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Cleanup Automation Project

Problem

Big companies (ex. Microsoft) have dozens of subs and a human going through all those links and pitchbook data takes too much time especially when most of that time is just copy and pasting into the search for retool/salesforce.

Program Overview

The program goes through Pitchbook and builds a tree of subsidiaries for each given company, along with all relevant data (former names, legal names, addresses, contacts, summary, etc.). It then uses Retool and Salesforce to search for and input all the data, adding matches as subsidiaries. Next, Salesforces (eventually also Google AI) are used to back-check each subsidiary to ensure data is not mismatched on a record; if it is, a warning will be raised for a human/Google AI to review.

Snippet of program output for Microsoft:

--- Color Coded JSON Tree ---
Profile: https://my.pitchbook.com/profile/11026-45/company/profile (Depth: 0)
├── website_link: http://www.microsoft.com/
├── former_names: None
├── legal_name: Microsoft Corp.
├── contact_name: Amy Hood
├── contact_profile_link: https://my.pitchbook.com/profile/53812-36P/person/profile
├── contact_title: Executive Vice President & Chief Financial Officer
├── contact_email: amyhood@microsoft.com
├── contact_email_link: mailto:amyhood@microsoft.com
├── contact_business_phone: +1 (800) 285-7772
├── contact_mobile_phone: None
├── office_address_line1: One Microsoft Way
├── office_address_line2: Redmond, WA 98052
├── office_address_line3: United States
├── office_email: msft@microsoft.com
├── office_phone: +1 (800) 285-7772
├── scraped_affiliates_table_data: [63 items]
│   ├── [0]:{}
│   │   ├── Name: Microsoft Corporation Savings Plus 401(k) Plan
│   │   ├── Name_link: https://my.pitchbook.com/profile/52578-55/limited-partner/profile
│   │   ├── Industry: Corporate Pension
│   │   ├── Industry_link:
│   │   ├── Location: Redmond, WA
│   │   ├── Location_link:
│   │   ├── Year Founded: 1987
│   │   ├── Year Founded_link:
│   │   ├── website_link: None
│   │   ├── former_names: None
│   │   ├── legal_name: None
│   │   ├── contact_name: Daniel Goff
│   │   ├── contact_profile_link: https://my.pitchbook.com/profile/144936-37P/person/profile
│   │   ├── contact_title: Plan Administrator
│   │   ├── contact_email: None
│   │   ├── contact_email_link: None
│   │   ├── contact_business_phone: +1 (425) 882-8080
│   │   ├── contact_mobile_phone: None
│   │   ├── office_address_line1: One Microsoft Way
│   │   ├── office_address_line2: Redmond, WA 98052-6399
│   │   ├── office_address_line3: United States
│   │   ├── office_email: None
│   │   ├── office_phone: +1 (425) 882-8080
│   │   ├── nested_affiliates: [0 items]
│   │   │   └── Empty
│   ├── [1]:{}
│   │   ├── Name: Microsoft Licensing, Gp
│   │   ├── Name_link: https://my.pitchbook.com/profile/402423-22/company/profile
│   │   ├── Industry: Systems and Information Management
│   │   ├── Industry_link:
│   │   ├── Location: Reno, NV
│   │   ├── Location_link:
│   │   ├── Year Founded: 2013
│   │   ├── Year Founded_link:
│   │   ├── website_link: None
│   │   ├── former_names: None
│   │   ├── legal_name: None
│   │   ├── contact_name: None
│   │   ├── contact_profile_link: None
│   │   ├── contact_title: None
│   │   ├── contact_email: None
│   │   ├── contact_email_link: None
│   │   ├── contact_business_phone: None
│   │   ├── contact_mobile_phone: None
│   │   ├── office_address_line1: 6100 Neil Rd Ste 100
│   │   ├── office_address_line2: Reno, NV 89511-1137
│   │   ├── office_address_line3: United States
│   │   ├── office_email: None
│   │   ├── office_phone: +1 (775) 823-5600
│   │   ├── nested_affiliates: [0 items]
│   │   │   └── Empty

Windows PowerShell

--- Profile Names by Depth ---
Microsoft Corp.
├── Microsoft Corporation Savings Plus 401(k) Plan
├── Microsoft Licensing, Gp
├── Microsoft's Your Big Idea
├── Simplygon
├── ZeniMax Media
│   └── Bethesda Softworks
│   ├── Zenimax Online Studios
│   └── Alpha Dog Games
├── Microsoft Canada
├── Microsoft for Startups
├── Code Connect
├── GitHub
│   └── npm
├── Telekinesys Research
│   └── Havok Vision Engine
├── Citus Data
├── Undead Labs
├── Obsidian Entertainment
├── Ninja Theory
├── Flip (Flipgrid)
├── Vexcel Corporation
├── Grupo-imagine
│   └── Imagine Waves
├── Microsoft Global Finance
├── Encore Business Solutions
├── M12
├── The Microsoft Ireland DC Pension Plan
├── Orions Systems
├── Lookout Software
├── Affirmed Networks
├── ADRM Software
├── Scaptify
├── Mixer (Social/Platform Software)
├── Activision Blizzard
│   ├── Ward Infinity
│   ├── Tespa
│   ├── Neversoft Entertainment
│   ├── Toys for Bob
│   ├── Digital Legends Entertainment
│   ├── Infinity Ward
│   ├── King.Com(Us)
│   ├── Beenox
│   ├── High Moon Studios
│   ├── King.com
│   │   └── Sweet Capital
│   ├── Trey Arch
│   ├── Sierra Entertainment
│   └── Radical Entertainment
├── Microsoft 4Afrika
├── Clipchamp
├── Microsoft Climate Fund
├── InXile Entertainment