

Phase 8: Data Management & Deployment

360-Degree Restaurant Lifecycle Management Platform

In this phase, the focus was on handling data efficiently, ensuring its quality, and preparing the system for deployment in a production environment. The journey began with the **Salesforce Data Import Wizard**, where we imported foundational records such as customer and supplier accounts, menu categories, menu items, and inventory items. Sample CSV files were created to simulate realistic restaurant data and uploaded into the system with proper field mappings. This ensured that all relationships, such as menu items tied to their categories or inventory items linked to suppliers, were accurately preserved. The wizard simplified the process for smaller datasets and provided an intuitive way to test initial data loads.

For larger and more complex relationships like **recipe ingredients**, the **Data Loader** tool was employed. Unlike the import wizard, Data Loader allows for bulk inserts and supports external IDs, making it ideal for linking menu items to their required inventory ingredients. By defining external IDs for both menu items and inventory items, we could reference them cleanly without relying on system-generated IDs.

Inventory_Items - Excel													
File Home Insert Draw Page Layout Formulas Data Review View Help Tell me what you want to do													
Name													
A	B	C	D	E	F	G	H	I	J	K	L	M	N
Name	Item_Type	Unit_of_M	Storage_L	Unit_Cost	Current_St	Minimum_	Maximum_	Expiration	Primary_Supplier__c				
Tomatoes	Vegetable	Kg	Cold Stora	25.5	120	50	200	#####	Veggie Mart				
Chicken Br	Meat	Kg	Freezer	180	80	20	150	#####	Quality Meats Co				
Milk	Dairy	Litre	Cold Stora	45	200	100	400	#####	Dairy Delights Inc				
Olive Oil	Beverage	Litre	Dry Storag	320	60	20	100	#####	Beverage Distributors				
Cheese	Dairy	Kg	Cold Stora	500	40	10	80	#####	Dairy Delights Inc				
Potatoes	Vegetable	Kg	Dry Storag	20	300	100	500	#####	Veggie Mart				
Mutton	Meat	Kg	Freezer	600	50	15	120	#####	Quality Meats Co				
Butter	Dairy	Kg	Cold Stora	420	35	10	90	#####	Dairy Delights Inc				
Soft Drinks	Beverage	Litre	Dry Storag	55	150	50	300	#####	Beverage Distributors				
Onions	Vegetable	Kg	Dry Storag	18	250	80	400	#####	Veggie Mart				

This provided a scalable approach for managing complex many-to-many data relationships such as recipes and their components. Additionally, Data Loader was configured to support exports, enabling us to back up data regularly. Weekly automated exports were scheduled to capture all custom object records, ensuring that no data loss occurs during ongoing operations.

Getting closer

Choose data

Edit mapping

Start import

What kind of data are you importing?

Standard objects

Custom objects

Inventory Items

Line Items

Menu Categories

Menu Items

Order_Line_Items

Orders

What do you want to do?

Add new records

Match by:

Which User field in your file designates record owners?

Which Account field in your file do you want to match against to set the Primary Supplier lookup field?

Trigger workflow rules and processes?

Update existing records

Where is your data located?

Drag CSV file here to upload

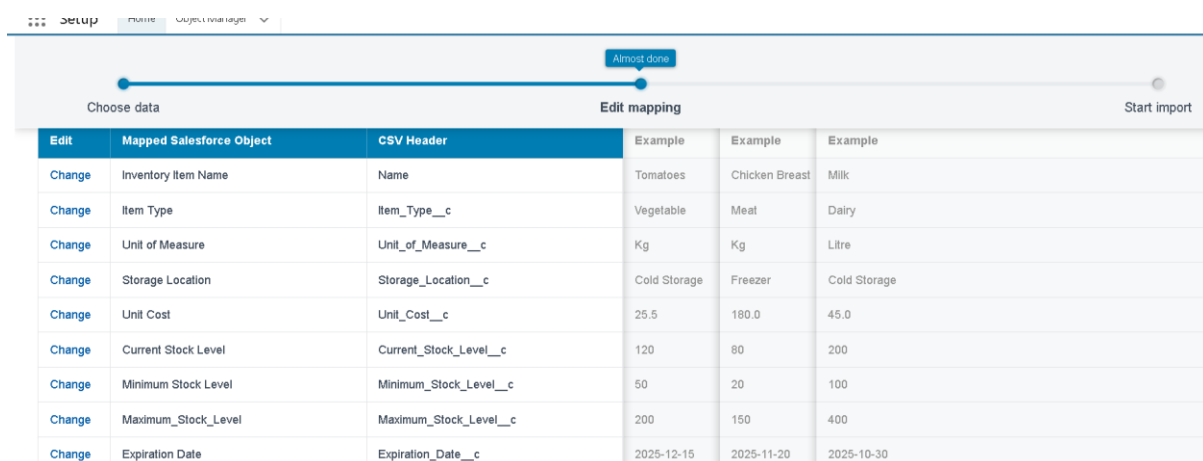
CSV

File

Character Code

Values Separated By

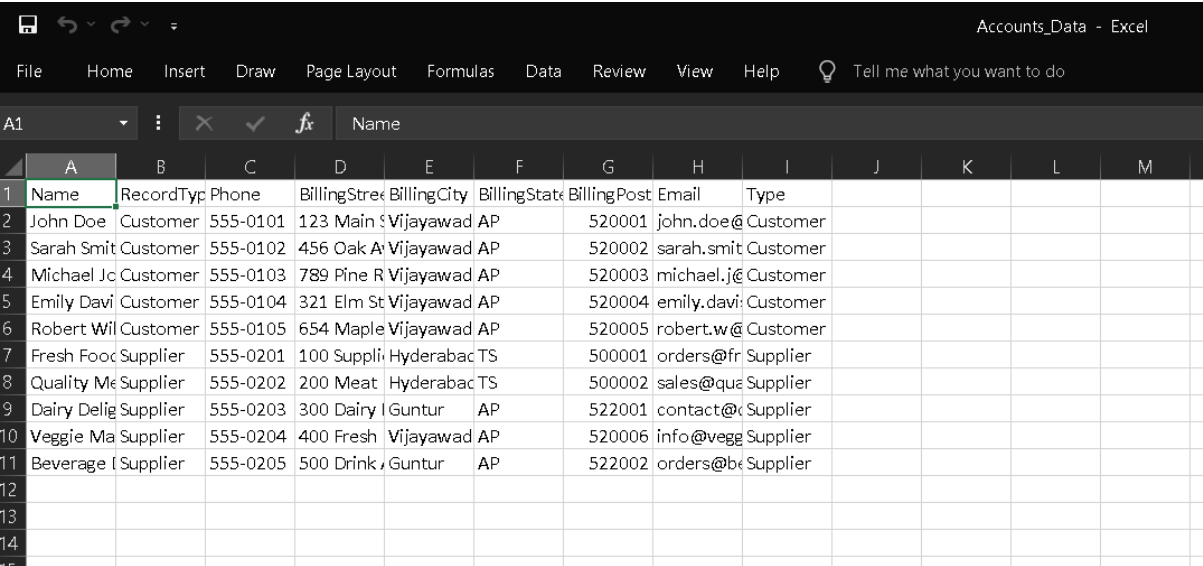
To maintain **data integrity**, duplicate management rules were introduced. For accounts, the system checks for duplicate company names to prevent accidental repetition of customers or suppliers. For menu items, duplicates are blocked if the same name appears within the same category. Similarly, inventory items are checked against supplier and name combinations to ensure unique identification of stock items. These rules create a safeguard against redundancy, which is critical for accurate reporting and stock tracking.



Edit	Mapped Salesforce Object	CSV Header	Example	Example	Example
Change	Inventory Item Name	Name	Tomatoes	Chicken Breast	Milk
Change	Item Type	Item_Type__c	Vegetable	Meat	Dairy
Change	Unit of Measure	Unit_of_Measure__c	Kg	Kg	Litre
Change	Storage Location	Storage_Location__c	Cold Storage	Freezer	Cold Storage
Change	Unit Cost	Unit_Cost__c	25.5	180.0	45.0
Change	Current Stock Level	Current_Stock_Level__c	120	80	200
Change	Minimum Stock Level	Minimum_Stock_Level__c	50	20	100
Change	Maximum Stock Level	Maximum_Stock_Level__c	200	150	400
Change	Expiration Date	Expiration_Date__c	2025-12-15	2025-11-20	2025-10-30

On the **deployment side**, we leveraged Salesforce deployment tools such as **Change Sets**, **Unmanaged Packages**, and the **ANT Migration Tool**. Change Sets allowed us to migrate configurations—including objects, validation rules, flows, Apex classes, and Lightning components—from sandbox to production with dependency management. Unmanaged Packages were created to bundle all restaurant management system components into a reusable and shareable package, providing a portable deployment option for other environments. For more technical scenarios, the ANT Migration Tool and Salesforce CLI (SFDX) were configured. These tools offered script-

based deployments, automation via CI/CD pipelines, and better control over versioning and rollback strategies.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Name	RecordType	Phone	BillingStreet	BillingCity	BillingState	BillingPost	Email	Type				
2	John Doe	Customer	555-0101	123 Main St	Vijayawada	AP	520001	john.doe@	Customer				
3	Sarah Smith	Customer	555-0102	456 Oak Ave	Vijayawada	AP	520002	sarah.smith@	Customer				
4	Michael Johnson	Customer	555-0103	789 Pine Rd	Vijayawada	AP	520003	michael.j@	Customer				
5	Emily Davis	Customer	555-0104	321 Elm St	Vijayawada	AP	520004	emily.davis@	Customer				
6	Robert Wilson	Customer	555-0105	654 Maple Ave	Vijayawada	AP	520005	robert.w@	Customer				
7	Fresh Foods	Supplier	555-0201	100 Supply	Hyderabad	TS	500001	orders@fr	Supplier				
8	Quality Meats	Supplier	555-0202	200 Meat	Hyderabad	TS	500002	sales@qua	Supplier				
9	Dairy Delights	Supplier	555-0203	300 Dairy	Guntur	AP	522001	contact@d	Supplier				
10	Veggie Mart	Supplier	555-0204	400 Fresh	Vijayawada	AP	520006	info@vegg	Supplier				
11	Beverage Inc	Supplier	555-0205	500 Drink	Guntur	AP	522002	orders@be	Supplier				
12													
13													
14													
15													

Bulk Data Load Job

750gL00000EgMSI

View the details of a bulk data load job.

[« Back to List: Bulk Data Load Jobs](#)

Bulk Data Load Job Detail

Reload

Job ID	750gL00000EgMSI	Job Type	Bulk V1	Status	Closed
Submitted By	Harshitha Gude	Operation	Insert	Total Processing Time (ms)	87
Start Time	10/3/2025, 1:38 AM PST	Queued Batches	0	API Active Processing Time (ms)	16

In summary, Phase-8 ensured that the restaurant management platform is **data-ready, secure, and deployable at scale**. Data import processes brought the system to life with realistic records, Data Loader streamlined bulk operations and relationships, duplicate rules protected data quality, and deployment strategies ensured smooth transitions between sandbox and production environments.

This comprehensive approach guarantees not only functional accuracy but also operational sustainability as the system goes live.