



COM

The Perfect Fit

MigrateX

By mac

The Lossless Migration

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The Easiest Way to Migrate from Legacy Systems to Apache
Fineract – Built for Accountants, Trusted by Financial
Professionals

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<https://mifos.netlify.app/>

The most advanced Fineract Migration tool without losing a single data.



Mifos Initiative



Prologue

For finance professionals and IT teams working within microfinance institutions, cooperatives, SACCOs, and digital banks, the need to move away from outdated systems is clear. Legacy ERPs like Odoo, Microsoft Dynamics, and Finacle, or even in-house solutions, often hold you back creating inefficiencies, introducing risks, and requiring expensive workarounds just to keep your operations running.

But migrations can be complex, time-consuming, and costly right?

That's exactly why **MigrateX** was created. It's a powerful yet simple tool that lets you move **all your financial data** loans, fixed deposits, savings, transactions, accounting, and more from any system into **Apache Fineract**, in just **one click**.

And you don't need a team of engineers or consultants to make it happen.

MigrateX. Fineract. Lossless

One of the biggest fears for any accountant or finance lead during a system migration is the potential for **missing or corrupted financial records**. MigrateX was designed to eliminate those fears completely.

With MigrateX, you can move all your key data sets without compromise:

- **Loan Portfolios**
All disbursements, repayment schedules, interest rates, grace periods, penalties, and past transactions are accurately captured and transferred. Historical loan performance is preserved.
- **Fixed and Term Deposits**
Migrate customer deposits along with contract terms, interest calculations, maturity instructions, and past

withdrawals. Everything is retained just as it was in your original system.

- **Customer Accounts and Transactions**

All customer data — including KYC documents, account statuses, balances, and complete transaction histories — is migrated seamlessly, ensuring no gaps in customer profiles.

- **Savings and Wallets**

From interest accruals to standing orders and recurring payments, MigrateX brings every savings record into Fineract without any formatting issues or lost information.

- **Accounting Entries and Financial Records**

General ledger accounts, journal entries, reconciliations, and trial balances are all mapped correctly into Fineract's accounting framework. You stay compliant and audit-ready.

There is **no data loss, no manual re-entry**, and no need for days or weeks of system downtime.

“The reputation of a financial institution is in its ability to not lose data”

Migrate in Minutes, Not Months — Without Hiring a Consultant or Technical Team

Traditional migrations take months, require custom development, and often lead to multiple rounds of data validation. MigrateX replaces all that with a simple, guided process that can be completed internally — often within a **single afternoon**.

Here's how it works:

1. **Upload Your Data** — MigrateX accepts data exports from virtually any ERP or core banking system.
2. **Map Fields Easily** — Use built-in templates and a guided interface to match your fields to Fineract's data structure.
3. **Click to Migrate** — Run the migration and watch your institution's data move into Fineract in real time.

There's no steep learning curve. You don't need to be a developer. And you'll never wonder whether something got left behind.

Powerful Features That Give You Total Control Over the Migration Process

MigrateX isn't just fast — it's **safe, flexible, and built for accuracy**:

- **Rollback Capability**
If something doesn't look right, you can undo the entire migration instantly and return to your previous system without losing any data.
- **Mirror Mode**
Run side-by-side comparisons of the data in your old system versus Fineract to ensure complete consistency before going live.
- **Audit Logging and Access Controls**
Every step of the migration is logged. Only authorized personnel can access or initiate migrations, keeping your data secure.
- **Encryption and Data Protection**
All data is encrypted in transit and at rest, ensuring compliance with banking security standards.

Why the \$2,299 Cost is Worth It — And How It Supports Financial Inclusion Globally

The license fee for MigrateX is **\$2,299**. This includes the migration tool, access to templates, support, future updates, and the rollback and mirror features. You pay once and can migrate on your schedule, at your own pace.

But unlike other software tools, **your payment doesn't go to a corporation.**

The full amount is donated to the **Mifos Initiative**, a nonprofit organization dedicated to enabling accessible, affordable financial services through open-source banking technology like Apache Fineract.

To purchase your license, simply send payment via **PayPal to donations@mifos.netlify.com**. Every dollar supports innovation in digital financial services for underserved communities around the world. Use the email you will want to receive the MigrateX Source on

Take the Pressure Off Your Team and Migrate with Confidence

As an accountant, your role is to ensure accuracy, stability, and accountability across your organization's financial systems. MigrateX gives you the tools to do exactly that — without hiring third-party firms, without months of testing, and without fear of errors.

If you've been waiting to modernize your core system, now is the time.

**Migrate once. Migrate with
confidence. MigrateX.**



To get started or request a demo, reach out or send your donation via PayPal to **donations@mifos.netlify.com**.

Comprehensive Guide to Purchasing and Setting Up MigrateX for Your Apache Fineract Installation

MigrateX makes it incredibly easy to transition from legacy systems to Apache Fineract — and setting it up is just as simple. Below is a step-by-step guide to help you complete your purchase and installation successfully.

Step 1: Make Your Payment via PayPal

To get started, purchase your MigrateX license by sending a one-time payment of **\$2,299** to the following PayPal address:

donations@mifos.netlify.com

Important: When making the payment, **enter the email address where you'd like to receive the MigrateX source code and license file** in the notes section. This is the email we will use to send your copy of the tool.

Once your payment is confirmed, you will receive:

- A zipped folder containing the full **MigrateX source code**
- Your unique **license file**
- A setup guide (in PDF) for reference

Step 2: Upload the Source Code and License File to Your Fineract Server

After receiving the source code and license:

1. **Access your Fineract server** via SSH or file transfer tool.
2. **Navigate to your preferred working directory** (e.g., `/opt/fineract/modules/` or a similar location).

3. **Upload the MigrateX source code folder and the license file** to this directory.

4. Unzip the MigrateX package using a command like:

```
bash
```

```
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```

```
unzip migratex-package.zip
```

- 5.

Step 3: Compile MigrateX with Your Fineract Installation

Once uploaded:

1. Navigate into the MigrateX source folder.

```
bash
```

```
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```

```
cd migratex
```

- 2.

3. Run the build and compile command:

```
bash
```

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```
./gradlew build
```

4.

5. After a successful build, integrate the compiled module into your existing Fineract installation by moving or linking it into the modules folder (if applicable), or ensure it's referenced in your build setup.

6. Recompile your full Fineract application:

```
bash
```

```
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```

```
./gradlew clean build -x test
```

7.

8. Restart your Fineract service:

```
bash
```

```
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```

```
sudo systemctl restart fineract
```

9.

Step 4: Map MigrateX to a Dedicated Endpoint

By default, MigrateX operates via a custom API channel. To enable it:

1. Open your **routing or application configuration file** (e.g., `application.properties` or routing config).

2. Map MigrateX to a new endpoint:

```
bash
```

```
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```

```
/channels/migratex/**
```

- 3.

This endpoint will serve as the dedicated interface for all migration actions including data uploads, mapping, validations, and final pushes into Fineract.

Step 5: Attach Relevant Modules and Permissions

To ensure MigrateX runs smoothly:

1. **Enable necessary Fineract modules** (such as Loans, Savings, Clients, Accounting) through your admin interface or config files.
2. Assign **roles and permissions** to users who will operate MigrateX:
 - MIGRATEX_UPLOAD
 - MIGRATEX_VALIDATE
 - MIGRATEX_EXECUTE
 - MIGRATEX_ROLLBACK

These permissions allow users to securely perform migrations while maintaining auditability.

Step 6: You're All Set — Begin Your Migration

Once configured, access your Fineract instance and navigate to:

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[https://your-fineract-domain.com/
channels/migratex](https://your-fineract-domain.com/channels/migratex)

From here, you can:

- Upload data from your legacy system
- Map fields to Fineract's structure
- Run test migrations
- Preview results in mirror mode
- Execute the final migration
- Roll back if needed

Need Help?

If you run into any issues, reach out using the support contact provided in your setup package. We're here to make your transition as smooth and successful as possible.

Migrate with confidence. Migrate with MigrateX.