

Brightwater Outfitters

Case study | Smart Lookup Data Loader | TwinStack Solutions

Case study 1 of 2



At a glance

Organisation

Brightwater Outfitters, outdoor equipment retail

Salesforce footprint

Sales Cloud, 60 users, 4 custom objects

Volume

94,000 customer records, 210,000 order lines, 3 related objects

The problem

Every migration pass required exporting parent records to fetch IDs

Approach

Resolve lookups at import time against legacy customer codes

Elapsed time

9 working days, down from an estimated 4 weeks

Outcome

Zero orphaned records, 340 rows flagged for manual review

The situation

Brightwater Outfitters had run their customer and order data in a legacy retail platform for eleven years. A move to Salesforce meant bringing across customer records, order history, store locations and a custom loyalty object, with relationships intact across all four.

The data had one useful property. Every customer, order and store carried a code from the legacy system, and those codes had been applied consistently since the platform was installed. What the data did not have, anywhere, was a Salesforce record ID, because nothing in it had ever touched Salesforce.

What they tried first

The first plan was the conventional one. Load accounts, export them with their new IDs, VLOOKUP those IDs into the contact file, load contacts, export again, and repeat for orders and loyalty records.

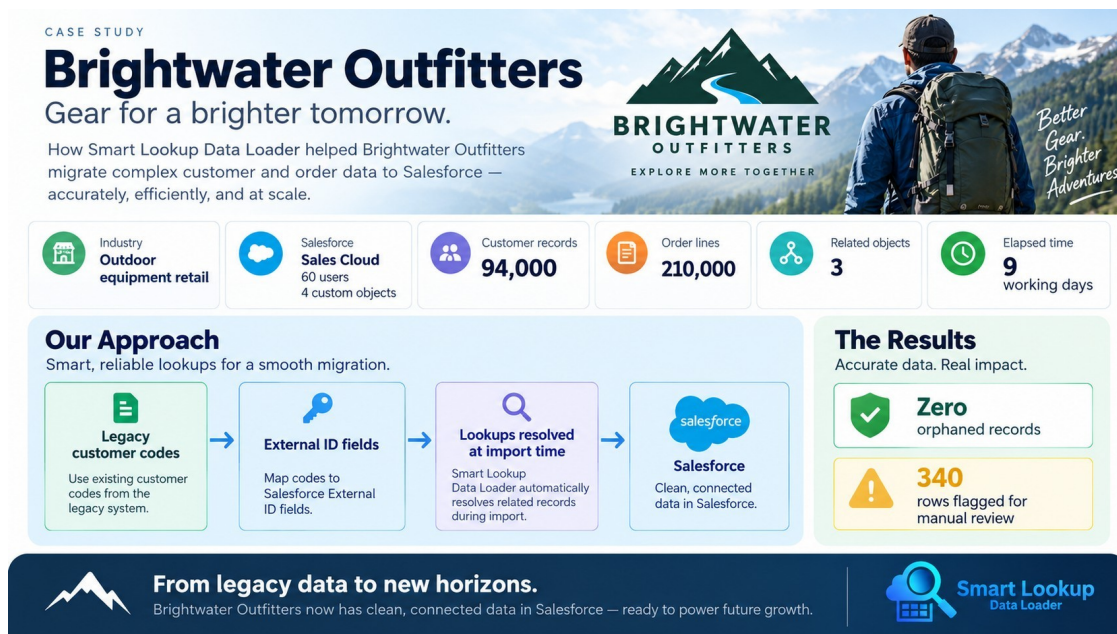
Two problems appeared in the first week.

The export and lookup cycle took longer than the loading. Each pass meant a full export of the object just loaded, a merge in a spreadsheet, and a verification step to confirm the merge had not dropped rows. On a file of 94,000 records that verification was itself a half-day job.

More seriously, the passes did not stay in sync. Test loads were being re-run as mapping issues were found, which invalidated the exported ID files from the previous pass. The team found orders attached to accounts that had been deleted and reloaded between the export and the import.

“We were spending more time proving the spreadsheet was still correct than actually loading anything. Every re-run meant redoing the lookup files from scratch.”

Data migration lead, retail group



Brightwater Outfitters at a glance: scope, approach and results.

The approach

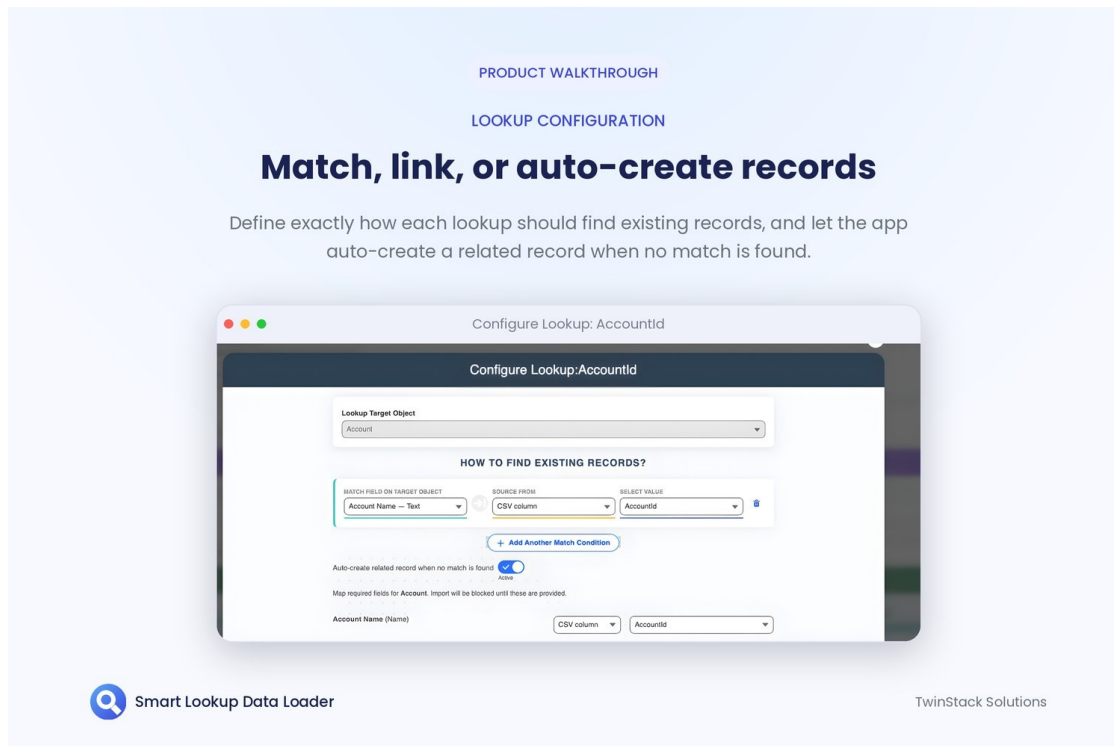
The team changed the model rather than the tooling around it. Instead of converting legacy codes to Salesforce IDs before each load, they configured the import to resolve the relationship at load time against the legacy code.

Three changes made this work:

A dedicated External ID field on every object. Each object got a custom field holding the legacy system's code, marked as External ID and unique. This became the single identifier the entire migration ran on.

Multi-field match rules where codes were not unique. Store locations shared codes across two acquired brands. Matching on code plus region resolved that without manual intervention.

Row-level validation on a sample before each full pass. Every object was loaded with 200 rows first and reconciled against the source before the full file ran.



Lookups matched against the legacy customer code at load time.

What changed

The export and VLOOKUP step disappeared entirely. Because relationships resolved against live data at load time rather than against an export, re-running a test load no longer invalidated anything downstream. The team could reload accounts, then reload contacts, and the relationships were correct both times.

That removed the constraint that had been shaping the whole project plan. Instead of sequencing carefully to avoid re-runs, the team re-ran freely.



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Removing the reconciliation step between passes is where the time went.

Results

Nine working days end to end, against an original estimate of four weeks. Most of the saving came from removing the reconciliation work between passes rather than from the loads themselves running faster.

Zero orphaned records. Every order attached to a customer, and every loyalty record attached to an order.

340 rows flagged rather than failed. These were legitimately ambiguous, mostly customers appearing under two codes after a brand acquisition. They were routed to a manual review queue instead of being silently attached to whichever record matched first.

The legacy codes stayed. Because the External ID fields were populated during migration rather than discarded after it, the retail team can still trace any Salesforce record back to its origin in the old platform.

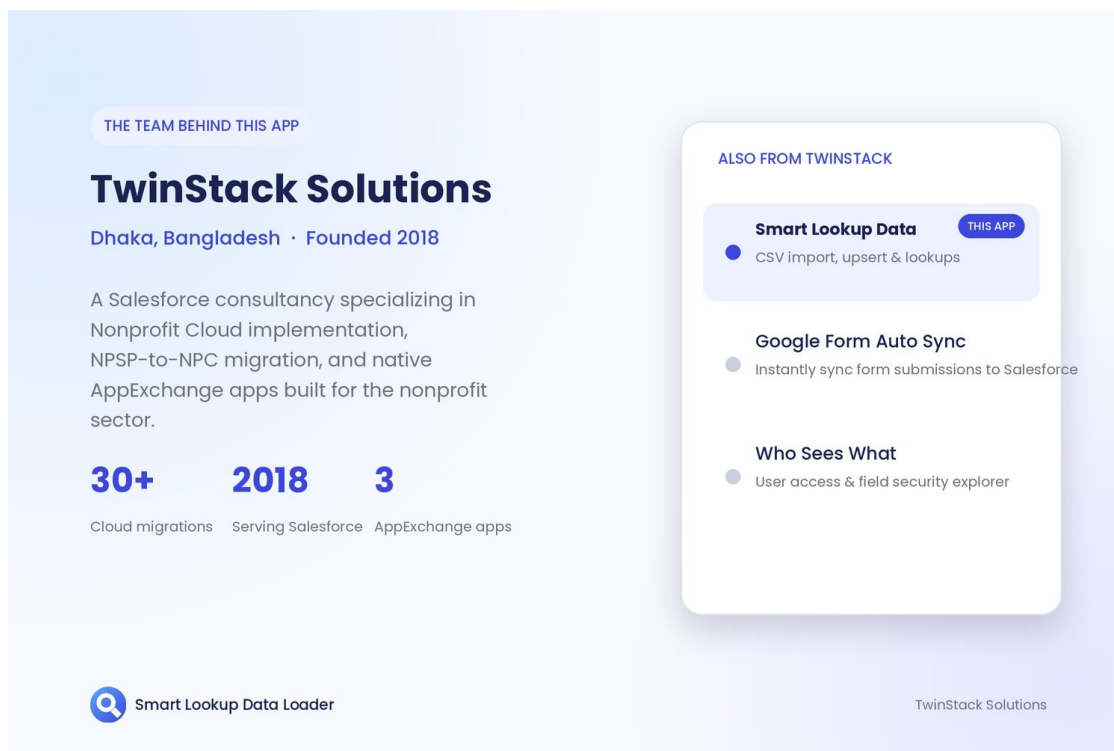
What they would do differently

The team ran their first sample from the top of each file. Those rows turned out to be the cleanest part of the data, so the sample passed and the full load then surfaced formatting problems that a middle-of-file sample would have caught on day one.

They also underestimated reconciliation. Loading took less time than expected and verifying took more.

Disclosure

This case study is an illustrative composite. It is built from patterns common to retail data migrations and does not describe a single identifiable customer. Organisation name, figures and quotations are constructed for illustration. It is published to show how the product is typically used rather than to report the results of one named engagement.



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SEO metadata

Field	Value
Slug	cs-brightwater-outfitters-data-migration
Page title	Retail Data Migration Without the VLOOKUP Pass
Target keyword	salesforce data migration case study
Secondary keywords	csv import salesforce retail, salesforce customer data migration, external id import salesforce
Meta description	A retail group migrated 94,000 customer records into Salesforce without a single VLOOKUP pass, using external codes to resolve lookups at import time.

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