Sales Navigator PPT Automator

miércoles, 16 de marzo de 2022   09:33

Important information

1. The code will only work with the template SN PPT Template we have.
2. The charts of the ppt contains a name that is used for the code. Do not change any name
3. If you create a chart that has the same name of other chart. The code will introduce the data of the other chart in the new chart.
4. The Dataloader and analysis sheet templates structures should not be modified. You can only introduce data in the fields that where we request information.
5. You need to use this analysis sheet version:
   https://mckinsey.box.com/s/u8xctve244gthbucfnnx9b9zap5a80y2
6. You need to use this Dataloader version: https://mckinsey.box.com/v/SN-dataloader
7. The tool only has capacity to use the first reference set from the analysis sheet

Install requirements

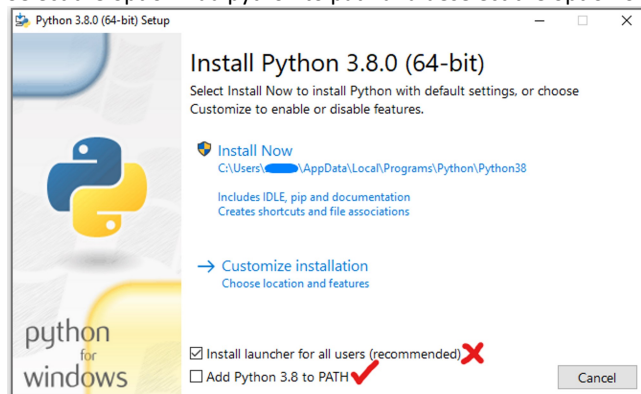This step needs to be done only one time

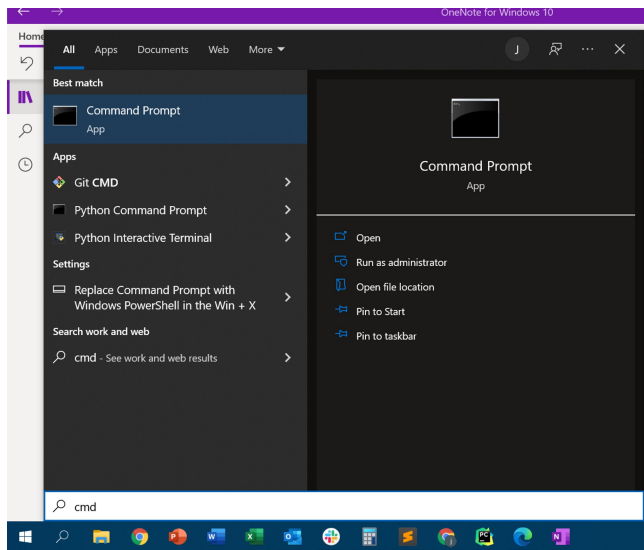1. Go to https://www.python.org and click on Downloads
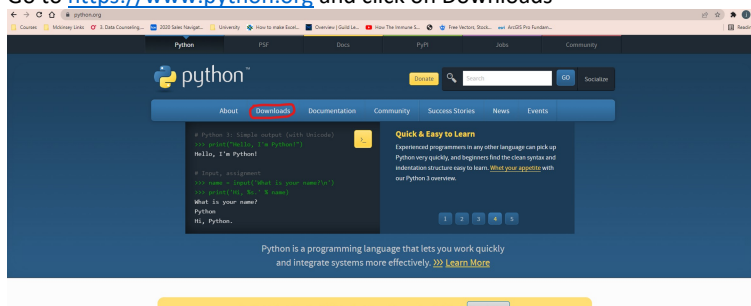
2. Click on Download Python
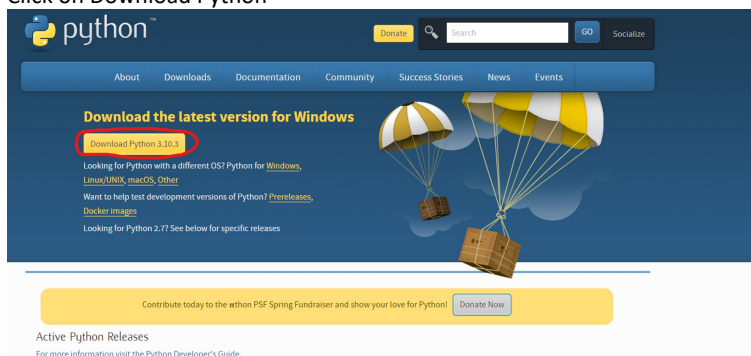
3. Open the installer
4. Select the option Add python to path and deselect the option of install launcher for all users

5. Follow the instructions until python is installed
6. Open the command prompt

7. Type in the console python --version
This should return the python version

8. Run the following commands:
    a. pip install pandas
    b. pip install numpy
    c. pip install thinkcell
   d. pip install openpyxl
    e. pip install regex

Use of the app

1. Go to the next link: https://mckinsey.box.com/s/d3pagd707xaxkm2oyaocx1wxqt59lchg
2. Download the pptautomation.zip
3. Open the folder where you save your downloads
4. Select the pptautomation.zip file and press the righ click buttom then click on extract all. Wait until the process is fully completed
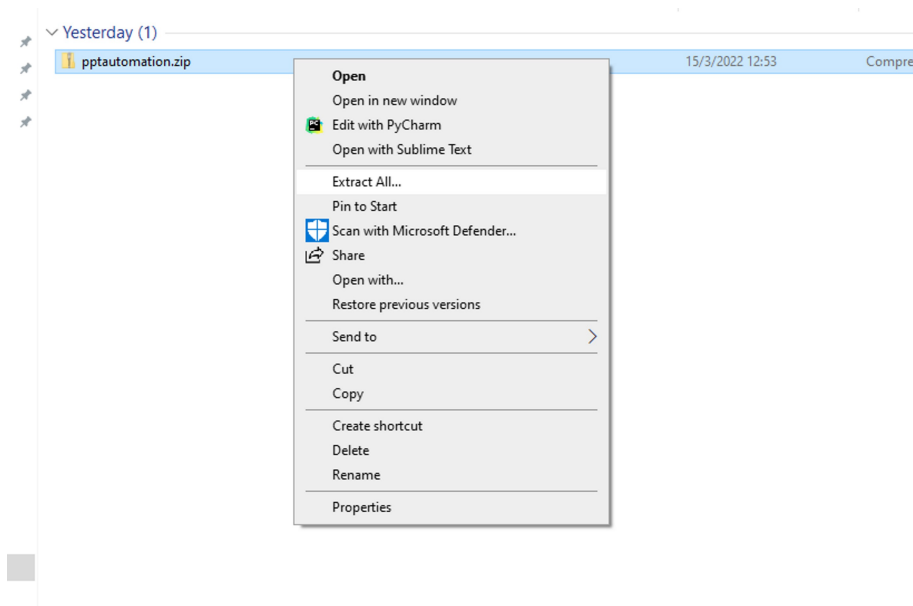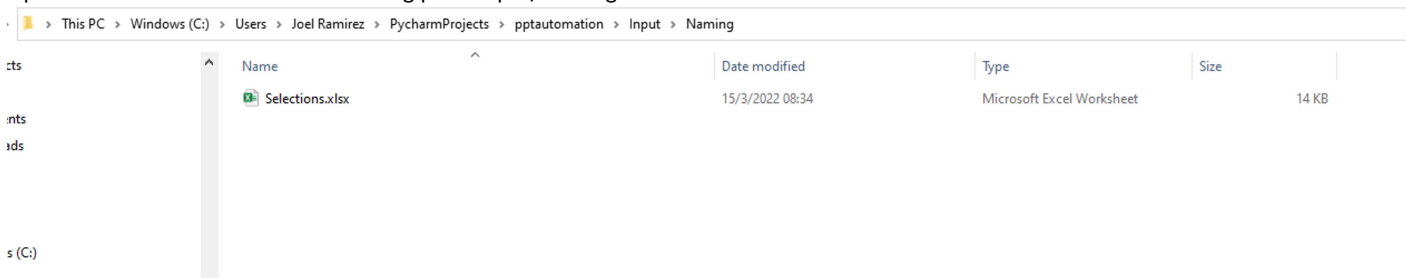
5. Open the ppt automation folder obtained from the zip file
6. Insert the analysis sheet in the following path Input/Analysis_Sheet
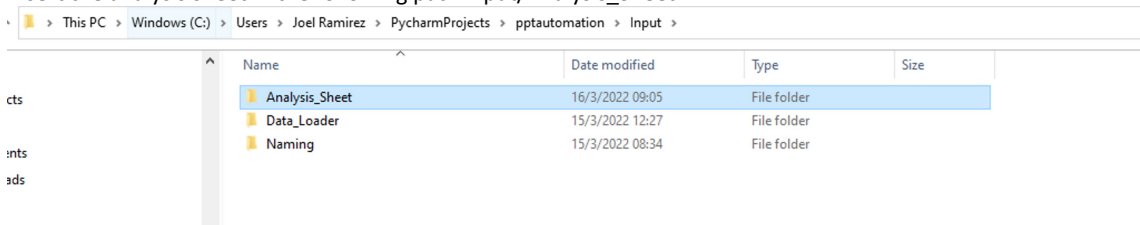
7. Insert the Data_Loader in the following path: Input/Data_Loader
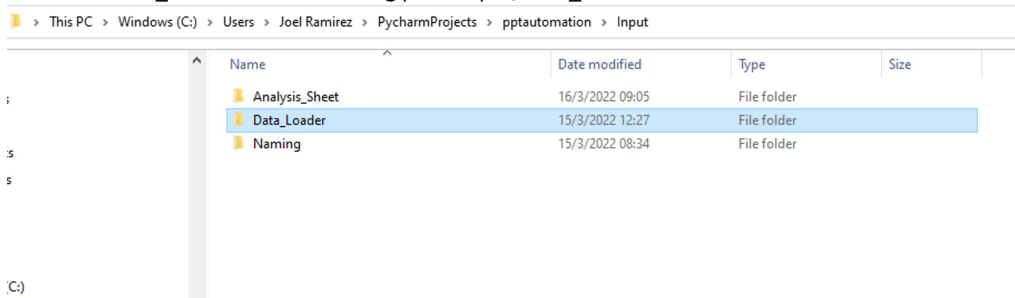
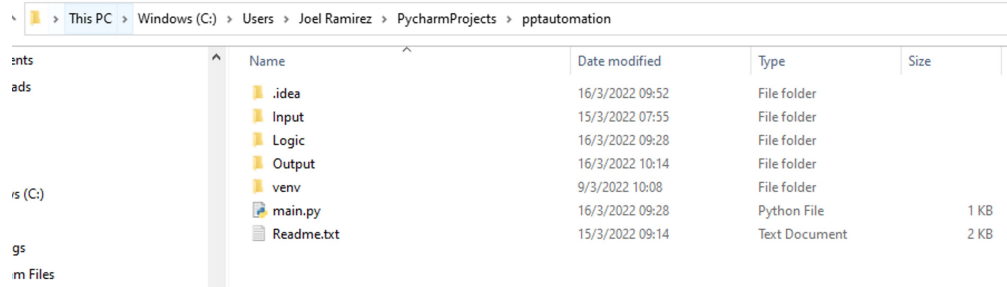8. Open the Selections.xlsx in the following path: Input/Naming

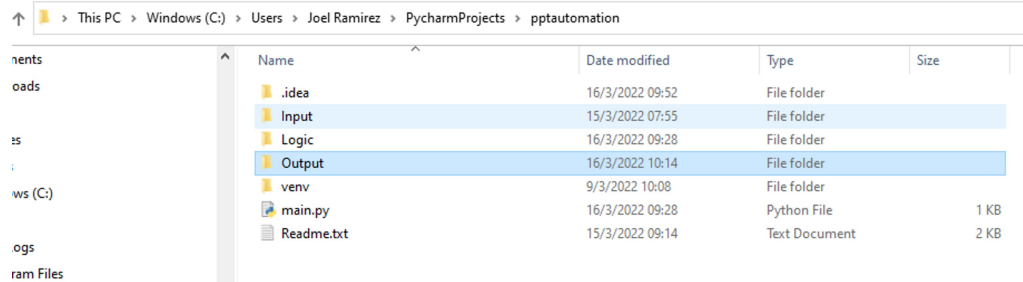9. Insert the name of the company name and business units

This is going to affect the following section of the ppt

■ Company A ■ Company A by BU ■ Benchmark 1[2]

10. Save the document
11. Go to the pptautomation folder

12. Double Click on the main.py and wait until the commad prompt closes
13. Go to the path pptautomation/output

14. Double Click on template.pptc (if there is no template.pptc file (in case that you do not find the pptcs file, please reach to joel ramirez (joel_ramirez@mckinsey.com) to get support)
    a. Notes:
        i. This step will open a new power point called presentation 2
        ii. The presentation 2 will have the charts with data from the analysis sheet, data loader and the selection files.
        iii. Please save this ppt with the desire name
        iv. If you need to update the presentation 2 created on this step, you need to name it as 032020 - Sales Navigator Report Template.pptx, run the main.py and the template.pptc. You will get another presentation 2 with the new changes. Save the ppt with the desire name