in V1 will be mapped to *"emailAddress"* in V2.
6. The field *"prefered\_business\_location.country"* in V1 will be mapped to "*country*" in V2.
7. The field *"prefered\_business\_location.state"* in V1 will be mapped to "*state*" in V2.
8. The field *"prefered\_business\_location.city"* in V1 will be mapped to "*city*" in V2.
9. The field *"registrationNumber"* in V1 will be mapped to "registrationNumber" in V2 and will be set as an **auto-incremen**t value.
10. The field *"address.pincode"* in V1 will be mapped to "*pincode*" in V2.
11. The field *"address.street + address.city + address.state + address.country"* in V1 will be mapped to "*fullAddress*" in V2.
12. Several new fields are being added to V2 as follows:
13. "*KycNotStarted*" with a default value of "*kycStatus*" as it was not present in V1.
14. "*childIds*" with a default value of an empty array as it was not present in V1.
15. "*parentId*" with a default value of null as it was not present in V1.
16. "*parentName*" with a default value of an empty string as it was not present in V1.
17. "*channelPartnerOrganizationId*" with a new organization created for all as it was not present in V1.
18. "*partnerUniqueId*" with a default value of an auto-increment as it was not present in V1.
19. *"mobileCountryCode"* in V2 and the mobile country code will be extracted from the *primary\_phone\_numbe*r field.

V2 Channel partners Schema

{

"firstName": "",

"lastName": "",

"companyName": "",

"mobileNumber": "",

"channelPartnerType": "",

"mobileCountryCode": "",

"emailAddress": "",

"country": "",

"state": "",

"city": "",

"registrationNumber": "",

"pincode": "",

"KycNotStarted": "",

"fullAddress": "",

"childIds": [],

"parentId": "",

"parentName": "",

"channelPartnerOrganizationId": "",

"partnerUniqueId": ""

}



V2 Channel Partners Oragnization Model

{

"companyName": "",

"assetUnderManagement": "",

"distributorCategory": "",

"assetType": "",

"focusedArea": [],

"focusedAreaOther": ""

}



## Migration Steps

1. Loop through all CPs of V1 (referred to as CpV1).
2. Typecast CpV1 to V2 (referred to as CpV2).
3. Use [this code](https://gist.github.com/manikantj06/67f40d37e7ada7b1cee86a75b3a544f3) to do Point 2.
4. Check if CpV1 has a company name of some value. If true, set the channel partner type to "Company". If false, set the channel partner type to "Individual".
5. Check if the Country, State, and City fields are empty. If true, set the fields to "India", "Maharashtra", and "Mumbai" respectively. Document this change in [this sheet](https://docs.google.com/spreadsheets/u/0/d/1oLa8y89Rq_aV4_R0-P6cGne35JkCsdrgdizsrwAr9I4/edit) with additional details in the comments.
6. Check if CpV2 has a phone number and email address in the userV2 record. If true, update the userType to include "ChannelPartner".
7. If CpV2 does not have a phone number or email address that exists in the userV2 record, create a new user in V2 with userType as "*Customer*" and "*ChannelPartner*".
8. If CpV2 has a phone number or email address that exists in the userV2 record, but not both, mark them in [this sheet](https://docs.google.com/spreadsheets/u/0/d/1oLa8y89Rq_aV4_R0-P6cGne35JkCsdrgdizsrwAr9I4/edit) and highlight the [last column in yellow](https://docs.google.com/spreadsheets/d/1oLa8y89Rq_aV4_R0-P6cGne35JkCsdrgdizsrwAr9I4/edit#gid=319866436&range=T2) for further review.