

# Case Study

## Scalable Bulk Registration Automation for Events

### The Challenge

A national membership organization needed a faster, more reliable way to process high-volume conference registrations inside Salesforce (Nimble AMS).

Large events required:

- Group registrations from agencies and associations
- Multiple registration types (Member, Non-Member, Speaker, Exhibitor, etc.)
- Optional session selection
- Event question capture
- Badge customization
- Centralized billing to a single “Bill-To” account

Before automation, staff entered registrations individually — manually selecting products, verifying pricing, attaching sessions, and managing billing reconciliation.

Processing 200 registrations could consume 10-15 **staff hours** and often required downstream corrections.

The organization needed scale — without sacrificing financial control.

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### The Solution

DataViewz designed and implemented a **Bulk Registration Loader** — a governed, automated workflow that transforms structured spreadsheet data into fully configured Salesforce Cart records.

## How It Works

### 1. Dynamic Event Templates

Users download event-specific templates that include registration types, optional sessions, and survey questions — all presented in human-readable format.

### 2. Intelligent Validation & Conversion

Uploaded files are automatically:

- Parsed and validated
- Checked for valid Accounts
- Verified against available registration types
- Converted from session selections into correct product assignments
- Mapped to the appropriate Salesforce IDs

Errors are identified before any records are created.

### 3. Automated Pricing Logic

Pricing is determined automatically based on:

- Registration Type
- Member status derived from Account lookup

No manual price entry. No inconsistencies.

### 4. Structured Batch Governance

Each import requires:

- Batch ID
- Bill-To Account
- Event reference
- Transaction date

The system creates:

- One Cart per batch
  - Cart Items per registrant
  - Session product lines
  - Full import history with run tracking
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## The Results

### Operational Efficiency

- 90%+ reduction in registration processing time
- 200 registrations processed in minutes
- Significant reduction in pricing errors
- Faster billing reconciliation

### Governance & Control

- Standardized intake process
  - Enforced pricing rules
  - Clear batch-level financial traceability
  - Row-level error reporting
  - Full import history audit trail
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## Strategic Impact

The Bulk Registration Loader transformed event operations from manual processing into scalable automation.

The organization gained:

- Increased operational capacity without additional staffing
  - Improved financial accuracy
  - Stronger data governance standards
  - Reduced dependency on institutional knowledge
  - A repeatable framework for future enterprise events
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## Why It Matters

Enterprise events generate revenue, member engagement, and organizational visibility.

When registration workflows are structured, validated, and automated, organizations gain speed, accuracy, and control — all at once.

**Good Data is Good Business.**